

INSTALL GUIDE

# Lexis<sup>®</sup> Create+

Microsoft<sup>®</sup> Word Add-in



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## INTRODUCTION

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This document describes the install process for the Lexis® Create+ Microsoft® Word Add-in.

## REQUIREMENTS

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- Users need to have the Microsoft Word Desktop installed on their machine.
- The Administrator needs access to the Microsoft admin center.
- The end user system requirements are:
  - **Computer and processor:**
    - » Windows OS: 1.6 GHz or faster, 2-core
    - » macOS: Intel processor
  - **Memory:**
    - » Windows OS: 4 GB RAM
    - » macOS: 4 GB RAM
  - **Hard disk:**
    - » Windows OS: 4 GB of available disk space
    - » macOS: 10 GB of available disk space; HFS+ hard disk format (also known as macOS Extended) or APFS
  - **Microsoft Word:** Office 365 required.
  - **Compatible Microsoft Office versions:** 32-bit, 64-bit [NOTE: While 32-bit is supported, it can impact the performance of the add-in. 64-bit is recommended.]
  - **Display:**
    - » Windows OS: 1280 x 768 screen resolution (32-bit requires hardware acceleration for 4K and higher)
    - » macOS: 1280 x 800 screen resolution
    - » Web apps require the same minimum resolution as the OS they are running on.
    - » Minimum resolution assumes zoom, DPI settings, and text scaling are set at 100%. If not set to 100%, minimum resolution should be scaled accordingly. For example, if you set the Windows display 'scale and layout' setting on your Surface Book, which has a 3000x2000 physical display, to 200%, then Office would see a logical screen resolution of 1500x1000, meeting the minimum 1280x768 requirement.

- **Graphics**

- » Windows OS: Graphics hardware acceleration requires DirectX 9 or later, with WDDM 2.0 or higher for Windows 10 (or WDDM 1.3 or higher for Windows 10 Fall Creators Update).
- » macOS: No graphics requirements.

On the network side, the software needs to connect to the internet, by default, it will attempt to use your system settings in the Control Panel. Please ensure that traffic for <https://pdc1c-maximuslmo.globalplatform.route53.lexis.com/> is allowed on your network.

### **Version Checking**

To determine your version of Word, open the File menu in Word, then Account, then About Word. The version will appear in the first line of the About Microsoft Word dialog. In Microsoft Windows on newer versions of Office you can type Control-C to copy this information to share with others more readily.

To determine if you have the latest Office updates for your software, first check Windows Update settings by going to the Settings app, then select Windows Update (or Updates and Security). You should see when the last check was made and the phrase “You’re up to date” on this application. Next, in Word, open the File menu, then Account. Next to the Update Options button is a description of the update status for your software. If your updates are managed by your organization, you will need to ask your system administrator if your system is up to date.

## **DEPLOYMENT**

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There are two methods of deployment: through the Microsoft Store and through the Microsoft Admin Center.

### **Deployment from the Microsoft Store**

Install directly from the Microsoft Store:

<https://appssource.microsoft.com/en-us/product/office/WA200004714>

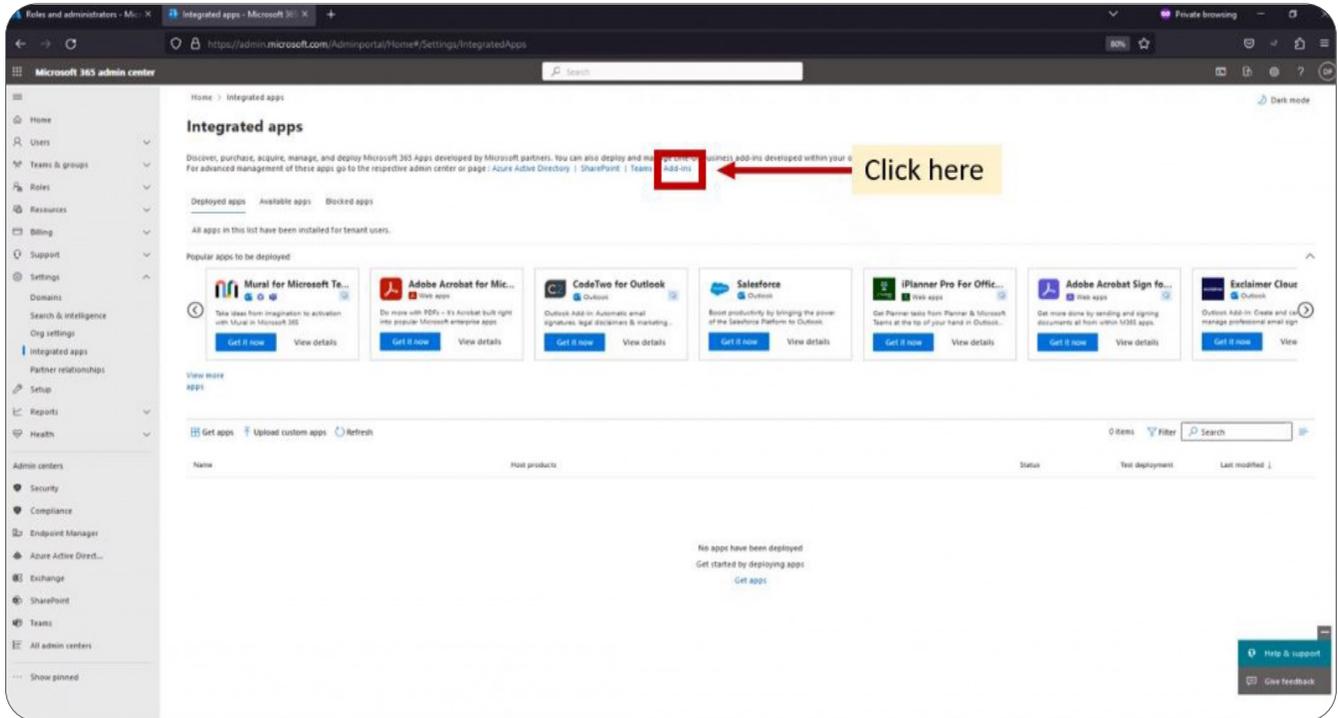
### **Centralized Deployment from Microsoft Admin Center**

Reference <https://docs.microsoft.com/en-us/office/dev/add-ins/publish/centralized-deployment>

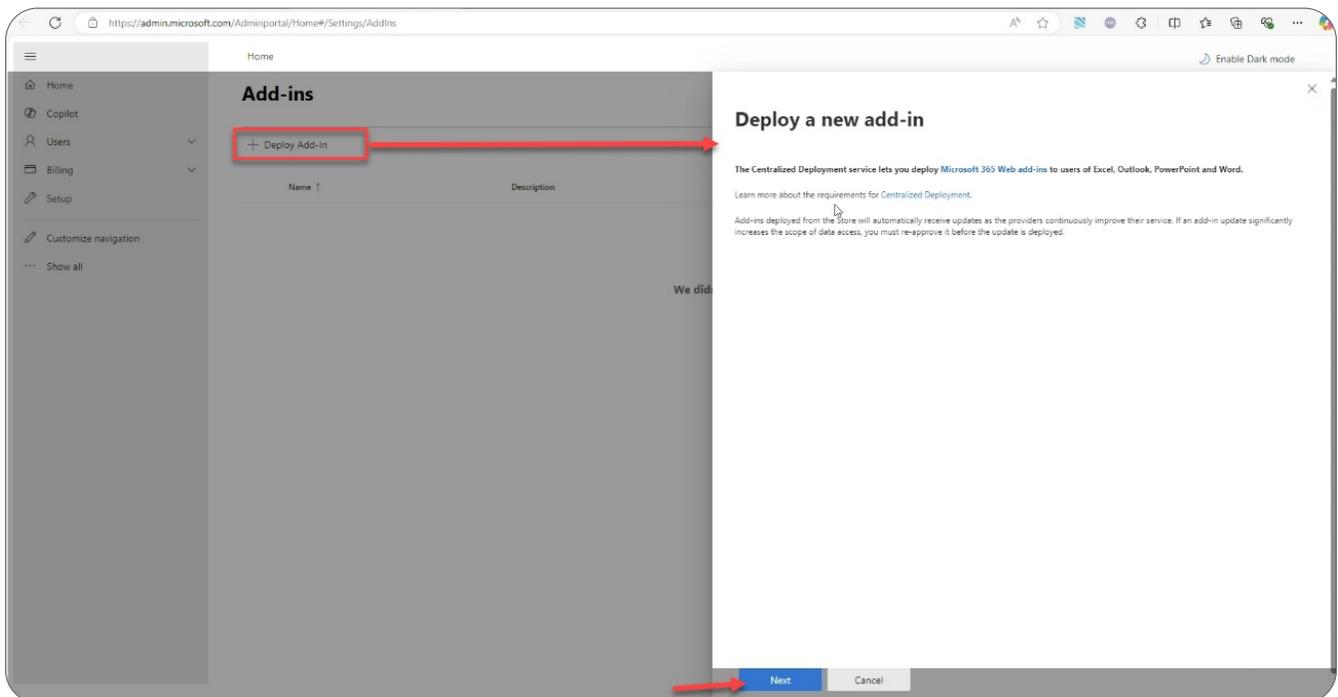
We recommend using these options for deployment of the LexisNexis Add-In: AppSource, Microsoft 365 Admin Center or SharePoint catalog.

