LexisNexis® PowerInvoice™ Custom Rates and Report Layout User Guide

LexisNexis®

June 07, 2016

Contents

Legal Credits

LexisNexis, the Knowledge Burst logo, *Shepard's*, Lexis, Nexis, and Lexis Advance are registered trademarks of Reed Elsevier Properties Inc., used under license. AutoCite is a registered trademark and PowerInvoice is a trademark of RELX Inc. Other products or services may be trademarks or registered trademarks of their respective companies.

Purpose of this Guide

This user guide will walk you through the steps to set up a custom cost recovery profile and create a user-defined report layout.

This guide will take you step by step through the process of creating a PowerInvoice Custom profile to assign your desired cost recovery dollar amounts or percentage rates.

It will also cover the steps taken to take a base PowerInvoice report and create your own report:

- Selecting only those columns you want to include in the report, in the order you wish
- Renaming the column headers
- Selecting the desired columns, when using User Defined in conjunction with the Custom function, in order for a new total charge to be calculated and displayed as the last column in the report

Cost Recovery

It is not uncommon for law firms to recover research expenses by passing those expenses on to the clients for whom the research was performed. To assist in this process, the PowerInvoice service lets you generate customized billing reports. Using these customized billing reports, you can reallocate your research costs across the span of the LexisNexis Activity Descriptions and use that information to help set the level of cost recovery from your clients.

Customization is done by creating one or more custom-settings profiles. Each profile contains a series of customization factors that can be applied to the data for individual LexisNexis Activity Descriptions as the report is generated. These adjustment factors let you:

- Specify a flat dollar amount to be recovered for each type of billed action performed using a particular LexisNexis Activity Description
- Specify a percentage rate to be recovered for each type of billed action performed using a particular LexisNexis Activity Description
- Rename any LexisNexis Activity Description to a name more descriptive to your clients
- Specify whether the recovery amounts or rates should be applied to Contract or Transactional, Gross or Net amounts

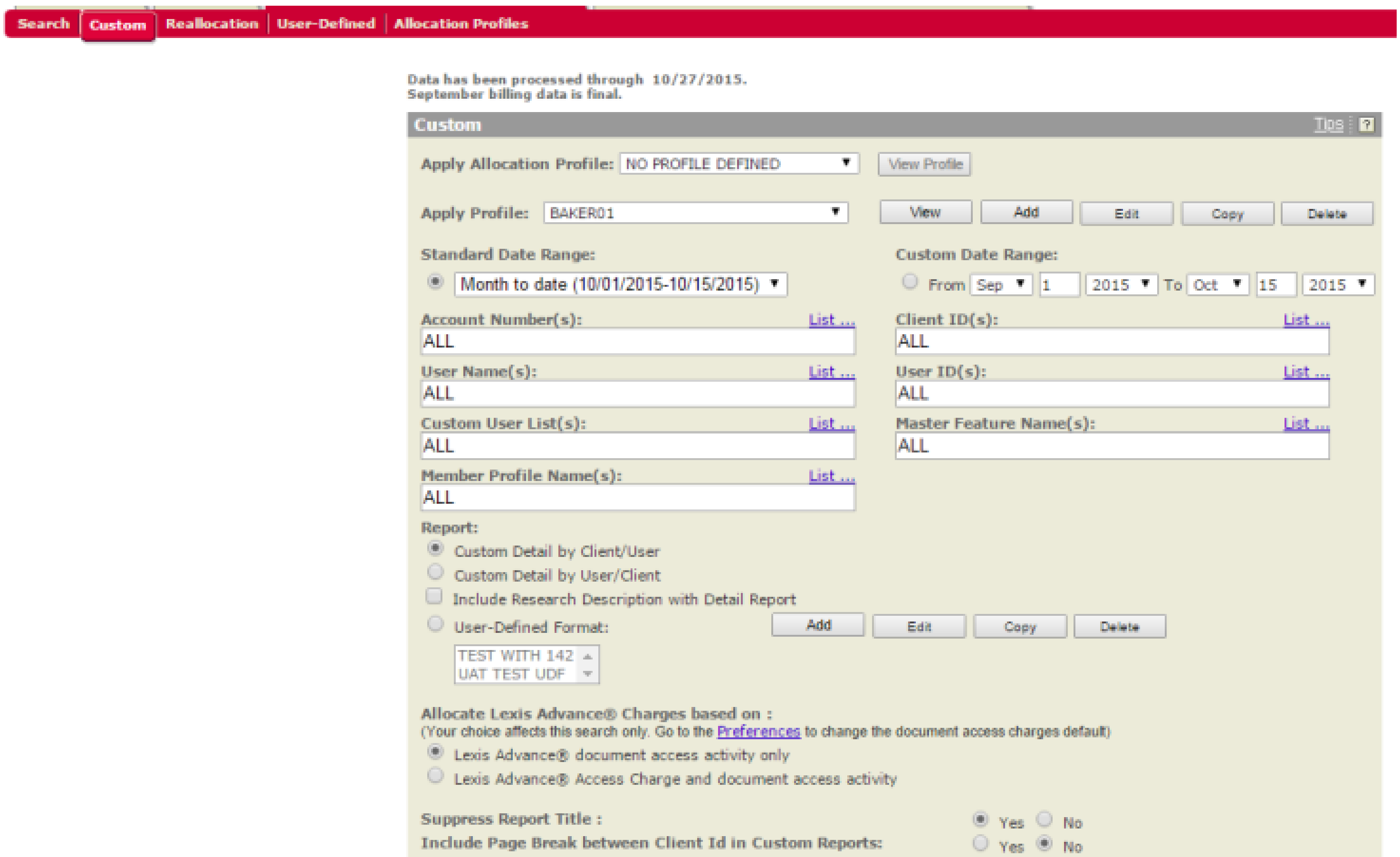
Once you have created, named and saved a custom-settings profile, you can use this feature to generate a custom report that applies the adjustment factors specified in the profile you select. Be aware that this feature does not alter any of the actual LexisNexis charges that are billed to your firm.

Cost-recovery options let you establish recovery rates - before sending billing data to your office billing system. Once you've selected the Custom tab under the Billing Data tab, you'll see the Custom screen.

