

Lexis® PSL Numbering and Cross-referencing User Guide

This guide gives you a quick overview on how to manage your numbering and cross-referencing when editing your documents.

What is a style?

All LexisPSL documents you download are styled to provide automated numbering throughout your document. A 'style', in simple terms, is a collection of formatting that has been given a name. (Styles contain many attributes and can be assigned to a numbering scheme). Provided you are using the correct template you won't have to set any of these attributes as your template will have all the styles you need to create your documents.

What are cross-references?

A cross-reference refers to an item that appears in another location within the document. You can create a cross-reference to headings, footnotes, bookmarks, captions and numbered paragraphs. LexisPSL documents are created using a template which enables auto-cross reference numbering (i.e. if a clause is inserted or deleted the document is intelligent/robust enough to recognise this change and correct it). As you work with your downloaded document and insert or delete clauses, some simple formatting tools will help you retain the integrity of your automated numbering and cross-referencing.

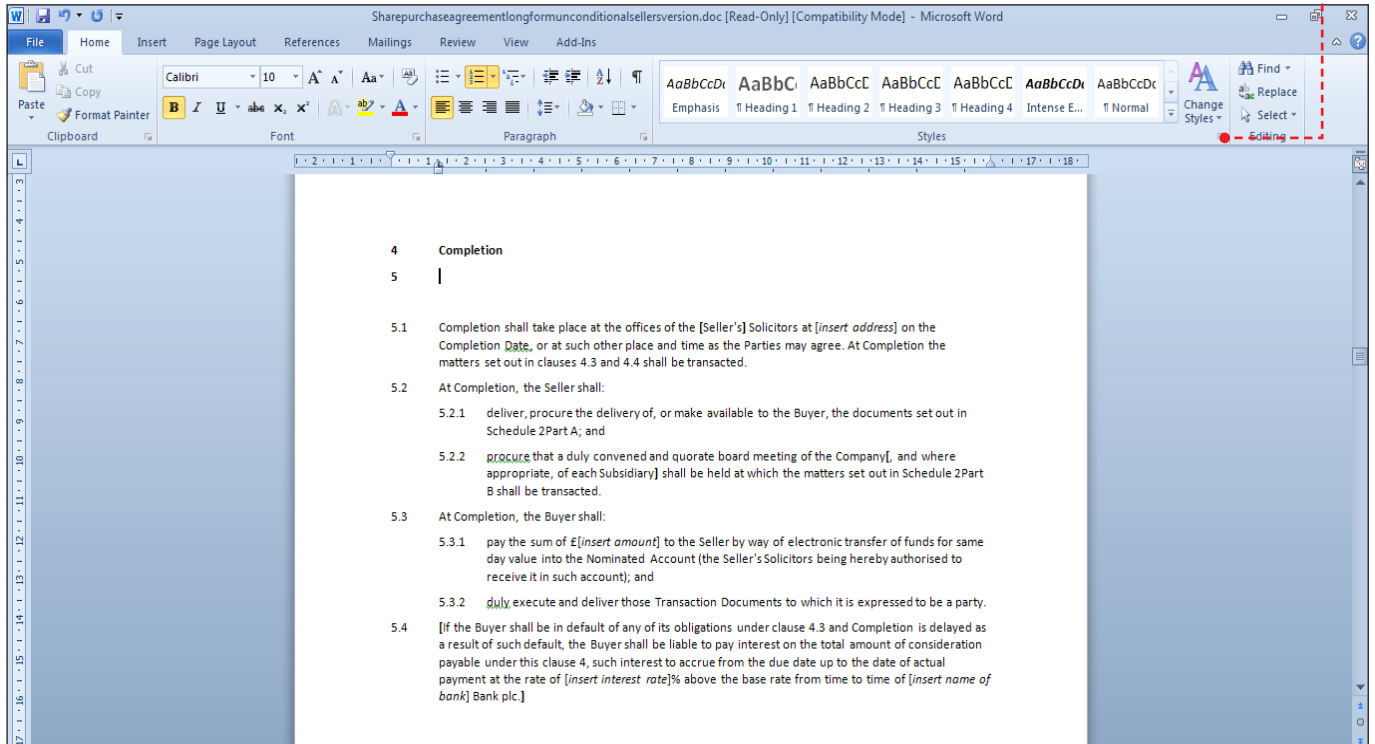
Inserting a new clause into a document

The document shown below has multi-level clause numbering (4, 4.2, 4.2.1 etc.)