# STEPS FOR MICROSOFT 365 ADMIN CENTER

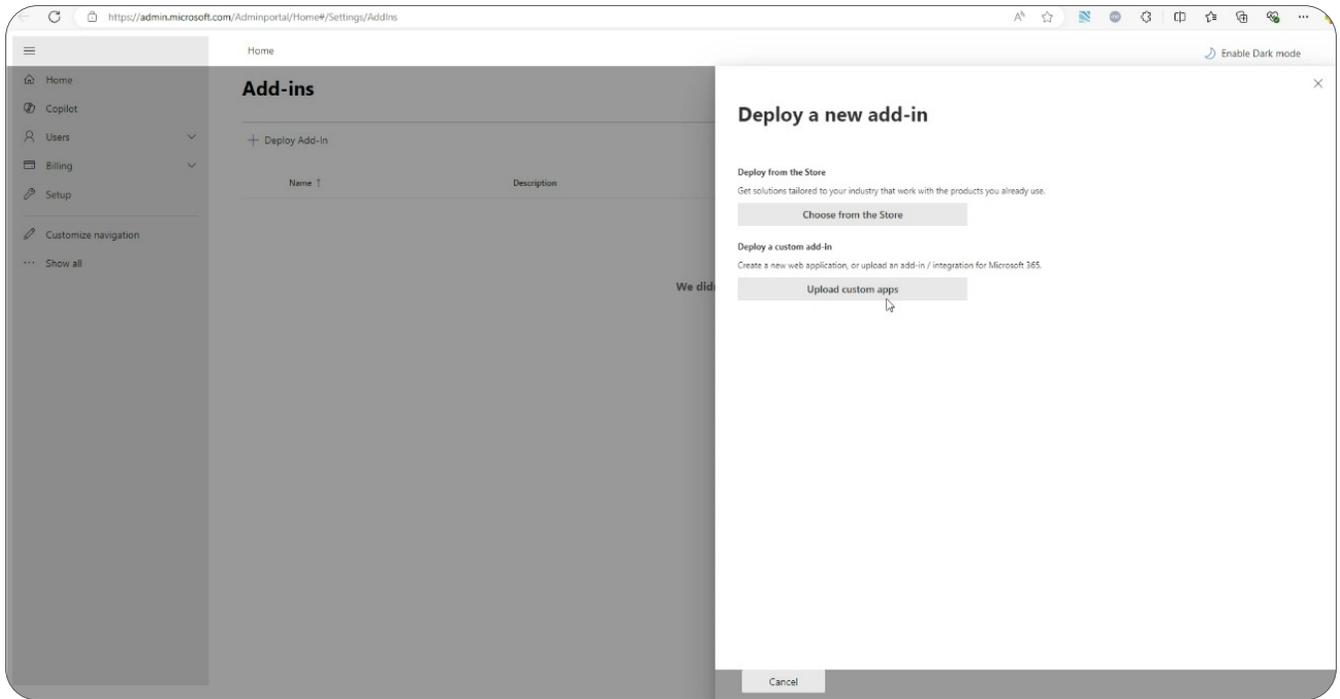
1. Log in to Microsoft Admin Center.
2. In the Admin center please go to **Settings > Integrated apps > Add-ins** page.



3. Click on **Deploy Add-In**

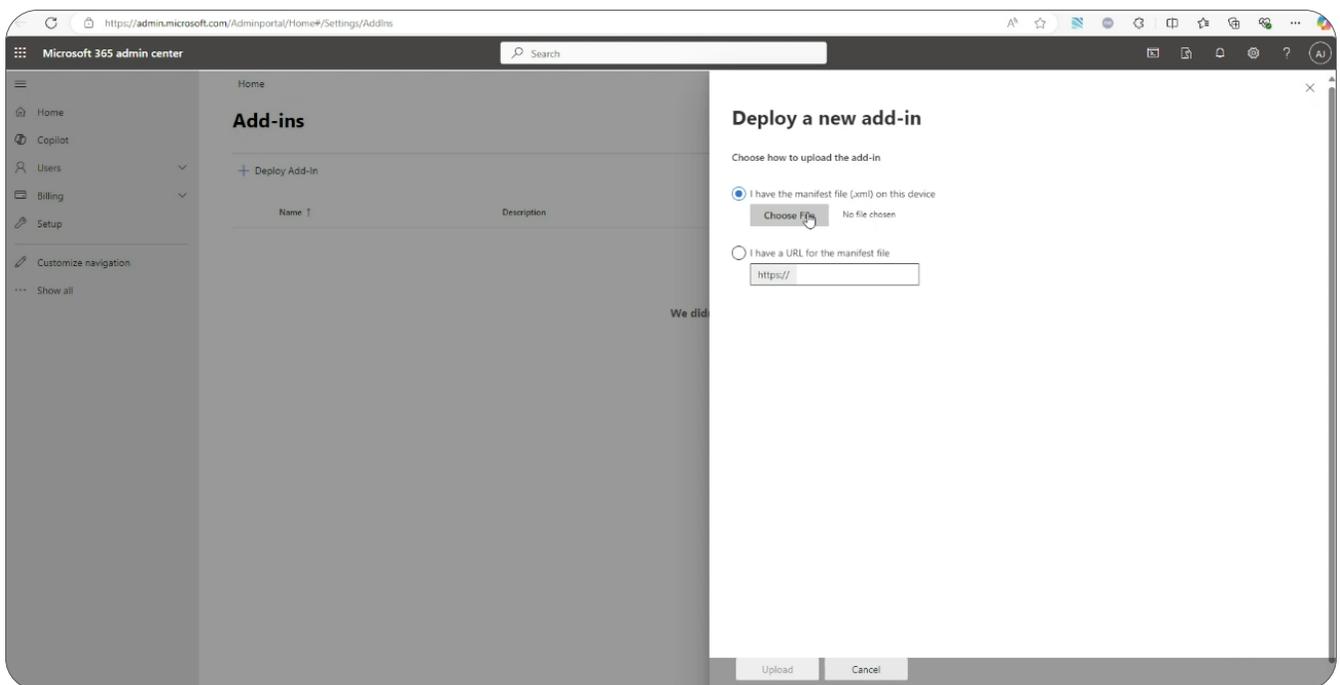


- If the add-in was published using an XML file provided by the IT team, then choose **Upload custom apps** option. If it was deployed from the Store, select the option **Choose from the Store**. Note that, the latter option can be used only when the add-in you want to deploy is already available in the Store.

