

Lexis® Draft User Guide

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Welcome to Lexis Draft

What is Lexis Draft?

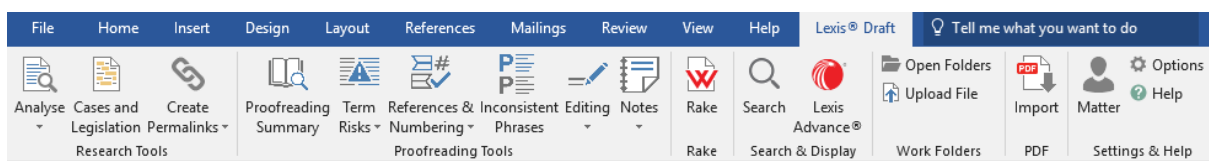
Lexis Draft is a powerful drafting solution designed by LexisNexis specifically for the legal market. Available in both Microsoft Word and Outlook, Lexis Draft will help ensure your documents are accurate, complete and consistent - every time.

How do I install and access Lexis Draft?

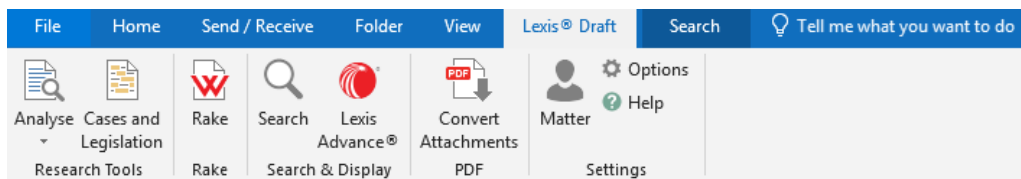
To install Lexis Draft, please refer to our [installation guide](#).

Once you have installed Lexis Draft, you will be able to access it in both Microsoft Word and Microsoft Outlook within the Ribbon Tabs.

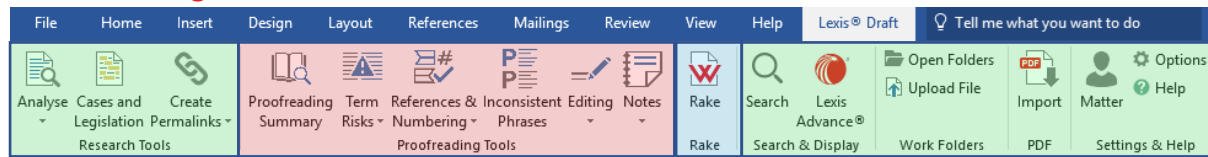
Microsoft word:



Microsoft Outlook:



What drafting and research tools are available in Lexis Draft?



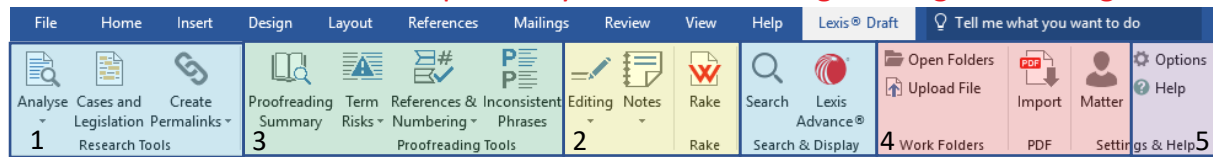
Lexis Draft has a wide range of drafting and research tools available. What tools you have access to depends on which version of Lexis Draft you have subscribed to:

1. **Essentials:** a collection of research tools (cases, legislation, company names), practical tools (**PDF converter**) and document collaboration (**Work Folders**).
2. **Standard:** all the tools included in the essentials package as well as editorial assistance (**Rake**).
3. **Pro:** all tools included in the standard package, as well as document drafting and proofreading tools (**Contract Companion**).

Function	Essentials	Draft	Pro
Analyse	V	V	V
Cases and Legislation	V	V	V
Create Permalinks	V	V	V
Proofreading Summary	X	X	V
Term Risks	X	X	V
Referencing and Numbering	X	X	V
Inconsistent Phrases	X	X	V
Editing	X	X	V
Notes	X	X	V
WordRake™	X	V	V
Search	V	V	V
Lexis Advance	V	V	V
Open Folders	V	V	V
Upload file	V	V	V
Import PDF	V	V	V
Matter	V	V	V
Options	V	V	V
Help	V	V	V

Note: not all features available in Microsoft Word are available in Microsoft Outlook.

How can I use Lexis Draft to improve my research, drafting, writing and editing?



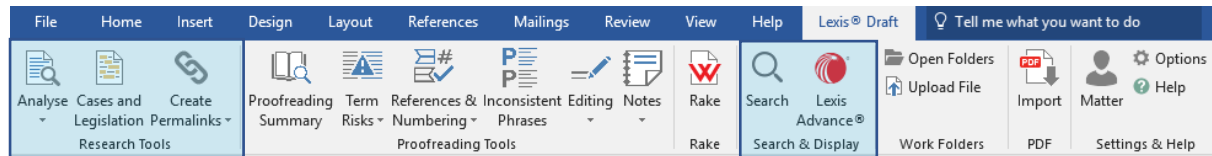
Lexis Draft contains versatile tools which can be used in many different research, drafting and editing situations. To ensure you get the most out of your Lexis Draft subscription, this guide divides available features into five groups, so you may easily incorporate this product into your drafting workflow:

1. **Research:** Aimed for the initial stages of your work with the documents, this set of tools allows you to perform research without leaving the document or open Lexis Advance in your browser. You can also review your citations and legislation references and access full text in the right-hand pane.
2. **Editing:** Following the process of document creation, this functionality helps you to check the file for mistakes (such as missing punctuation or extra spaces), check consistency and correctness of the used terms, dates, names and see suggestions for more concise and clear writing style. You can also add markers for parts of the text that you want to review later.
3. **Proofreading:** At the final stages of your work with the document, proofreading tools include a variety of checks for terms definitions, cross-referencing, consistency of phrases and numbers within the document.
4. **Working with files:** At any time of your work with the documents, you might need to save and share your documents, which can be done with this set of functions. You can also assign matter IDs to the document you work on for future reference. If required, with Lexis Draft you can also import PDF files into Word format for further editing.
5. **Options and help:** This set of functions helps you to customize Lexis Draft to better suit your preferences as well as get technical support and general guidance on how to use available functions.

Not all these tools will be accessible depending on what version of Lexis Draft you have subscribed to. Where possible, we have indicated which version of Lexis Draft each tool is available in.