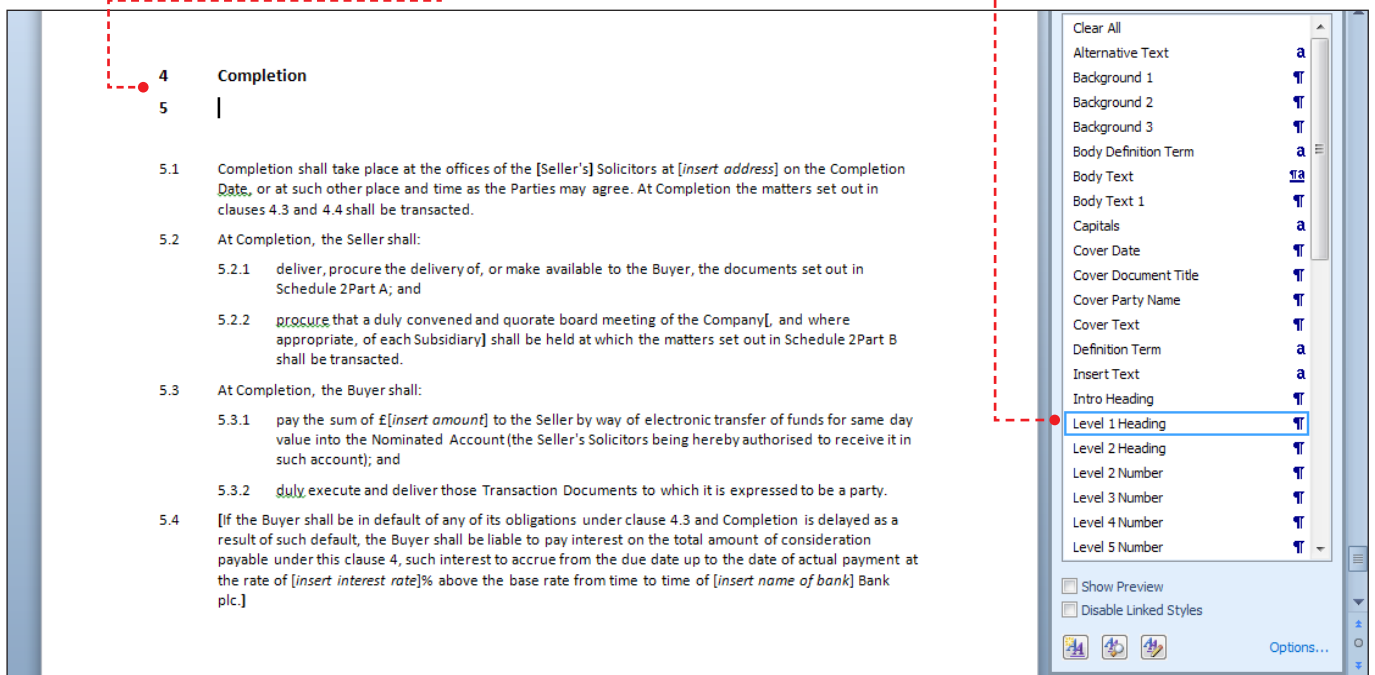
- 4** **Completion**
 - 4.1 Completion shall take place at the offices of the [Seller's] Solicitors at [insert address] on the Completion Date, or at such other place and time as the Parties may agree. At Completion the matters set out in clauses 4.2 and 4.3 shall be transacted.
 - 4.2 At Completion, the Seller shall:
 - 4.2.1 deliver, procure the delivery of, or make available to the Buyer, the documents set out in Schedule 2Part A; and
 - 4.2.2 procure that a duly convened and quorate board meeting of the Company[, and where appropriate, of each Subsidiary] shall be held at which the matters set out in Schedule 2Part B shall be transacted.
 - 4.3 At Completion, the Buyer shall:
 - 4.3.1 pay the sum of £[insert amount] to the Seller by way of electronic transfer of funds for same day value into the Nominated Account (the Seller's Solicitors being hereby authorised to receive it in such account); and
 - 4.3.2 duly execute and deliver those Transaction Documents to which it is expressed to be a party.

To enter a new clause 4.1, press enter at the end of clause 4 – which will enter a clause 5. To change this to 4.1 use your tab button, or click on the Styles drop down to show the list of styles in the document.