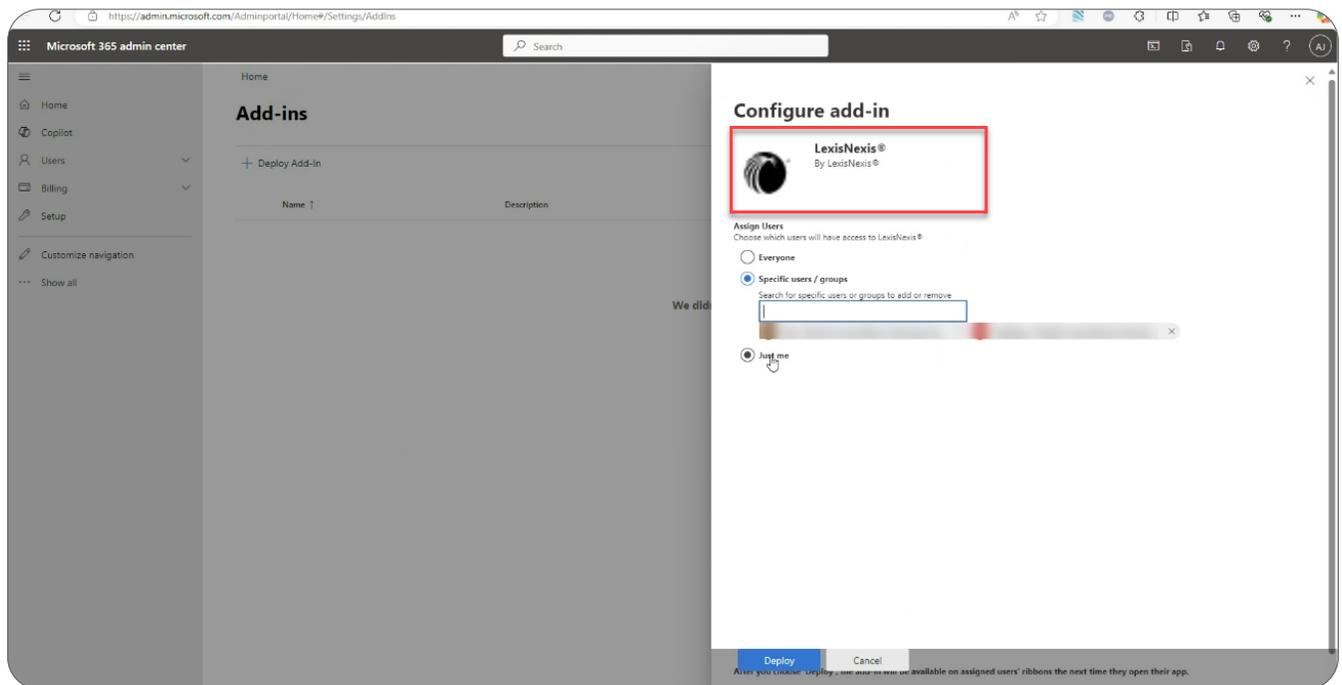


## 5. Deploy Add-In

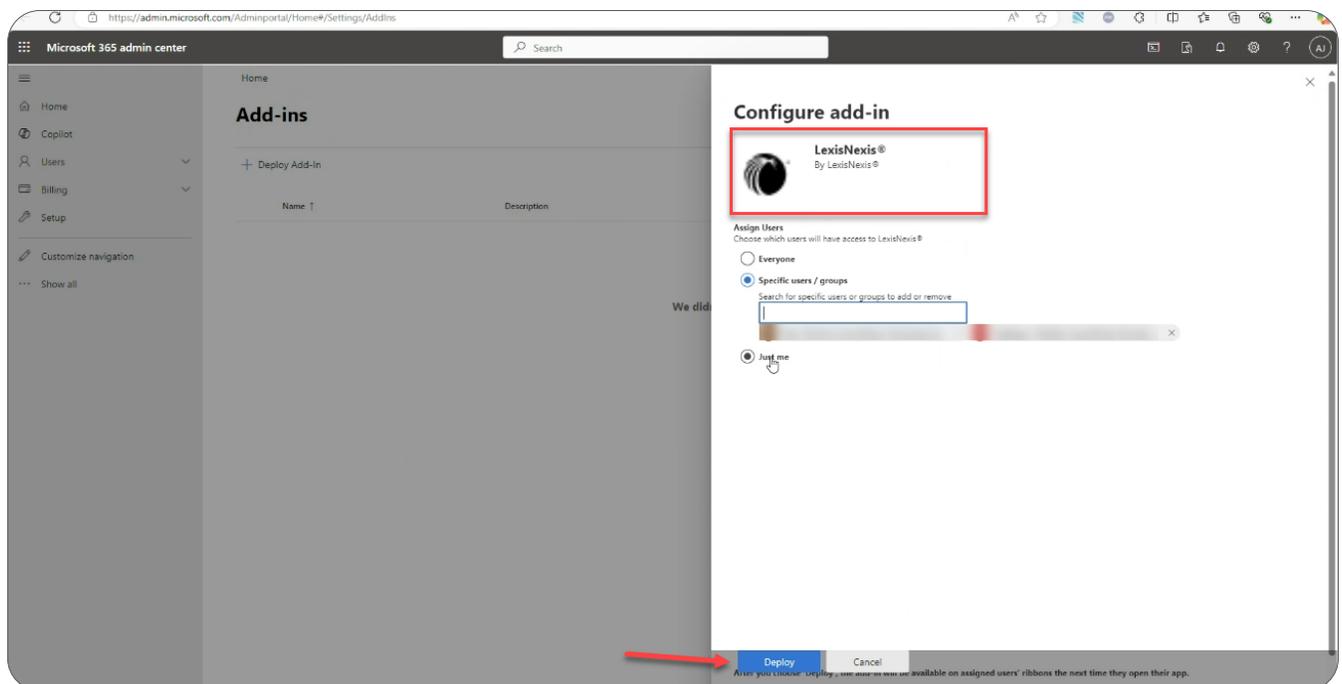
In this example, we are going with the option “Upload custom apps”. Click on Choose Files button to browse the location of the manifest file to upload it.

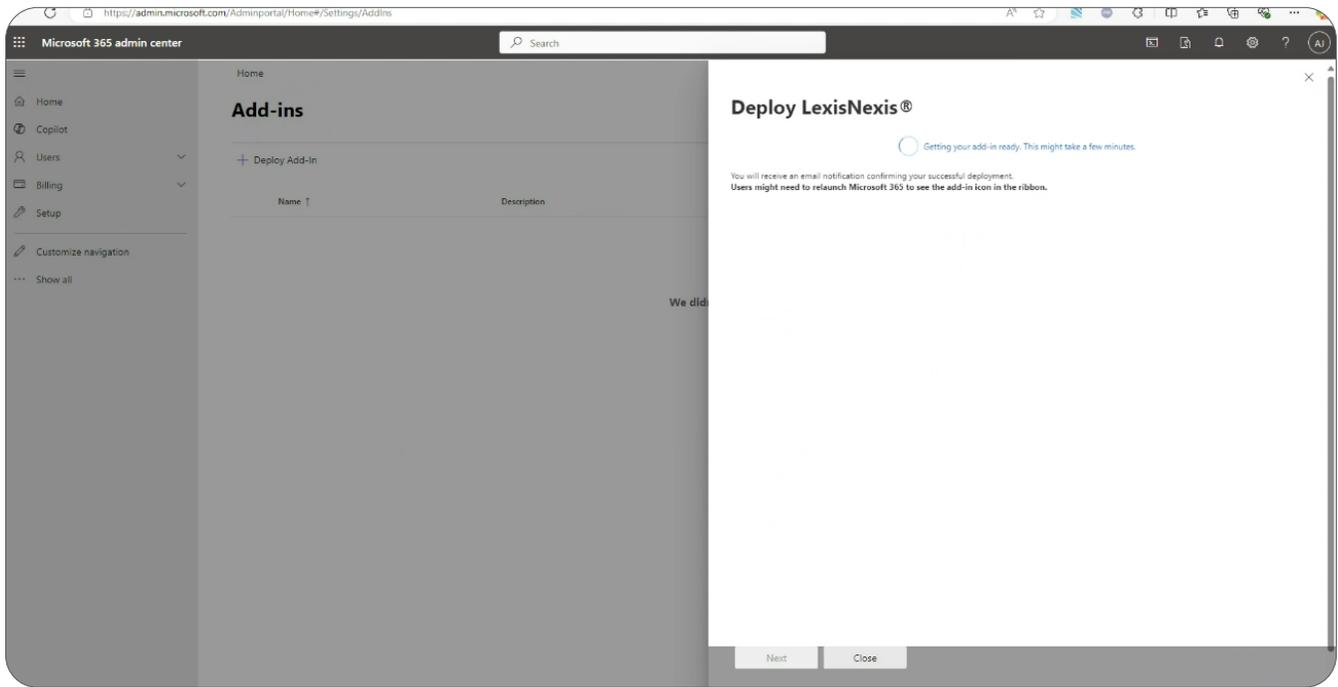


6. Once the upload is successful, we should see the “Configure Add-in” screen. Administrators can deploy it to Everyone / specific groups as shown below.

