



# Lexis<sup>®</sup> Create

User Guide – Australian Edition

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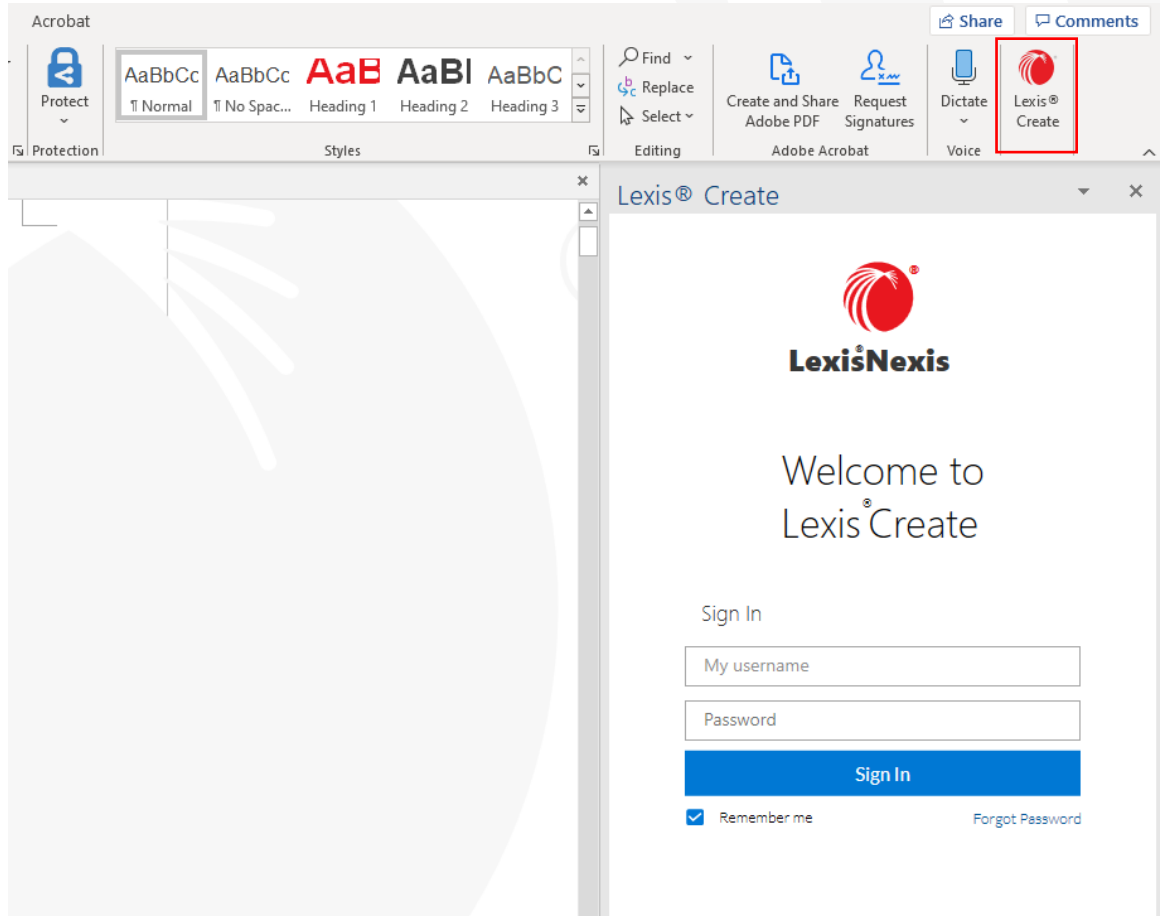
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## 1 Sign-In Screen

Click on to the Lexis Create button to open the application, then enter your username and password to sign-in.

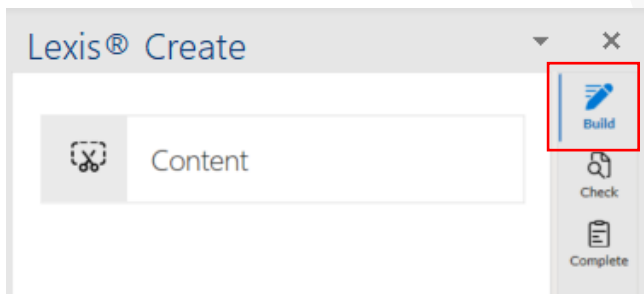


### 1.1 Forgot password Screen

If you have forgotten your password, select the “forgotten password” text and it will take you to the screen below to reset this.



