

# Lexis Create+

## USER GUIDE

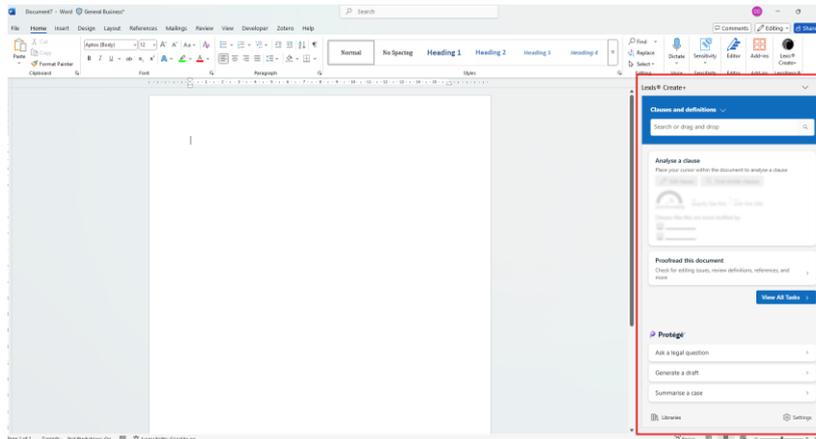
### Table of Contents

1	Overview and How to Start .....	2
1.1	What is Lexis Create+ .....	2
1.2	Features Available .....	2
1.3	How to Start .....	3
2	Search in Lexis Create+ .....	6
2.1	Case Search .....	6
2.2	Forms and Precedents Search .....	8
2.3	Clauses and Definitions Search .....	11
2.4	Using the Clause/Definition from Search Results .....	13
3	DMS Analyse a Clause ( <i>available only with Create+ DMS</i> ) .....	22
3.1	View Clause Insights .....	23
3.2	Identify Internal Experts .....	23
3.3	Find Similar Clauses .....	23
4	Libraries .....	24
4.1	Accessing Clauses in Your Libraries .....	24
4.2	Adding Clauses to Your Libraries .....	26
5	Protégé Integration in Lexis Create+ ( <i>available with a Lexis+ AI subscription</i> ) .....	28
6	Proofread this document .....	31
6.1	Reference Issues .....	32
6.2	Other Issues .....	32
6.3	Generate a Report .....	34
7	Document Tools .....	35
7.1	PDF to Word Converter .....	35
7.2	Redact .....	36
7.3	Clean this document .....	36
7.4	DocuSign integration .....	36
	Appendix 1. List of languages available for Translate .....	37
	Appendix 2. Proofreading .....	38

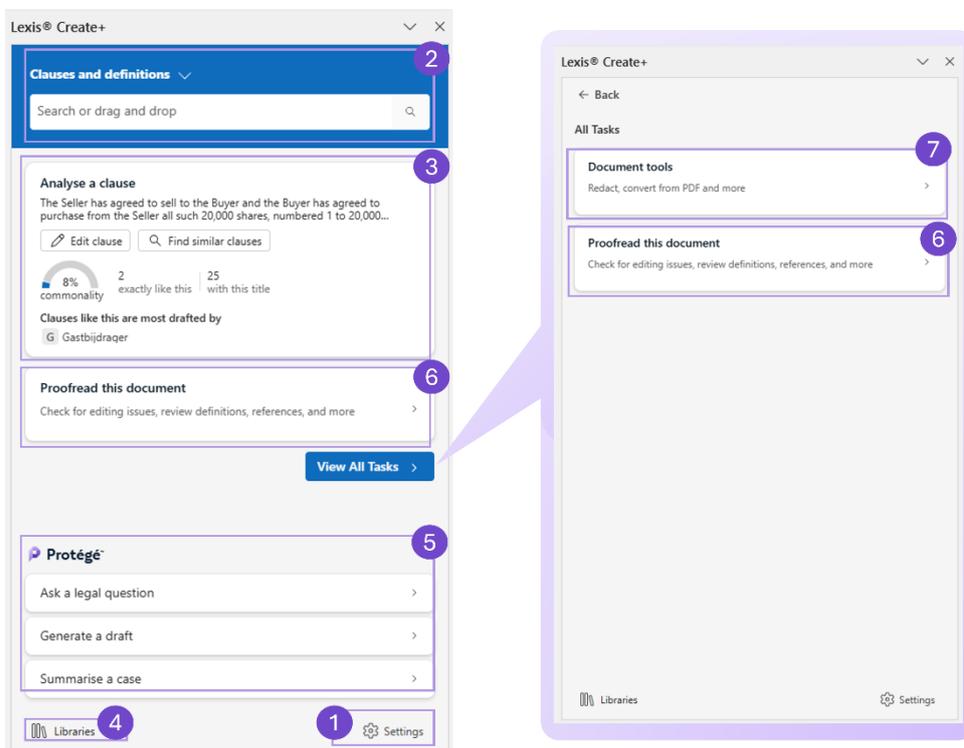
## 1 Overview and How to Start

### 1.1 What is Lexis Create+

Lexis Create+ is an AI-powered legal drafting solution that integrates seamlessly into Microsoft 365. Unlike generic drafting tools, it connects your firm's internal documents with LexisNexis' trusted legal content and generative AI (via Protégé), enabling you to draft, research, and review—all within Microsoft Word.



### 1.2 Features Available



The following main features are available in Lexis Create+ and Lexis Create+ DMS.

1. Settings
2. Search for content including Cases, Forms and Precedents, and Clauses and Definitions.

# Lexis® Create+

3. Analyse a Clause (*available only with a Lexis Create+ DMS subscription*)
4. Libraries
5. Protégé Integration (*available only with a Lexis+ AI subscription*)
6. Proofread this document
7. Document tools

Additional sub-features are introduced within each section of the User Guide as you explore these main features.

## 1.3 How to Start

### 1.3.1 Signing in

To get started, click the Lexis® Create+ icon located on the Home tab of the Microsoft Word ribbon.



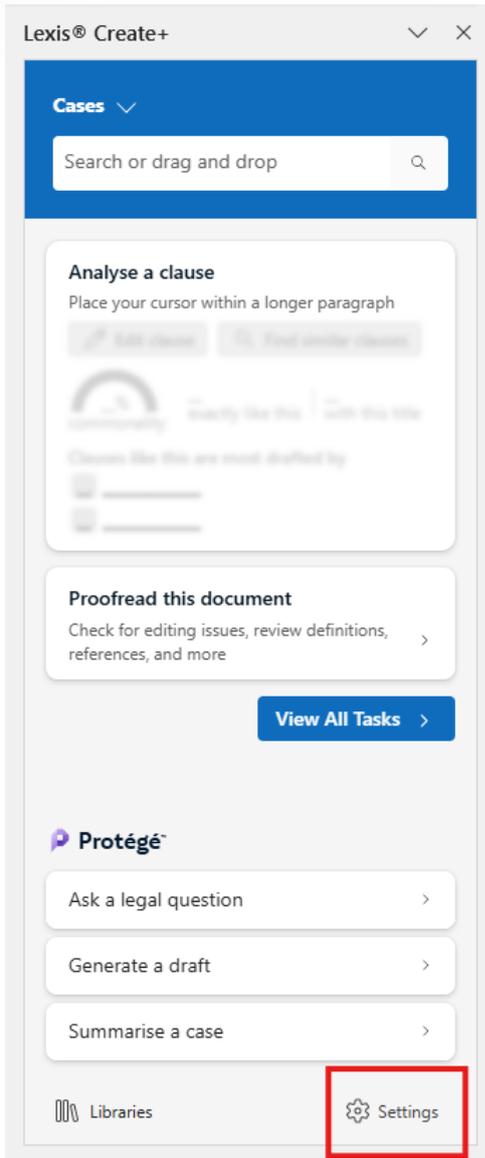
- The sign-in page will automatically appear.
- Enter your Lexis ID and password to log in. If you're an SSO (Single Sign-On) customer, you'll be signed in automatically without needing to enter your credentials.
- You can choose to save your credentials for quicker access next time.
- **Important Notice: Some features (Search and Libraries) may take up to 48 hours to become fully available after account activation.**

### 1.3.2 Settings

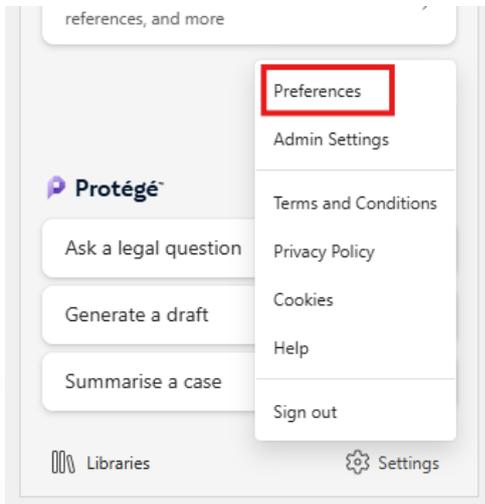
Before using Lexis Create+ for the first time, you may want to set your default Settings for Search. The default setting for the product out of the box is Case. You can choose to update the default search to Clauses and definitions or Forms and Precedents according to your needs.

To update the default search

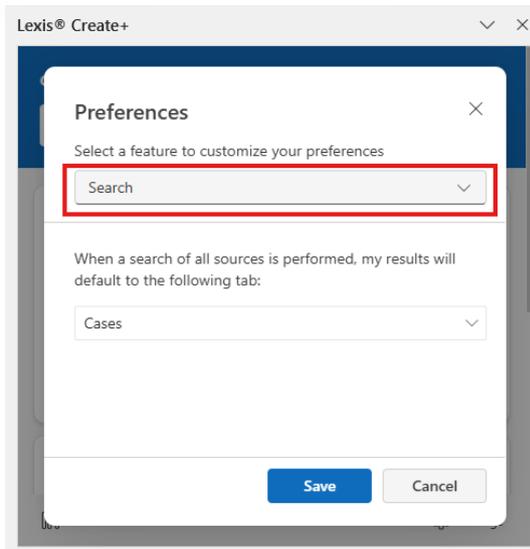
1. Open Settings by clicking on the Settings button on the bottom right-hand side of the Lexis Create+ panel.



