

Practical Guidance

**Lexis<sup>®</sup> Automated  
Templates**  
User Guide

**TABLE OF CONTENTS**

Introduction to Lexis Automated Templates.....03

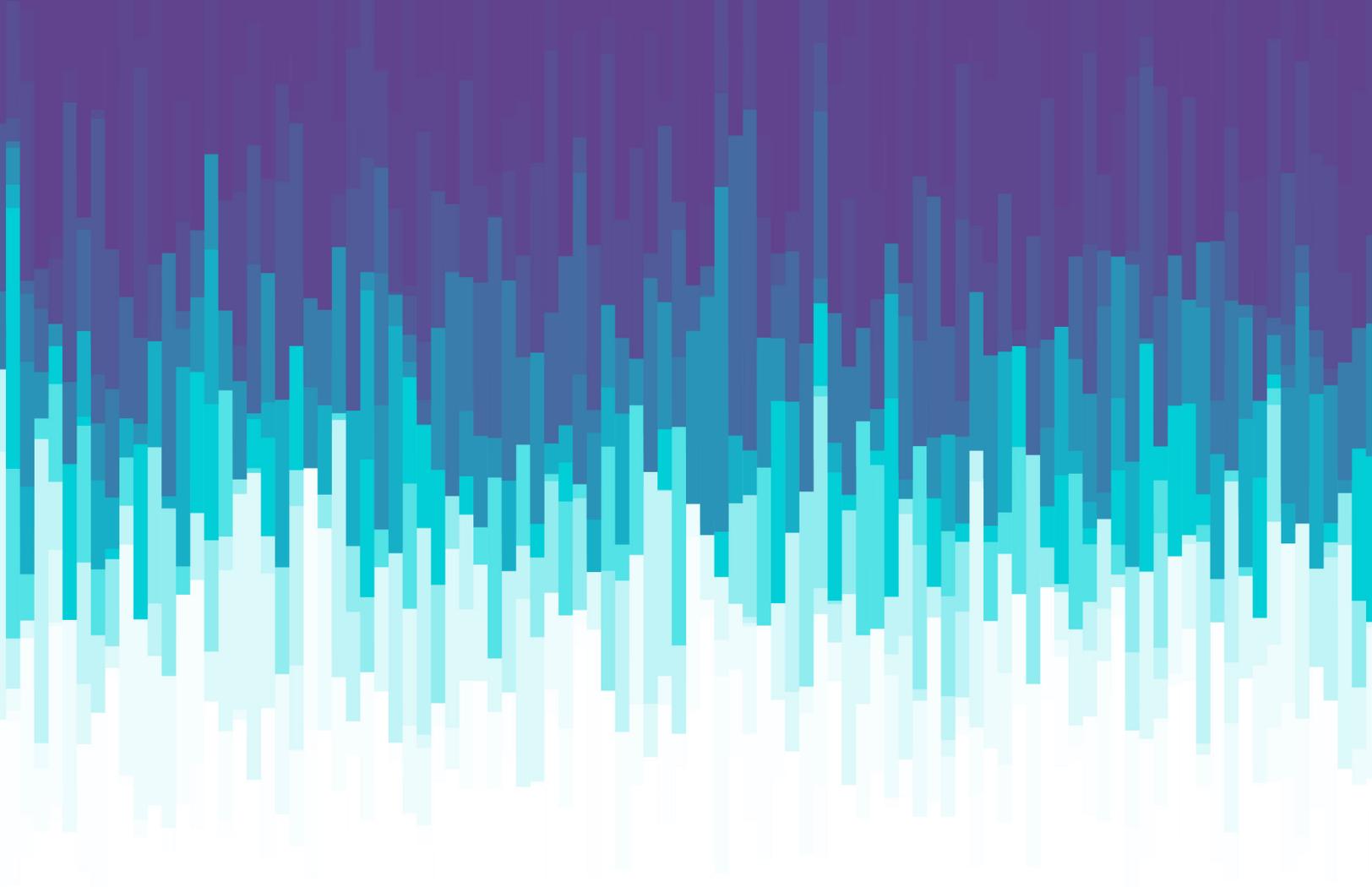
Finding Automated Templates.....04

Accessing Automated Templates.....05

Interview Progress.....06

Navigating the Interview Topics.....07

Previewing, Saving, and Downloading Automated Templates..... 08



## **INTRODUCTION TO LEXIS AUTOMATED TEMPLATES**

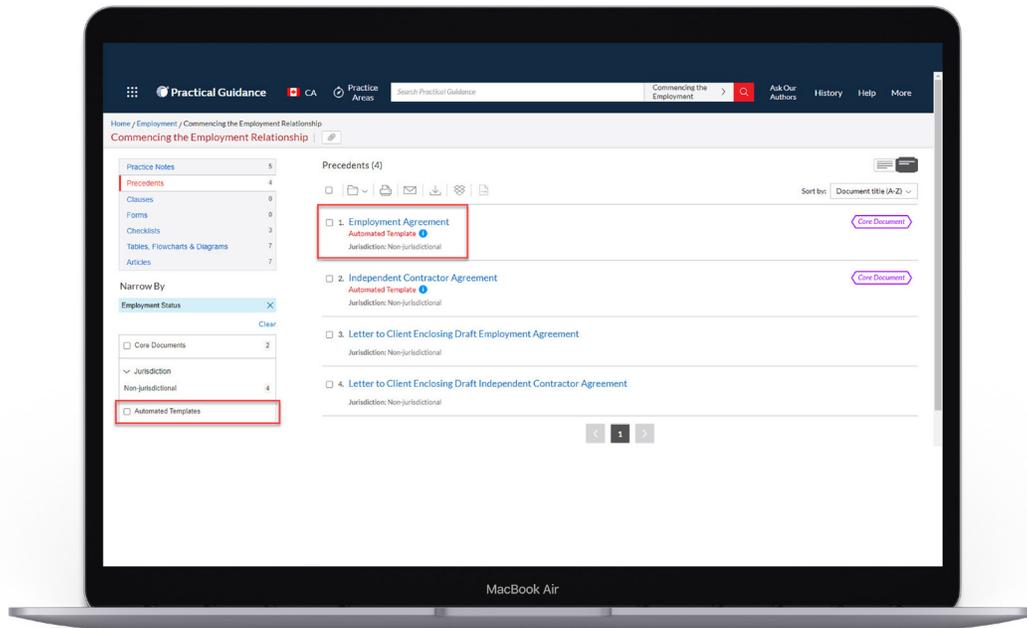
Lexis Automated Templates are legal templates that provide trusted up-to-date content delivered on a powerful technology platform. The templates come in the form of interactive interviews that can build documents with the right data and clauses