## 2 Build

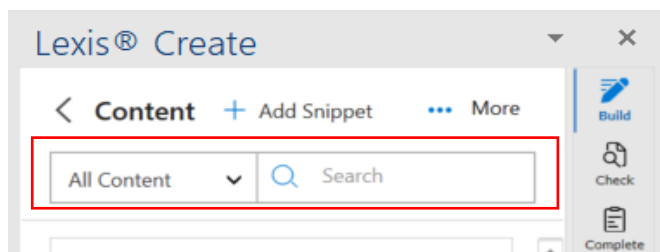


Clicking on the “Content” tab allows you to add to the content of your document with the aid of snippets.

### 2.1 All Content

*Build > Content > All Content*

Shows all content you have access to, including your own snippets.

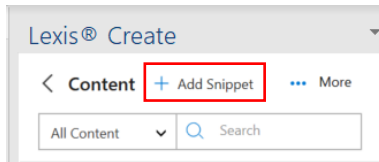


## 2.2 Add Snippet

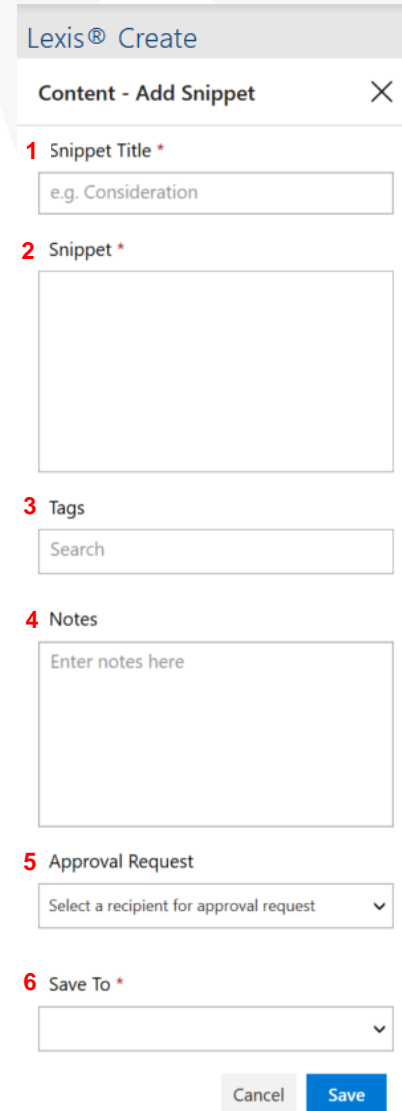
*Build > Content > Add Snippet*

Snippets are useful if you will be using the same information for different documents, either on your own account or within your organisation.

- Highlight the text you wish to create a snippet from.
- Click “+ Add Snippet” button. Enter the Snippet details:



1. **Snippet Title** – name your snippet
  2. **Snippet** – your snippet text
  3. **Tags** – enter the practice area/areas.
  4. **Notes** – can be used to add any notes you wish to include.
  5. **Approval Request** – select the person responsible for approving the snippet.
  6. **Save To** –
    - ‘My Snippets’ if for yourself;
    - “All Departments” if useful for everyone in your organization; or
    - to a “team.”
- Once you select “Save” the approval is sent by email to whoever you have selected. The status will show as “Waiting Approval.”
  - Once approved the status shows as “Newly Approved.”



The form is titled 'Lexis® Create' and 'Content - Add Snippet'. It contains the following fields:

- 1 Snippet Title \***: A text input field with the placeholder 'e.g. Consideration'.
- 2 Snippet \***: A large text area for entering the snippet text.
- 3 Tags**: A search input field for tags.
- 4 Notes**: A text area with the placeholder 'Enter notes here'.
- 5 Approval Request**: A dropdown menu with the text 'Select a recipient for approval request'.
- 6 Save To \***: A dropdown menu for selecting where to save the snippet.

At the bottom right, there are 'Cancel' and 'Save' buttons.

