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

General Information

• **Check Cite Format** finds citations in your document and checks them against the style manual selected in Set Cite Format. When proceeding through your document, Check Cite Format uses read order and will go from a footnote reference to the footnote itself and then back to the body of the document.

• Use **Set Cite Format** to 1) choose your style manual and 2) set your formatting preferences such as underlining or italicizing case names or whether to use “Id.” when citing a source multiple times.

• You can achieve optimal results by performing Check Cite Format before using 1) Check Quotes or 2) Prepare TOA (Table of Authorities). However, you are not required to perform Check Cite Format first. You do need to perform Check Cite Format to automatically update the long/short formats of a citation.

• Lexis® for Microsoft Office® may automatically update the long and short formats of citations when you do the following:
  - Move the location of the citations or
  - Reference the citations more than once in the document

See “Decisions to consider” below for the specific scenarios under which Lexis for Microsoft Office will automatically update long and short formats without additional user input.

• You can internally share previews of your citation format report by clicking the email or print icon in the upper-right corner.

• In finding citations, a Lexis for Microsoft Office search is “over inclusive.” It may pick up text that is not a citation. You may elect to treat the citation in the following ways:
  1. If the entire text is not a citation (e.g., the product identifies a ZIP code as a citation), simply select **Not a Citation**. Lexis for Microsoft Office will not include the citation in the TOA.
  2. If some of the text (but not all) is a citation, you can use **Change cite boundaries** to highlight what you specifically want to include as part of the citation to be checked.

Information presented:

A. Citation as it appears in your brief
B. Citation format suggested by Lexis for Microsoft Office

Decisions to consider:

1. Use Current
   a. If Correct format appears in the bottom box, clicking simply confirms that citation is correct.
   b. If a suggestion appears in the bottom box, clicking indicates that you want to leave the cite “as is” in the brief.
   c. If no suggestion appears in the bottom box, clicking indicates that you want to leave the cite “as is” in the brief.

Information presented and decisions to consider when using Check Cite Format

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Use Suggestion

a. If Correct format or no suggestion appears in the bottom box, this option will be grayed out.

b. If a suggestion appears in the bottom box, clicking indicates that you want the suggestion used in your brief. A green checkmark will appear next to the button.

Not a Citation

This indicates the text identified as a cite by Lexis for Microsoft Office is “not a citation.” The product will not include this text in the TOA.

Let me edit text of current citation

After checking the box, you can edit the current citation in the top box. You then click Check Current to have the new citation reviewed.

Change cite boundaries

If the content highlighted does not contain part of the citation’s text, click the link in the dialog box to activate a pop-up (see left) and highlight the text you want the product to check for citation formats. Then click Submit for the citation to be reviewed.

Also, use this feature to remove text extraneous to a citation.

Change parent

When a short form or Id. citation is not properly associated with a full (parent) citation, click the link in the dialog box to activate a pop-up (see left). Choose the correct full (parent) citation from the pull-down menu, and click Check Parent. If the new parent citation is validated, click Submit to effect the change.
Lexis® for Microsoft Office
24/7 Customer Support: 888.539.4770
www.lexisnexis.com/newlexis/office

*This tip sheet is applicable to Lexis for Microsoft Office customers who 1) have access to the Check Cite Format feature as a part of their product subscription and 2) have Version 4.4 of the product. (To verify your version, click the Help button within the Lexis for Microsoft Office ribbon in Microsoft® Word or Microsoft® Outlook®.)