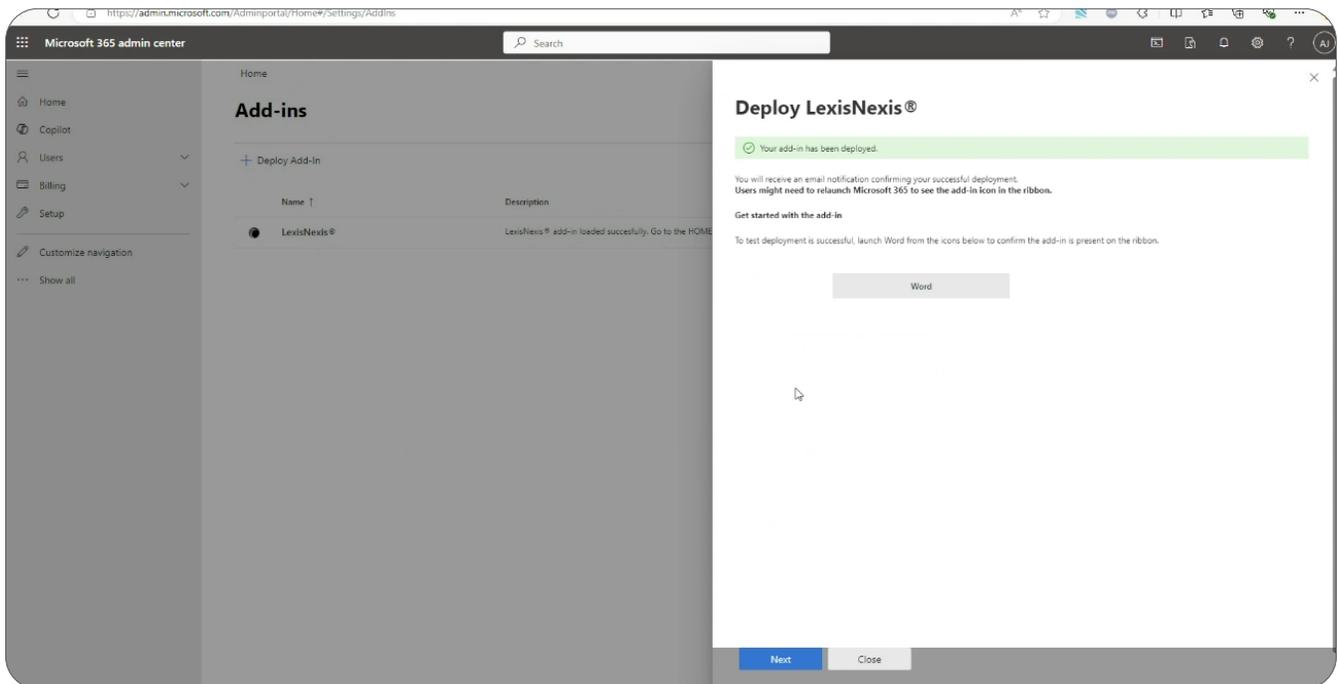


7. Click on the Deploy button.



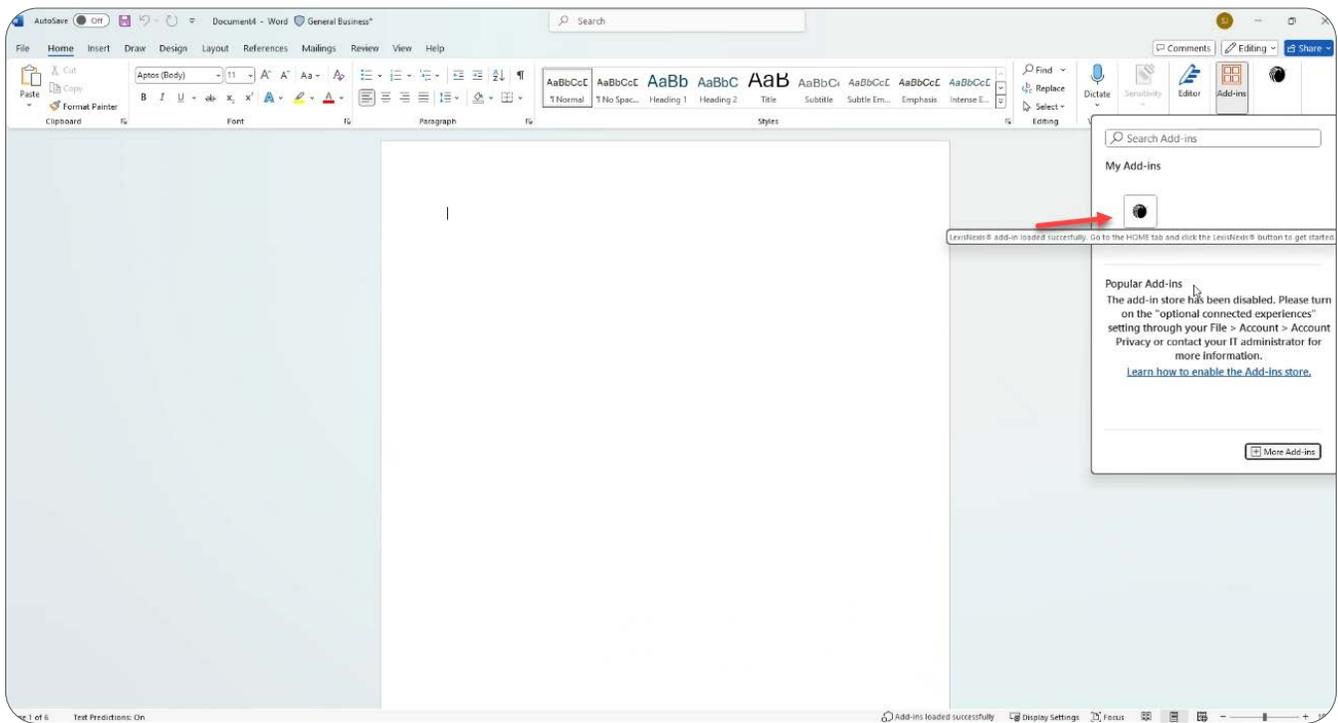


8. LexisNexis Word Add-In is successfully deployed to the end users within your organization.



## Test it from the Word application

1. Now open the Word application and sign in to your account and click on the “Add-ins” button in the ribbon on the Home menu and we should be able to see our add-in that was just deployed.



Note: The steps documented above are in line with the Microsoft website and may be subject to change and updates. The link can be found here: <https://learn.microsoft.com/en-us/microsoft-365/admin/manage/manage-deployment-of-add-ins?view=o365-worldwide>

## Updating an add-in via Microsoft 365 admin center

1. Sign in to Microsoft 365 Admin Center. Click on Settings >> Integrated Apps and then click on Add-ins as shown below.

The screenshot shows the Microsoft 365 Admin Center interface. The left-hand navigation pane has 'Settings' and 'Integrated apps' highlighted with red boxes. In the main content area, the 'Integrated apps' section is visible, with a red arrow pointing to the 'Add-ins' link in the top right corner. Below this, there are sections for 'Popular apps to be deployed' and a table of 'Deployed apps'.