based on user's answers. The interviews can support multiple data types, enabling easy population of the document based on interview answers supplied as free text, date selections, radio button selections, and dropdown menus.

Completed forms built using Lexis Automated Templates can be downloaded as Microsoft® Word files (.docx) Interview answers can also be saved and accessed at a later point in time, either for the same project or a different one.

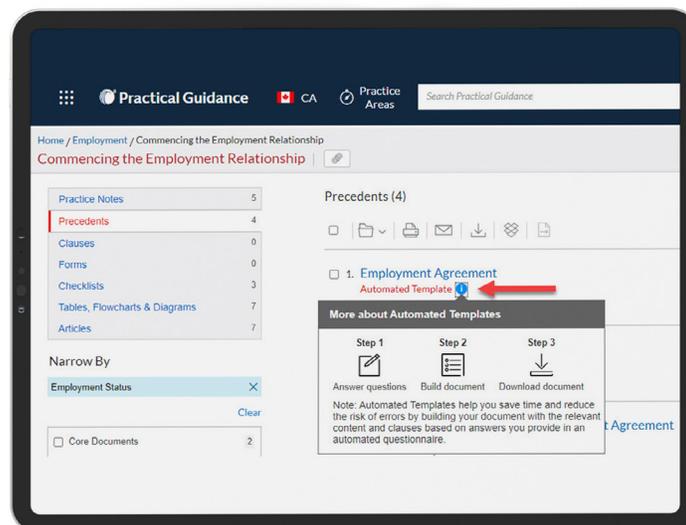
## FINDING AUTOMATED TEMPLATES

Automated Templates are included in select Practical Guidance practice areas. Navigate Practical Guidance by running a search, browsing the Topics & Tasks, or clicking on the link under Tools & Resources.