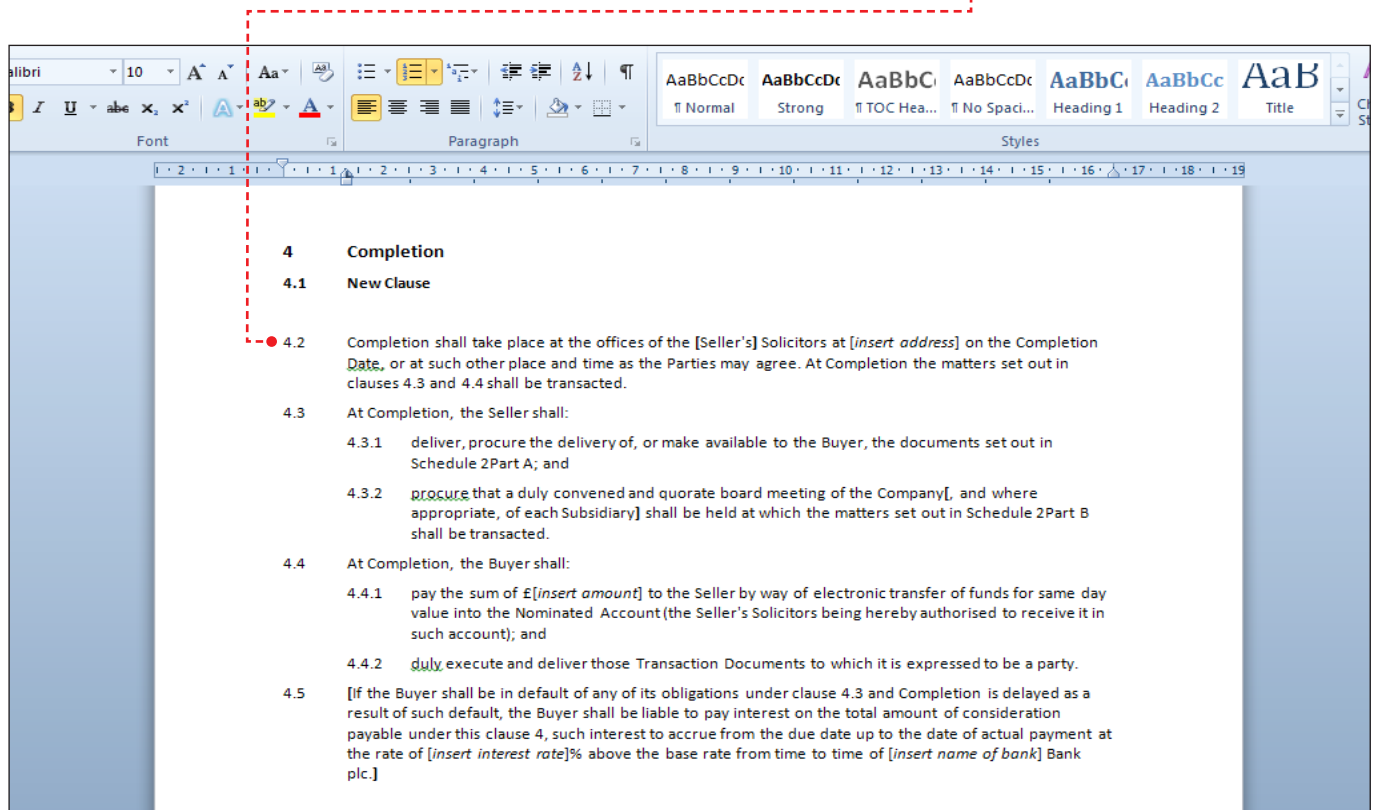
NB. You can also normally use the **Tab** key to demote a numbered style to the next level and **Shift +Tab** Key to promote to the previous level.



To change the style of the clause to the correct clause number, place your cursor on the clause you wish to restyle and select the clause level from the style list – in this case we will restyle to a level 2 number.