Researching

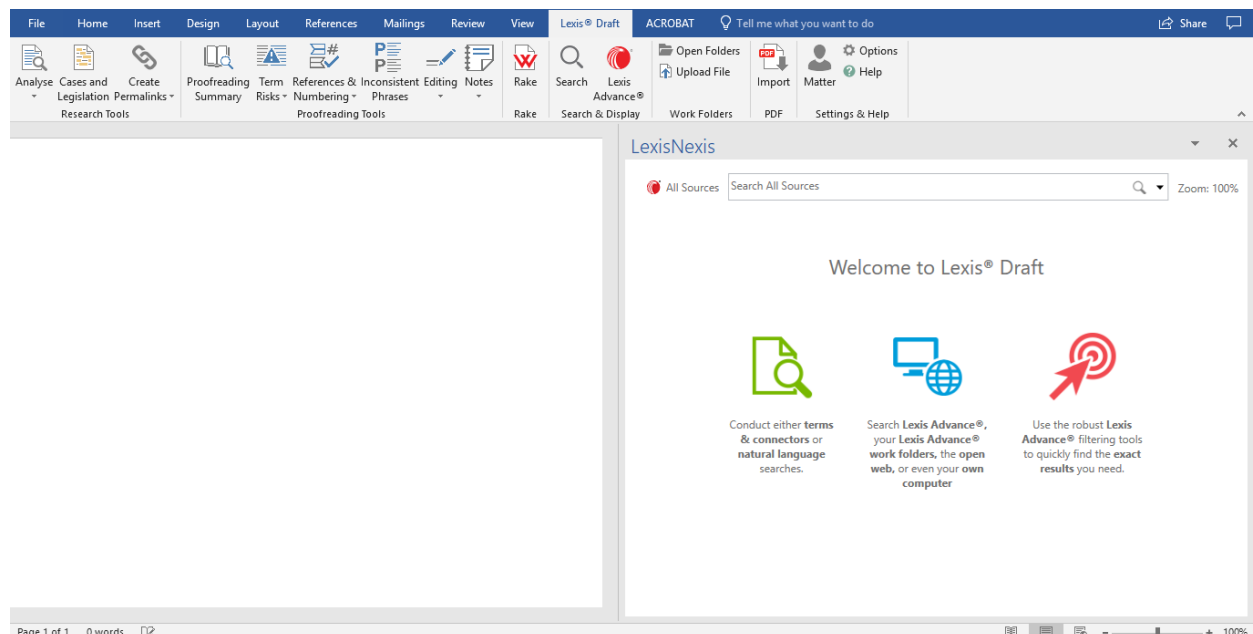
Lexis Draft provides tools which can assist you with your research both prior to and during your document drafting. This section focuses on the tools highlighted below, however other tools may also come in use during this stage.



Lexis Advance and Lexis Search

Lexis Advance and **Lexis Search** are two ways you can access LexisNexis's legal research database. The primary difference between these two functions is that **Lexis Advance** opens in your browser, while **Lexis Search** opens right-hand pane. Which way you decide to access our research database may depend on your personal preference, a number of available screens, or the scope of the search.

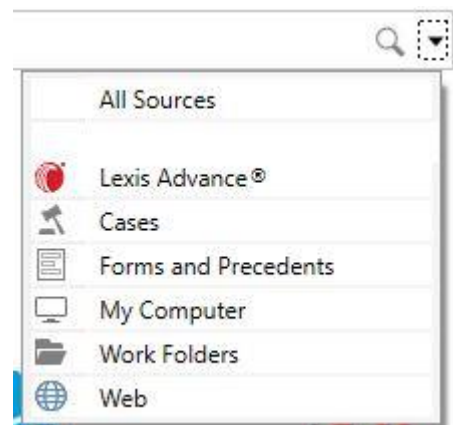
Lexis Search



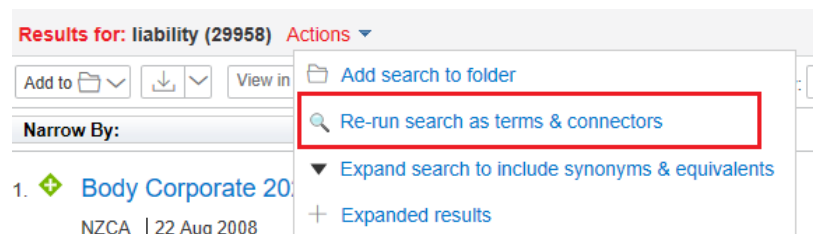
The **Lexis Search** tool allows you to access LexisNexis's research database without needing to leave your document. To use the search tool:

1. **Accessing Lexis Search:** When you click the Search button, a research pane will open on the right-hand side. Alternatively, you can also access **Lexis Search** by right-clicking anywhere in the document and selecting **Search** within the menu.

*Note: to use **Lexis Search** for a term immediately, simply highlight the text you wish to search, right click on the highlighted text, and click **Search**.*



2. **Filtering your search source:** Using the drop-down arrow within the search pane, you may filter the source you want to search in before you enter your search terms. The available sources include Lexis Advance, Cases, Forms and Precedents, My Computer, Work Folders and the Web (Google and Bing).
3. **Searching Terms and Connectors:** Once the search is completed and you see a list of results you can choose to re-run your search as terms and connectors from the Actions drop-down menu:



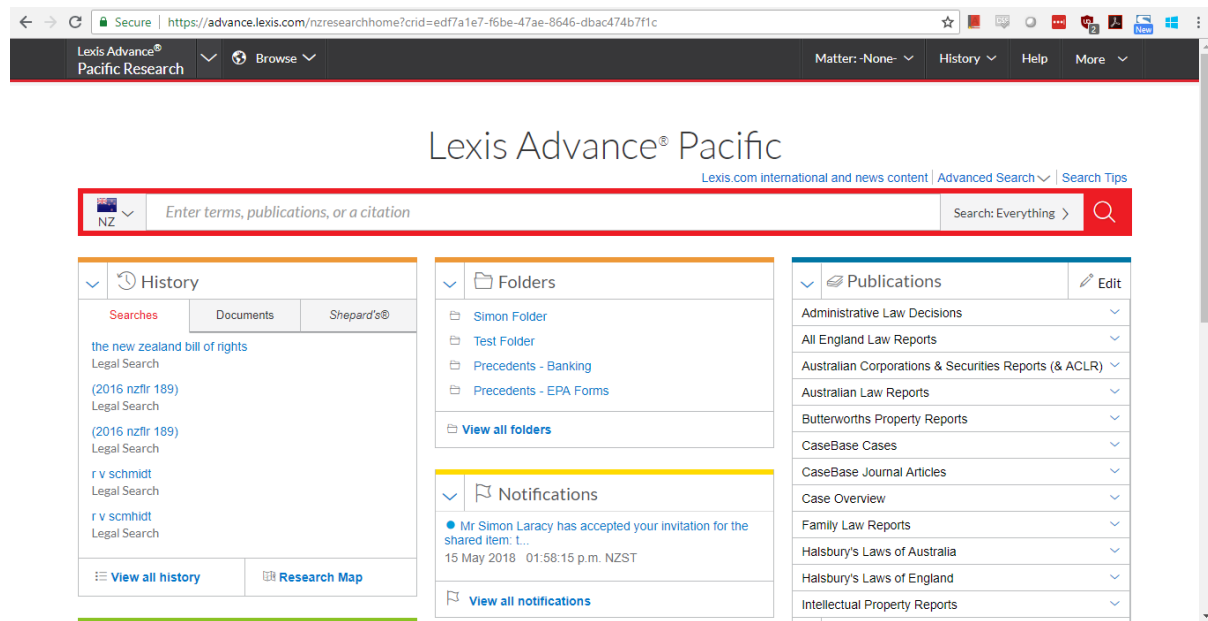
Note: To get more information on this type of search go [here](#).

4. **Narrowing search:** Using **Narrow By** option you can specify your search request by using a search within results, identifying the content type, the source of the document and practice area.
5. **Filtering your search results:** You can also filter (a, b) and sort (c-f) your results list by:
 - a. source of information;
 - b. category of the result (cases, legislation, analytical material)
 - c. relevance
 - d. document title
 - e. court
 - f. date
6. **Working with search results list:** If you want you can save and share your list of results by using Add to folder or delivery options (print, email, download, Dropbox).



Note: Lexis Search is the default tool for most research tools within Lexis Draft.