If there are Automated Forms available in your browse or search results list, you will see an **Automated Templates** checkbox at the end of the list of filters. Check the box to see just the Automated Templates in your results list.

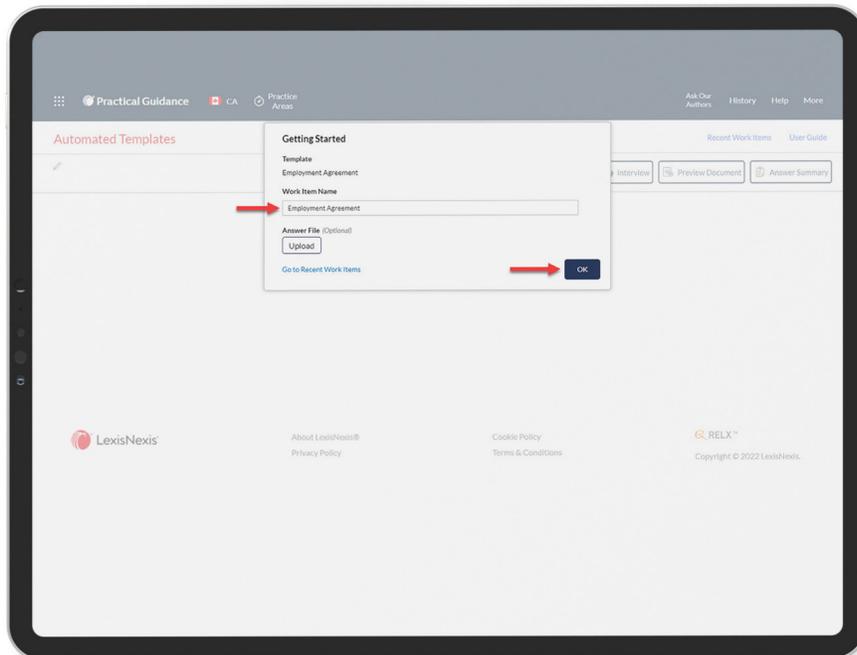
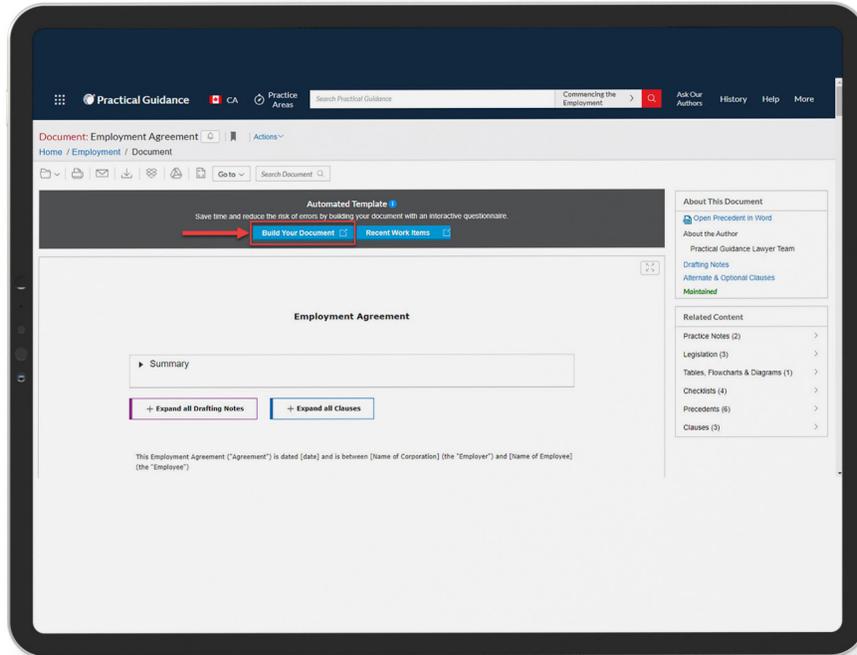


Automated Templates are labeled with an information button on the results page. Hover over the **blue i** button to get more information about Automated Templates.