How do I use the Billing Data > Custom page?

On this page, you can:

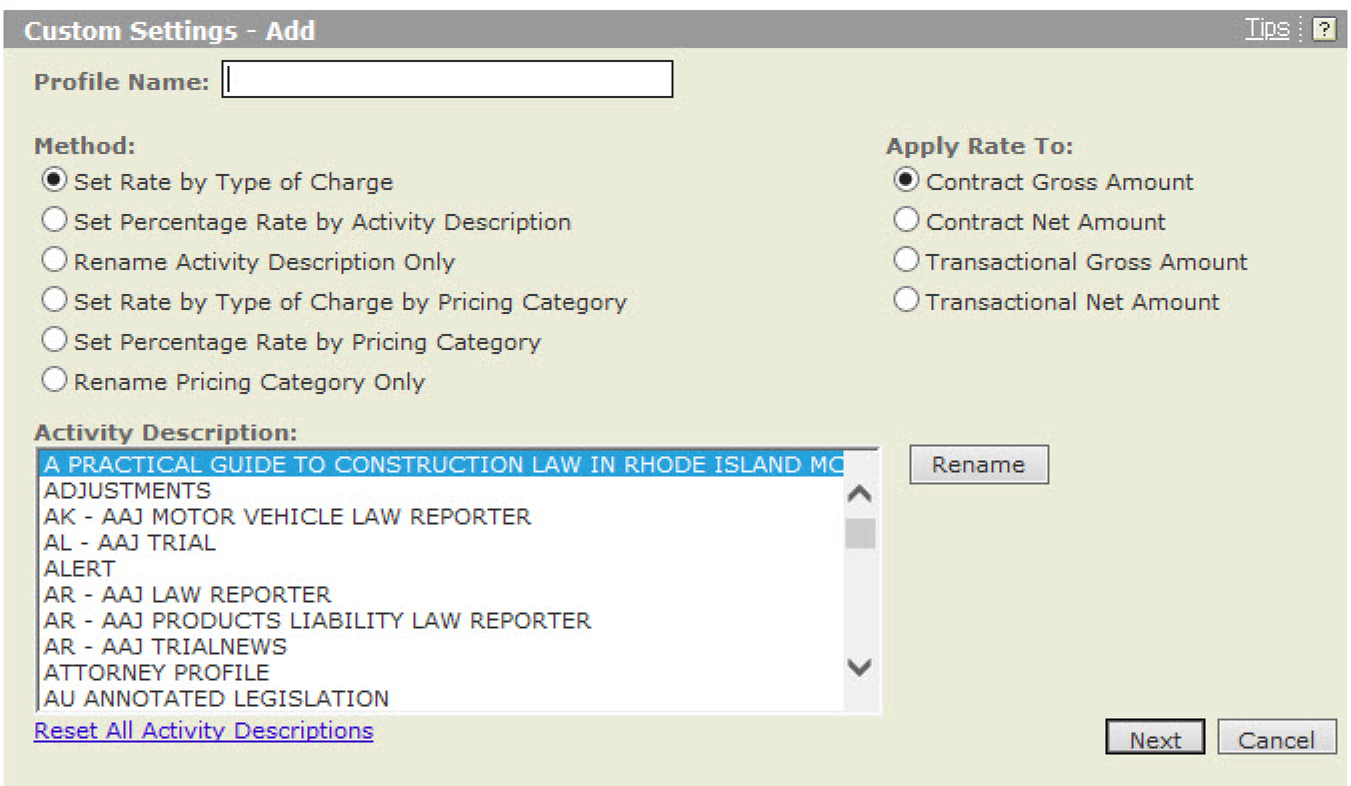
- Add a cost-recovery profile to apply to your billing data.
- Edit an existing profile.
- Make a copy of an existing profile if it's very close to a new profile you need to create.
- Delete an existing profile.
- Apply an existing profile to your billing data.
- Choose whether or not to Suppress Report Titles or Include Page Breaks in your reports.



How do I create a profile?

At any time, you can create a new profile (a set of cost-recovery options).

1. Enter a **Profile Name**.
2. Choose the method of recovery.
3. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Set Rate by Type of Charge by Pricing Category lets you assign an amount you want to recover for any pricing category
   - Set Percentage Rate by Pricing Category allows you to specify the percentage rate for any pricing category
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

