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Welcome to Lexis Draft for Office 365

What is Lexis Draft for Office 365?

Lexis Draft is a powerful drafting solution designed by LexisNexis specifically for the legal market. Available in both Microsoft Word online and desktop version, Lexis Draft for Office 365 will help ensure your documents are accurate, complete and consistent - every time.

How do I install and access Lexis Draft for Office 365?

To install Lexis Draft for Office 365, please refer to our installation guide.

Once you have installed Lexis Draft for Office 365, you can access it via the Home ribbon in both Microsoft Word Online and the Microsoft Word desktop app.
What tools are available in Lexis Draft for Office 365?

Lexis Draft for Office 365 contains versatile tools which can be used in many research, drafting and editing situations. To ensure you get the most out of your Lexis Draft for Office 365 subscription, this guide divides features into three groups, so you may easily incorporate this product into your drafting workflow:

1. **Research**: Designed for the initial stages of your work with the documents, this set of tools allows you to perform research without leaving the document or opening Lexis Advance in your browser. You can review your citations and legislation references and access the full text in the right-hand pane.

2. **Working with files**: Save and share your documents at any time with this set of functions. You can also assign matter IDs to the document you’re working on for future reference.

3. **Options and help**: This set of functions helps you to customize Lexis Draft to better suit your preferences. You can also get technical support and general guidance on how to use the available functions.

*Note: Lexis Draft for Office 365 operates in a right-hand pane. Due to technical restrictions, some screens might not fit into the default width of the pane. You can adjust the width manually by holding your mouse over the left edge of the pane and dragging it as far as you need.*
Researching
Lexis Draft provides tools which can assist you with research both before and during your document drafting. This section focuses on some of the available tools, however other tools may also be of 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 the right-hand pane within Word. The choice you make may depend on your personal preference, the 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 leaving your document.

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

- **Filtering your search source**: Using the drop-down arrow within the search pane, you can filter the source you want to search within before you enter your search terms. Available sources include Lexis Advance, Cases, Forms and Precedents, Work Folders and the Web (Google and Bing).
- **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:

![Search results](image)

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

- **Narrowing search:** Use the **Narrow By** option to search within your results by identifying the content type, the source of the document and practice area.

- **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

- **Working with the search results list:** You can save and share your list of results by using “Add to folder” or one of Lexis Draft’s delivery options (print, email, download).

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

The **Lexis Advance** tool will allow you to quickly open Lexis Advance within your preferred browser. 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 the same button again.

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:

- 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 or containing the highlighted word.
- Legislation Titles: highlights the references to legislation in the document.
- Companies: highlights the names of the companies that can be found in the New Zealand Business Register.
- Case References: highlights all the references to cases within your document with links to CaseBase database and treatment indicators.

After the document is scanned you will see links and highlights added to your document. 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, which lists search results for the term in these categories:

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

Cases and Legislation

The 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. You can:

- filter the list by treatment;
- narrow your search by type of citation;
  - Cases
  - Legislation
- choose your preferred list view;
  - Cite by Cite
  - Citations list
  - 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:

- Insert the full or selected list of cases or links to the cases into the document;
- Print out the list of citations or all the documents in the list;
- Download the documents;
- Save the documents to your Lexis Advance Work Folders; or
- Email the documents
Create Permalinks

The 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. This allows you to share your document with the links 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.
Working with files
Lexis Draft allows you to effectively manage your documents. You can safely store, access and share your documents using the following tools.

Open Folders
Open Folders allows you to access your Lexis Advance Work Folders directly through Microsoft Word.

To access your Lexis Advance Work Folders, go to the Lexis Draft for Office 365 right-hand pane, click the drop-down arrow next to the Work Folders button and click Open Folders. You will see the folders listed in the right-hand pane.

Note: If you want to see your documents in your browser, click “View in Browser” within the Folder pane.

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

You can sort your documents and folders by:
- The time it was modified;
- Level of matter;
- Type (folder, document or user document);
- Title;
- Relevance.

When looking at your list of documents, click on the document name to open it. It will open as either a separate Word document or as a new tab in the right-hand pane, depending on the type of document you selected.

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

Here you can:
- Rename the folder
- Download the folder
- Move the folder
- Copy the folder
- Update all CaseBase signals in the folder
- Delete the folder
- Share the folder

If you click on these options a new pop up window will appear where you can enter the details relevant to your selection.

Last, you can add notes to the folders by clicking the Add notes button.

Upload File

Upload File allows you to save your file in the Lexis Advance Work Folders.

Go to Lexis Draft for Office 365 right-hand pane, click the drop-down arrow next to the Work Folders button and click on Upload File. You will see a window in the right-hand pane where you can select the location to save your file to. You can also create a new folder if required.
When you have selected where you want to save your file, click **Upload**. You will see a success notification when uploading is completed.

Matter

The **Matter** function allows you to assign new or existing Matter ID to your documents, emails or research content. To do this, go to Lexis Draft for Office 365 pane, click the arrow at the right-hand corner to open the drop-down menu and click the **Matter** button.

A new window will open where you can select a Matter ID from the list created, or enter a new Matter ID.
You can also add a description of your research if desired. Once you are done, click Set Matter ID. You can change an assigned Matter ID by repeating the above steps.
Options and Help
During your work with Lexis Draft for Office 365, you might want to customise the application to better suit your needs. You may also require training or technical support, or you might have 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 these categories:

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.

You can also select types of CaseBase Signal indicators you see in your document. To learn more about CaseBase signals go here.
If you want to include 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.

The **Jurisdiction** tab lets you select the jurisdiction applied as a default for your future research. Click on the drop-down list to choose the option that best suits you.

![Jurisdiction dropdown](image)

*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.*

**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 dropdown](image)

**Help**

**Help** links you to our online help manual where you can find more detailed information about the tool.