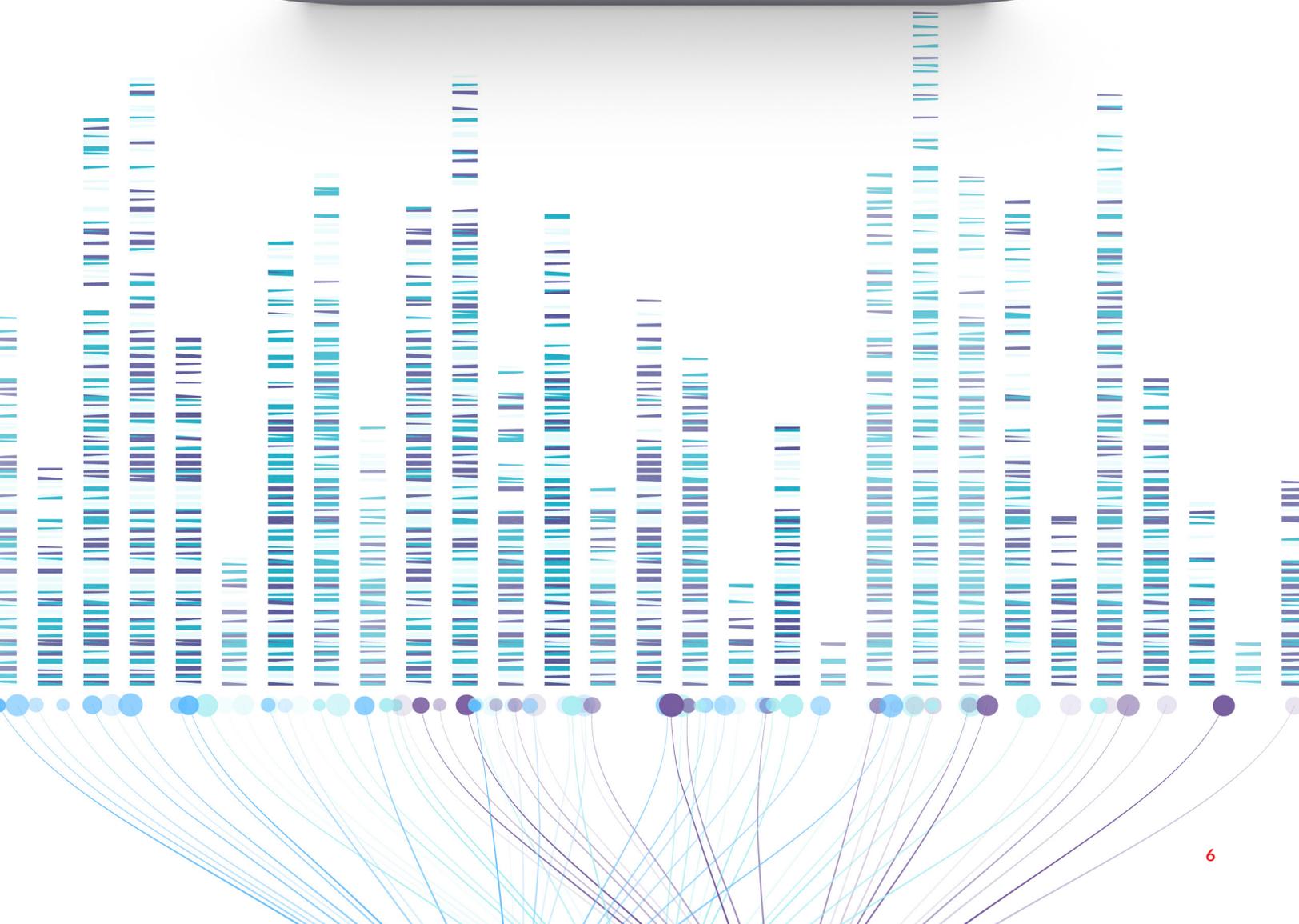