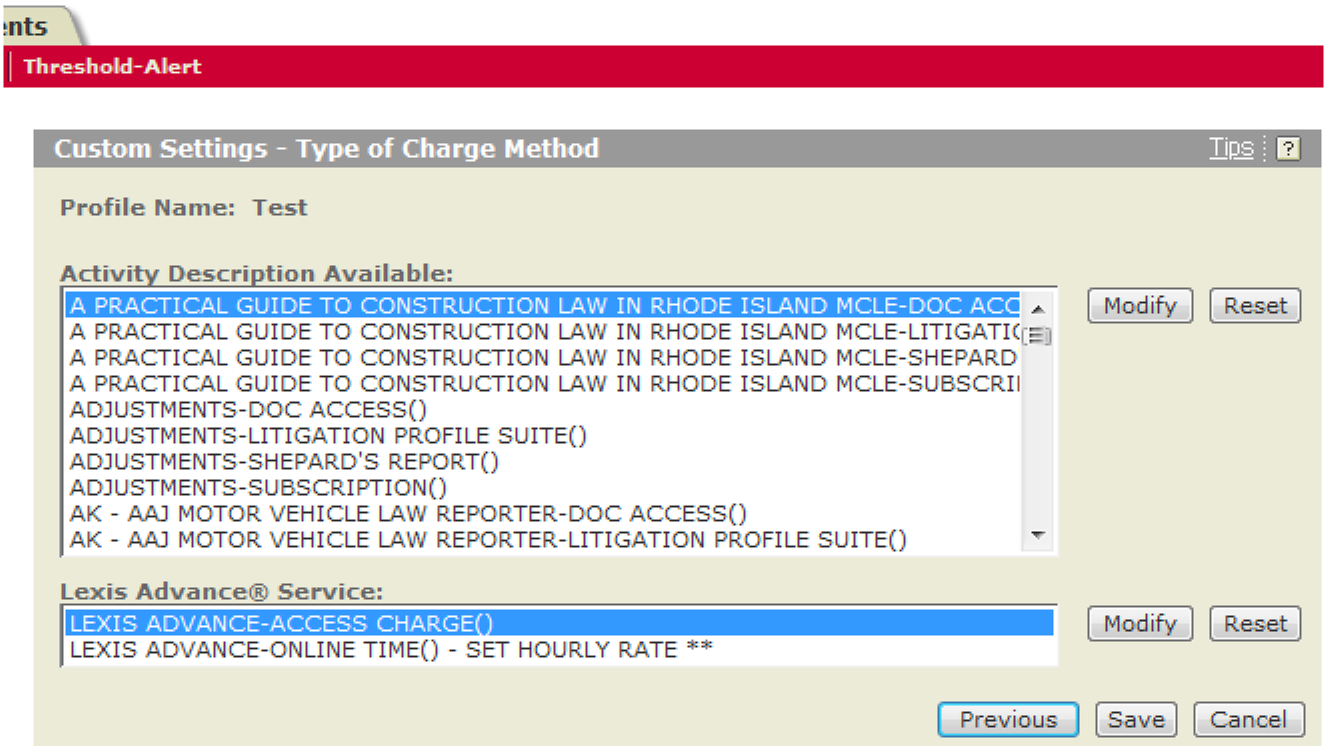


How do I set fixed rates?

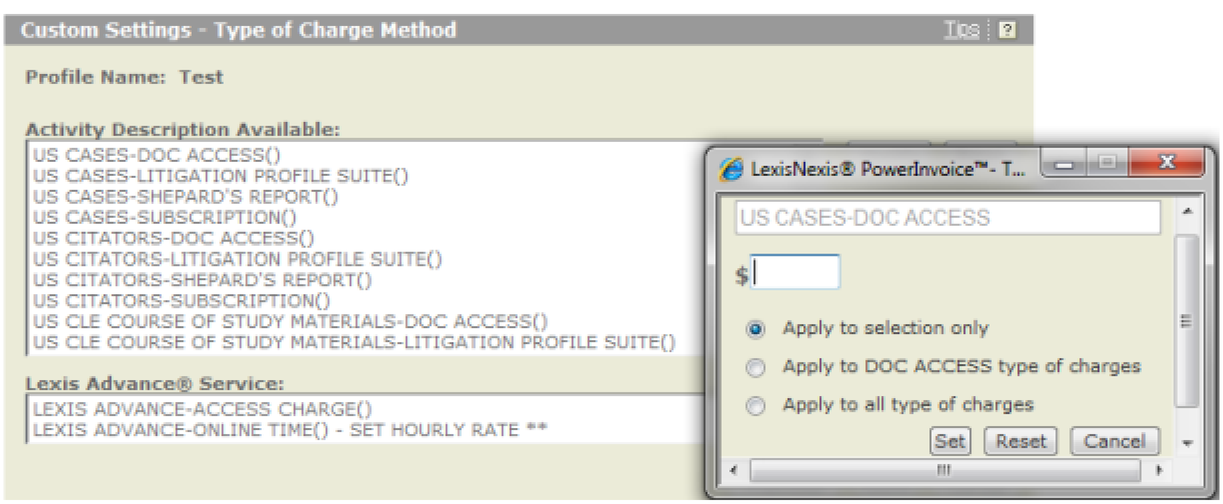
If you've selected the **Set Rate by Type of Charge** Method, you can:

1. Select any Activity Description to set a fixed rate for cost recovery.
2. Highlight any activity description and click **Reset** in order to modify a previously set rate or to reset the rate.
3. Once you have set all desired recovery rates, click **Save** to save your new profile.

Custom Settings - Type of Charge Method



Fixed Rate Pop-up Window



Once you've selected an activity description:

1. Enter the fixed amount you wish to recover for each occurrence of that activity description.

2. Once you've set an amount, click **Set**.
3. Click **Reset** to reset the dollar amount field.

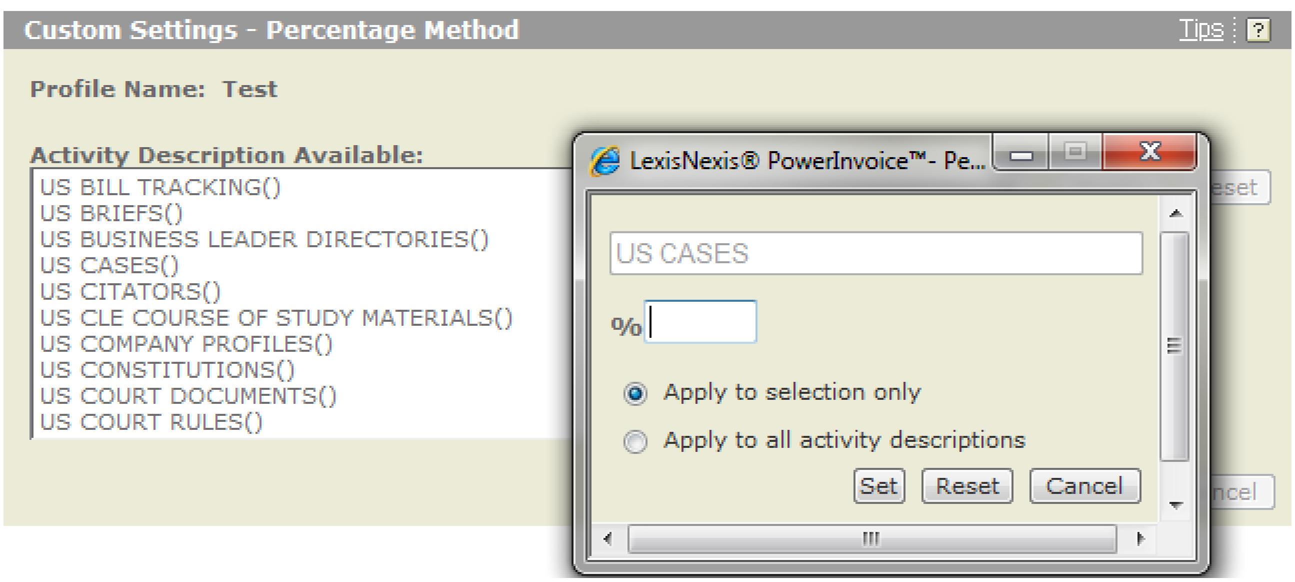
How do I set percentage rates?