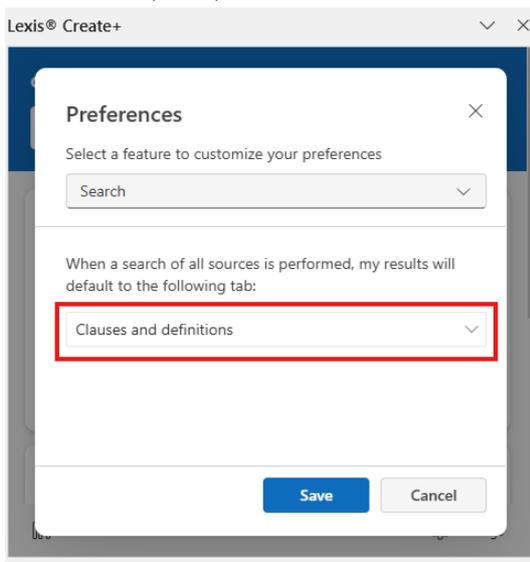
## 2. Choose Preferences



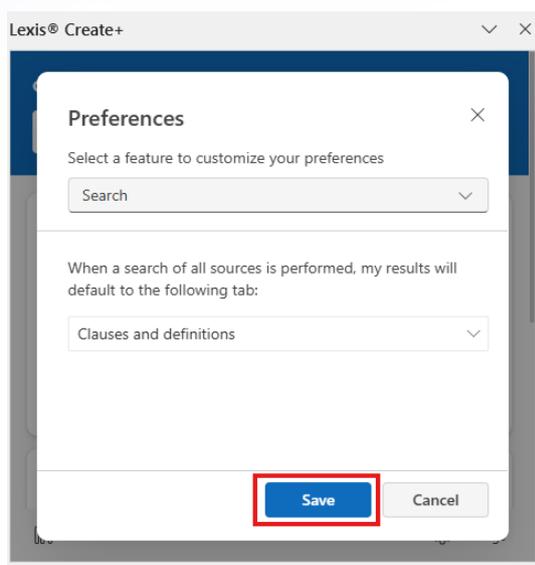
3. From select Search from the dropdown menu at the top of the panel.



4. Choose your preferred search default option from the dropdown below.



5. Click Save



### 1.3.3 Clean this document: Remove citation metadata/hyperlinks

Before using any feature of Lexis Create+, you should first click on the Clean this document button under Document Tools and choose to Remove Citation Metadata and Remove Hyperlinks. If you have never used Lexis Create+ on your document before, or if it was converted from .pdf, use the **Clean this document** feature at the outset to allow for optimal results.

## 2 Search in Lexis Create+

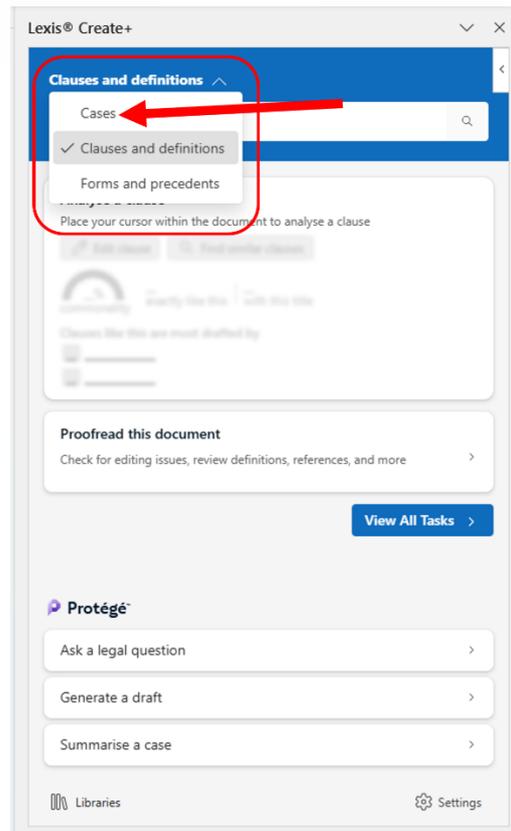
### 2.1 Case Search

With Lexis Create+, you can seamlessly search for LexisNexis case law content directly within Microsoft Word—no need to leave your document. Whether you're drafting legal arguments, preparing memos, or conducting quick research, the Case Search feature helps you find relevant judgments and CaseBase documents right where you work.

**Subscription Note:** *The visibility of results depends on your content subscription.*

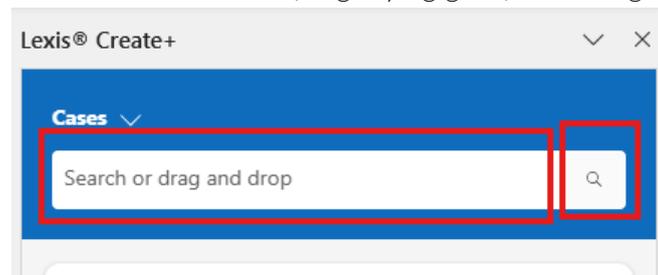
#### 1. Access the Case Search

- At the top of the Create+ pane, click the dropdown menu.
- Select “Case” from the list of search types.



## 2. Enter Your Search Term

- In the search box, type your keywords or phrases just like a regular search.
- Press Enter or click the search icon (magnifying glass) on the right.

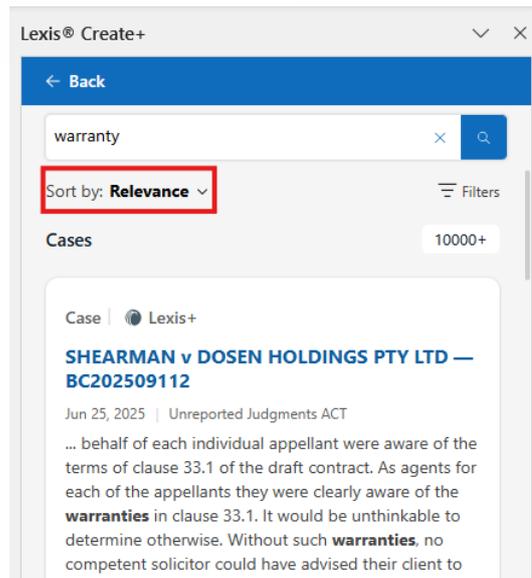


## 3. View Search Results

Results will appear below the search box, automatically sorted by relevance.

## 4. Change Sorting Order (Optional)

To sort results differently, click the “Sort by” dropdown under the search box. You can sort by Relevance, Judgment Date, Court and more.

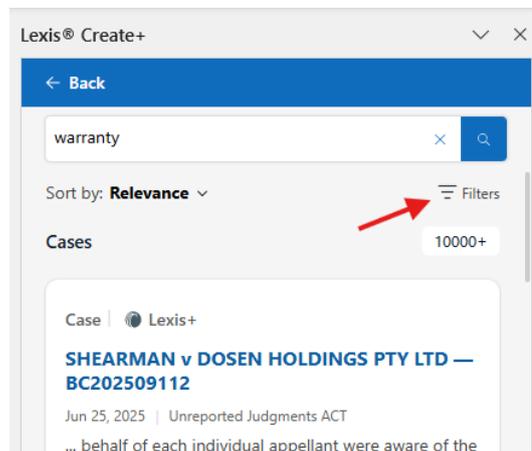


## 5. Apply Filters to Narrow Results (Optional)

On the right side below the search box, you'll find filtering options. Available filters include:

- Jurisdiction
- Court
- Timeline
- Publication
- Legal Topics

Click on any filter to refine your results.



## 6. View Case Details

Click on a search result to open it. You'll see either the full judgment text, or CaseBase content.

## 2.2 Forms and Precedents Search

The Forms and Precedents Search feature allows you to efficiently locate legal forms and precedents from trusted LexisNexis sources—right within Microsoft Word. Whether you're

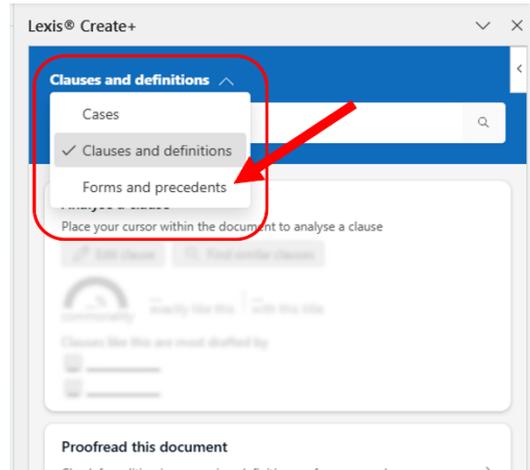
# Lexis® Create+

drafting contracts, preparing legal forms, or referencing best-practice precedents, this tool connects you to content from the Australian Encyclopaedia of Forms & Precedents (AEF&P), Practical Guidance, and more.

**Subscription Note:** Access to content is based on your LexisNexis subscription. Some documents may not be available if they fall outside your subscription coverage.

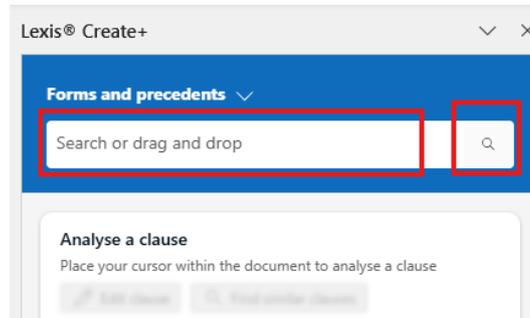
## 1. Access the Forms and Precedents Search

- At the top of the Lexis Create+ pane, click the dropdown menu.
- Select “Forms and Precedents” from the list of search types.



## 2. Enter Your Search Term

- Type your keywords or phrases into the search box.
- Press Enter or click the search icon to begin your search.

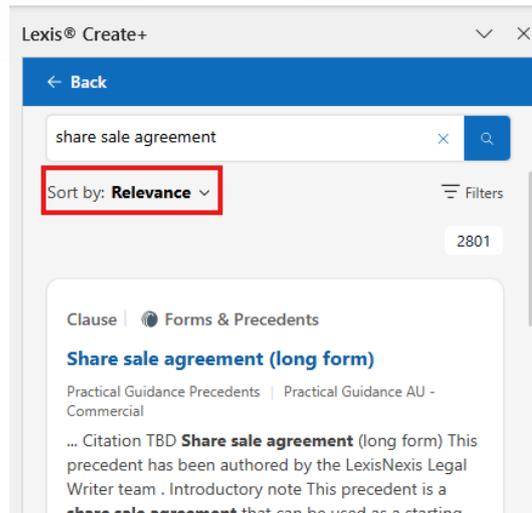


## 3. View Search Results

Results will appear below the search box, sorted by Relevance by default.