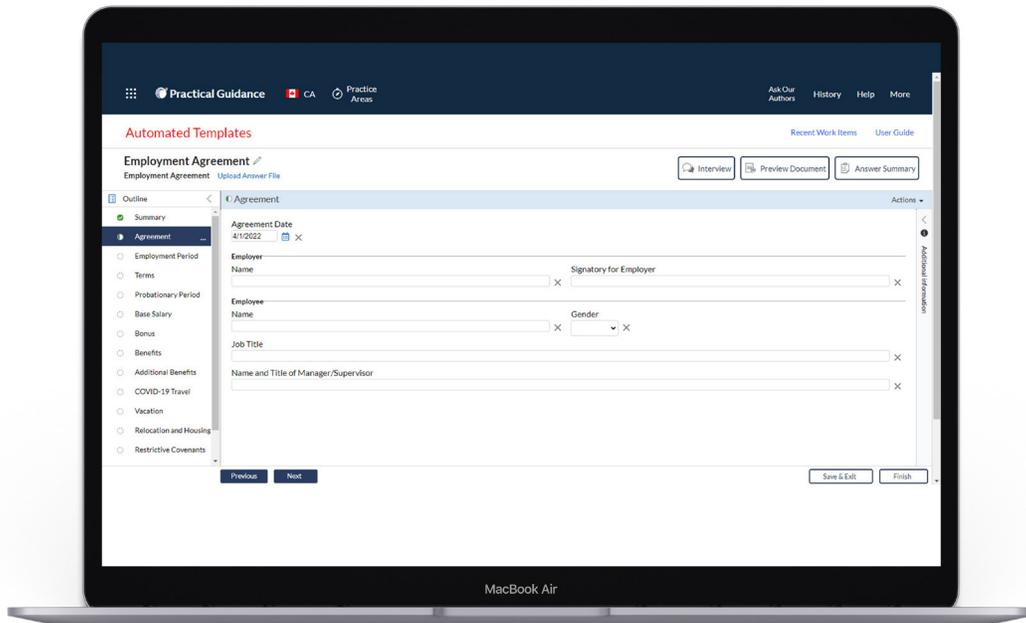
## ACCESSING AUTOMATED TEMPLATES