If you've selected Set Percentage Rate by Activity Description, you can:

1. Select any activity description to set a proportional rate for cost recovery.[1]
2. Click **Reset** to remove any previously entered dollar amount.
3. Once you have set all desired recovery rates, click **Save** to save your new profile.

Here's what you'll see:

Percentage Pop-up Window



Once you've selected an activity description:

1. Enter the percentage rate you wish to recover for each occurrence of that activity description.
2. Once you've set a percentage rate, click **Set**.

3. Click **Reset** to reset the percentage rate form.

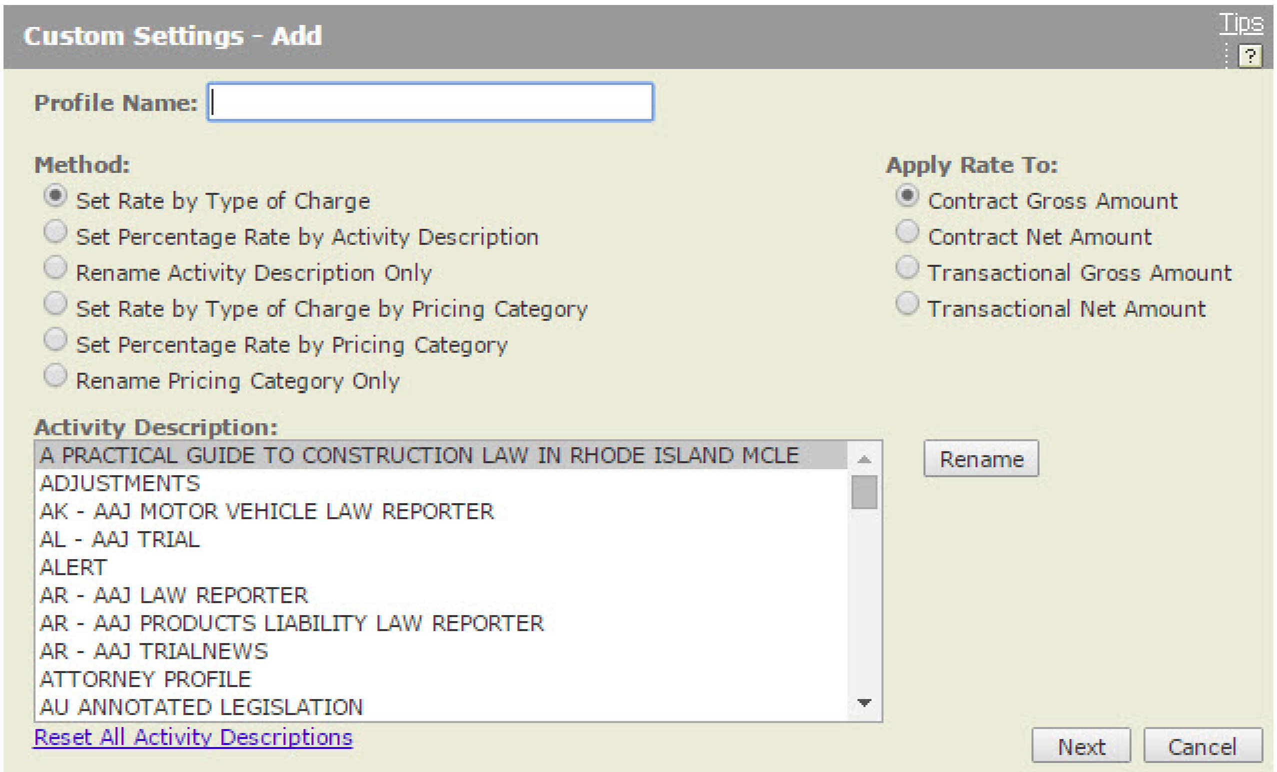
Tip:
The rate you enter indicates the percentage rate you wish to recover, not the discount rate. If you enter 25, you'll recover 25 cents on the dollar; if you enter 125, you'll recover 125 cents on the dollar.

How do I rename activity descriptions?