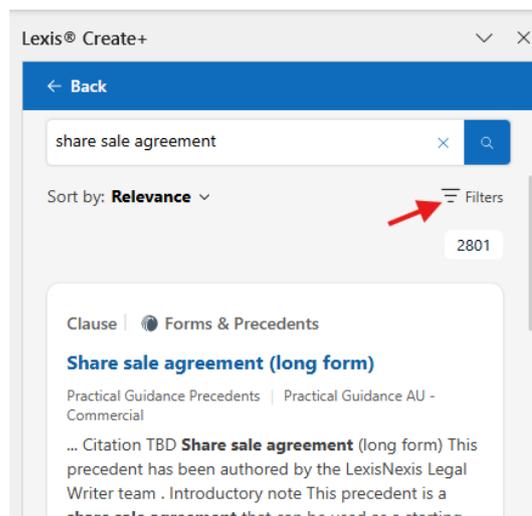
## 4. Change Sorting Order (Optional)

To sort results differently, click the dropdown next to “Sort by”. You can sort by Relevance, Document Title, and Content.



5. Apply Filters to Refine Results

Use the filters on the right side below the search box to narrow your results. Available filters include Jurisdiction, Publication, Legal Topics.

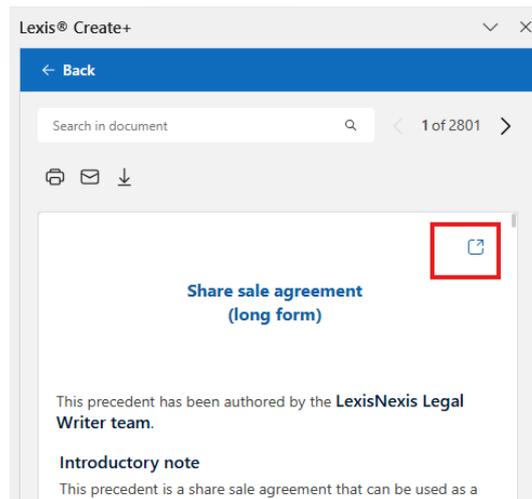


6. View and Use a Document

Click on a search result to open the document preview. The document will be displayed directly within the Lexis Create+ pane.

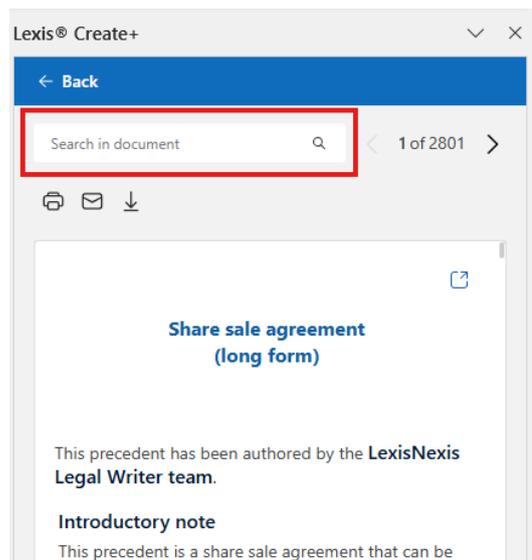
7. Open Full Document in Platform (Optional)

To view the full document in the LexisNexis platform, click the external link icon at the top right-hand side of the document view.



## 8. Search Within the Document (Optional)

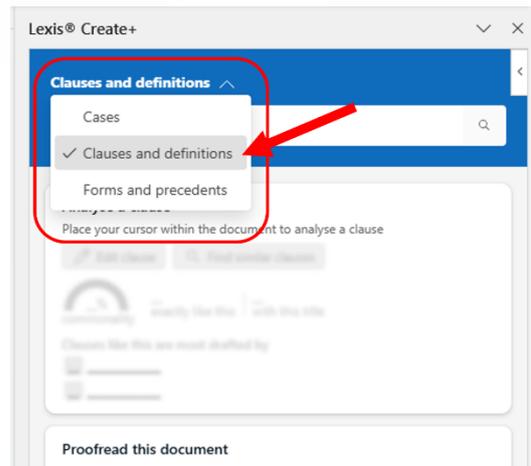
Use the “Search in document” box at the top of the pane to find specific terms or clauses within the opened document.



## 2.3 Clauses and Definitions Search

Within Lexis Create+ you can easily find clauses/definitions from LexisNexis Practical Guidance content, your Libraries, or previously written contracts or templates in your firm’s database (**access to firm database is subject to Lexis Create+ DMS subscription**). There are two ways to start searching for Clauses and Definitions: **Exact search** and **Similar search**

*Subscription Note: For PG Clauses and Definitions Search, access to content is based on your LexisNexis subscription. Documents will not appear in the search results if they fall outside your subscription coverage.*



## 2.3.1 Exact search

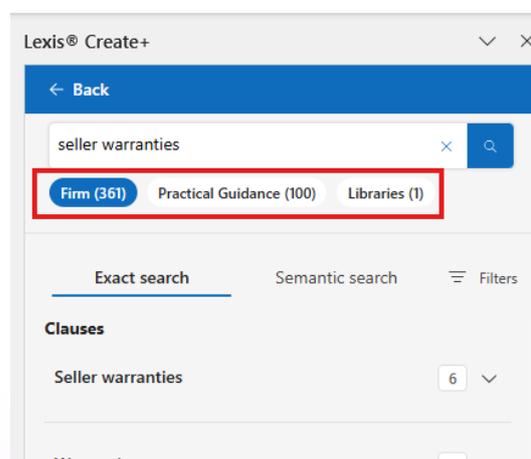
- Search for clauses/definitions by typing keywords in the search bar
- Add multiple terms in one search
- Use quotation marks ["..."] to indicate if keywords need to appear in a specific order

## 2.3.2 Similar search

- Other ways of searching for clauses and definitions include (a) copying and pasting clauses/definitions from your working document into the Lexis Create+ search box and clicking the search icon or (b) highlighting, dragging and dropping the clause/definition into the Lexis Create+ panel.
- Based on semantics, Lexis Create+ pulls up relevant variations of the selected text as found in your different source content.
- Similar results will be sorted by "Most Similar".

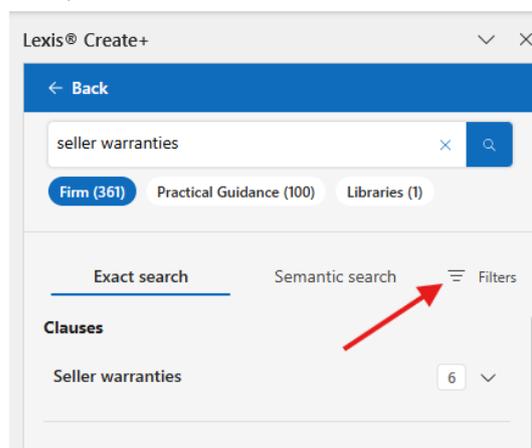
## 2.3.3 Content Sources

Choose the content sources of your Search Results by clicking on the tabs on top of the search results. You can view results from your Firm DMS (subject to Lexis Create+ subscription), LexisNexis Practical Guidance (subject to your LN PG subscription), and Libraries.



## 2.3.4 Filtering

To further refine your search, use the filters to drill down.



You can select multiple filters for any given search. Navigate to Filters and select the ones you would like to use.

For results from Firm documents, filter types are firm specific, but often include (*available only with a Create+ DMS subscription*):

- Contract Type, Contract has the words, File name has the word,
- Collaborators (person who created or modified the contract),
- Jurisdiction, Language, Creation date, Version, and
- Labels. (Add if you only want to view clauses/definitions with a specific label attached).

For results from Practical Guidance content, results can be filtered by Contract type.

For results from Libraries, filters include:

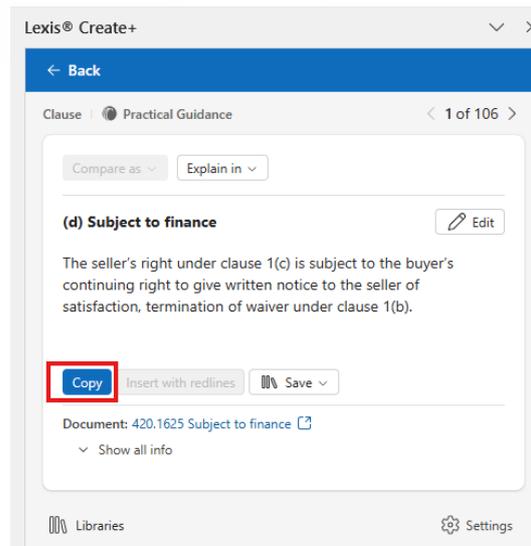
- Library name (including Private and Team Libraries)
- Contract type
- Labels (user created labels)
- Created by (author of the clause)

## 2.4 Using the Clause/Definition from Search Results

Once you've found a relevant clause—whether from an Exact search or a Similar Search—you can open it by clicking on the card containing the clause. After opening the clause, you can then choose how to use it in your document. The available options are:

### 2.4.1 Copy the Clause

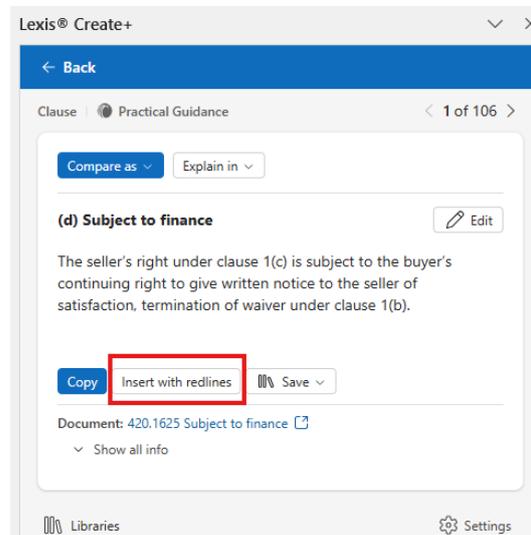
Use the copy button if you want to copy the full clause/definition or select the relevant part for further use such as pasting it into your document.



## 2.4.2 Insert with Redlines

If the clause or definition found in Lexis Create+ differs only slightly from the version in your document, use **Insert with redlines** to insert only the changes. Make sure that the clause you want replace is highlighted within your document to enable this feature.

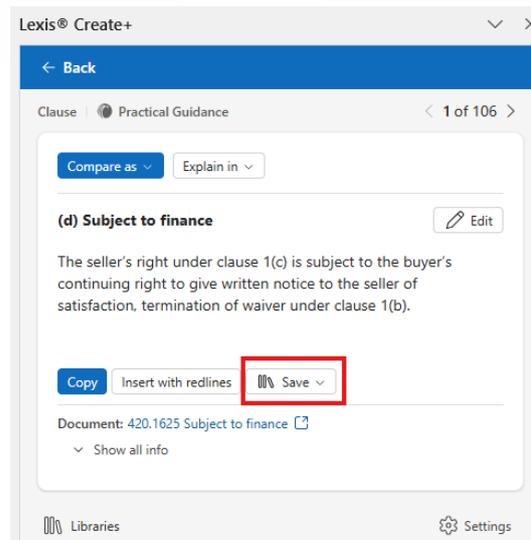
Make sure **Track Changes** is enabled in Microsoft Word to view the redlines.