## 2.3 My Snippets

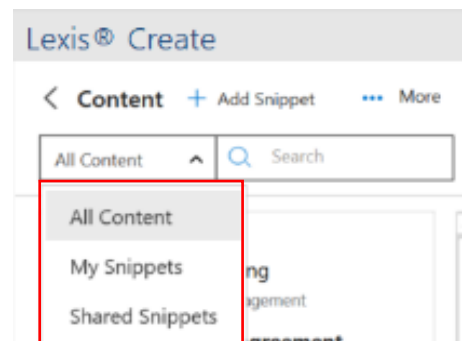
*Build > Content > My Snippets*

These are snippets you have created. Only you can access these, and you can use them in multiple documents.

## 2.4 Shared Snippets

*Build > Content > Shared Snippets*

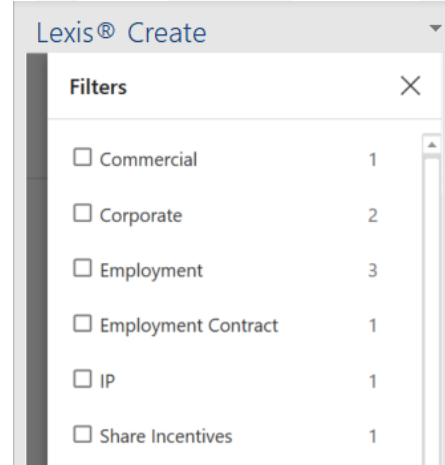
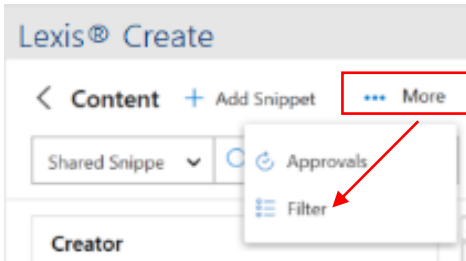
These are approved snippets that have been shared by your organization - they are separate to each team and cannot be seen by users outside of your organisation.



**2.5 Filters**

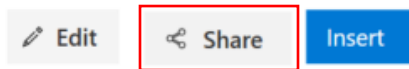
*Build > Content > More > Filter*

If you press the filter button you can easily select specific practice areas to help refine your search for content in your personal or shared snippets.



**2.6 Share**

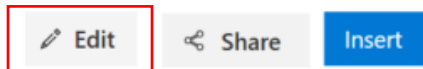
*Build > Content > Share*



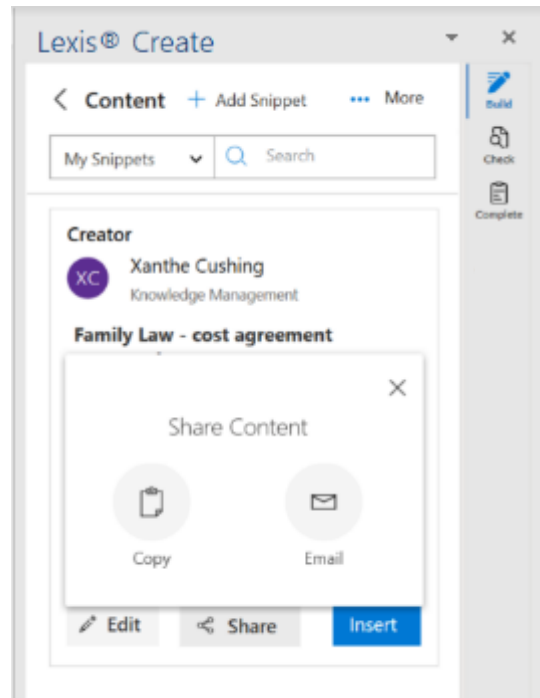
You can share a snippet with other users. Simply click on the “Share” button in the snippet and a pop up will appear where you can either share the snippet by email or by copying it.

**2.7 Edit**

*Build > Content > Edit*



Clicking on Edit will allow you to make any necessary amendments to your snippet, as in adding notes and updating the snippet title.