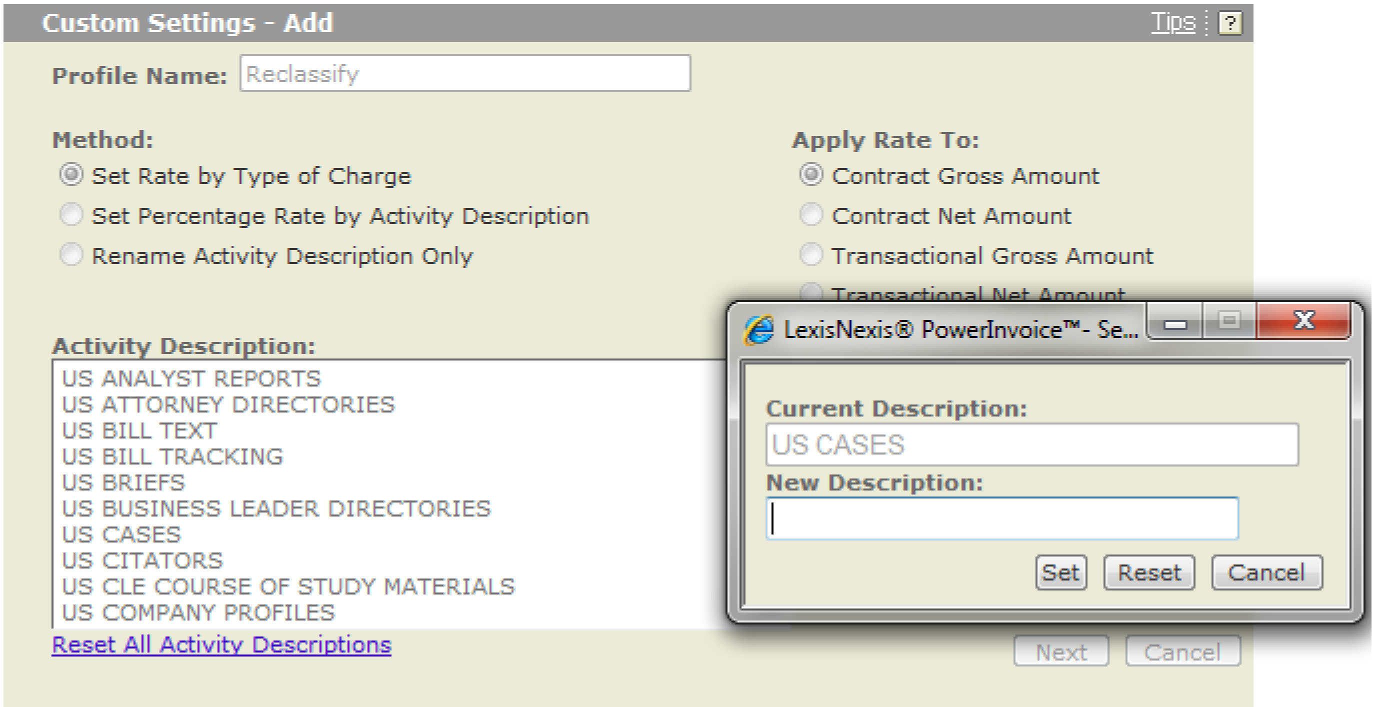
Whether you're setting recovery rates or not, whether you're creating, editing or copying a profile, you can rename any or all Activity Descriptions that appear in your billing system. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis US Codes".

1. Select a activity description to rename and click **Rename**.
2. Once you have renamed all desired activity descriptions, click **Save** to save them.