Lexis Advance



The **Lexis Advance** tool will allow you to open Lexis Advance within your preferred browser immediately. For guidance on Lexis Advance, please refer to [Lexis Advance User Guide](#).

*Note: You may also open any **Lexis Search** result in Lexis Advance by clicking the “View in Browser” button within the right-hand pane.*

Analyse, Cases and Legislation, and Create Permalinks

Analyse, Cases and Legislation and **Create Permalinks** are functions that help you identify references in your documents and link them to the full documents. Once you click on the button Lexis Draft will scan your document and add links to it. You can always remove the links from your document by clicking **Undo Analyse Link**, **Undo C&L** or **Undo Permalinks**.

Analyse

Analyse is a feature that helps you to scan your document in search of legal entities. It lets you check the accuracy of:

- legislation
- case citations
- company data
- use of legal terms and phrases.

Before the analysis is started you can select the following types of entities to be marked:



- **Legislation Titles:** highlights the references to legislations referenced in the document.
- **Companies:** highlights names of the companies mentioned in the document that can be found in the register of [New Zealand Business Number](#).
- **Legal Terms:** by default, the search for legal terms is performed in Lexis Advance within Analytical Materials. That search returns definitions of terms equal to the highlighted word or containing it.
- **Case References:** highlights all the references to cases within your document with links to CaseBase database and treatment indicators.

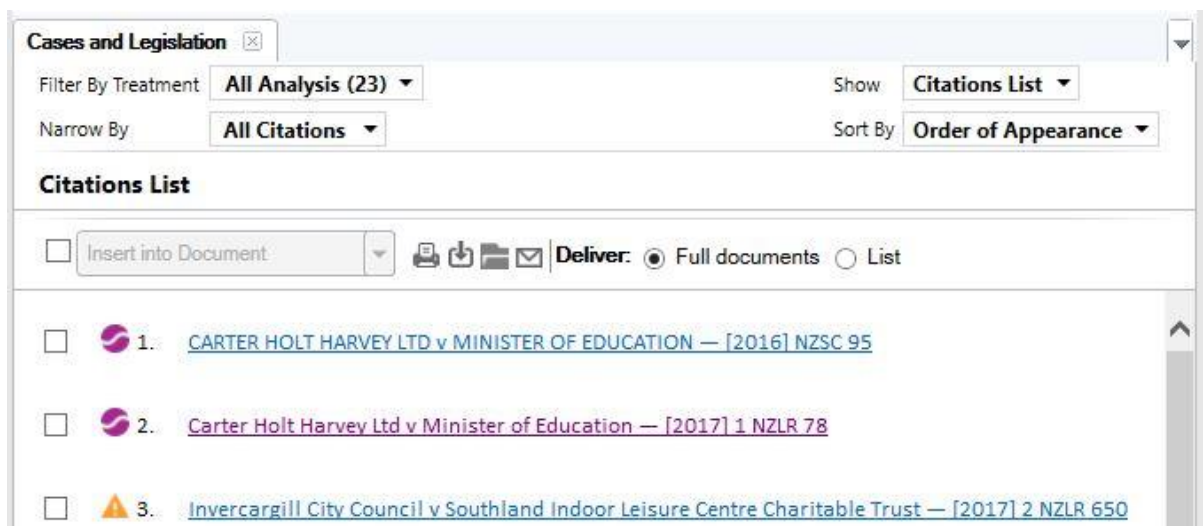
*Note: You can choose what types of entities you want to be marked by default by choosing **Edit this list** from the drop-down menu.*

After the document is scanned you will see links and highlights added to your document to relevant terms, cases etc. Depending on the type of term highlighted (e.g. cases, legislation, company name etc), clicking on the term after the scan opens the results pane listing search results for the term in the following categories:

- Definitions
- Cases
- Legislation
- Commentary
- News
- Precedents

Cases and Legislation

Cases and Legislation function scans the document for case citations and creates a list of all cases cited in the document. To use this function, click on **Cases and Legislation** button on the Lexis Draft tab. It will open the right-hand pane with the list of results for your document:



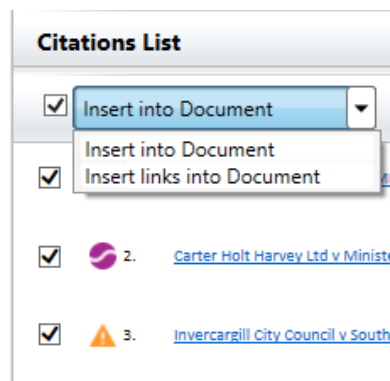
Results pane allows you to work with the list of cases in many ways. You can:

- filter list by treatment;
- narrow by type of citation:
 - Cases,
 - Statutes,
 - Other
- choose a view of the list:
 - Citations list
 - Cite by cite
 - Citations with context
- sort by order of appearance or in alphabetical order.

When you have completed your work with the list or you want to save it to work with it later there are a few options to choose from:



1. Insert the full or selected list of cases or links to the cases into the document.



2. Print out the list of citations or all the documents in the list
3. Download these documents
4. Save these documents to your Lexis Advance Work Folders
5. Email these documents

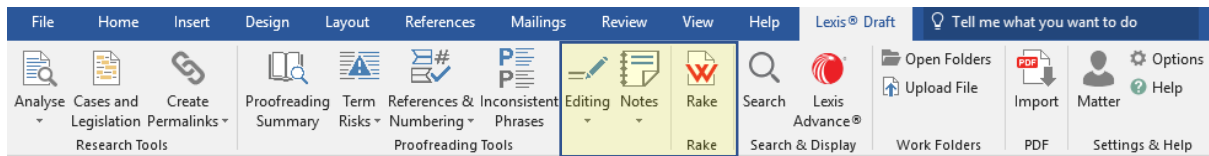
Create Permalinks

Create Permalinks function adds permanent links to Lexis Advance cases and legislation in your document. Unlike **Cases and Legislation**, the links will not disappear when you save and close your document. So that you can share your document if needed.

Note: You will be sharing only links to the Lexis Advance, not the content on these pages. Access to the content on Lexis Advance for other people is subject of their accounts access.

Editing

Lexis Draft provides tools which can assist you with editing your document when you have finalized drafting. It performs many types of checks that you usually perform manually. That means you only need to go through the results of these checks and fix any found issues. This section focuses on the tools highlighted below. However, you may also use other tools at this stage if needed.



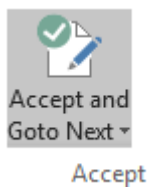
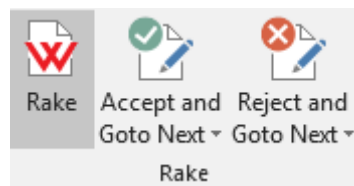
Note: Editing and Note functionality is only available in Lexis Draft Pro version for Microsoft Word.

WordRake™

WordRake for Lexis Draft scans the document and provides suggestions for a clear and concise writing style. It goes beyond grammar and spelling checks performed by Microsoft tools. This check is tailored specifically for business writing: clear, concise and effective communication. **WordRake** is only available in Lexis Draft Standard or higher version.

Again, ~~surely~~ the claimants ~~were entitled to~~
~~purchase~~ could purchase the products and to
use them in the way which the defendant's
statements had induced them to.

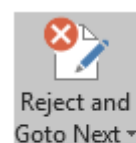
When the scan is completed you will see the edited version of the text. Despite there being multiple ways to use accept or reject changes, the most effective way is to use the buttons at the top pane – similar to how users would accept or reject edits when using Microsoft Words Track Changes.