## 2.4.3 Save to Library

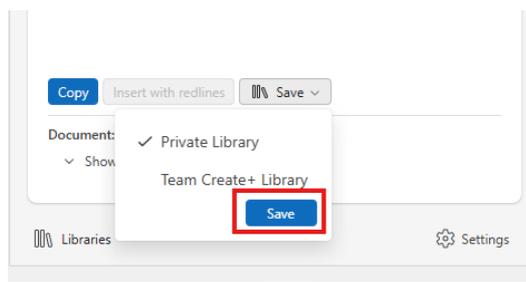
You can save the clause to your **Private** or **Team Library** for future use.

Note: Saving to a Team Library depends on your permissions, as set by your Create+ administrator.



To save a clause:

1. Click the **Save** dropdown at the bottom of the clause card.
2. Select the library where you want to save the clause.
3. Click the **Save** button to confirm.



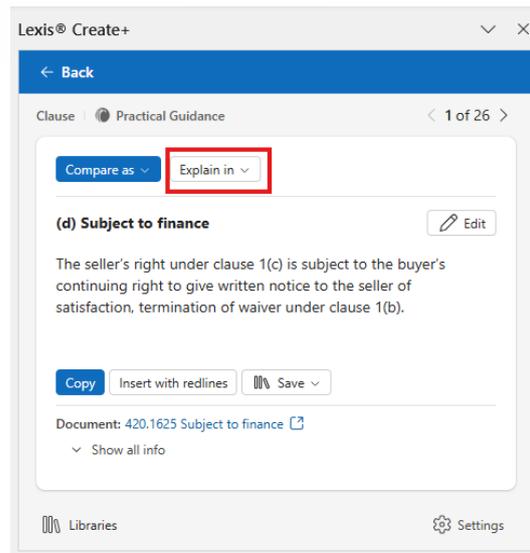
## 2.4.4 Explain in

*(available only with a Lexis+ AI subscription)*

The **Explain in** feature allows you to simplify and better understand complex legal clauses directly from your **Clauses and Definitions** search results. Powered by **Protégé**, this tool offers two explanation modes: 1) Simple Language and 2) Event–Effect Table. These explanations help you quickly grasp the meaning, obligations, risks, and outcomes of a clause in a clear and accessible format.

To use the **Explain in** feature, from your search results, click on the clause you want to explore.

At the top left-hand side of the clause view, you'll see the **“Explain in”** dropdown menu.



### 2.4.4.1 Simple Language

This option translates complex legal language into clear, plain English—without changing the legal meaning.

- Click the “**Explain in**” dropdown and select “**Simple Language**.”
- Protégé will generate a plain language summary of the clause.
- Use the **copy** button to copy the explanation for use elsewhere.

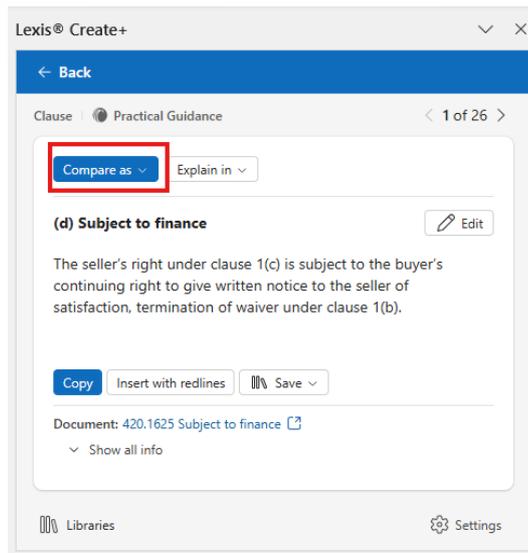
### 2.4.4.2 Event-Effect Table

This mode breaks down the clause into a structured table, mapping key events (triggers) to their contractual consequences (effects).

- From the “**Explain in**” dropdown, select “**Event-Effect Table**.”
- Protégé will display the clause in a table format, showing cause-and-effect relationships.
- Use the **copy** button to copy the table for reference or reuse.

## 2.4.5 Comparing Clauses

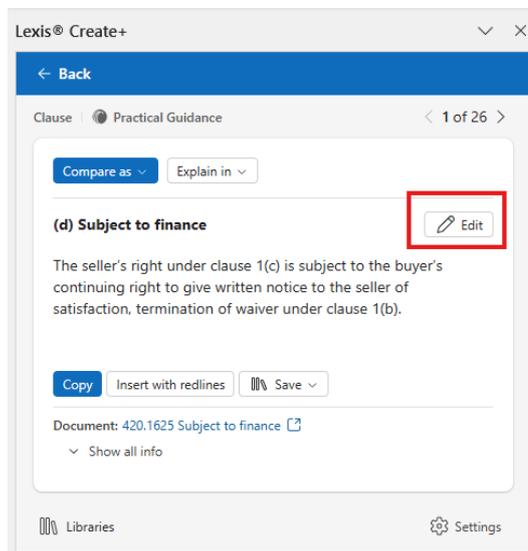
- With the **compare** functionality, you can easily redline and see the differences between your original clause and the clause from your search results. Note: make sure that the clause in your open document is highlighted to make use of the **Compare as** feature.
- Above the selected clause in the Lexis Create+ panel, click on the **Compare as** dropdown and choose between compare as **Redline** for a word-by-word analysis or as **Table** for highlighting key differences



## 2.4.6 Edit Clauses

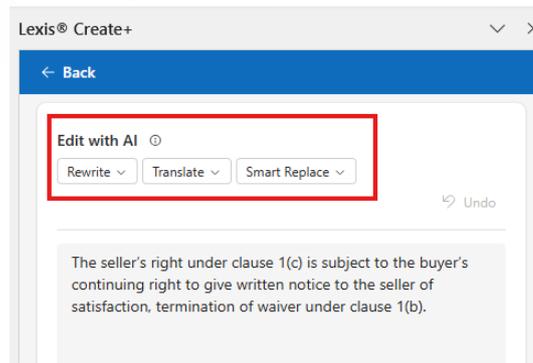
If you want to edit a clause from your search results, click the **Edit** button. This will allow you to make changes directly to the clause.

Note: Editing a clause in this way only affects the current instance—it does **not** update the version saved in your DMS, Library, or Practical Guidance (if the clause originated from PG). If you want to reuse the edited clause later, be sure to save it to your library.



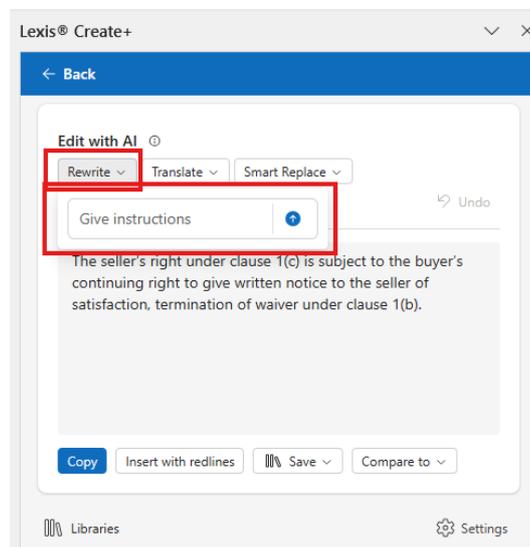
### 2.4.6.1 Edit with AI

Available only with a Lexis+ AI subscription

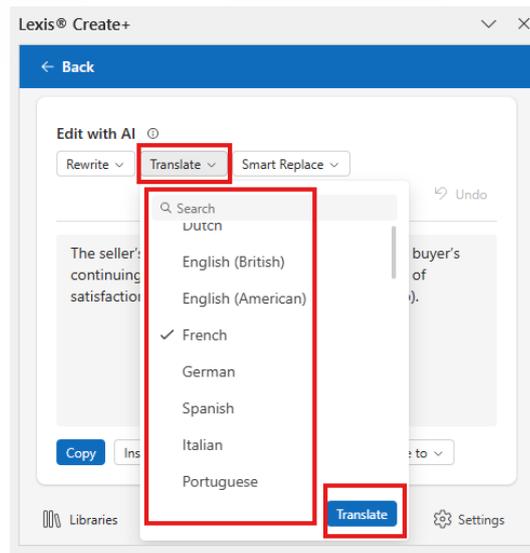


You can use **Protégé** to assist with clause editing in the following ways:

- **Rewrite**



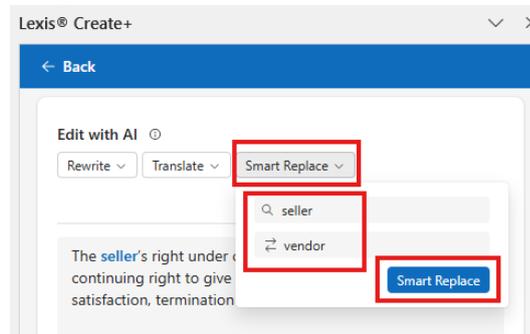
1. Click the **Rewrite** button at the top of the pane.
  2. Enter your instructions in the prompt box (e.g., “simplify this clause” or “make this clause more specific”) and press Enter or click the submit icon.
  3. Protégé will rewrite the clause with redlines to show the changes.
  4. You can repeat this process until you're satisfied with the result.
- **Translate**
    1. To translate the clause into another language, click the **Translate** dropdown at the top of the pane.
    2. Select a language from the list (see Appendix 1 for available languages), then click the **Translate** button.



- **Smart Replace**

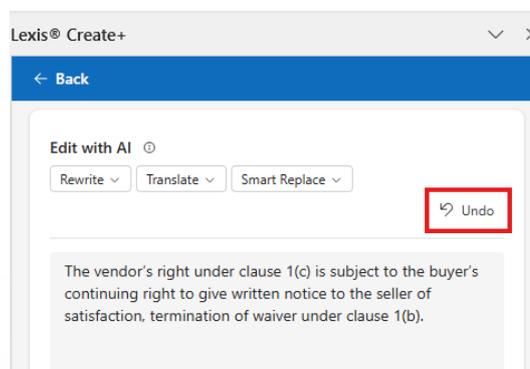
To replace a specific term within the clause:

1. Click the **Smart Replace** dropdown.
2. Enter the word you want to replace in the **Find** box.
3. Enter the new term in the **Replace with** box.
4. Click the **Smart Replace** button to apply the change.