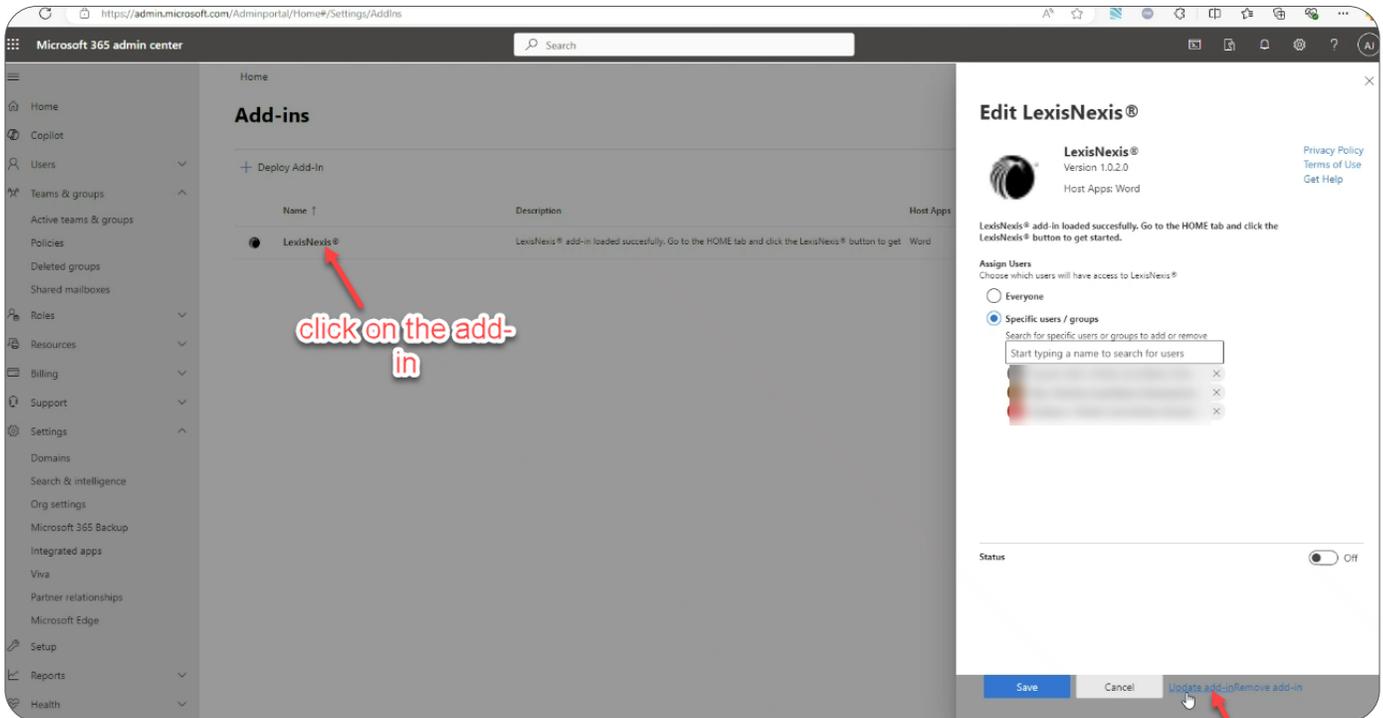
Name	Host products	Status	Test deployment	Last modified ↓
LexisNexis Protégé™ (lvin) Your Legal AI Assistant	Copilot, Teams	OK	No	11/14/2024
LexisNexis Protégé™ (local-tf) The personalized AI assistant for legal and business professionals.	Copilot, Teams	OK	No	11/12/2024
LexisNexis Protégé™ (local-bm) The personalized AI assistant for legal and business professionals.	Copilot, Teams	OK	No	11/12/2024

2. See the list of deployed add-ins

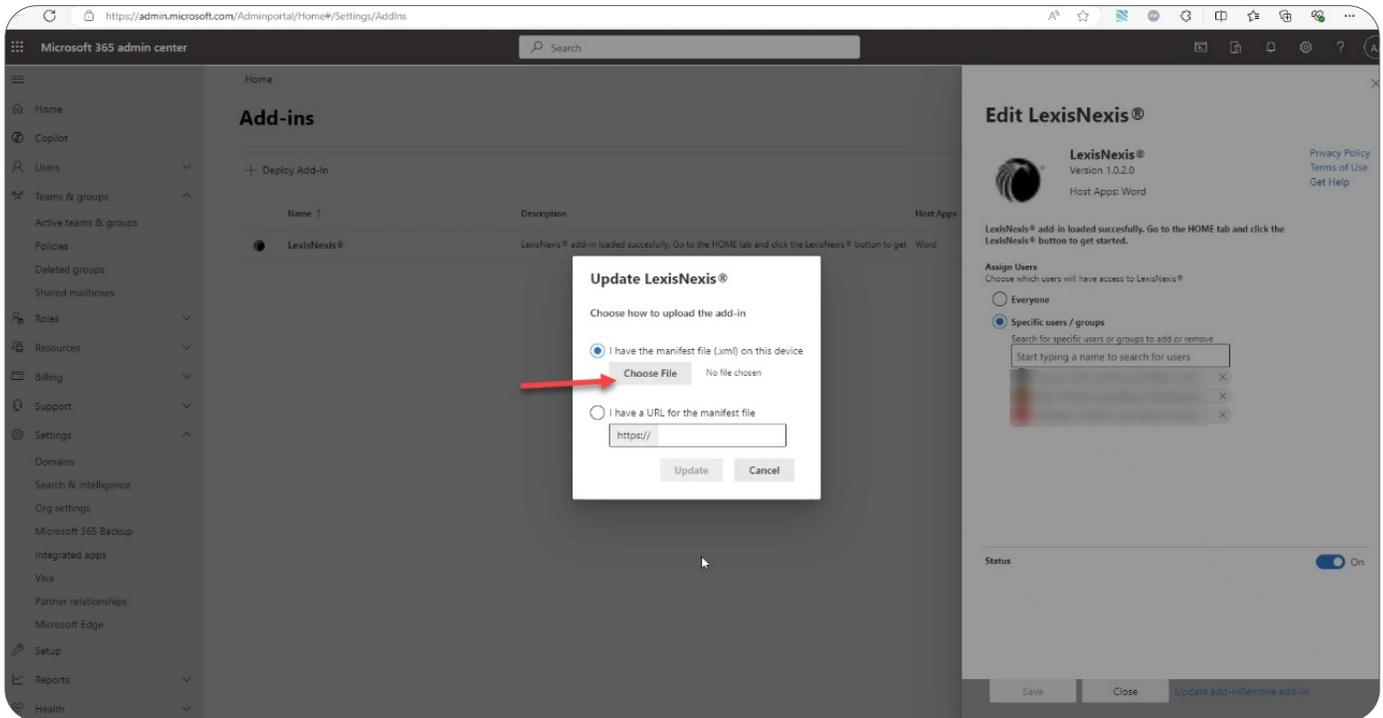
The screenshot shows the Microsoft 365 Admin Center 'Add-ins' page. The left-hand navigation pane has 'Home' and 'Add-ins' highlighted. The main content area displays the 'Add-ins' section with a table of deployed add-ins.