Custom Settings - Rename



Rename Pop-up Window

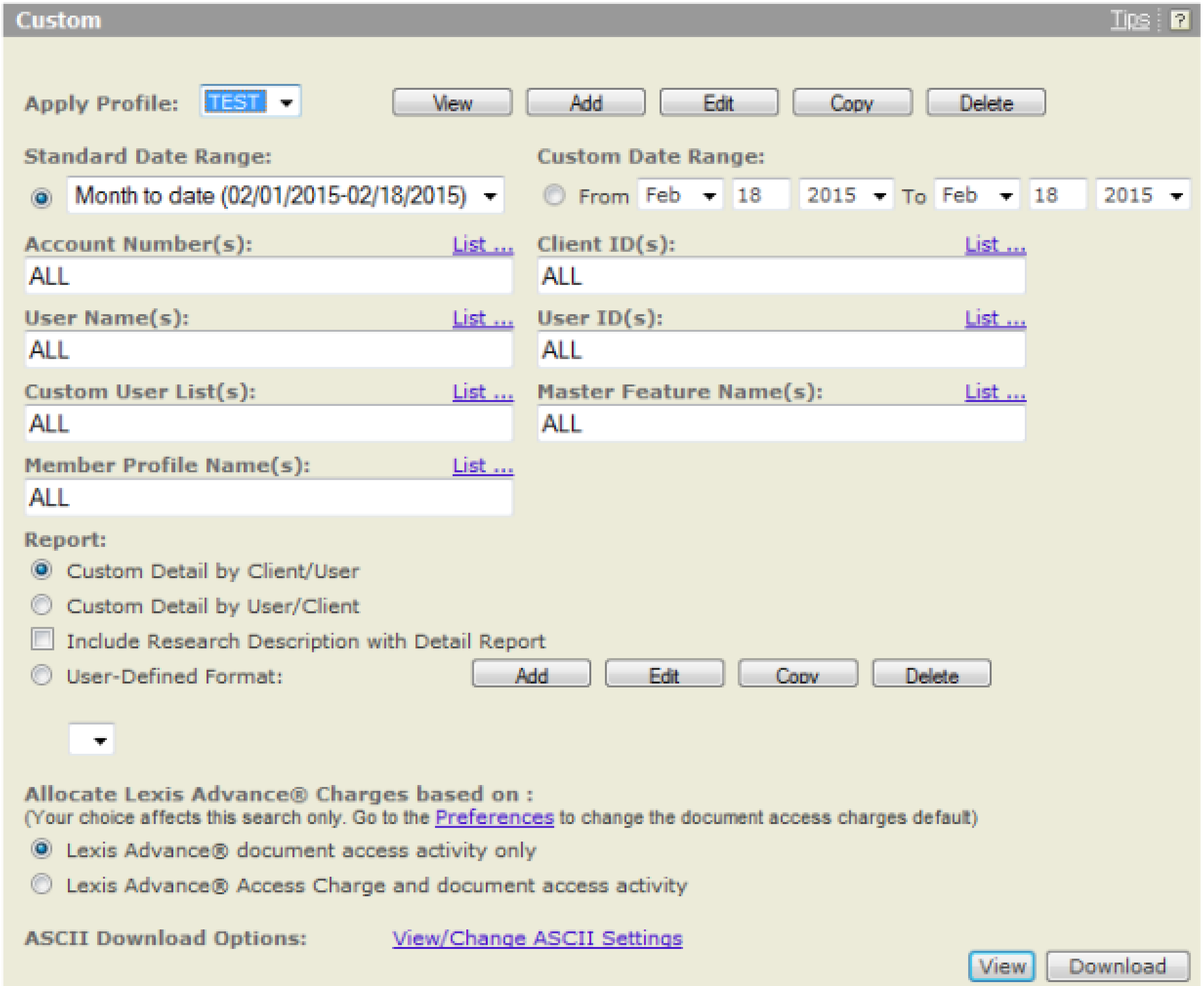


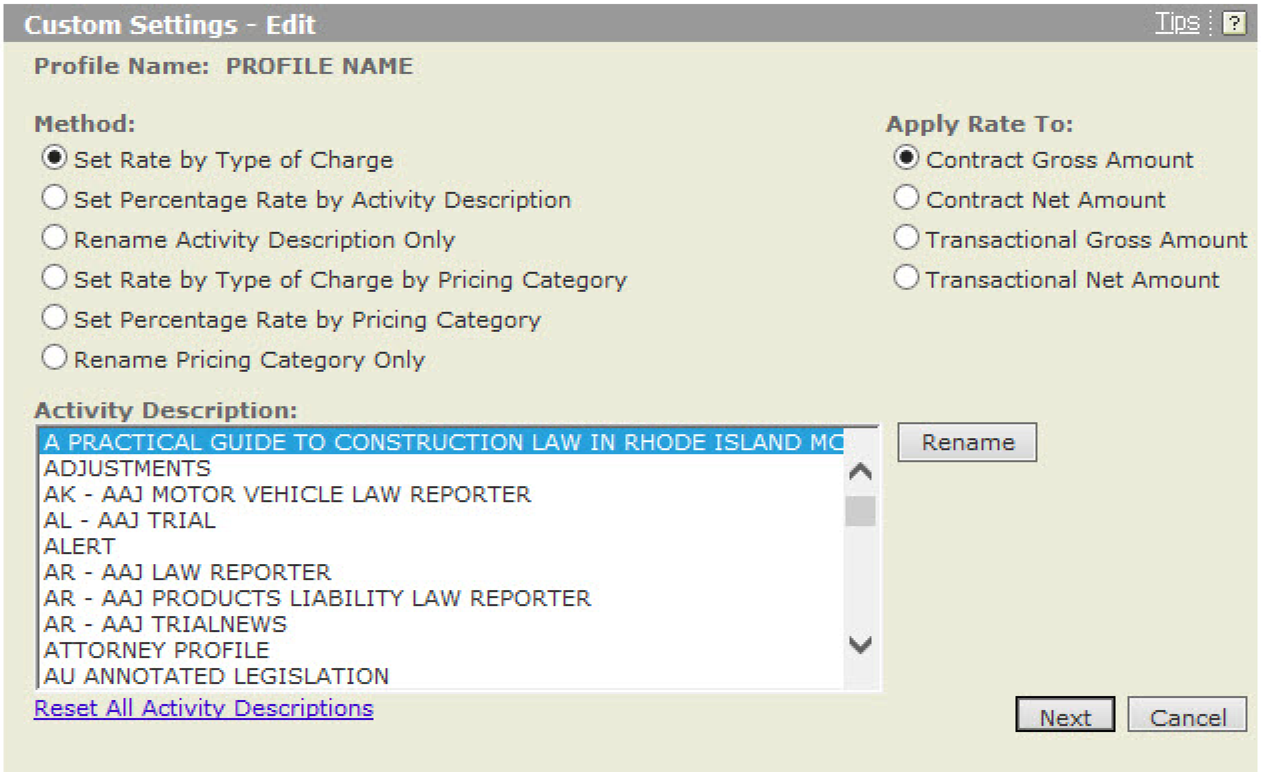
Once you've selected an activity description:

1. Enter a **New Description**.
2. Click **Set** to save.

How do I edit a profile?

1. Select an existing profile.
2. Click **Edit**.
3. Enter a **Profile Name**.
4. Choose the method of recovery.
5. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