### 2.4.6.2 Undo

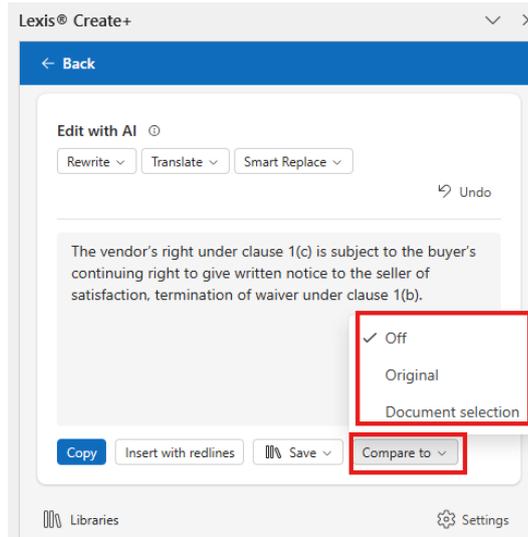
To revert any changes made during editing, click the **Undo** button at the top right of the clause card.



## 2.4.6.3 Compare To

You can compare the edited clause to:

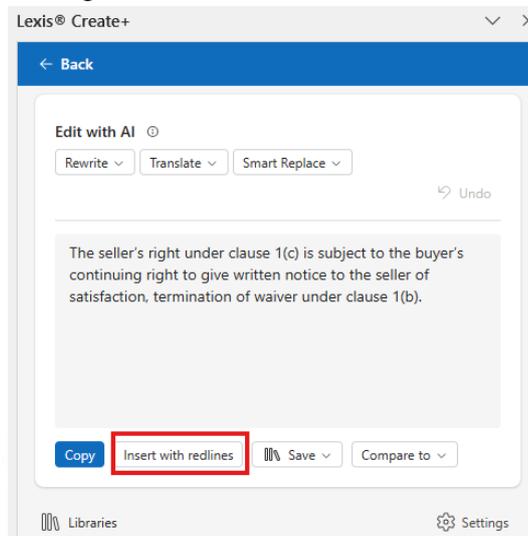
- The **original clause** from the search results by selecting **Original** from the **Compare to** dropdown. This will show redlined differences.
- A **clause in your document** by highlighting the clause in your document, then selecting **Document selection** from the **Compare to** dropdown. This will show a redlined comparison between the two.



## 2.4.6.4 Insert with Redlines

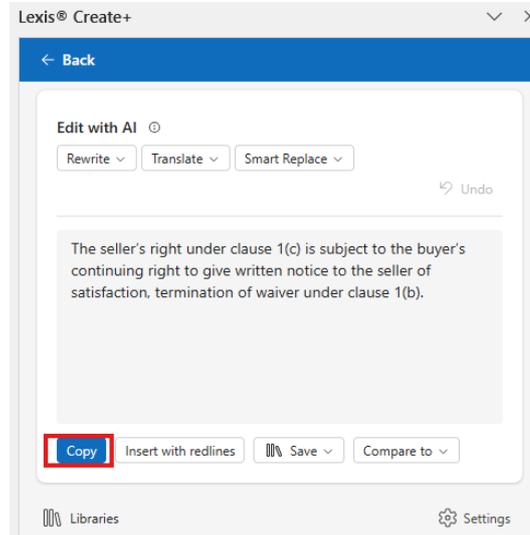
To insert the edited clause into your document:

- Highlight the clause in your document you want to replace, then click **Insert with redlines**.
- If no clause is highlighted, the Insert with redlines button is disabled and will be greyed out.
- Make sure **Track Changes** is enabled in Word to view the redlines.



## 2.4.6.5 Copy

Click the **Copy** button to copy the edited clause for use elsewhere, such as pasting it into your open document.

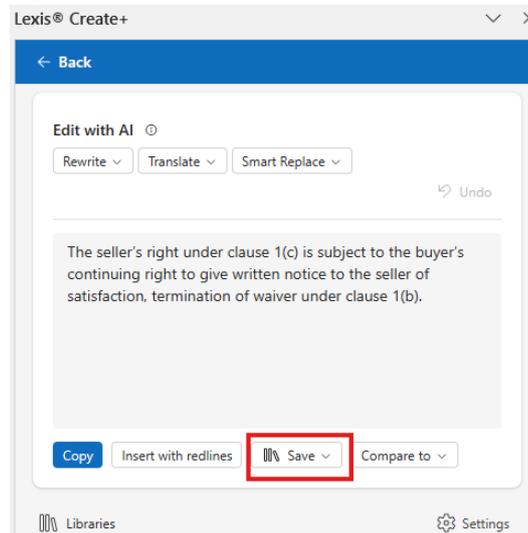


## 2.4.6.6 Save to Library

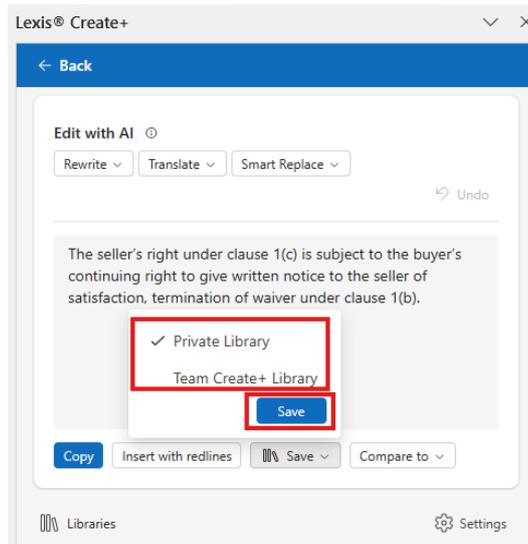
You can save the edited clause to your **Private** or **Team Library** for future use. Note: Saving to a Team Library depends on your permissions, as set by your Create+ administrator.

To save a clause:

1. Click the **Save** dropdown at the bottom of the clause card.

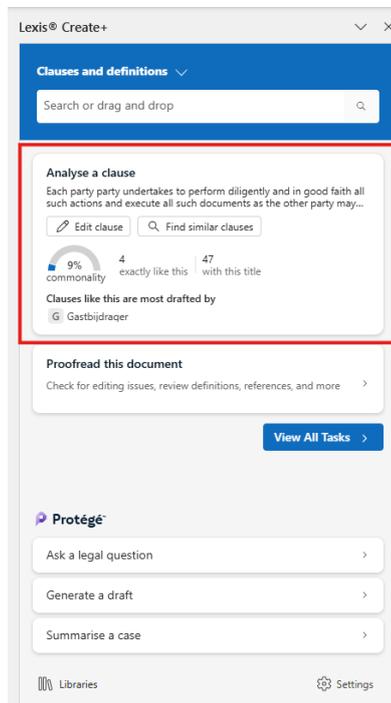


2. Select the library where you want to save the clause.
3. Click the **Save** button to confirm.



### 3 DMS Analyse a Clause (available only with Create+ DMS)

With Lexis Create+ DMS, clause insights are automatically surfaced through the “Analyse a Clause” card, available on the home screen of your Lexis Create+ DMS interface. This feature helps you assess how standard or bespoke a clause is and identify internal experts for further guidance.

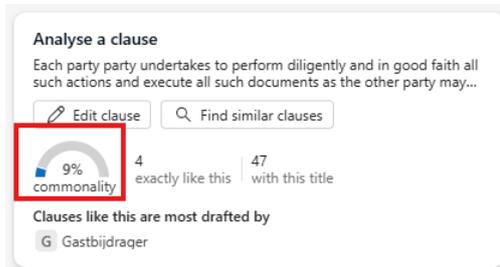


#### How to Use Analyse a Clause

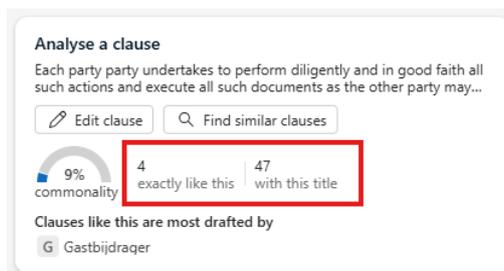
Place your cursor within the clause or highlight the clause you want to analyse.

## 3.1 View Clause Insights

- The “Analyze a Clause” card will display a **Commonality Score**, indicating how unique or standard your clause is.

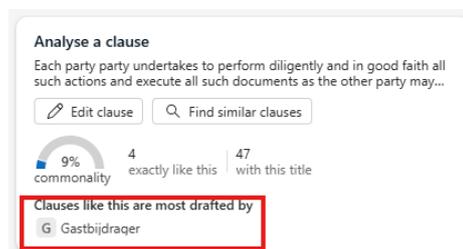


- This score helps you decide whether the clause should remain bespoke or be redrafted to align with firm standards.
- You'll also see:
  - The number of **exact matches** of the clause across your firm's documents.
  - The number of clauses with the **same title but different wording**.

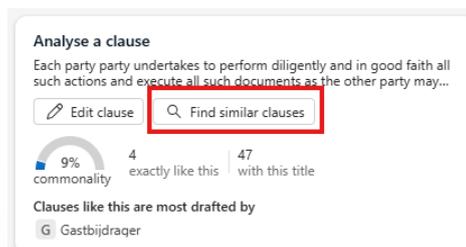


## 3.2 Identify Internal Experts

On the **lower left-hand side** of the screen, you'll find the name(s) of colleagues who have drafted the most similar clauses—helping you identify **subject matter experts (SMEs)** within your firm.



## 3.3 Find Similar Clauses



# Lexis® Create+

Click the “Find similar clauses” button to run a **semantic search** across:

- Your firm’s clause database
- LexisNexis Practical Guidance content
- Your personal or shared clause libraries
- For more information, see **Section 2.3.2 Similar Search**.

To learn how to work with clauses or definitions from the Similar Search results, refer to **2.4 Using the Clause/Definition from Search Results** for available options.

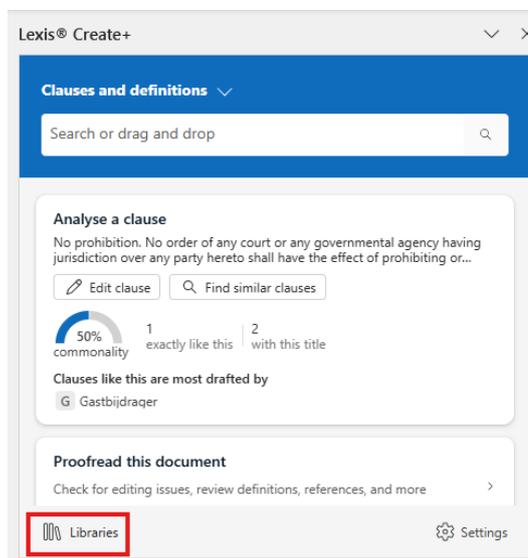
## 4 Libraries

Libraries in Create+ allow you to save and organise clauses or definitions for future use. Each user has access to their own Private Library and Create+ administrators can set up Team Libraries with controlled access for specific users.