Practical Guidance forms that have the Automated Templates feature include a **Build Your Document** button at the top of the screen. When you click on **Build Your Document**, the start screen will open in your default browser in a new tab or window. Enter the work name of your template in the **Work Item Name** box and click **OK**.



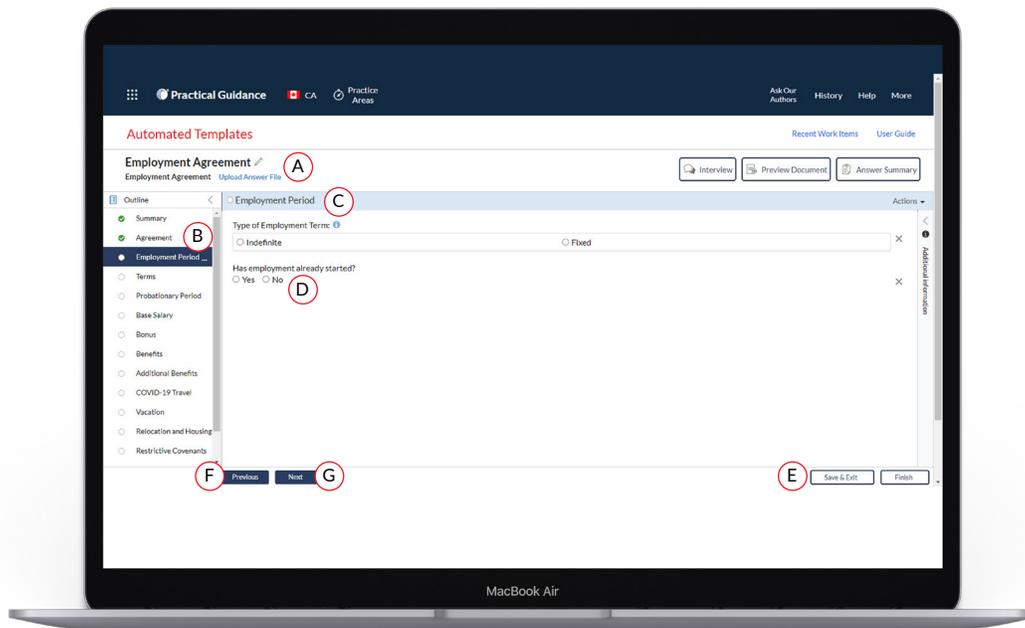
## INTERVIEW PROGRESS

Each screen in the interview will show you the name of the form that will be built and the topic you are currently completing within the interview. Answer fields may be free-text fields, dropdown menus, radio buttons, date selectors, or check boxes.



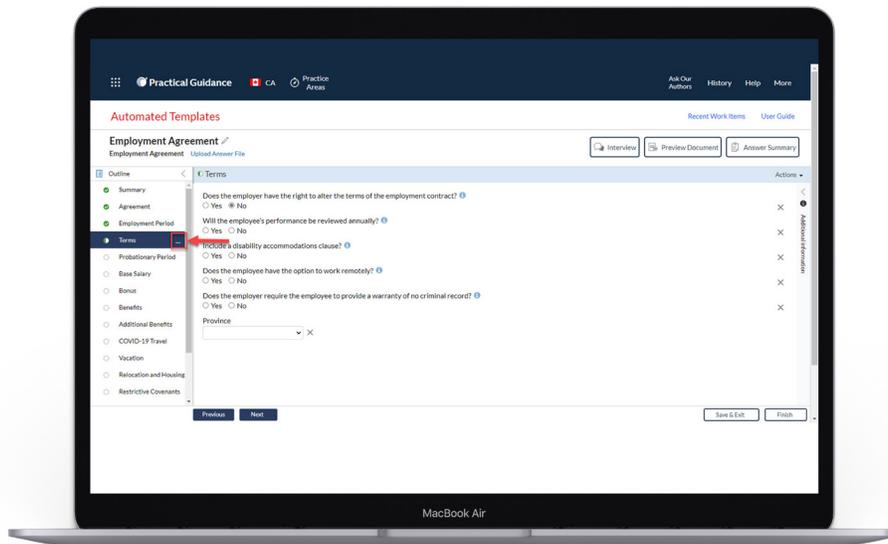
## NAVIGATING THE INTERVIEW TOPICS

You can jump from one interview topic to another by clicking on the topics in the **Outline** pane. To go back and forth between interview topics, click the **Previous** or **Next** buttons.



NO	ITEM	DESCRIPTION
A	Form in Progress	Form title indicating the form that has been selected and in progress
B	Topic Progress	The topic highlighted in blue denotes the topic of the interview that the user is on
C	Topic Title	Title of the topic, which reflects the title in the Topic Progress pane
D	Answer Field	Text answers should be written here. Other types of answer fields may include radio buttons, check boxes, date selectors, and dropdown menus
E	Save & Exit	Saves the user's answers before exiting the interview. The user will be taken to the Recent Work Items page
F	Previous	Takes the user back to the previous screen in the interview
G	Next	Takes the user to the next screen in the interview

If click on the three dots button to the right of the topic name, you will be given an option to clear all answers provided within that topic.