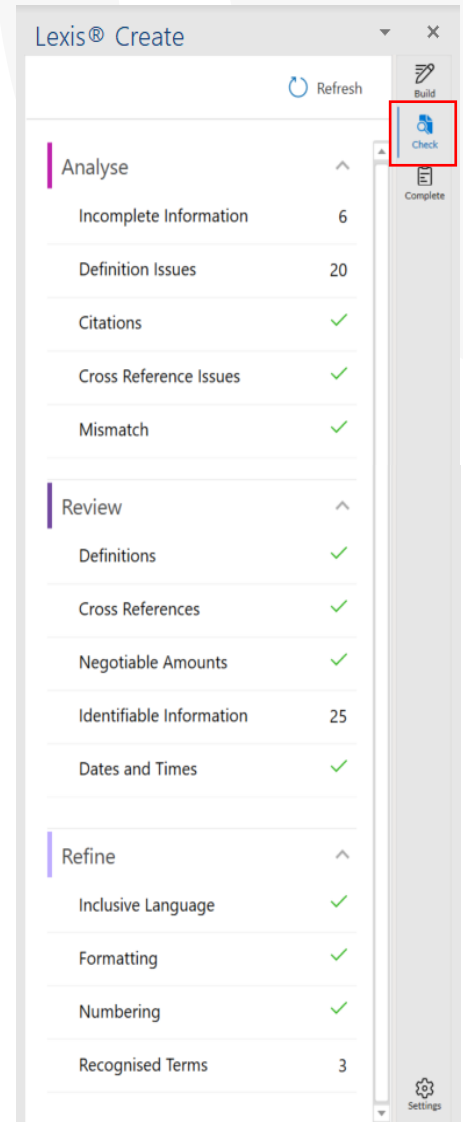


### 3 Check

Here your document will be scanned for any issues and you will have the option to amend them.

- When you click onto the Check menu, a progress bar will appear as the document is being scanned for issues, each of which will be underlined. Every time you click refresh, this bar will reappear, and the document will be re scanned.
- You have three options for modifying your document:
  1. Analyse;
  2. Review; and
  3. Refine.

Anything with a green tick has been checked and has no issues to amend.
- Clicking on the items that do not have a green tick will allow you to check and amend if needed.

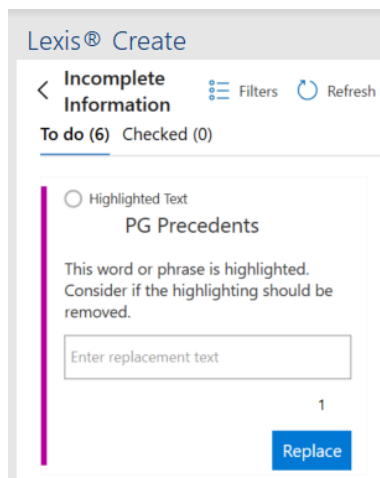


#### 3.1 Result card

##### [Check > Result Card](#)

This tab provides multiple categories of issues detected in the document and lists them out for review under the three options: Analyse; Review; and Refine.

- Click on an issue that has appeared in your document e.g. Under *Analyse* click on “Incomplete Information” and every issue detected will be shown in separate cards.
- The “Incomplete Information” cards will be sorted into “To Do” and “Checked” based on their status.



- If you select a card, you will be directed to the part of your document where this issue was found, and the issue will be highlighted. You can then either fix the issue by entering replacement text within the text bar or dismiss the highlighted issue.
- If you select “Replace” the text highlighted will be changed to what you have imputed into the text bar and this card will be moved to your completed list.