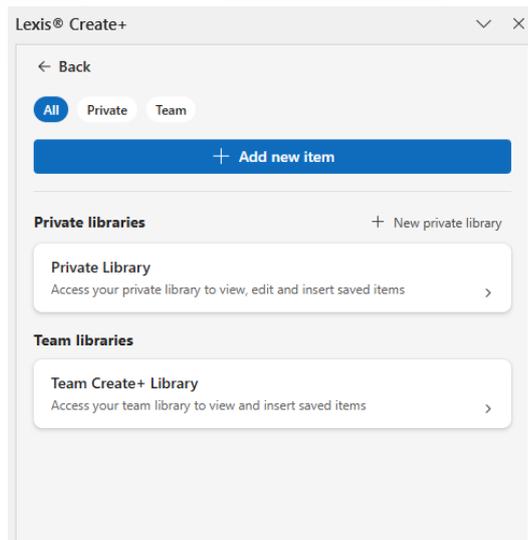
### 4.1 Accessing Clauses in Your Libraries

You can access saved clauses in two ways:

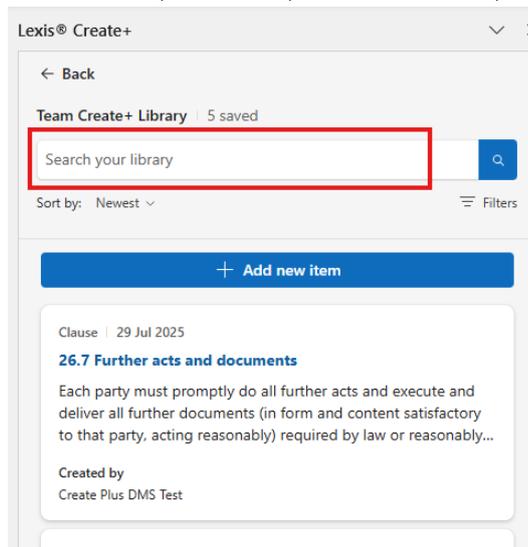
- **Search for Clauses and Definitions**  
Use the Clauses and Definitions search to find content stored in your libraries. Refer to **2.3 Clauses and Definitions Search** section for more details.
- **Browse Your Libraries**



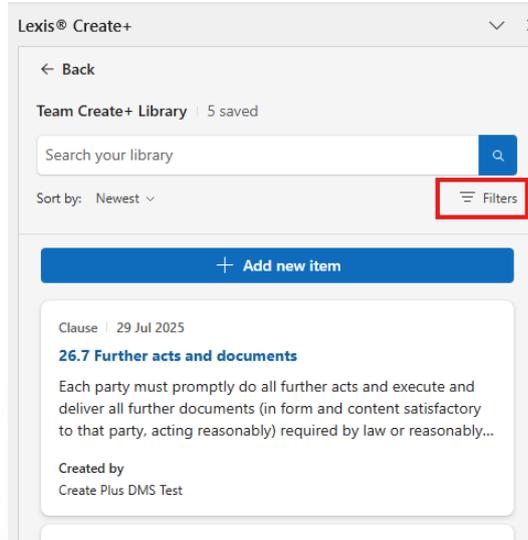
1. Click the Libraries icon on the lower left-hand side of the Create+ pane.
2. From the list of available libraries, select the one you want to browse.



3. The pane will display all clauses within the selected library.
4. Use the search box at the top to find specific clauses by keyword.



5. Apply filters to narrow down the list of displayed clauses.

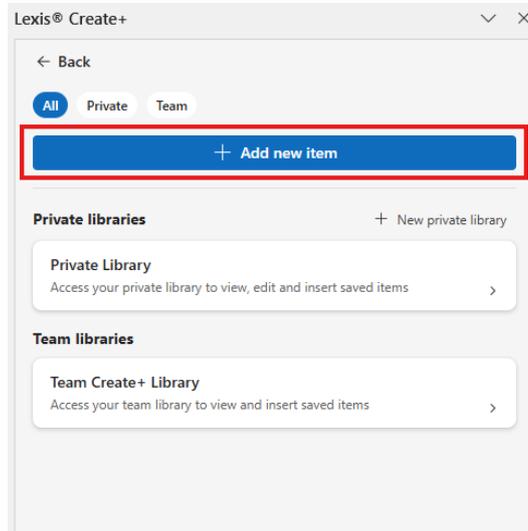


## 4.2 Adding Clauses to Your Libraries

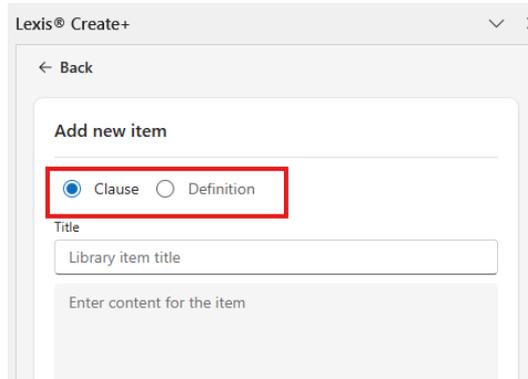
You can add clauses into your library using the following ways:

### 4.2.1 Add from Scratch

1. Go to Libraries and click Add new item.

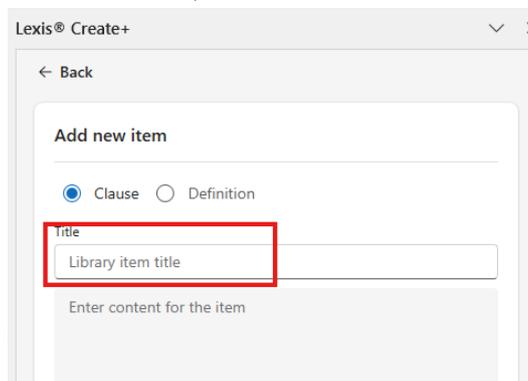


2. Choose whether you're adding a Clause or a Definition.



3. Enter a title for the library item.

*Note: This title is not inserted into your document, so if you want a heading included, add it within the content field.*



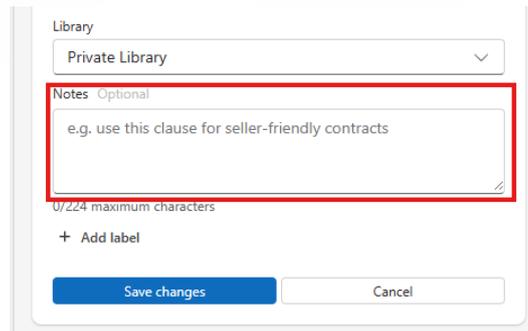
4. Enter the clause text in the content box.

The screenshot shows the 'Add new item' form in Lexis Create+. At the top, there is a 'Back' button. Below it, the form title 'Add new item' is displayed. There are two radio buttons: 'Clause' (selected) and 'Definition'. A 'Title' field contains the text 'Library item title'. A large text area below is labeled 'Enter content for the item' and is highlighted with a red border.

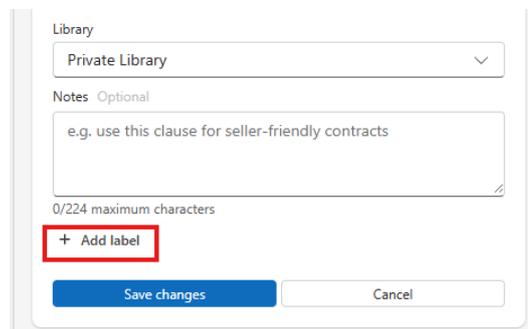
5. Select the library where you want to save the item.

This screenshot shows the same 'Add new item' form. The 'Library' dropdown menu at the bottom is highlighted with a red border. The dropdown currently shows 'Select a library' with a downward arrow. Below the dropdown, there is a 'Notes' field with the label 'Notes Optional' and the text 'e.g. use this clause for seller-friendly contracts'.

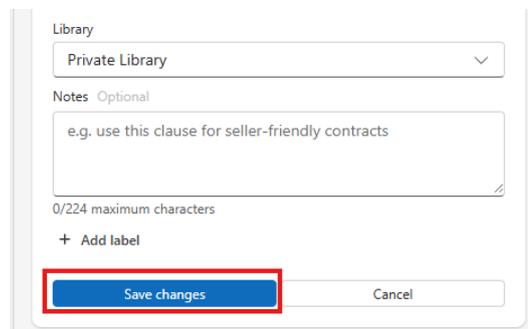
6. Optionally, add notes in the notes field.



- 7. Add one or more labels to help categorise and retrieve the clause later. Labels are searchable and can be used as filters.



- 8. Click Save changes.



### 4.2.2 Add from Search Results

Refer to Section 2.4.3 above for step-by-step instructions on saving clauses from Search Results.

### 4.2.3 Add an Edited Clause

Refer to Section 2.4.6.6 Save to Library from Edit a Clause for guidance on saving clauses you've modified.