Accept and Go to Next - Click to accept a suggestion and move to the next suggestion. Select **Accept** at the drop-down arrow to remain at that location after accepting a suggestion.

We do not provide an Accept all function for Word Rake as we believe it is important our users review suggested changes before accepting or reject the edits.

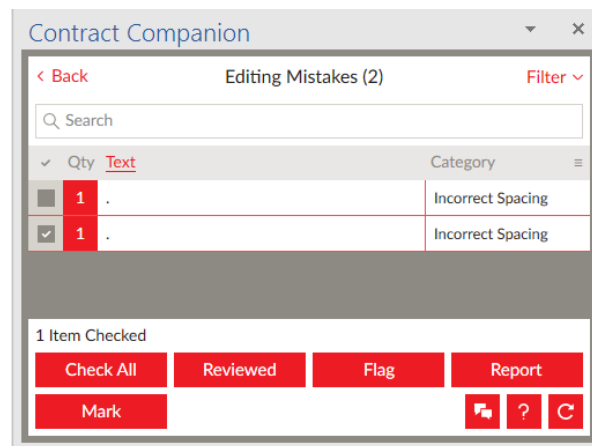
Reject and Go to Next - Click to reject a suggestion and move to the next suggestion. Select **Reject** at the drop-down arrow to remain at that location after rejecting a suggestion. Select **Reject All** at the drop-down arrow to reject all suggestions offered by Rake.




Reject
Reject All

Editing

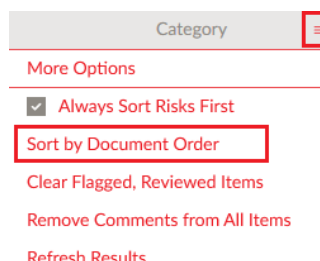
This group of features allows you to check general editing mistakes, common terms and specific values such as names, dates etc.



You can change the status of each result by using one of the markers, flagging or marking it as reviewed. These statuses, as well as the category of mistakes, can be used to filter the results. You can also add comments to any result by clicking on the comment () button.

If you click Report button, a new Word document will open with the mistakes that you selected or all of them.

You can also sort your results by the number of entries, alphabetically and by category. You can also sort the results by the order they appear in the document. To do so click on the **More** options menu and select Sort by document order.



Note: These features apply to every type of check in the Proofreading tools section.

Editing mistakes

Editing mistakes function checks for punctuation errors, typos and incorrect spacing. To use this function select **Editing mistakes** from the drop-down list under editing button. Alternatively, you can click on **Proofreading Summary** and select **Editing mistakes** there.

Common Terms

Common Terms function provides a list of common terms used in the document for review. These are the terms that are so commonly used that you do not need a definition for them.

Many departments and agencies are already added as **Common Terms** for you. You can select which terms you want to be defined as common terms to remove them from the list of Undefined terms later. To do so:

1. If you're in the **Common Terms** results window, click Back. Or click **Proofreading Summary** button on the Lexis Draft tab.
2. Click Settings in the lower left corner of the Contract companion pane.



3. Go to **Common Terms**.

Settings	Close
Specifics	
References	
Common Terms	
Term Risks	
Definition Formats	
Display	
Import and Export	
Upgrade	

4. Select category for your new term.

< Back	Common Terms	Close
Holiday		
Language		
Department / Agency		
Culture		
Policy / Standard		
Unit		
Written Number		
Miscellaneous		

5. Click New and type in your term.

< Back	Policy / Standard	Close
		New
Ignored		Delete
Enter text here		Ignore
Please Enter at Least 1 Character		

From there you can repeat the last step or last two steps for any new terms you want to add.

Names, Dates, etc.

Names, Dates, etc. function helps you to see the details in the document that refer to a company or a person. This way you can re-use previous documents and be sure that all the details have been updated for the new client. This function finds all of those existing facts and returns them as a list in the right-hand pane.

A full list of categories includes:

- Name
- Company name
- Address
- Date
- Sums
- Location
- Phone number
- Title
- Email address

Notes

This group of features helps you to leave markers in the document and review your notes afterwards.

Mark Incomplete

Mark Incomplete function provides you with four preconfigured markers to use in your document as placeholders so that you or anyone else can come back to it later for further action or review. Markers include:

- Insert bullet

Highlight text

Colour text

[Bracket text]

This function can be used from the Lexis Draft tab or from the Results pane of any of the Proofreading tools.

Note: You can also use these markers manually (e.g. type the text in square brackets or highlight parts of the text). The next feature would still recognise these as markers.

Incomplete Items

The **Incomplete Items** feature helps you to scan the document for markers added previously (see section above). From the list of all incomplete terms, you can locate each marker, mark it complete and remove from the list.

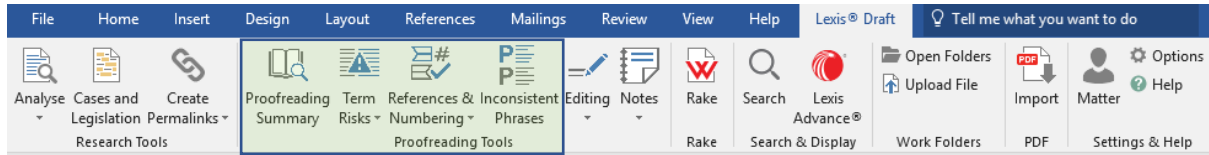
The whole list of markers picked up by this feature includes:

Incomplete Marker	Example
Bracketed Text	[replace with actual value]
Highlighted Text	Enter new value here.
Coloured Text	Enter new value here
Bulleted Text	April •, 2016
Underlined	Enter actual date here _____

Blank Spaces	Beginning on the , and ending on the of this year.
Repeated Xs	Beginning on XXXXXX, and ending on XXXXXX.
Repeated ?s	Beginning on ??????, and ending on ??????.
Question	(Correct?)
Struck-Through Text	Remove before finalizing