**Note:** If you click on any underlined text in your document you will be directed to the specific card it relates to.

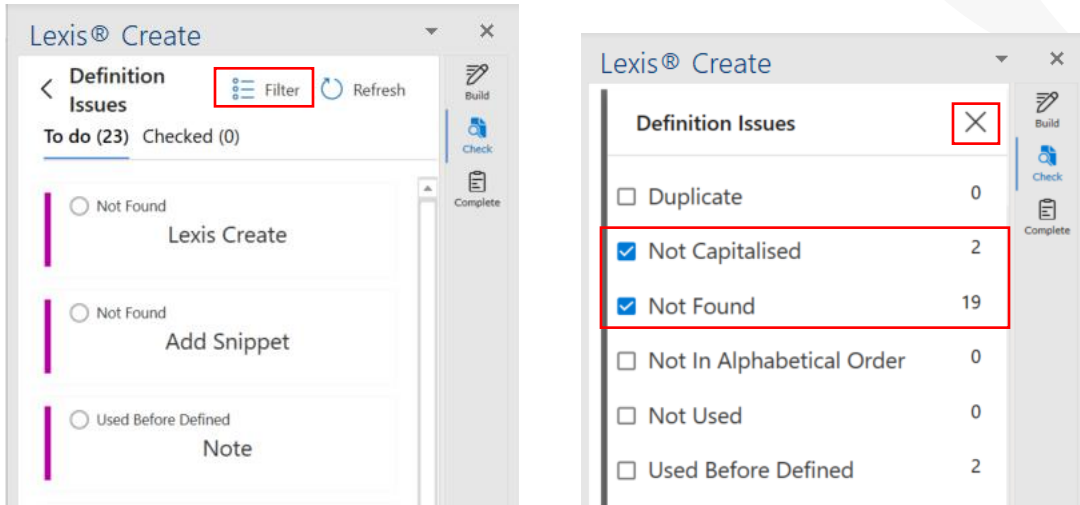


### 3.2 Filter

[Check > Result Card > Filter](#)

You can use the filter button on specific result cards to refine your search through your review to target specific issues.

- Simply select the result card and then select *Filter*.
- A list of issues will appear allowing you to select the ones you would like to focus on. Click on the X to close the *Filter* screen and you will be directed back to the results card.

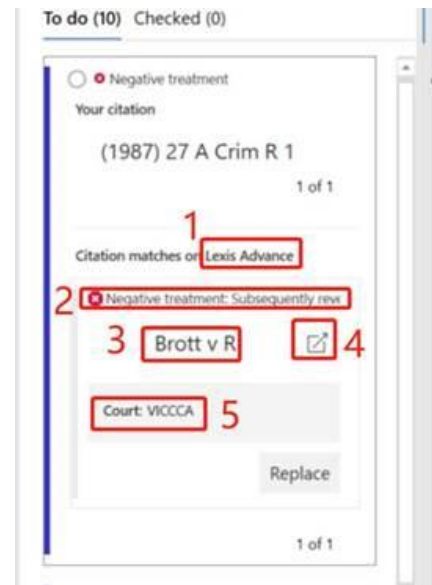


### 3.3 Case Citation






[Check > Result Card](#)

Lexis Create will identify citations in your document, match these against Lexis Advance and return the following information into the *Result Card*:

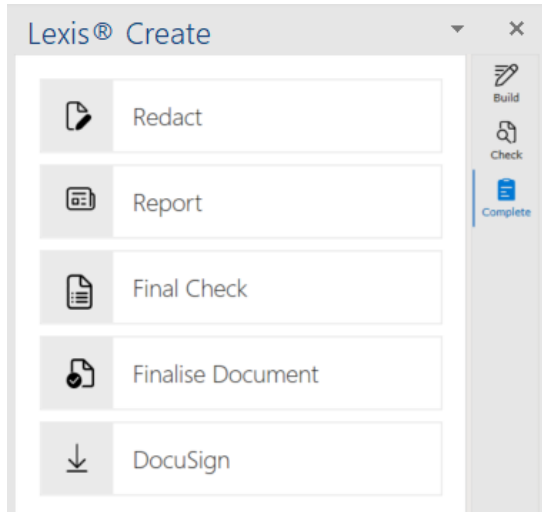
1. Citation matches or Lexis Advance
2. CaseBase signal - treatment flag
  - Not every case has a CaseBase Signal
  - Refer to 3.4 for a list of the CaseBase signals
3. Case name
4. Link to the CaseBase entry on Lexis Advance (existing subscription to CaseBase required)
5. Court name.



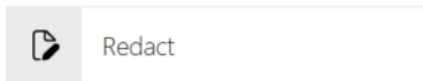
### 3.4 CaseBase Signals

Signal	Summary	Explanation
	Negative treatment	Warning – Negative treatment indicated. A negative (red) signal is given to decisions which have been subsequently reversed, disapproved or overruled.
	Cautionary treatment	Caution – Questioning or distinguishing treatment indicated. A cautionary (yellow) signal is given to decisions which have been subsequently distinguished, explained, not followed, questioned or varied.
	Positive treatment	Positive treatment indicated. A positive (green) signal is given to decisions which have been subsequently applied, approved, followed or affirmed.
	Neutral treatment	Neutral or citing treatment indicated. A neutral signal is given to decisions which been either considered or cited (also 'referred to' or 'discussed').
	Citation information	Link to CaseBase entry. A citation information signal is given to decisions for which there is only citation information available.