## 5 Protégé Integration in Lexis Create+ (available with a Lexis+ AI subscription)

With a Lexis+ AI subscription, you'll have access to the Protégé integration within Lexis Create+. This feature appears in the bottom half of the Create+ pane in Microsoft Word and allows you to:

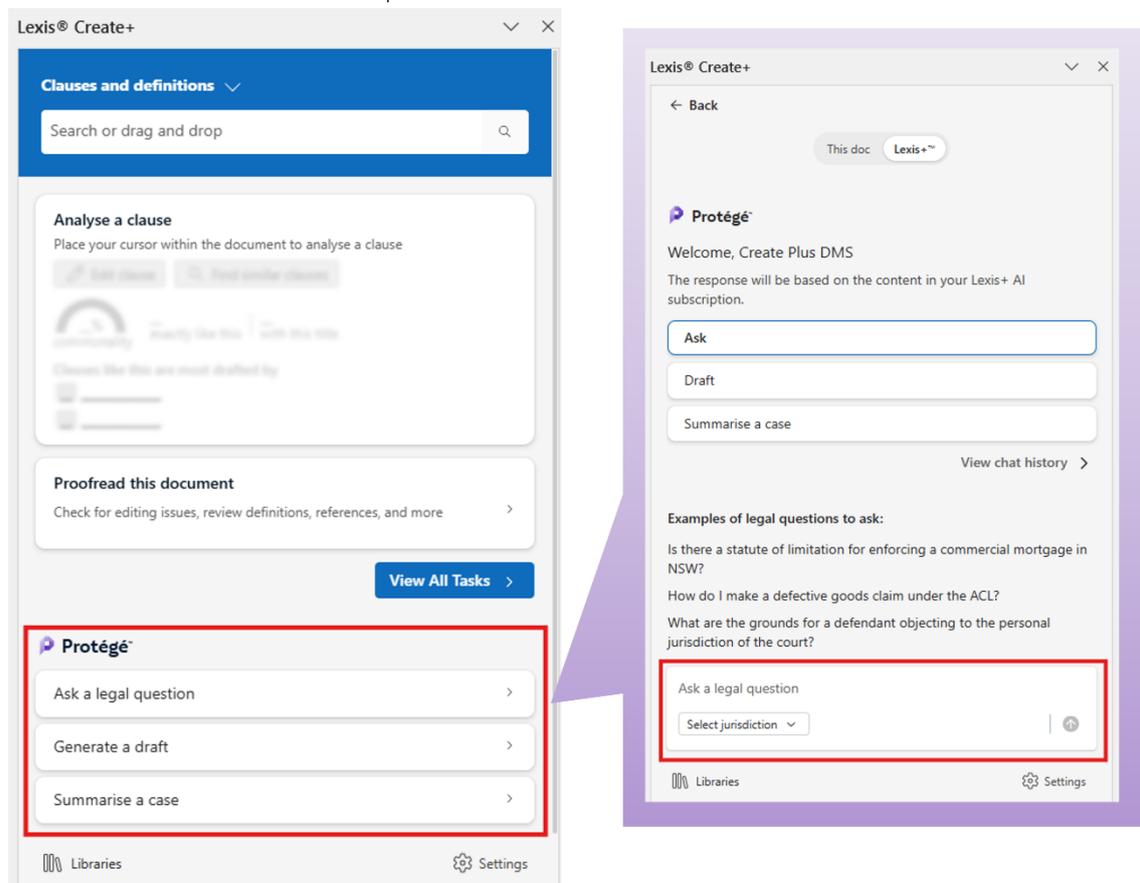
# Lexis® Create+

- Ask a legal question
- Draft
- Summarise a case

To use Protégé:

## 1. Select a Task

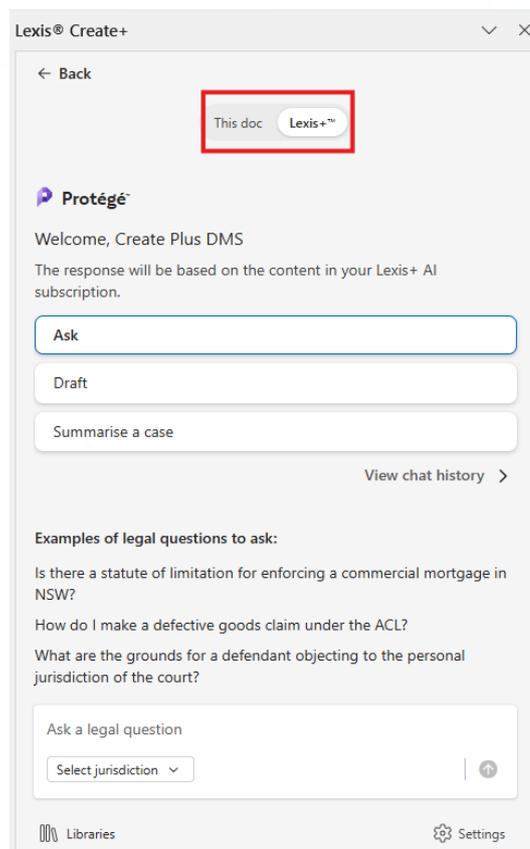
Click on the task you want to perform (e.g., Ask a legal question, Draft, or Summarise a case). This will open a view where you can enter your prompt in the text box at the bottom of the pane.



## 2. Use Document Context (Optional)

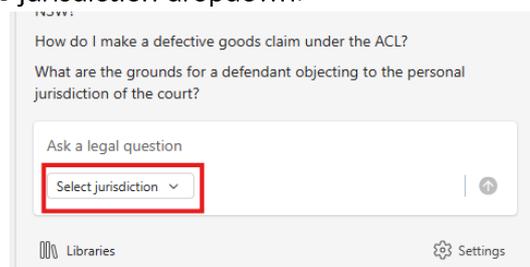
By default, Protégé's answers are based on LexisNexis content.

If you want Protégé to base its response on the content of your open document, toggle the switch at the top of the pane to "This doc."



### 3. Set Jurisdiction (Optional)

If you want the response to focus on a specific jurisdiction, select your preferred jurisdiction from the **jurisdiction dropdown**.

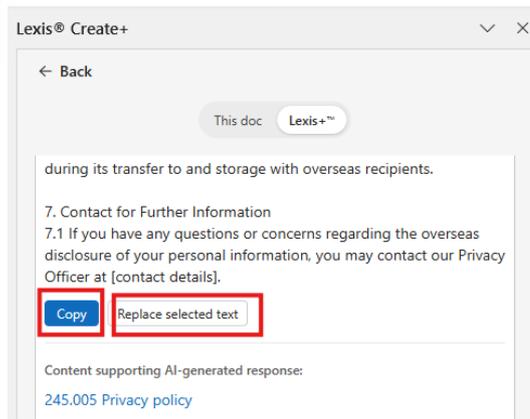


### 4. Submit Your Prompt

Once your prompt is ready (and jurisdiction selected, if applicable), press **Enter** or click the **submit icon** to generate a response.

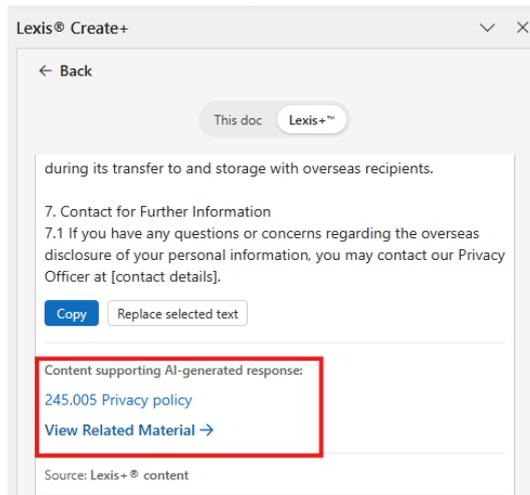
### 5. Working with the Response

- To **copy** the response for reuse, click the **Copy** button under the response.
- To **replace text** in your document with the response, highlight the text in your document and click **Replace selected text** under the Protégé response.



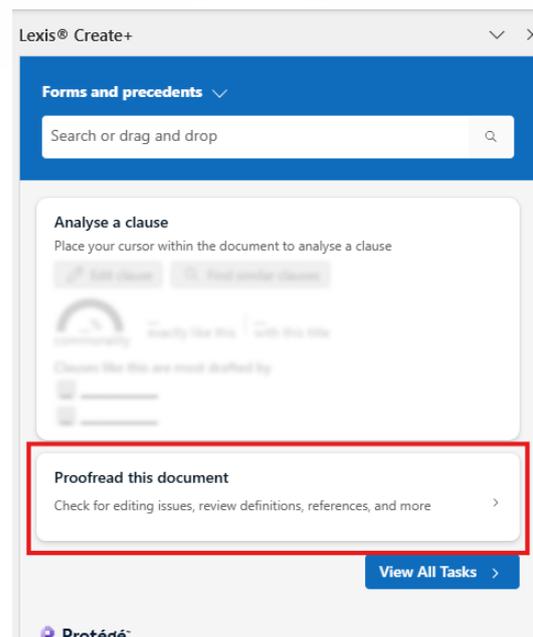
## 6. View Supporting Documents

If the response includes supporting documents, click on any linked document to view it. This will open the document in your browser via the LexisNexis platform.



## 6 Proofread this document

To get started with Proofreading in Lexis Create, navigate to the Lexis Create+ panel, then select "Proofread this document."



## 6.1 Reference Issues

To address Reference issues using Lexis Create+, follow these steps:

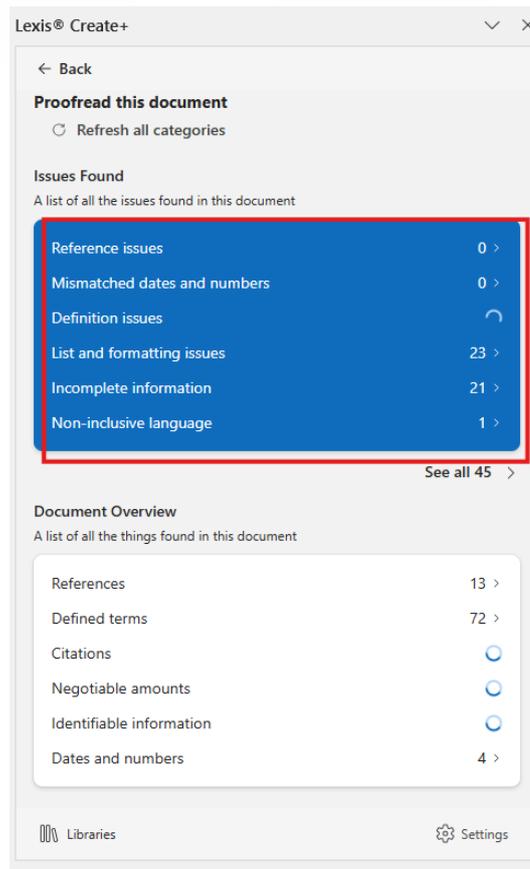
1. **Identify Reference Issues:** Within the “Issues Found”, select “Reference issues.” Then, look for cards that identify items requiring attention, such as unlinked references.
2. **Link References:** Click on the relevant card to view the reference issue. To link a reference, select the section from the document to which you want the reference to link. If linking is not necessary, you can choose to ignore the issue.
3. **Finalise Changes:** After addressing the reference issues, click on the “Done” category to review the changes made.