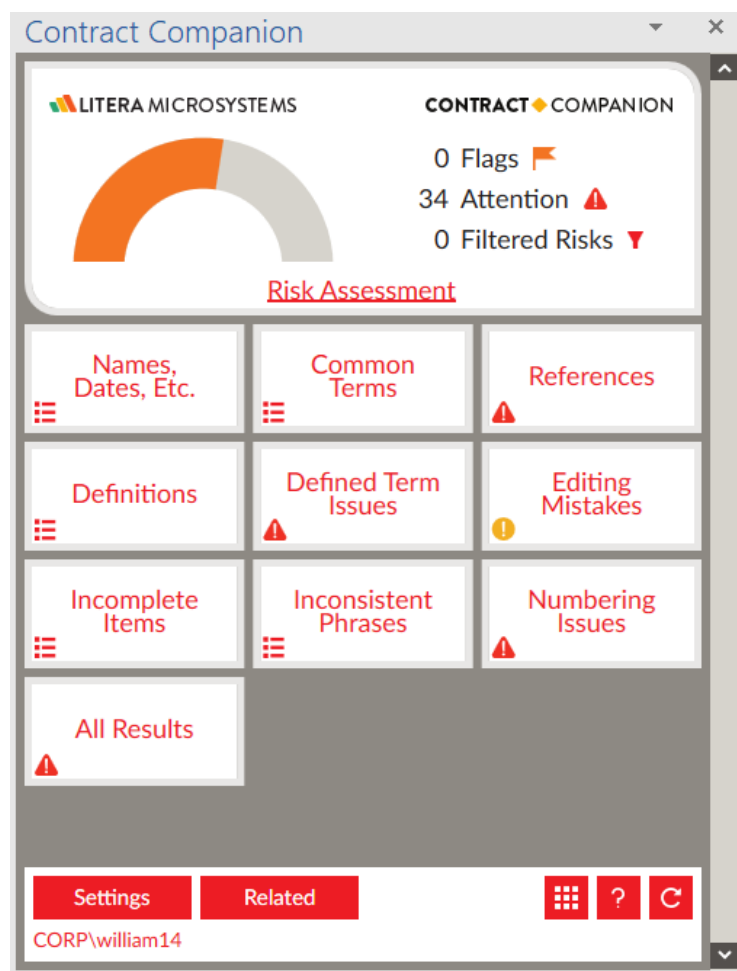
Proofreading

When you have completed drafting and editing, Lexis Draft provides you with a set of functions that help you clean up your document and do the final touches to make it look perfect. This section focuses on the proofreading tools of Lexis Draft. These tools are only available in Lexis Draft Pro version for Microsoft Word.



Proofreading Summary

Proofreading Summary provides an overview of all the proofreading issues identified in the document. If you click on **Proofreading Summary** button, a results pane will open on the right-hand side.

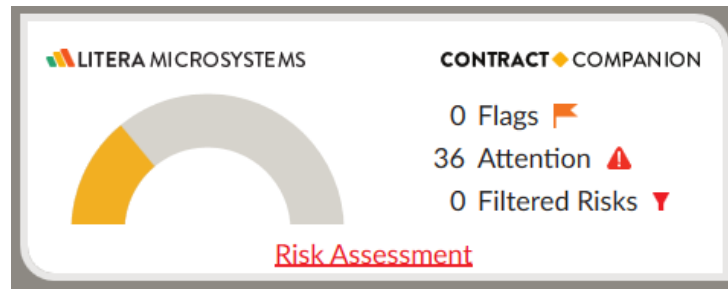


All the issues are grouped by the category and broken down into severity types: notifications, critical problems and high-risk issues.

Proofreading Summary pane consists of three main areas:

1. Summary and filtering options - shows average risk level for issues found in your document, number of issues flagged, requiring your attention and filtered by you. If you click anywhere

in on this section, you will get a list of all the issues referred to in the summary from all the categories.



2. Proofreading categories – this part of the summary view consists of links for each category of checks with a symbol reflecting the status of this category. Click on the category to see issues only of this type.
3. Settings and help – at the bottom of the pane you can find the following options:

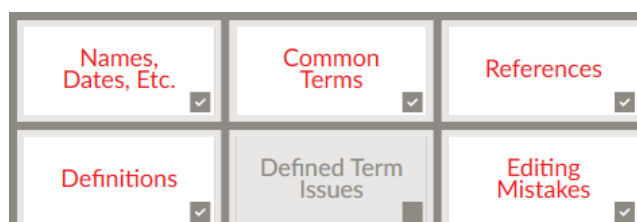




- a. Settings – allows you to customise other types of checks:

Settings	Close
Specifics	
References	
Common Terms	
Term Risks	
Definition Formats	
Display	
Import and Export	
Upgrade	

Helpful Hint: You can select your default view for proofreading summary by going into Settings and switching between Tile view and Tree view.

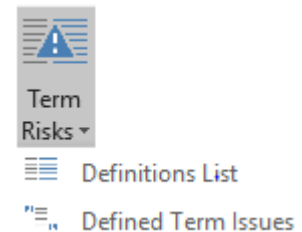
- b. **Related** – allows you to select related documents that are opened on your computer at the same time. This function is used to narrow down the result of Defined Terms check. You can find more information below.
- c. Show or hide specific feature (only available in Tile view) – this function helps you to customise what types of check results you would like to see on your summary page. Click the button with multiple squares on it. Select functions that you don't want to see or select the ones you would like to add if they were previously excluded. Click Done when you finished.



- d. Help – click Help () button to search for guidance on specific functions for Proofreading tools.
- e. Refresh – click Refresh results button () to refresh the summary page after any changes you've made.


Term Risks

Term Risks group of functions scans the document and provides you with information about the terms used that allows you to ensure your definitions are consistent throughout your document. For example, terms used but not defined, used before defined, defined multiple times etc.

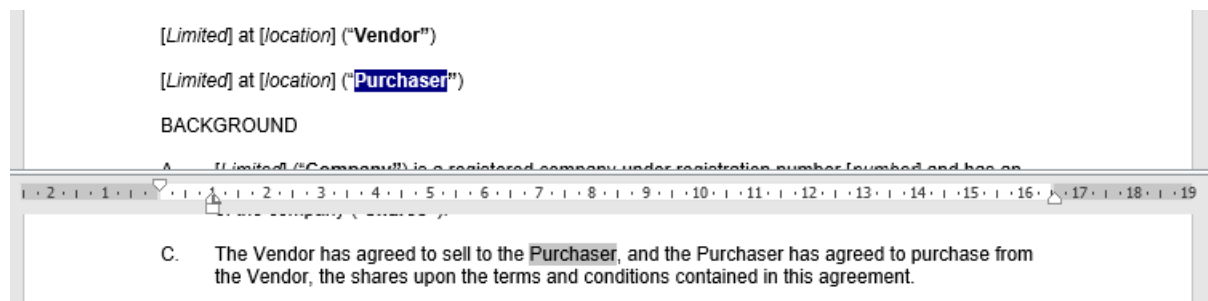


Definitions List

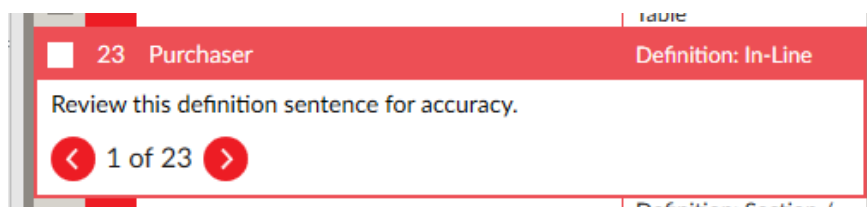
Definitions List allows you to locate all defined terms both inline and in a definition section. You can filter your definitions in the results pane to view only terms defined in “Definitions” section or terms defined inline.

If you select **Related** documents for your analysis on the **Proofreading Summary** pane, you will also see definitions given in your secondary documents. It will be marked with a sign  next to the term.

When you click on the term that you would like to review, if this term was defined but not used, the tool will show you where in the file that term is. If the term has been used in the document apart from the definition you will see a split screen with the definition highlighted in **blue** in the top part and the term used first time highlighted in **grey**.



You can go through all of the uses of the term by clicking on the arrow under the term in the results pane.



Defined Term Issues

The **Defined Term Issues** function locates problems with defined terms to help you ensure the terms are consistent throughout your document. It also puts them under the following categories:

- Used before Defined – terms that has definition appeared later in the document than the first use of it.
- Duplicated terms – terms that have definition in multiple locations in the document.

- Defined not capitalised – terms with definitions that were not capitalised.
- Inconsistent capitalisation – a word or a phrase matching the defined term with capitalisation different from the one used in the definition.
- Used but not defined – terms that are capitalised but not associated with a definition in the document.
- Defined but not used – terms that appear only in the definition.
- Out of alphabetical order – for documents with definition sections, this status is given to terms that are not in the alphabetical order.