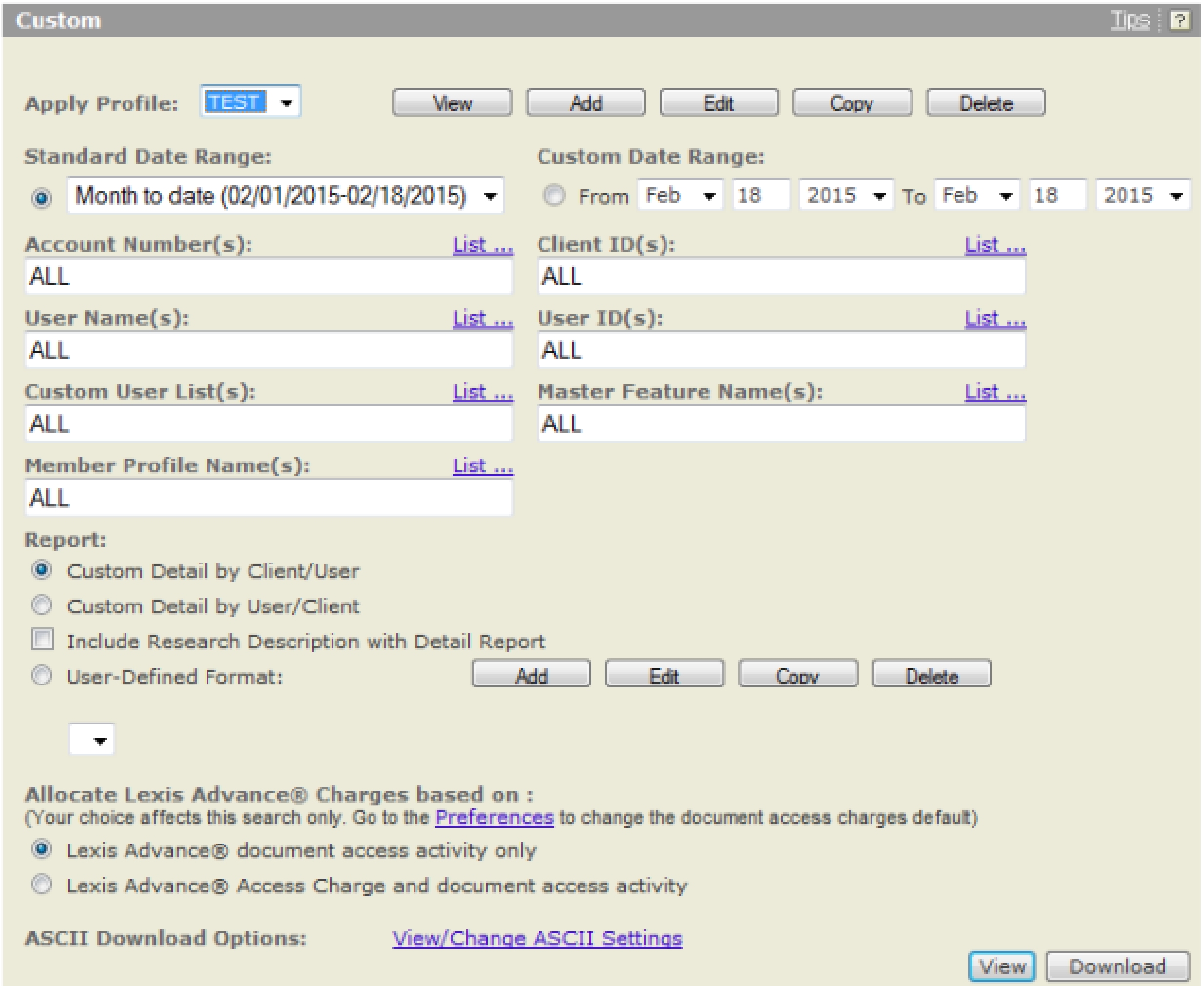

Custom
Tips
Apply Profile: TEST
View
Add
Edit
Copy
Delete
Standard Date Range:
Month to date (02/01/2015-02/18/2015)
Custom Date Range:
From Feb 18 2015 To Feb 18 2015
Account Number(s): List ...
ALL
Client ID(s): List ...
ALL
User Name(s): List ...
ALL
User ID(s): List ...
ALL
Custom User List(s): List ...
ALL
Master Feature Name(s): List ...
ALL
Member Profile Name(s): List ...
ALL
Report:
Custom Detail by Client/User
Custom Detail by User/Client
Include Research Description with Detail Report
User-Defined Format:
Add
Edit
Copy
Delete
Allocate Lexis Advance® Charges based on :
(Your choice affects this search only. Go to the Preferences to change the document access charges default)
Lexis Advance® document access activity only
Lexis Advance® Access Charge and document access activity
ASCII Download Options:
View/Change ASCII Settings
View
Download

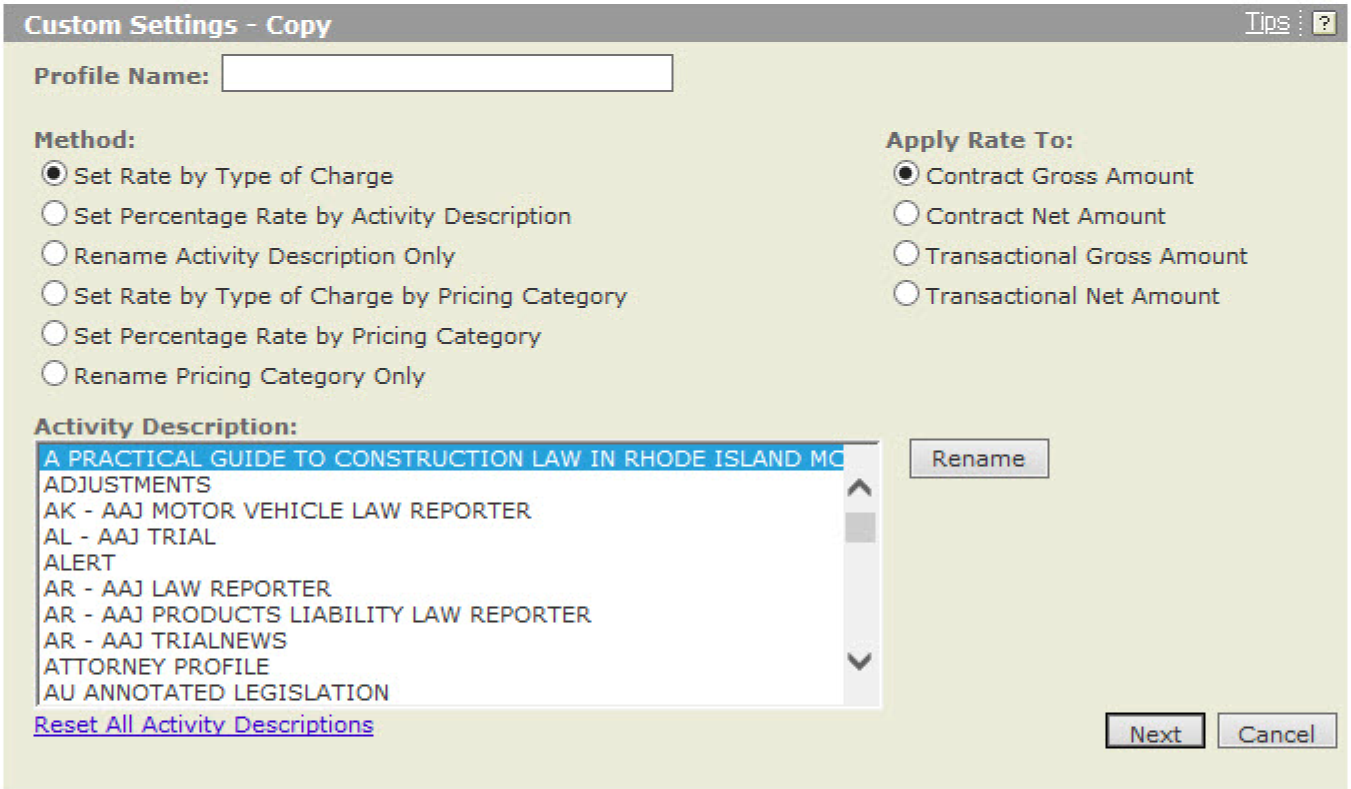

Custom Settings - Edit
Tips
Profile Name: PROFILE NAME
Method:
Set Rate by Type of Charge
Set Percentage Rate by Activity Description
Rename Activity Description Only
Set Rate by Type of Charge by Pricing Category
Set Percentage Rate by Pricing Category
Rename Pricing Category Only
Apply Rate To:
Contract Gross Amount
Contract Net Amount
Transactional Gross Amount
Transactional Net Amount
Activity Description:
A PRACTICAL GUIDE TO CONSTRUCTION LAW IN RHODE ISLAND MC
ADJUSTMENTS
AK - AAJ MOTOR VEHICLE LAW REPORTER
AL - AAJ TRIAL
ALERT
AR - AAJ LAW REPORTER
AR - AAJ PRODUCTS LIABILITY LAW REPORTER
AR - AAJ TRIALNEWS
ATTORNEY PROFILE
AU ANNOTATED LEGISLATION
Rename
Reset All Activity Descriptions
Next
Cancel

How do I copy a profile?