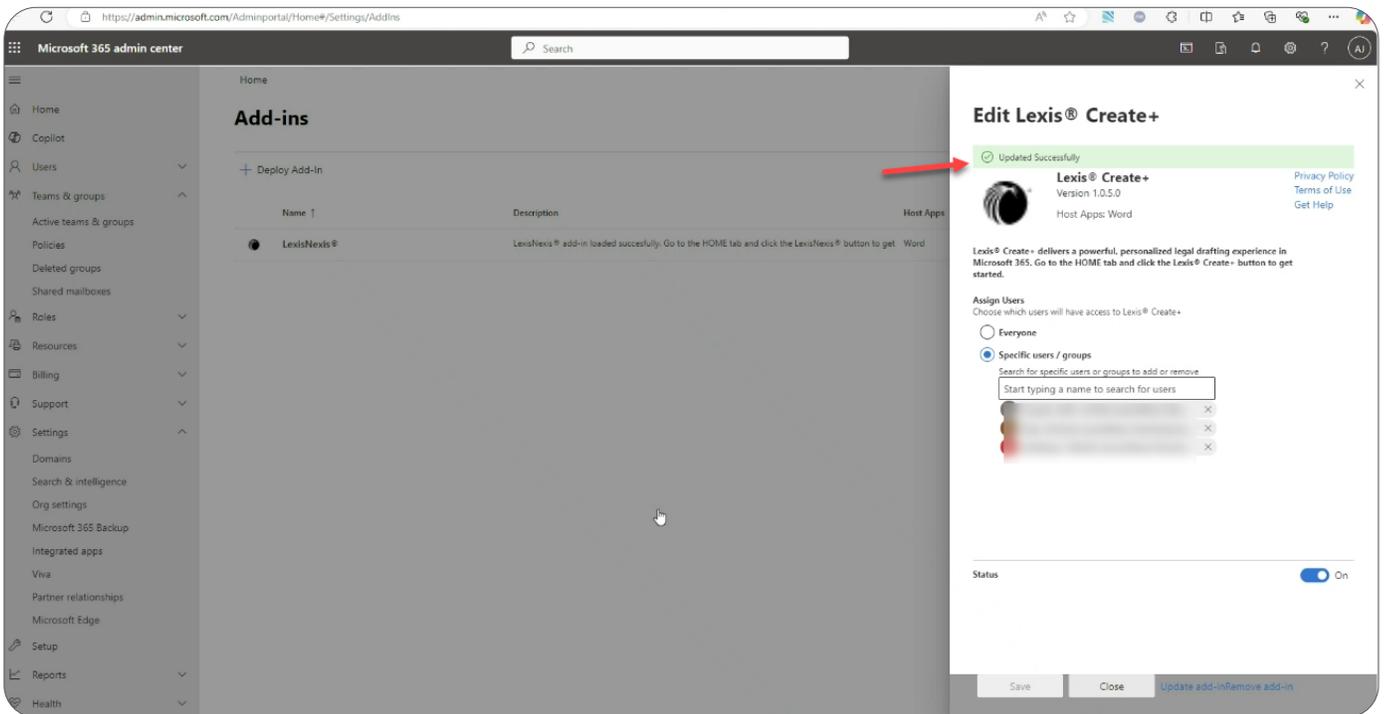
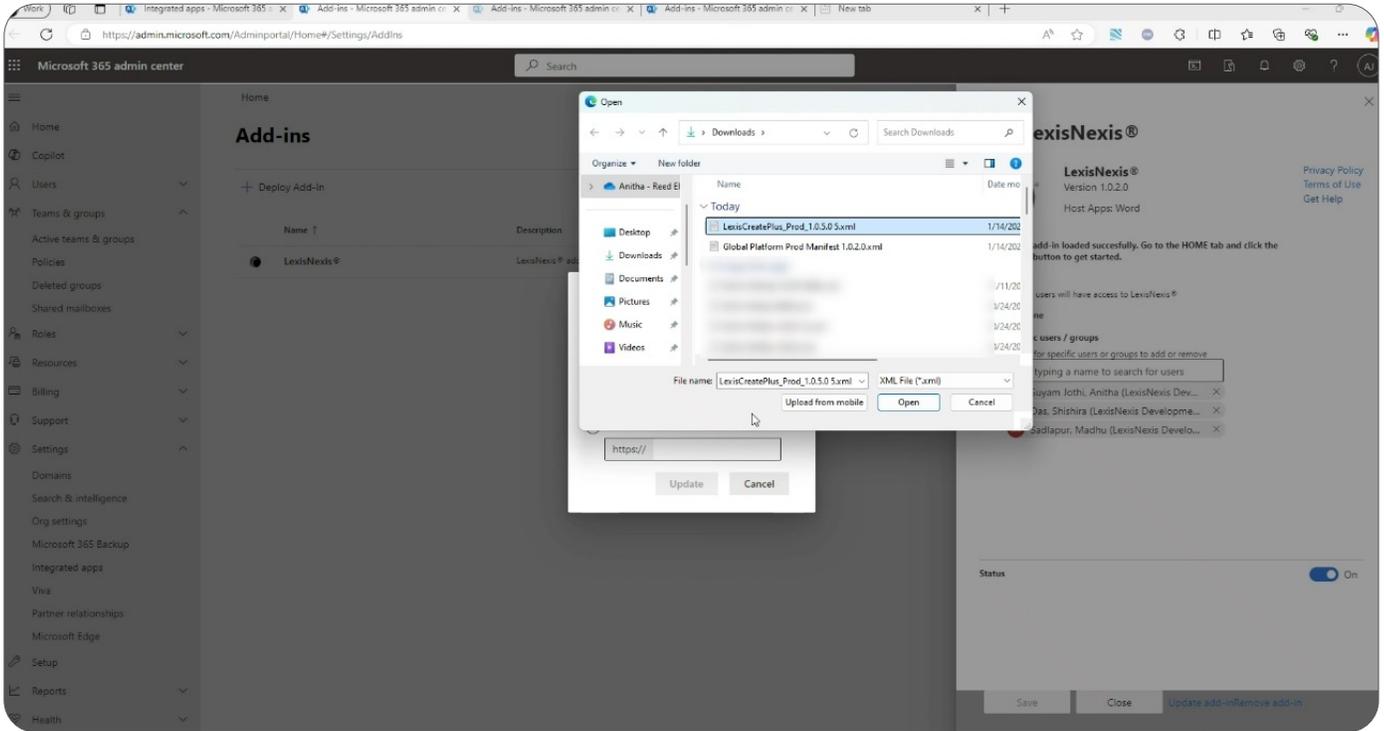
Name ↑	Description	Host Apps	Status
LexisNexis®	LexisNexis® add-in loaded successfully. Go to the HOME tab and click the LexisNexis® button to get	Word	Ok

3. Click on the “Update add-in” link available at the bottom right corner shown below

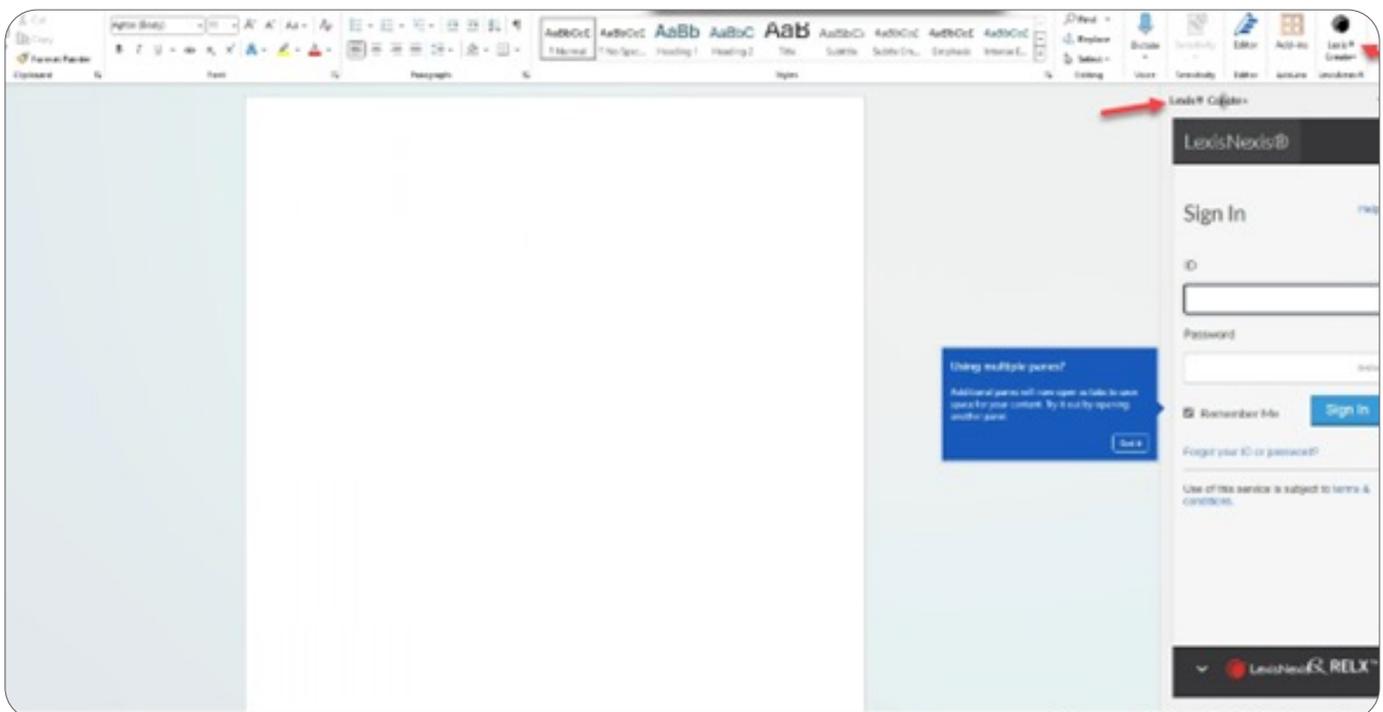
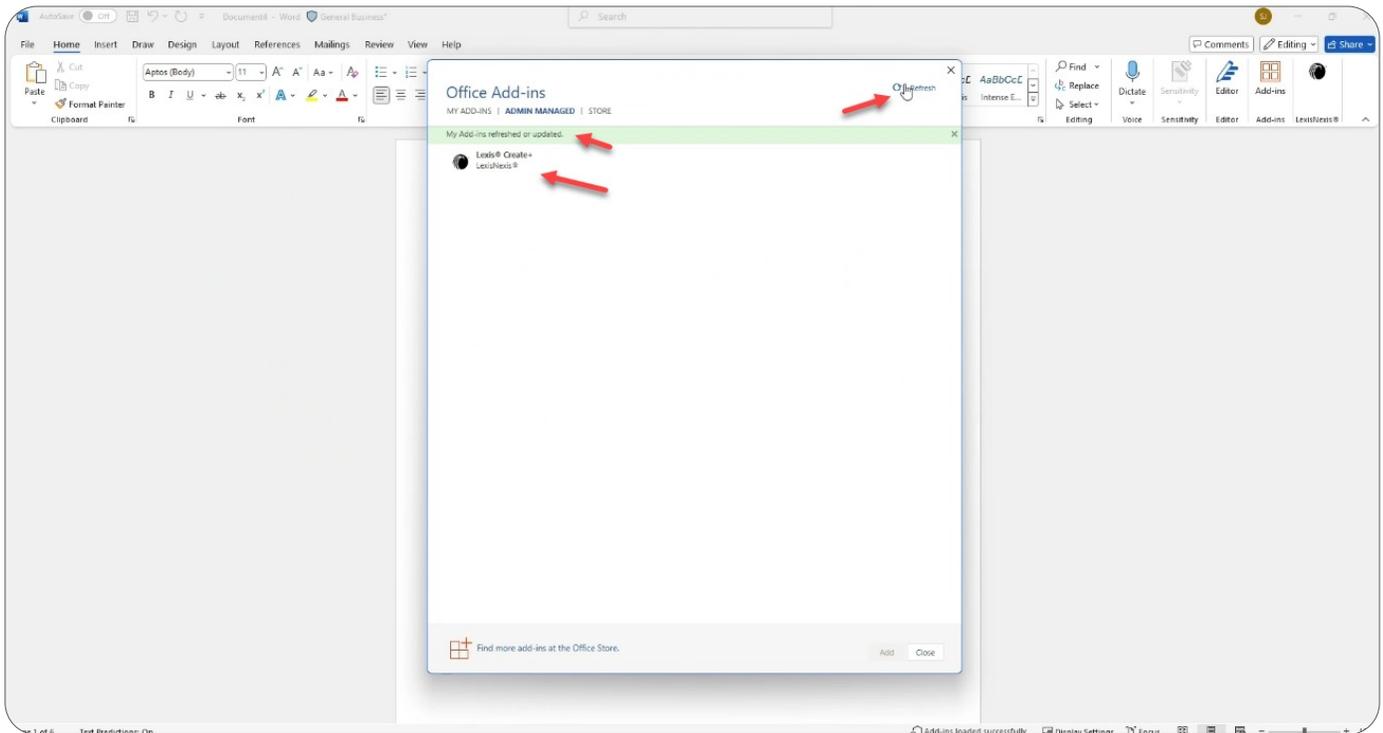