You can filter found terms by categories in the results pane. If you have a **Related** document attached to the analysis the term is defined is there is a definition in any of the files.

References & Numbering

After working with the documents for some time and restructuring the content and moving sections around there is a chance of numbers used or cross-references to be misplaced. Referencing and numbering group of tools helps you to ensure consistency of the typed and automated numbers as well as references used in the document.

Inconsistent numbering

Inconsistent Numbering is a tool that analyses your document for numbers that appear to be part of a list and identify those that looks to be out of order. To use this function go to Lexis Draft tab and Select **Inconsistent Numbering** in the **References & Numbering** drop-down menu.

References

With this tool, you can scan your document for errors in cross-references, legislative references, ambiguous references and more. This function also automatically fixes “Out of date” cross-reference errors.

References function checks the following categories of references:

- Definition references – a reference of the defined term that refers to the definition in another section.
- Section references – a reference to another clause or section in the document. They are further separated based on the issues into:
 - External document references – a reference to another document.
 - Legislative section references – a reference to any type of legislation.
 - Citations – a reference to any type of cases.

Note: You can configure you Settings to add, edit or delete keywords used for finding external document references or phrases indicating a reference.

References check will assign the following categories to found issues:

- Not found – the target location for the reference is not found.
- Ambiguous – there are multiple potential targets in the document that can be referred to (eg. subsection (a) in multiple sections).
- Section (typed) – a reference to a section in the document that was simply typed and has no hyperlink attached to it.
- Definition (typed) – a reference to a definition that is typed and has no hyperlink attached to it.

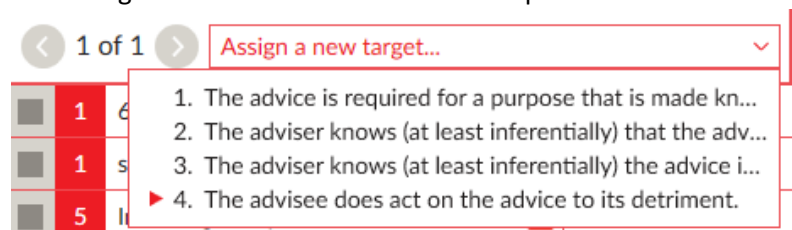
- **Out of Date** – a reference to a location in the document that has changed (eg. due to adding or removing paragraphs or sections).

Apart from finding issues with the references in your document this tool also offers a set of instruments for you to fix those issues faster:

- **Assign a new target...** - this function can be used for all categories of references (except external documents) and it helps you to assign the new target to the references that are currently wrong or not working. To use this function:
 1. In the results pane select a reference that you want to fix.



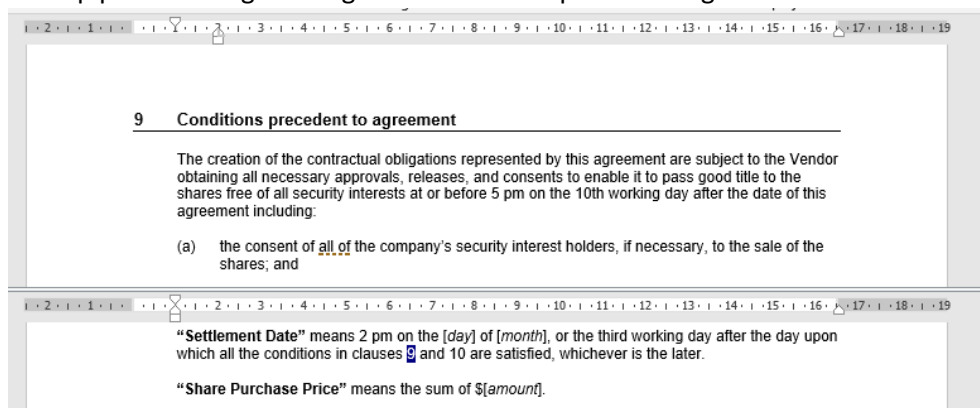
2. Click on **Assign a new target...**
3. Select the new target for the reference from the drop-down menu.



4. Click **Assign** (or **Assign all** if there are multiple instances of this link) to update the reference.



*Note: For Out of date references the updated target location is automatically selected and you can simply click **Assign** or **Assign all**. In case you want to change the location, you can also select it from **Assign new target...** list.*

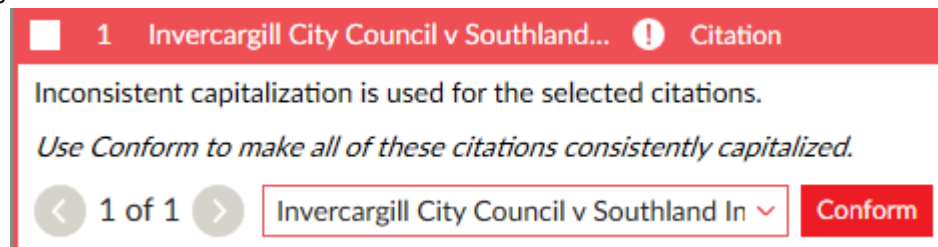
- **Split Screen function** - to simplify the review process Reference tool helps you to see the reference in question and the target on one screen. This will look like the split screen to you with the top part showing the target and the lower part showing the reference.



If the suggested target is not correct you can use **Assign new target...** to find the appropriate one.

Note: You can scroll both parts of the screen separately. If you lose the original target or reference, click on any other the reference in the result pane and then come back to the one you've been reviewing.

- For Citation references, the tools will check if the short forms of reference are appropriately used with the full form used elsewhere in the document. For such references there are two additional instruments that you can use:
 -  - copy citation to the clipboard. This function enables you to select a citation, copy it and paste it into any other resource for review or to copy it to another location in your document.
 -  - research the selected case. This function launches Google scholar in your browser with the results of a search of the selected citation for your verification.
- Another check for Citation references is a consistency check for capitalisation. In case when inconsistent capitalisation is found, when you select that result you will see a drop-down list with all the found options for capitalisation. You can choose which version you want to use throughout the whole document and click **Conform** button.



Inconsistent Phrases

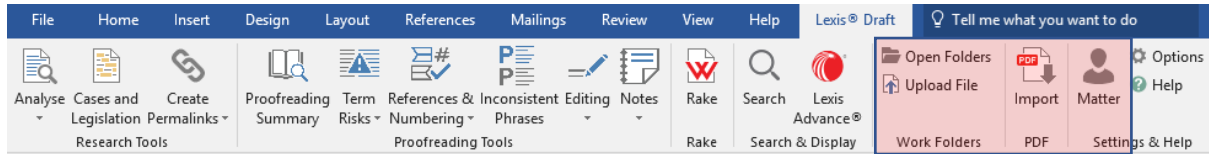
Inconsistent Phrases tool helps you to ensure that phrases you have commonly used within your documents are used consistently. The phrases are identified by first finding phrases used multiple times and second locating other phrases that are similar to those but with slight changes. You can review those results as inconsistent and change them if required.

There are two categories of issues for this check:

- **Inconsistent Phrases** – phrases with slight differences in the words used
- **Phrase capitalisation** – phrases that are consistent in wording, but differ in capitalisation

Working with files

During your work with the documents, you might need to share it with your colleagues, save it till later or access the document that you have worked with on a different computer. Lexis Draft provides you with tools that will help you to add efficiency to your document management.



