

Lexis® for Microsoft® Office Tip Sheet—Check Cite Format*

GENERAL INFORMATION

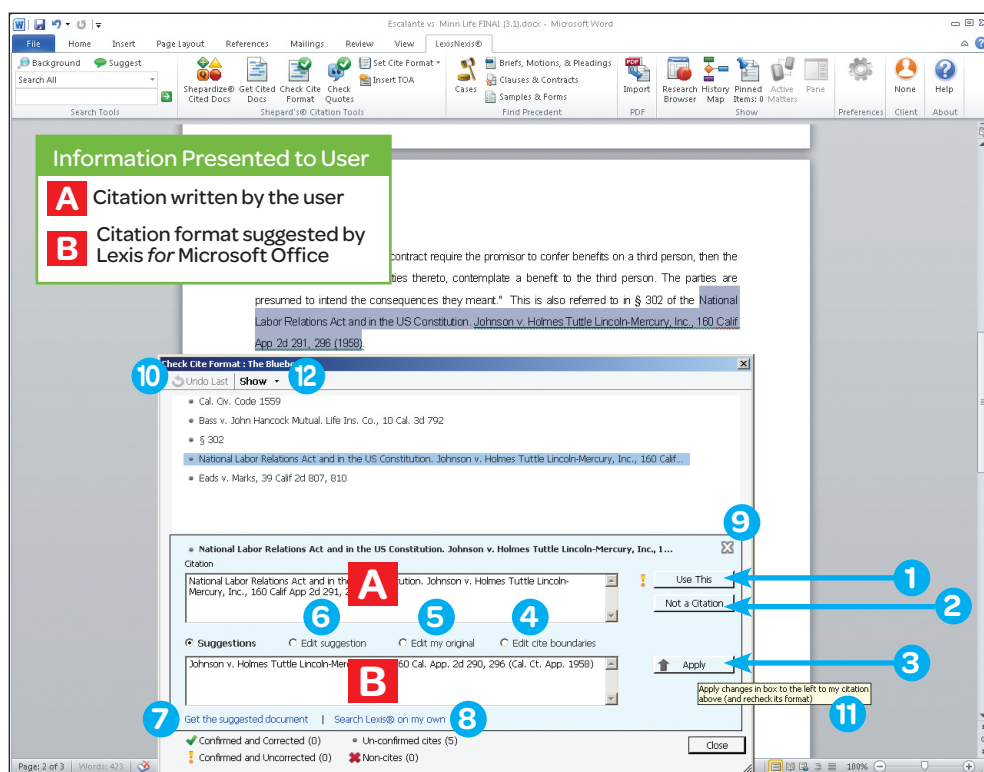
- **Check Cite Format** finds citations in your document and checks them against the style manual selected in **Set Cite Format**. Lexis® for Microsoft® Office will respect the format choice selected in **Set Cite Format** (e.g., California or New York). When proceeding through your document, **Check Cite Format** uses read order and will go from a footnote reference to the footnote itself and then back to the body of the document.
- Use **Set Cite Format** to 1) choose your style manual and 2) set your formatting preferences such as underlining or italicizing case names or whether to use "Id." when citing a source multiple times.
- The user must **Check Cite Format** before using 1) **Check Quotes**, 2) **Insert TOA**, or 3) being able to automatically update the long/short formats of a citation.
- Lexis for Microsoft Office may automatically update the long and short formats of citations when users do the following:
 - Move the location of the citations, or
 - Reference the citations more than once in the document.

See "Decisions the User Can Make" to the right for the specific scenarios under which Lexis for Microsoft Office will automatically update long and short formats without additional user input.

- In finding citations, Lexis for Microsoft Office is "over inclusive." It may pick up text that is not a citation. You may elect to treat the citation in the following ways:

1. If the entire text is not a citation (e.g., the product identifies a ZIP code as a citation), simply select "Not a Citation." Lexis for Microsoft Office will not include the citation in the TOA.
2. If some of the text (but not all) is a citation—see the example to the right where the product identifies the words "National Labor Relations Act and in the U.S. Constitution" as part of the citation—you can use "Edit cite boundaries" to highlight what you specifically want to include as part of the citation to be checked.

*This tip sheet is applicable to Lexis for Microsoft Office customers who 1) have access to the Check Cite Format feature as a part of their product subscription and 2) have Version 3.1 of the product. (To verify your version, click on the "Help" button within the Lexis for Microsoft Office ribbon in Microsoft Word or Microsoft Outlook.)