## 4 Complete



### 4.1 Redact

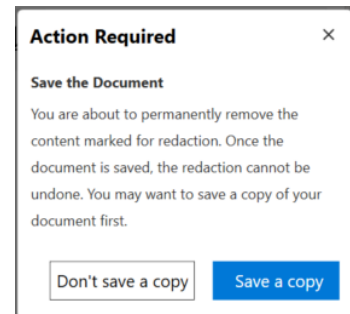


#### [Complete > Redact](#)

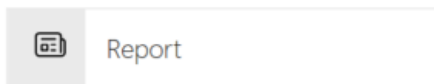
Redact enables you to hide identifiable information. E.g. cost, company name, address. Redact will replace the content with a black space. In the “Redact” tab you can view the status of your tasks in the “To Do” and “Completed” lists.

- Click onto the redact tab.
- You will be prompted to save a copy prior to redacting.
- If you want to redact all press the “Redact All” button.
- For certain suggestions, there are multiple instances where this information has been found.

The number of instances will appear e.g. 1 in 6, you can either redact all instances or you can select one at a time by using the arrows.



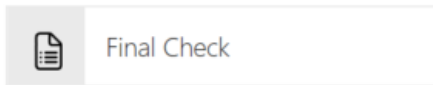
### 4.2 Report



#### [Complete > Report](#)

The Report tab allows you to review changes made in the Check menu. Select the categories you want in the review and select “Generate Report”.

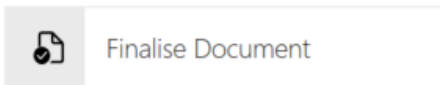
#### 4.3 Final Check



[Complete > Final Check](#)

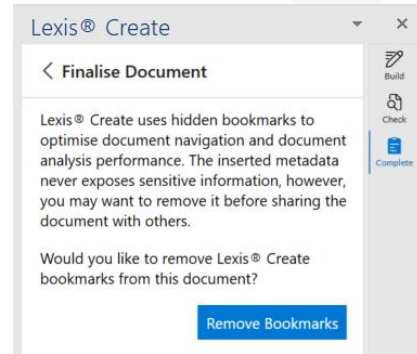
Final Check will run through anything that is still outstanding or may have been accidentally overlooked.

#### 4.4 Finalise Document



[Complete > Finalise Document](#)

When you use the Check section, Lexis Create uses hidden bookmarks to help navigate, however before sharing the document you may wish to remove them. Selecting Finalise Document and then “Remove Bookmarks” will remove these.



#### 4.5 DocuSign



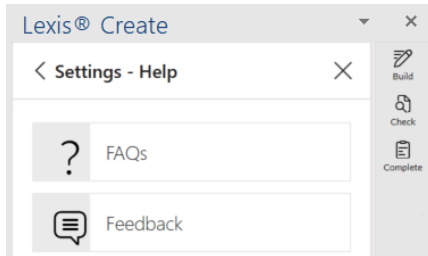
[Complete > DocuSign](#)

By selecting this tab, a pop up will appear allowing you to sign into DocuSign, which then allows you to send off the agreement to be digitally signed. You will need a DocuSign account for this to work.

## 5 Settings

Settings provides information on which version of Lexis Create you have and allows you to Sign Out.

### 5.1 Help



#### FAQ's

Here you will find a few frequently asked questions such as:

- What is Lexis Create?
- How do I get started with Lexis Create?
- How do I contact Lexis Create support?
- What content can I access from Lexis Create?
- Where are my snippets stored?

#### Feedback

Here you can provide any feedback and report any issues you may have come across.

- First select the category which best describes your feedback.
- Then use the title and description boxes to write your feedback.
- If you want to attach a file you can do so on the choose file section which will allow you to select a file from your computer.
- Once you have completed this select "Submit" and your feedback will be sent to a member of the feedback team to be reviewed.

### 5.2 General

- You can alter your settings for the check menu, by selecting or deselecting the underline tool.
- You can report any errors you have encountered.
- You can also revert back to the default settings.