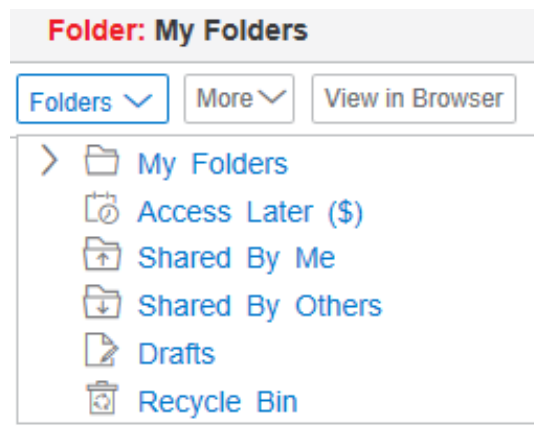
Open Folders

Open Folders is a function that allows you to access your documents saved in folders on Lexis Advance. With this function, you can navigate through Work Folders directly from Microsoft Word.

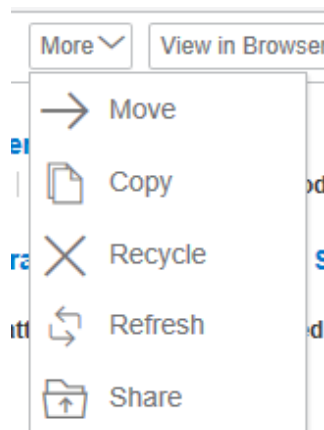
To access your Lexis Advance Work Folders, go to Lexis Draft tab and click on **Open Folders** icon. You will see the folders listed in the right-hand pane.

Note: If you want to see your documents in the browser in Lexis Advance you can click [View in Browser in Folder pane](#).

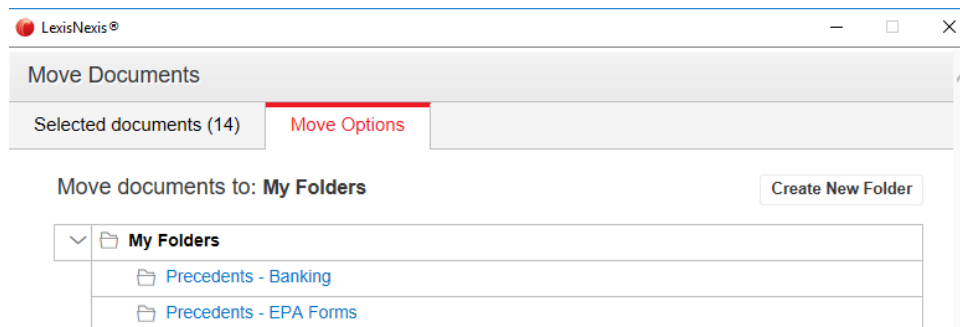
By default, you see the content of My Folders from Lexis Advance. To go to other folders click on the **Folders** drop-down menu in the left-hand corner of the tab and select the folder that you want to see.



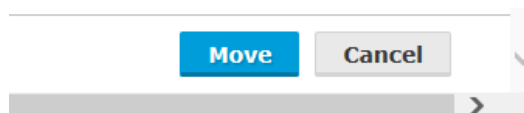
Click on the folder name to see what documents it contains. You can use the **More** drop-down menu to manage the contents of that folder. If you want to move, copy or delete your folder refer to the section below.



If you select Move, Copy, Recycle or Share, you will see a pop-up window where you can select the document that you want to apply the effect to and destinations for your files (except Recycle).



When you completed choosing, click Move, Copy, Delete or Share button below.



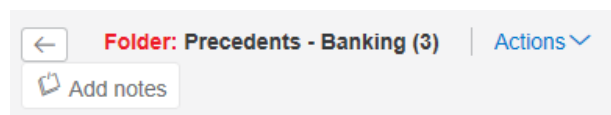
You can also sort your documents and folders by:

- The time it was modified;
- Level of matter;
- Type (folder, document or user document);
- Title;
- Relevance.

When you are looking at the list of the document in the folder click on the document name to open it. Based on the type of the document, it will open as a separate Word document on your computer or as a new tab in the right-hand pane.

You can go back to the higher folder level by clicking the arrow (←) in the top left corner of the right-hand pane.

To manage the folder, you can click the **Actions** drop-down menu next to the name of the folder you have opened.



It allows you to:

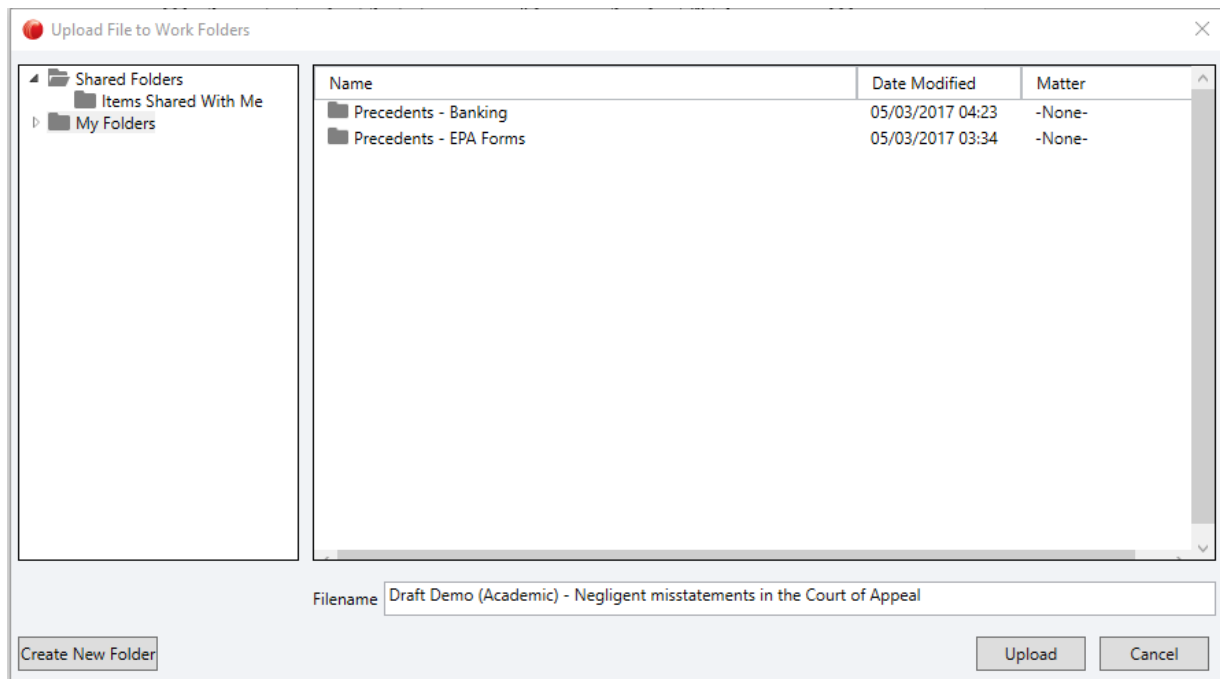
- Rename folder
- Download folder
- Move folder
- Copy folder
- Update all CaseBase signals in the folder
- Delete folder
- Share folder

If you click on any of these options a new pop up window will appear where you can enter more details such as a new name of the folder or a new location where you want to copy or move it.