## 6.2 Other Issues

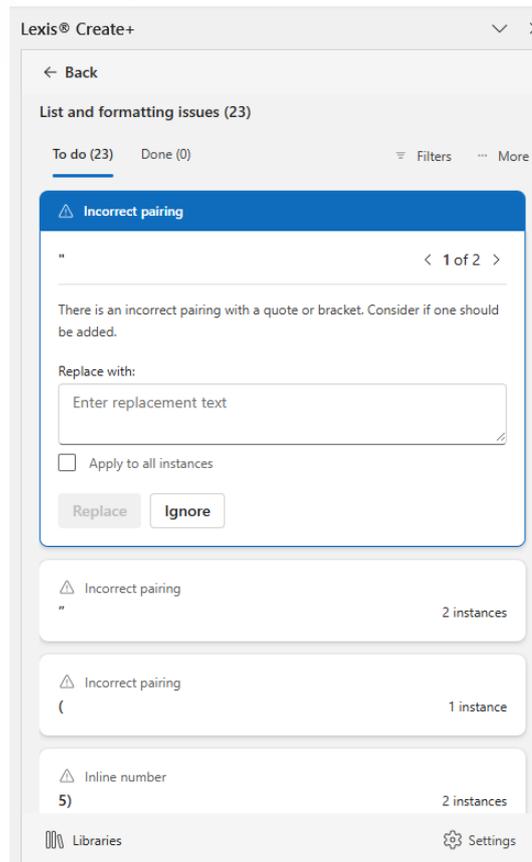
Lexis Create+ helps streamline document review by identifying and categorising common drafting issues such as mismatch dates and numbers, definition inconsistencies, list and formatting problems, incomplete information, and non-inclusive language.

To address these issues:

1. **Run the Proofreading tool:** Select “Proofread this document.”
2. **Review Issue Categories and Counts:** The proofreading view will display a list of issue categories, each showing the number of issues identified (e.g., *Mismatch Dates and Numbers* – 3). This gives you a quick overview of areas that may need attention.



3. **View Specific Issues by Category:** Click on any category to expand and view the specific issues identified. Each issue is presented as a card with suggested edits or actions.

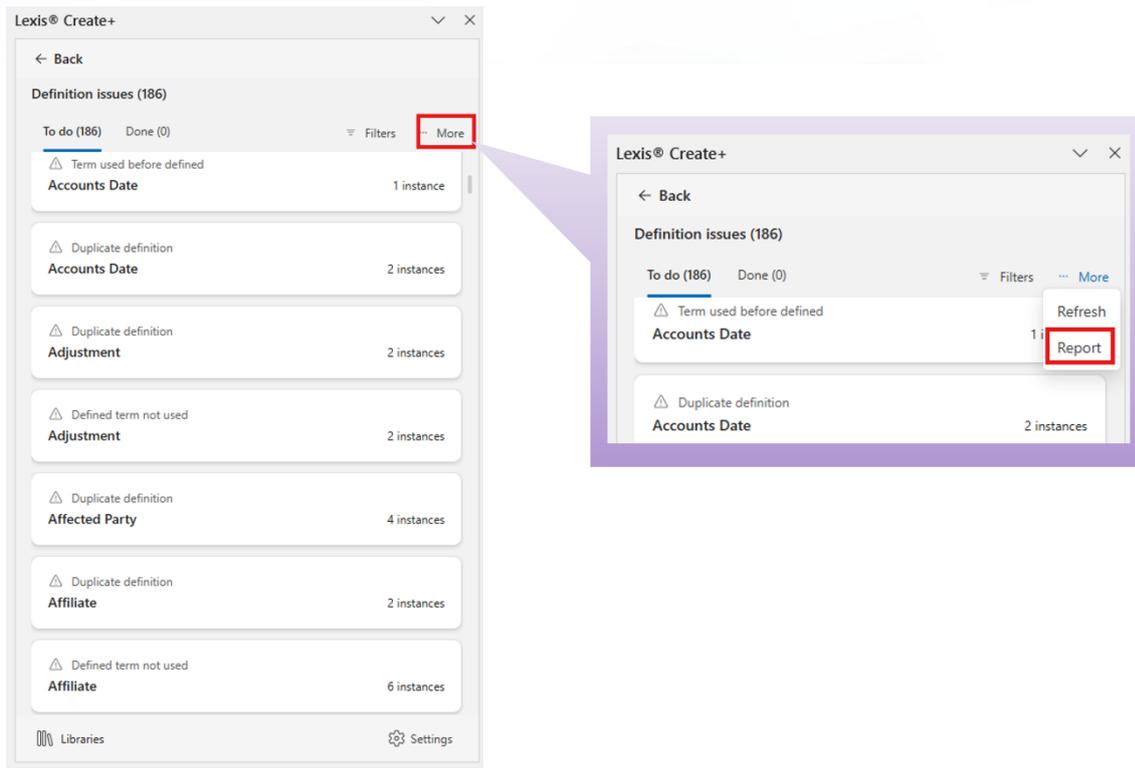


4. **Address Issues:** Click on each card detailing the issues found. You can choose to replace the information or ignore it in specific instances or across all instances within the open document.
5. **Finalise Changes:** After addressing the definition issues, click on the “Done” category to review the changes made.

### 6.3 Generate a Report

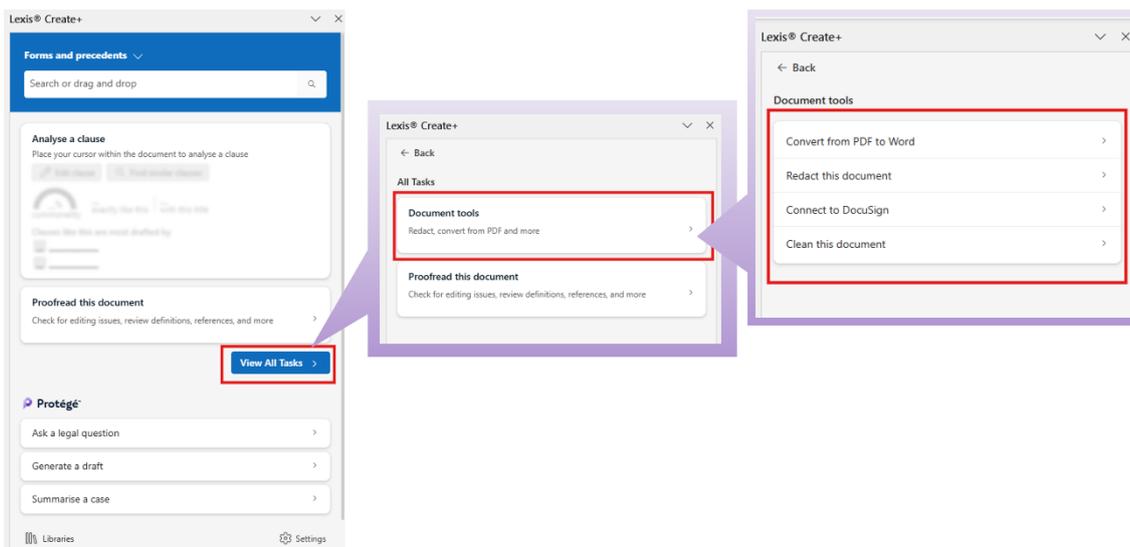
If needed, generate a report by clicking on “More” and then “Report.” Select the categories to include and click “Generate Report” to open it in a new window.

# Lexis® Create+



## 7 Document Tools

To view the available Document Tools, click **All Tasks** in the Create+ pane and select **Document Tools**.



### 7.1 PDF to Word Converter

If you have an existing PDF document that you'd like to refine using Lexis Create+, you can easily convert it to Word using the built-in **PDF to Word Converter**. To do this:

1. From Document tools, click on **Convert from PDF to Word**.
2. Either **drag and drop** your PDF file into the pane or click **Choose File** to upload the document for conversion.

Once converted, you can begin editing and enhancing the document using Create+ features.

### 7.2 Redact

To redact your open document, click **Redact this document** under **Document Tools**.

You'll be prompted to **save a copy** of your document before proceeding. Please note **Redaction is permanent**—once applied, it cannot be undone.

If you choose to save a copy:

- A duplicate of your document will be created and opened.
- Redaction will be applied to the original open document.
- Save the newly created copy to your preferred location.

### 7.3 Clean this document

To clean your open document, click **Clean this document** under **Document Tools**.

You can choose to remove any of the following elements:

- Citation Metadata
- Hyperlinks
- Navigation Bookmarks

Please note: This action is **permanent** and **cannot be undone**.

To proceed, click **I am sure** to confirm and apply the selected clean-up actions.

### 7.4 DocuSign integration

The DocuSign integration allows you to seamlessly connect your DocuSign account directly within Microsoft Word, enabling quick access to eSignature tools without leaving your document.

To connect:

1. Open your document in Word.
2. Navigate to the **Document Tools** tab.
3. Click **Connect to DocuSign**.
4. A pop-up window will appear prompting you to sign in to your DocuSign account.
5. Once connected, you can access DocuSign features directly from within Word.

## Appendix 1. List of languages available for Translate

Supported Languages for the "Edit with AI – Translate" Feature

Language List		
→ English (American)	→ Indonesian	→ Russian (Cyrillic)
→ English (British)	→ Italian	→ Russian (Latin)
→ Chinese (simplified)	→ Japanese	→ Serbian (Cyrillic)
→ Croatian	→ Korean	→ Serbian (Latin)
→ Czech	→ Latvian	→ Slovak
→ Danish	→ Lithuanian	→ Slovenian
→ Dutch	→ Macedonian	→ Spanish
→ Estonian	→ Norwegian	→ Swedish
→ Finish	→ Polish	→ Turkish
→ French	→ Portuguese	→ Ukrainian (Cyrillic)
→ German	→ Portuguese (Brazilian)	→ Ukrainian (Latin)
→ Greek	→ Romanian	

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## Appendix 2. Proofreading

List of Issues per Issue Category in Proofreading Issues Found

Issue Category	Issues
→ Reference	→ Cross reference out of date, → Cross reference not found
→ Mismatch dates and numbers	→ Number mismatch, → Date mismatch
→ Definitions	→ Defined term not used, → Definition not in alphabetical order, Defined term not capitalised, → Definition not found, → Term used before defined, → Duplicate definition
→ List and formatting issues	→ Inline number, → Spacing, → Incorrect pairing, → Duplicate text, → Inconsistent formatting, → Inconsistent currency decimal.
→ Incomplete information	→ Bracketed text, → Missing information, → Bulleted text, → Highlighted text
→ Non-inclusive language	→ Gender

Components Identified per Category in Proofreading Document Overview

Component Category	Component
→ References	→ Unlinked reference, → Cross Reference
→ Defined terms	

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→ Citations                      → Cases

---

→ Negotiable amounts

---

→ Identifiable Information                      → Name, Location,  
→ Phone number,  
→ Web address,  
→ Email,  
→ Address,  
→ Language

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→ Dates and Numbers                      → Dates and numbers,  
→ Weekends

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