4. Upload the add-in or enter the URL of the manifest file to upload





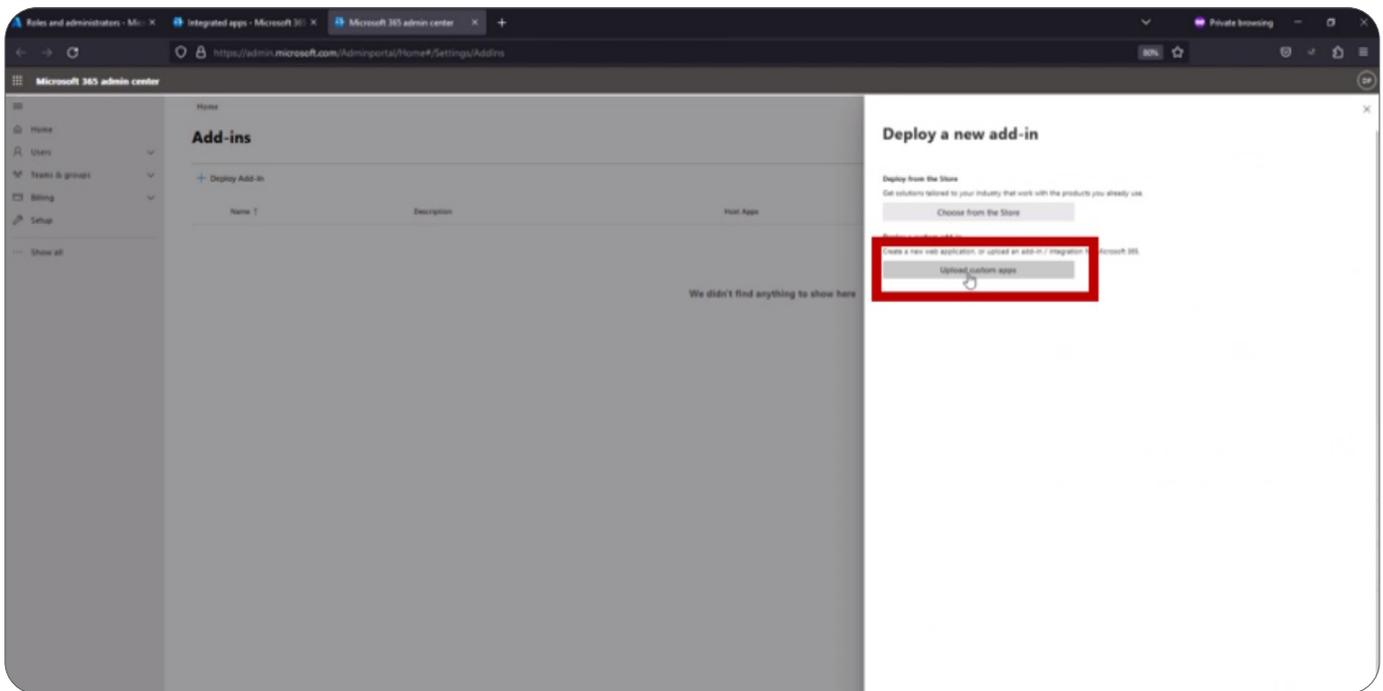
5. Verify the updated add-in. Go to Home menu and click on the Add-ins button and go to the “Admin managed” tab and click on the Refresh button available on the top right corner. This should refresh our add-in, and the newly updated add-in should show up.



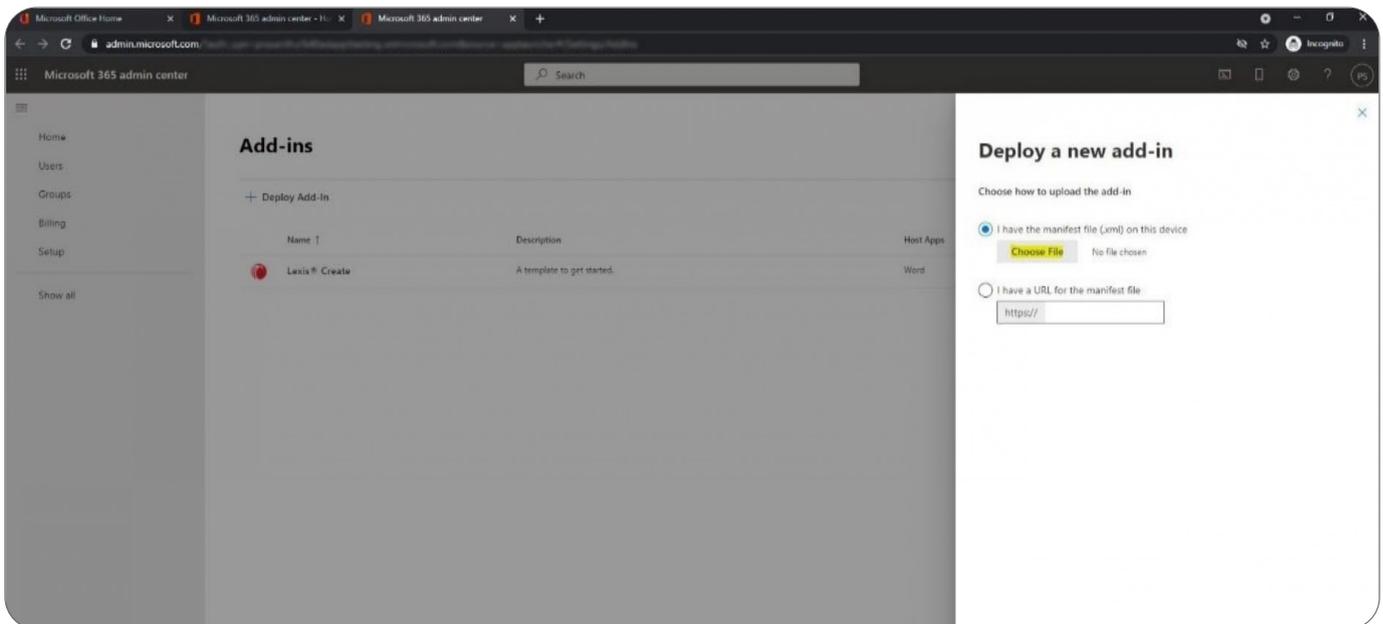
## USING CUSTOM AUTHENTICATION FOR THE APPLICATION (SAML)

The following is for internals (CSIC and Customer Support) only. If the Choose from the Store option is not available for your organization, then please use the steps below after Step 3 above instead. The use of a custom application file will prevent automatic updates to this file on users' machines compared to using the store.