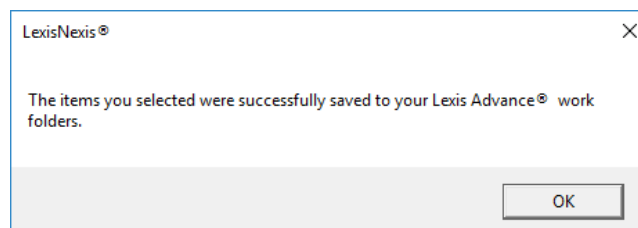
Lastly, you can add notes to the folders when you are in by clicking **Add notes** button.

Upload File

Upload File is a function that helps you to save your file in the Lexis Advance Work Folders. Click **Upload File** button on Lexis Draft tab. You will see a pop-up window where you can select the location where to save your file. You can also create a new folder if required.



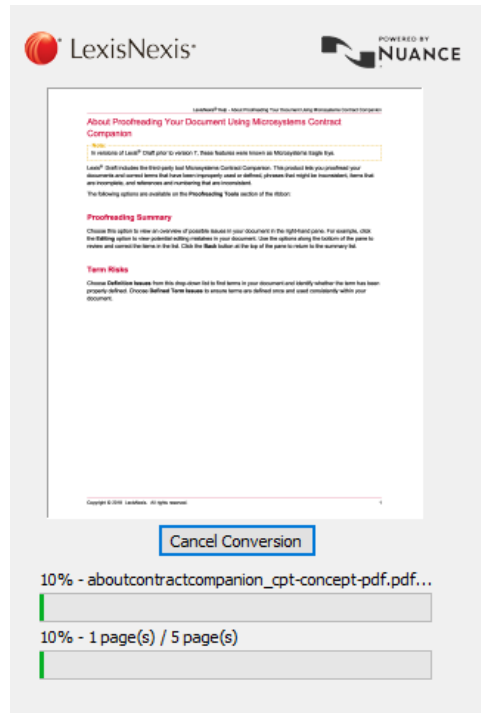
When you selected where you want to save your file, click **Upload**. You will see a success notification when uploading is completed.



Import PDF

Import PDF tool lets you convert unprotected PDF documents into Word format in a few clicks, so you can start editing right away and increase your personal productivity. To convert PDF file, go to Lexis Draft tab and click **Import**. You will see a navigation window where you can select which file from your computer you would like to convert.

Once you've selected the file you will see a progress window that will show you how many pages were converted and what percentage of the task is left. You can also **Cancel Conversion** in that window.



When the conversion is completed a new Word document will be opened on your computer that can be edited while keeping the original formatting.

Note: If you close that document before saving it, you can still find it on your computer and you don't have to convert it again. You can find the file at:

C:\Users\{UserName}\AppData\Roaming\LexisNexis\LMONZ\TempPdfFiles

Matter

Matter function allows you to assign new or existing Matter ID to your document, email or research content. To do this go to Lexis Draft tab and click **Matter** button. A new window will open where you can select Matter ID from the list previously created through Lexis Draft or Lexis Advance or you can enter a new Matter ID.

Set Matter ID

☒ Recent Matter IDs

49it034

☐ New Matter ID

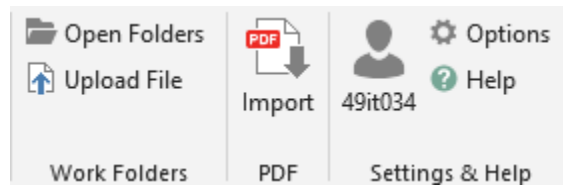
50 characters remaining

Research description optional

1000 characters remaining

Set Matter ID
Cancel

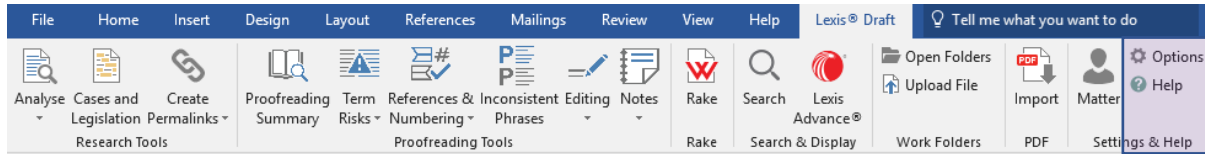
You can also add some description for your research if you want. Once you are done, **click Set Matter ID**. When the ID is assigned the **Matter** button shows you the ID assigned.



You can change it again by clicking that button again and repeating the above steps.

Options and Help

During your work with Lexis Draft, you might need to change some of the options to customise the application to better suit your needs or require training or technical support, or you might have some questions and suggestions. You can find all these tools in our Settings and Help group.



Options

Options is a set of functions that allows you to customise your work with Lexis Draft. If you click on the **Options** button, a LexisNexis **Options** dialogue box will appear. Within that window you can see the following categories:

Sign-in Settings

Jurisdiction

Cases and Legislation

Analysis

Sign in Settings is a section where you can Sign in (automatically pops up when you first open Lexis Draft tab). To sign in enter your login and password and click **Sign In**.

Once signed in you can also sign out in that page if requested. To do so click **Sign Out**.

Note: If you sign out you would not be able to use any of the Lexis Draft features before your sign in again.

Jurisdiction is a setting where you can select the jurisdiction that will be applied as default for your future research. Click on the drop-down list to choose the option that best suits you.

*Note: The option you choose here will be suggested for each search; however, you can change the jurisdiction on a search-by-search basis. You can do this using the **Narrow By** options while viewing your search results.*

Cases and Legislation is a tab with settings that allow you to change the default view for cited cases in your document after you perform **Cases and Legislation** analysis. You can choose between:

- Cite by Cite: shows the full text of the selected cited case only.

- Citation List: shows just a list of the citations. You can click on each citation to view the full document.
- Citations with Context: shows a list of citations followed by the short part of the text in the case that relates to your research.

Get Cited Docs

Specify how you want to view cited cases in your document:

Show Citations List

CaseBase Signal™ Indicators

CaseBase Signal™ indicators always appear next to citations in the right-hand pane. You can also include them in the document.

- ☐ Include CaseBase Signal™ indicators in the document
- ☒ Only show indicators for negative treatment

You can also select types of CaseBase Signal indicators that you see in your document. To learn more about CaseBase signals go [here](#).

If you want to include all of the indicators check the box next to **Include Case Base Signal™ indicators in the document**. If you want to see only negative treatment indicators click the checkbox next to **Only show indicators for negative treatment**. Only one checkbox should be selected at a time.

Analysis is a setting to define what type of data to include in your **Analyse** process. You can also open this window by clicking **Edit this list** in the **Analyse** drop-down menu.

Analysis

When I click "Analyse" from the Analysis Tools section of the ribbon, highlight the following:

<input checked="" type="checkbox"/>	Legal Terms
<input checked="" type="checkbox"/>	Companies
<input type="checkbox"/>	Organisations
<input checked="" type="checkbox"/>	Case References (names and citations)

Help

Help toolkit provides you with information about the version of Lexis Draft you have installed. Also, it contains links and contact details that you can use in case you require any type of support in your work with Draft. Click on **Help** button to open a Help navigation window.



Feedback: use this function if you would like to share your feedback about Lexis Draft. Click the **Feedback** link and it will create a new email addressed to Lexis Draft product team.

Download: use this link to get to the Downloads page where you can find latest version of Lexis Draft.

Help and Support: use this function if you would like to get support on any issues you might have with Lexis Draft. Click the **Help and Support** link and it will create a new email addressed to Lexis Draft support team.

User Guides and Training: this link will take you to the Guides page. There you can find all available guides to help you to learn about how to use Lexis Draft.