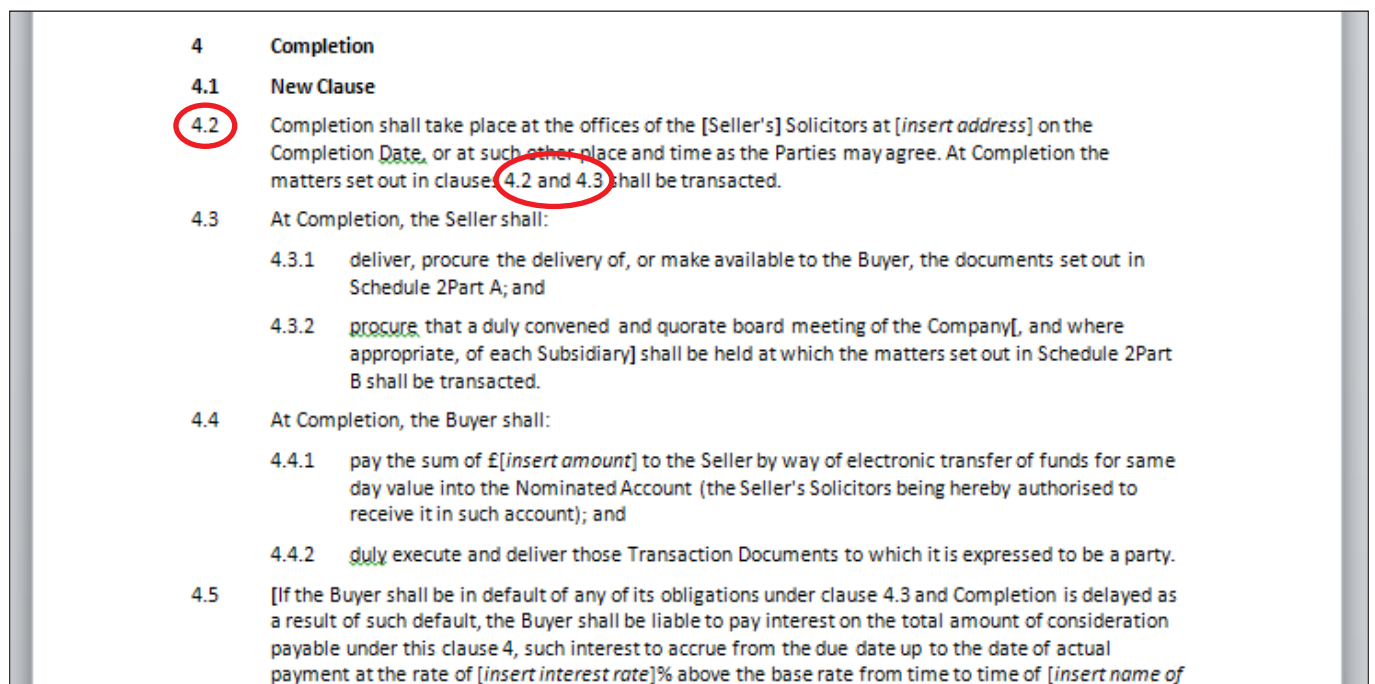


This changes the number of the clause and automatically renumbers subsequent clauses. The new clause 4.1 is inserted, the rest of the numbering will automatically change to take this into account – what was clause 4.1 is now 4.2 etc.



However now clause 4.2 still has a cross-reference to clauses 4.2 and 4.3.

But it should refer to 4.3 and 4.4.

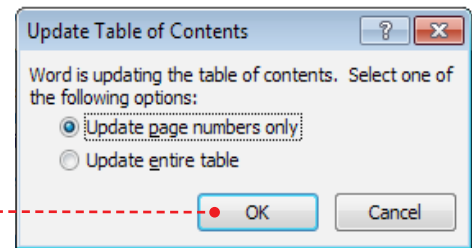


This change will **not happen automatically**, you do need to update the numbering to reflect the change.

To update all cross-referencing in your document select **Ctrl A** to select all and **F9** to update all fields, this will open the Update Table of Contents dialog box:

Select **Update entire table** and select **OK**

Alternatively, select the Update All Fields icon on the References ribbon 



4.1	New Clause
4.2	Completion shall take place at the offices of the [Seller's] Solicitors at [insert address] on the Completion Date, or at such other place and time as the Parties may agree. At Completion the matters set out in clauses 4.3 and 4.4 shall be transacted.
4.3	At Completion, the Seller shall:
4.3.1	deliver, procure the delivery of, or make available to the Buyer, the documents set out in Schedule 2Part A; and
4.3.2	procure that a duly convened and quorate board meeting of the Company[, and where appropriate, of each Subsidiary] shall be held at which the matters set out in Schedule 2Part B shall be transacted.
4.4	At Completion, the Buyer shall:
4.4.1	pay the sum of £[insert amount] to the Seller by way of electronic transfer of funds for same day value into the Nominated Account (the Seller's Solicitors being hereby authorised to receive it in such account); and
4.4.2	duly execute and deliver those Transaction Documents to which it is expressed to be a party.
4.5	[If the Buyer shall be in default of any of its obligations under clause 4.3 and Completion is delayed as a result of such default, the Buyer shall be liable to pay interest on the total amount of consideration payable under this clause 4, such interest to accrue from the due date up to the date of actual payment at the rate of [insert interest rate]% above the base rate from time to time of [insert name of bank] Bank plc.]