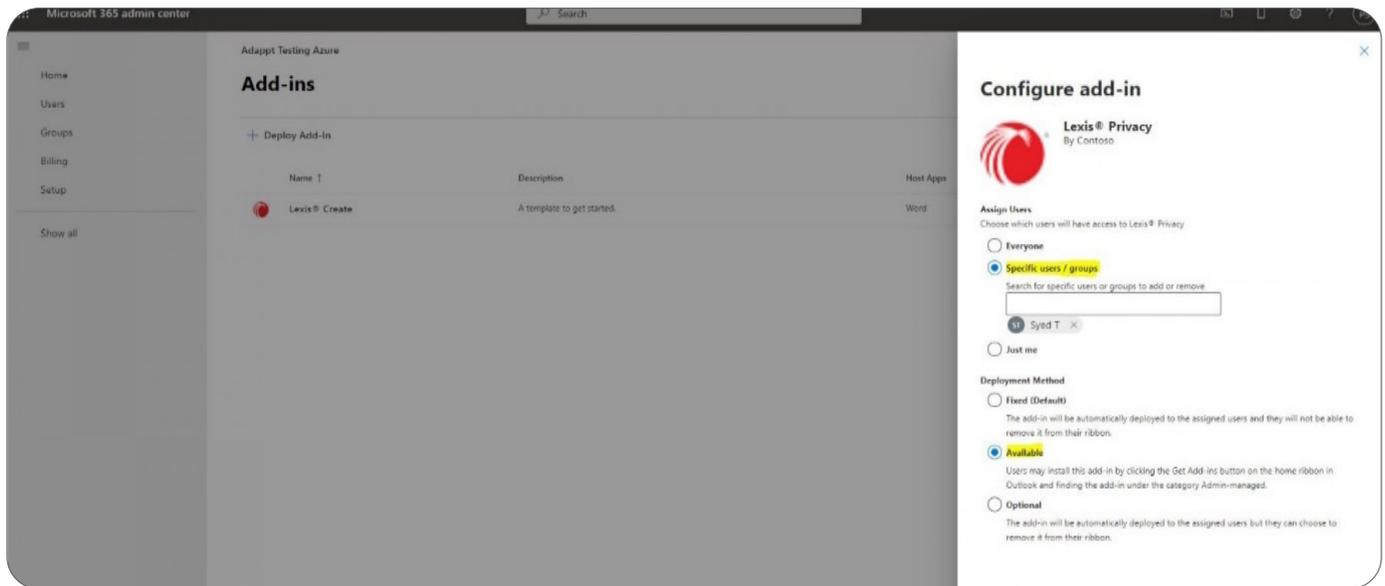
1. Select Upload Custom apps.



2. Choose File in **Deploy a new add-in**. Select the manifest file provided by CSIC or CS.



3. Click on **Upload**. This will Create+ the entry for the add-in.
4. Click on the add-in to configure.



5. Please select the option that best suits your business needs.

## GLOBAL CREATE+ PLATFORM

### Requirements

For setting up SAML for authentication instead of the standard Lexis Sign-in, a federation ID will have to be set up with the authentication team at [saml/sso@lexisnexis.com](mailto:saml/sso@lexisnexis.com). A sample federation ID is shown below for quick reference.

Example - 94B3HW5070

### Configure SAML authentication for Global Create+ Platform Customer

1. Please get the latest manifest.
2. Update the source URL in the manifest.

The general URL structure is:

**<WAM\_SIGNIN\_URL>** + **<Application\_URL>** + **%2F%3F** + **federationid%3D** + **<Federation\_ID>**  
+ **&aci=gp**

*For example*

<https://signin.lexisnexis.com/lnaccess/app/signin?back=https%3A%2F%2Fpdc1c-maximuslmo.globalplatform.route53.lexis.com%2F%3Ffederationid%3D94B3HW5070&aci=gp>

3. Load the manifest in the Word application using the deployment steps mentioned above.

## Update the SourceLocation in the manifest

<!-- The URL that gets called when we click on the Icon in the ribbon, basically the starting URL -->

```
<DefaultSettings>
```

```
<SourceLocation
```

```
DefaultValue="https://signin.lexisnexis.com/lnaccess/app/  
signin?back=https%3A%2F%2Fpdc1c-maximuslmo.globalplatform.route53.lexis.  
com%2F%3Ffederationidp%3D94B3HW5070&aci=gp"/>
```

```
</DefaultSettings>
```

## Update the Taskpane.Url in the manifest

```
<bt:Url id="Taskpane.Url" DefaultValue="https://signin.lexisnexis.com/lnaccess/  
app/ signin?back=https%3A%2F%2Fpdc1c-maximuslmo.globalplatform.route53.lexis.  
com%2F%3Ffederationidp%3D94B3HW5070&aci=gp"/>
```

## Screenshot

The following screenshot shows the two places in a sample manifest file where we need to update the URL to use the federation ID to enable SAML authentication for the customer.

```
1 <?xml version="1.0" encoding="UTF-8" standalone="yes" ?>  
2 <OfficeApp xmlns="http://schemas.microsoft.com/office/appforoffice/1.1"  
3   xmlns:xs="http://www.w3.org/2001/XMLSchema-instance"  
4   xmlns:bt="http://schemas.microsoft.com/office/taskpaneappversionoverrides" xsi:type="TaskPaneApp"  
5   xmlns:ov="http://schemas.microsoft.com/office/taskpaneappversionoverrides" xsi:type="TaskPaneApp">  
6   <Id>94DFB547-A187-4F59-8ECE-B9128250D64A</Id>  
7   <Version>1.0.0.4</Version>  
8   <ProviderName>LexisNexis</ProviderName>  
9   <DefaultLocale>en-US</DefaultLocale>  
10  <DisplayName DefaultValue="LexisNexis" />  
11  <Description DefaultValue="LexisNexis® add-in loaded successfully. Go to the HOME tab and click the LexisNexis® button to get started."/>  
12  <IconUrl DefaultValue="https://pdc1c-gp-ui-lmo-create.globalplatform.route53.lexis.com/assets/icon-LexisNexis-32.png"/>  
13  <HighResolutionIconUrl DefaultValue="https://pdc1c-gp-ui-lmo-create.globalplatform.route53.lexis.com/assets/icon-LexisNexis-64.png"/>  
14  <SupportUrl DefaultValue="https://help.lexisnexis.com/Flare/lmmop/US/en_US/Content/Home.htm"/>  
15  
16  <!-- List of domains that are supported. If we use something but not specified here we may see issues related to CORS -->  
17  <AppDomains>  
18  </AppDomains>  
19  
20  <!-- Type of application we want to support -->  
21  <Hosts>  
22  </Hosts>  
23  <Requirements>  
24  </Requirements>  
25  
26  <!-- The URL that gets called when we click on the Icon in the ribbon, basically the starting URL -->  
27  <DefaultSettings>  
28  <SourceLocation DefaultValue=  
29    "https://signin.lexisnexis.com/lnaccess/app/signin?back=https%3A%2F%2Fpdc1c-maximuslmo.globalplatform.route53.lexis.com%2F%3Ffederationidp%3D94B3HW5070&aci=gp"/>  
30  </DefaultSettings>  
31  
32  <!-- We need Read Write permissions for our add-in -->  
33  <Permissions>ReadWriteDocument</Permissions>  
34  
35  <VersionOverrides xmlns="http://schemas.microsoft.com/office/taskpaneappversionoverrides" xsi:type="VersionOverridesV1_0">  
36  <Hosts>  
37  </Hosts>  
38  <Resources>  
39  <bt:Image>  
40  </bt:Image>  
41  <bt:Url>  
42  <bt:Url id="GetStarted.LearnMoreUrl" DefaultValue="https://go.microsoft.com/fwlink/?LinkId=276812"/>  
43  <bt:Url id="Commands.Url" DefaultValue="https://pdc1c-gp-ui-lmo-create.globalplatform.route53.lexis.com/commands.html"/>  
44  <bt:Url id="Taskpane.Url" DefaultValue=  
45    "https://signin.lexisnexis.com/lnaccess/app/signin?back=https%3A%2F%2Fpdc1c-maximuslmo.globalplatform.route53.lexis.com%2F%3Ffederationidp%3D94B3HW5070&aci=gp"/>  
46  </bt:Url>  
47  </bt:Url>  
48  </bt:Image>  
49  </Resources>  
50  </VersionOverrides>  
51  </OfficeApp>
```

LexisNexis.com/**lexis-create+**

Contact a LexisNexis representative for more information



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istock<sup>™</sup>  
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