DECISIONS THE USER CAN MAKE

- 1 "Use This"—Lexis for Microsoft Office will process the citation listed in **A** in one of three ways depending on the value in the suggestion box in **B**:
 - a. **Correct format**—a green check mark will appear next to "Use This." Lexis for Microsoft Office leaves the cite "as is," includes it in the appropriate TOA section and automatically updates the long/short cite format of the cite.
 - b. **Lexis for Microsoft Office presents a suggestion**—a yellow exclamation point will appear next to "Use This." The product leaves the cite "as is" and includes it in the Table of Authorities "Other" section. The product does not automatically update long/short formats (See 3, "Apply" below.)
 - c. **No suggestions**—a yellow exclamation point will appear next to "Use This." The product leaves the cite "as is" and includes it in the Table of Authorities "Other" section. The product does not automatically update long/short formats.
- 2 "Not a citation"—indicate the text identified as a cite by Lexis for Microsoft Office is "not a citation." The product will not include this text in the TOA.
- 3 "Apply"—click "Apply" to accept a Lexis for Microsoft Office suggestion in section B. Once the suggestion is accepted, a green checkmark will appear next to "Use This," and "Use This" will then need to be clicked for the suggestion to be applied to the citation in the document.
- 4 "Edit cite boundaries"—when what appears in section A does not contain part of the citation's text, highlight the text in section B you want the product to check for citation formats. Also, use "Edit cite boundaries" to remove text extraneous to a citation. Click "Apply."
- 5 "Edit my original"—when you wish to make changes to the original citation, choose "Edit my original" and make any changes in section B. Click "Apply."
- 6 "Edit suggestion"—when you wish to make changes to a suggestion provided in section B by Lexis for Microsoft Office, choose "Edit suggestion" and make any changes in section B. Click "Apply."
- 7 "Get the suggested document"—view the source document in the Research Browser.
- 8 "Search Lexis® on my own" for the source document at lexis.com®.
- 9 "Close" the dialog box without making any changes.
- 10 "Undo Last"—return to the previous citation and undo any changes.
- 11 If you hover over any button, Lexis for Microsoft Office will explain the function.
- 12 "Show"—use the "Show" drop-down to filter the citations in your citation list by category.



Lexis® for Microsoft® Office
24/7 Customer Support: 1.888.539.4770
www.lexisnexis.com/newlexis/office

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Frequently Asked Questions

Q: When I changed the citations via **Check Cite Format**, it did not respect the formatting I had in the document (i.e., italics/underline).

A: Lexis® for Microsoft® Office reformats based on the setting selected (Underline or Italics) in **Set Cite Format** or Preferences. For example, if you had italics in your document, but you have Underline selected in **Set Cite Format**, it will be reformatted utilizing an underline.

Q: As I checked cites, Lexis for Microsoft Office identified a citation, but it also included additional text with the citation (see the example in the picture on the first page of this Tip Sheet). I'd like the product to automatically update the long/short formats of the citation and put it into the TOA. What can I do to ensure that happens?

A: In finding citations, Lexis for Microsoft Office is "over inclusive." If the product picks up the citation plus extraneous text that is not part of the citation, it is recommended you "change" the citation as described below to leverage broader product functionality. You can choose "Edit cite boundaries" and highlight in the suggestion box what you wish Lexis for Microsoft Office to check for citation formats. Click "Apply."

Q: Lexis for Microsoft Office did not identify one of my citations. How do I ensure it is included in the citation list at the top of the dialogue box?

A: Close the **Check Cite Format** dialog box. Highlight the missed citation text. Click **Check Cite Format** button. The product will work with you to identify and edit the citation.

Q: Lexis for Microsoft Office does not offer a suggestion. What should I do?

A: There are two methods to address this situation. Either 1) Select "Use This" and allow the product to treat the text as a confirmed and uncorrected cite. 2) Alternatively, you can search *lexis.com*® for the document. You then have two choices: A) Make changes to the original citation by using "Edit my original" based on what you find at *lexis.com*. OR B) Copy text from the source to your document including the citation. The citation format created by Lexis for Microsoft Office can serve as an example of how to cite to the document in question.

Q: Lexis for Microsoft Office is making a suggestion that does not match my interpretation of the style manual. What can I do?

A: Select "Use This" and allow the product to treat the text as a confirmed and uncorrected cite. The product leaves the cite "as is" and includes it in the Table of Authorities "Other" section. In this situation, the product does not automatically update long/short formats.

Q: How can I remove the items that I marked as "not citations" from my citation list at the top of the dialog box?

A: Use the "Show" drop-down at the top left of the dialog box to filter the citations in your citation list by category.

Q: What is the difference between the items with the exclamation mark vs. the items with the check mark?

A: The marks indicate the appropriate citation category for each citation as tabulated in the bottom of the dialogue box: 1) Confirmed and Corrected, 2) Confirmed and Uncorrected, 3) Un-confirmed cites and 4) Non-cites.

Q: What happens to the citations that are "Un-confirmed?"

A: "Un-confirmed" citations will not be included in the TOA, and their short and long form will not be updated when moving citations in the document. But, Lexis for Microsoft Office will attempt to look up the document using the un-confirmed citation when "Shepardize® Cited Docs" or "Get Cited Docs" is selected.

Q: What does it mean for a cite to be "Confirmed and Corrected," "Confirmed and Uncorrected," "Un-confirmed," and "Not a Citation"?

A: The citation categories indicate how Lexis for Microsoft Office will treat the citation. "Confirmed and Corrected" citations will be included in the appropriate TOA section, and their short and long form will be updated. "Confirmed and Uncorrected" citations will be included in the TOA "Other" section, but their short and long form will not be updated. "Un-confirmed" citations will not be included in the TOA, and their short and long form will not be updated. Citations marked "Not a Citation" will not be included in the TOA, and their short and long form will not be updated.