The document numbering now reflects the amendments made.

Deleting a clause which is referenced from a document

Clauses within documents will often cross-refer to other clauses.

4	Completion
4.1	Completion shall take place at the offices of the [Seller's] Solicitors at [insert address] on the Completion Date, or at such other place and time as the Parties may agree. At Completion the matters set out in clauses 4.2 and 4.3 shall be transacted.
4.2	At Completion, the Seller shall:
4.2.1	deliver, procure the delivery of, or make available to the Buyer, the documents set out in Schedule 2Part A; and
4.2.2	procure that a duly convened and quorate board meeting of the Company[, and where appropriate, of each Subsidiary] shall be held at which the matters set out in Schedule 2Part B shall be transacted.
4.3	At Completion, the Buyer shall:
4.3.1	pay the sum of £[insert amount] to the Seller by way of electronic transfer of funds for same day value into the Nominated Account (the Seller's Solicitors being hereby authorised to receive it in such account); and
4.3.2	duly execute and deliver those Transaction Documents to which it is expressed to be a party.

Working with styles

This note is intended for those who may not be so familiar with working with Word styles.

Setting up your view of Word

Style information is displayed in a number of areas on your Word screen, but if you are working with documents, the easiest way to see what styles have been applied to your document is to make sure that you are working in **Draft** mode.

You switch to this mode by using the icons at the bottom right of your screen.



Level 1 heading	4 Working with styles
Body Text	This chapter is intended for those who may not be so familiar with working with Word style
Level 2 heading	4.1 Setting up your view of Word.
Body Text	Style information is displayed in a number of areas on your Word screen, but if you are v the easiest way to see what styles have been applied is to make sure that you are wor switch to this mode by using the icons at the bottom right of your screen

When working in Draft mode you can see the styles applied to your text in the 3style area pane.

(If you can't see the style area pane (as displayed above), then amend your Word settings by clicking on **File, Options, Advanced**.

Amend the style area pane setting, or ask IT support for assistance).

Troubleshooting

When opening an existing document that you intend to update, it is best practice to health check the document to ensure that you understand its history and styles. You also need to 'know' the document and the template it has been created from, whether it's an internal or external document, this will help you decide which styles are to be used. Here are some simple tips that will help you troubleshoot.

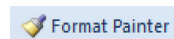
- Work in **Draft** mode with the styles panel visible and with paragraph marks and fields visible.
- If you are pasting text from older or differently styled documents, make sure you use the **paste text only** option or **format painter**. This will stop your document from inheriting additional unwanted styling options.
- If your numbering is not working correctly, check that your document has not had some manual formatting applied. If numbering won't restart, select the entire document (**Ctrl+A**), then clear any direct paragraph formatting, by selecting (**Ctrl+Q**). This often resolves the issue of the numbering not restarting. **Ctrl+Q** is a useful Word command that clears directly applied paragraph formatting and resets paragraph/style formatting to its default setting. **Ctrl+Spacebar** is a native Word command that will remove direct character formatting (e.g. colours, bold, italics), from text.

- If your cross references or a table of contents need updating, use **Ctrl A** to select all and **F9** to update all fields. This will open the Update Table of Contents dialog box: Select **Update entire table** and select **OK**.
- If your page numbering is not as expected ensure you have the correct section breaks and check whether your footer style is linked to the previous section.

Formatting

You can also use the **Format Painter** to apply formatting to text and paragraphs.

Select the text that has the formatting you want to copy from.



Click the Format Painter (the pointer will change to a paintbrush icon) Click the text

you wish to format

To apply formatting to more than one block of text, double-click the Format Painter. (When finished click the Format Painter again or press ESC to toggle off)

NB. Before clicking the Format Painter, if you wish to copy only the format of the text (e.g. bold, colour, etc.) drag and select part of the text you wish to copy from. If you wish to copy the paragraph formatting, click within the paragraph (without selecting any text) or select the whole paragraph.

Visit our website www.help.lexisnexis.co.uk
or follow us on Twitter @LNResources
Helpdesk number: 0845 370 1234 (Calls cost 7p/min)

The Future of Law. Since 1818.