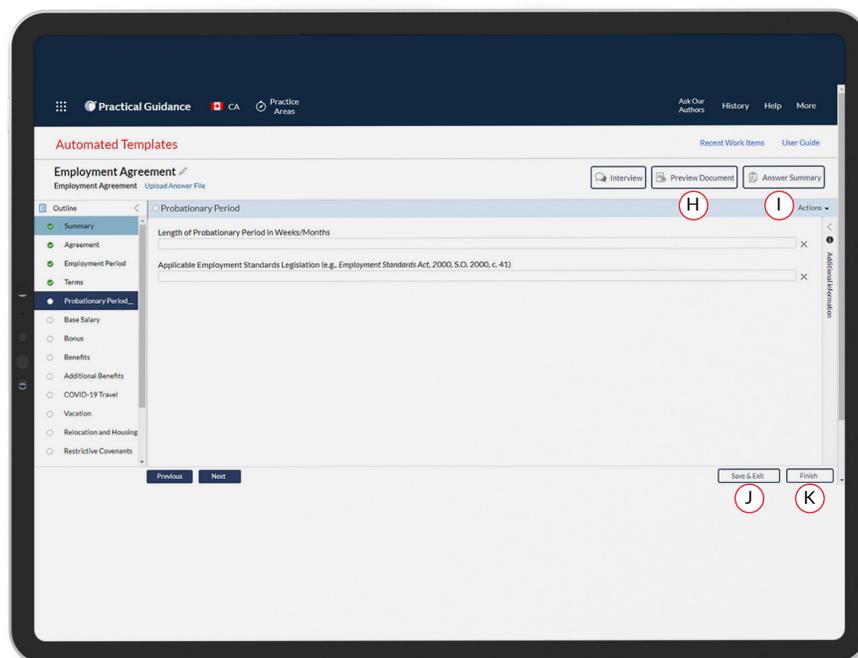


## PREVIEWING, SAVING, AND DOWNLOADING AUTOMATED TEMPLATES

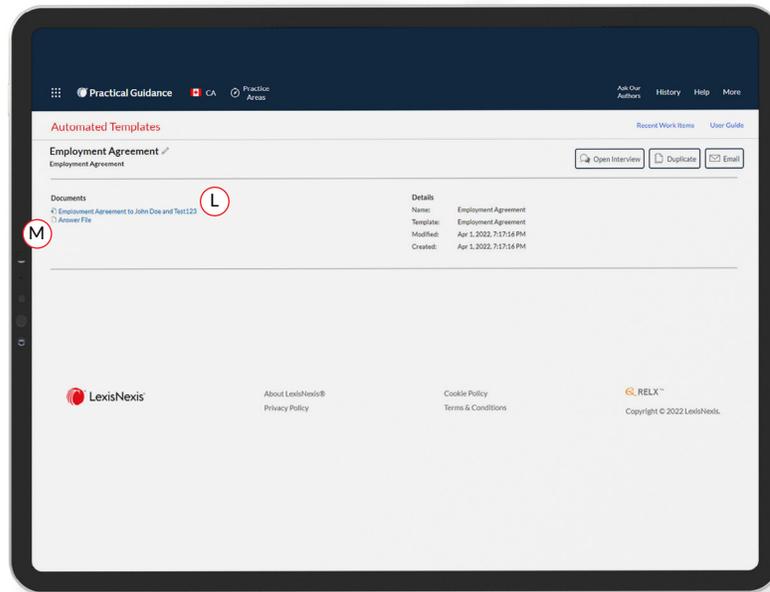
At any point during the interview process you can review the document with the answers entered by clicking on the **Preview Document** button at the top of the interview screen.

If you need more time to complete the interview questions, simply click **Save & Exit**. You can access your saved template(s) from the **Recent Work Items** in the Automated Templates tool.

To access/download a Microsoft Word version of your document, click **Finish** and your file will appear on the next screen, in the list under the **Documents** heading.



Below the Microsoft Word document you will find the HotDocs **Answer File** which you can download to your computer and upload into other Automated Templates you work on in the future.



NO	ITEM	DESCRIPTION
H	Preview Document	Generates a preview of the document using the currently available interview answers
I	Answer Summary	Shows a list of all the currently available interview answers
J	Save & Exit	Saves the answers submitted and returns the user to the Automated Template tool
K	Finish	Completes the interview process and generates a Microsoft Word file and HotDocs Answer File
L	Microsoft Word File	Allows the user to download the document as a Microsoft Word file
M	Answer File	Allows the user to download a HotDocs Answer File

### HELP IS ALWAYS AVAILABLE

Customer Support: **1-800-387-0899**

Email: **service@lexisnexis.ca**

Learn More: **lexisnexis.ca/resources**

LexisNexis.ca/**Practical Guidance**

 @lexisnexiscan

 linkedin/lexisnexis-canada