You can make a copy of an existing profile that's close to what you need and then modify it.

1. Select an existing profile.
2. Click **Copy**.
3. Enter a **Profile Name**.
4. Choose the method of recovery.
5. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

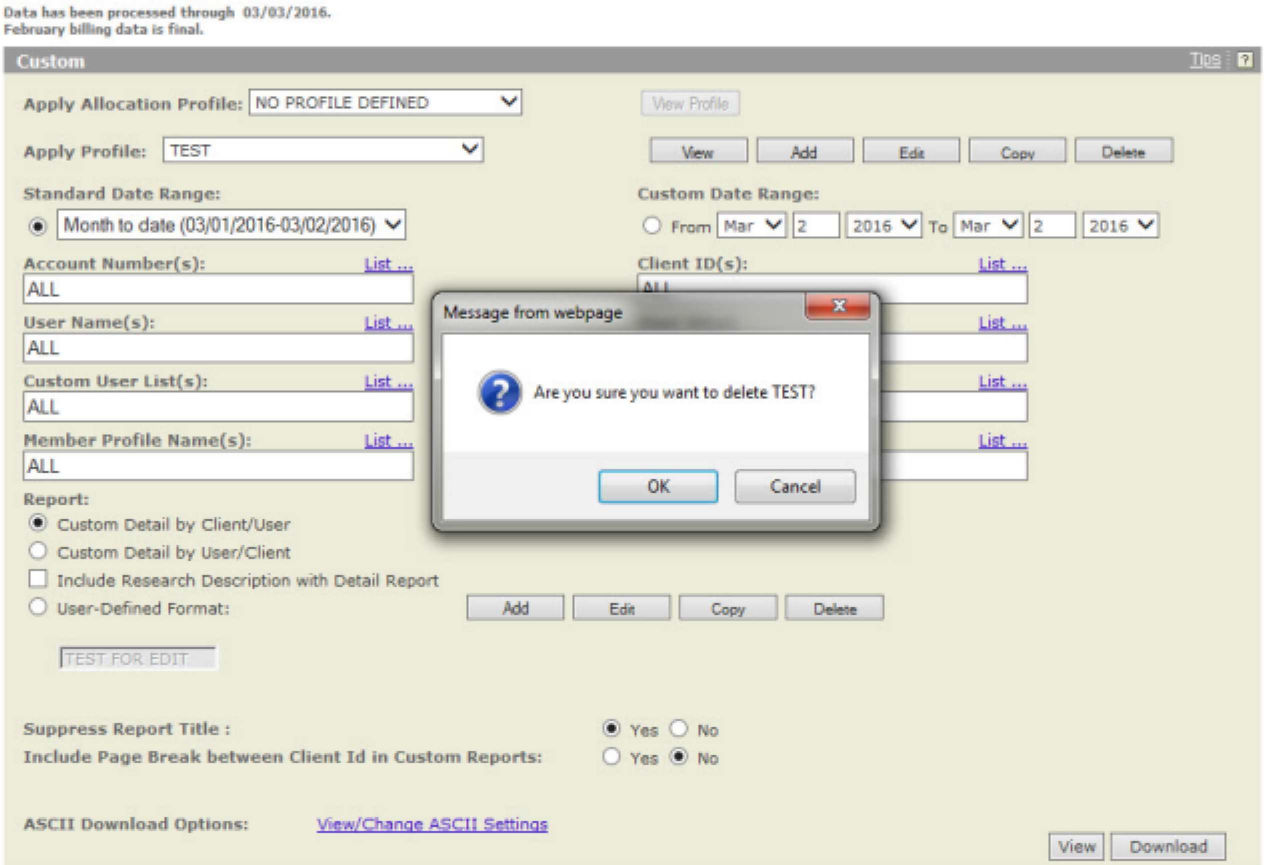

Custom
Tips
Apply Profile:
TEST
View
Add
Edit
Copy
Delete
Standard Date Range:
Month to date (02/01/2015-02/18/2015)
Custom Date Range:
From Feb 18 2015 To Feb 18 2015
Account Number(s):
List ...
ALL
Client ID(s):
List ...
ALL
User Name(s):
List ...
ALL
User ID(s):
List ...
ALL
Custom User List(s):
List ...
ALL
Master Feature Name(s):
List ...
ALL
Member Profile Name(s):
List ...
ALL
Report:
Custom Detail by Client/User
Custom Detail by User/Client
Include Research Description with Detail Report
User-Defined Format:
Add
Edit
Copy
Delete
Allocate Lexis Advance® Charges based on :
(Your choice affects this search only. Go to the Preferences to change the document access charges default)
Lexis Advance® document access activity only
Lexis Advance® Access Charge and document access activity
ASCII Download Options:
View/Change ASCII Settings
View
Download


Custom Settings - Copy
Tips
Profile Name:
Method:
Set Rate by Type of Charge
Set Percentage Rate by Activity Description
Rename Activity Description Only
Set Rate by Type of Charge by Pricing Category
Set Percentage Rate by Pricing Category
Rename Pricing Category Only
Apply Rate To:
Contract Gross Amount
Contract Net Amount
Transactional Gross Amount
Transactional Net Amount
Activity Description:
A PRACTICAL GUIDE TO CONSTRUCTION LAW IN RHODE ISLAND MO
ADJUSTMENTS
AK - AAJ MOTOR VEHICLE LAW REPORTER
AL - AAJ TRIAL
ALERT
AR - AAJ LAW REPORTER
AR - AAJ PRODUCTS LIABILITY LAW REPORTER
AR - AAJ TRIALNEWS
ATTORNEY PROFILE
AU ANNOTATED LEGISLATION
Rename
Reset All Activity Descriptions
Next
Cancel

How do I delete a profile?

If you decide that you no longer need one of your profiles, you can:

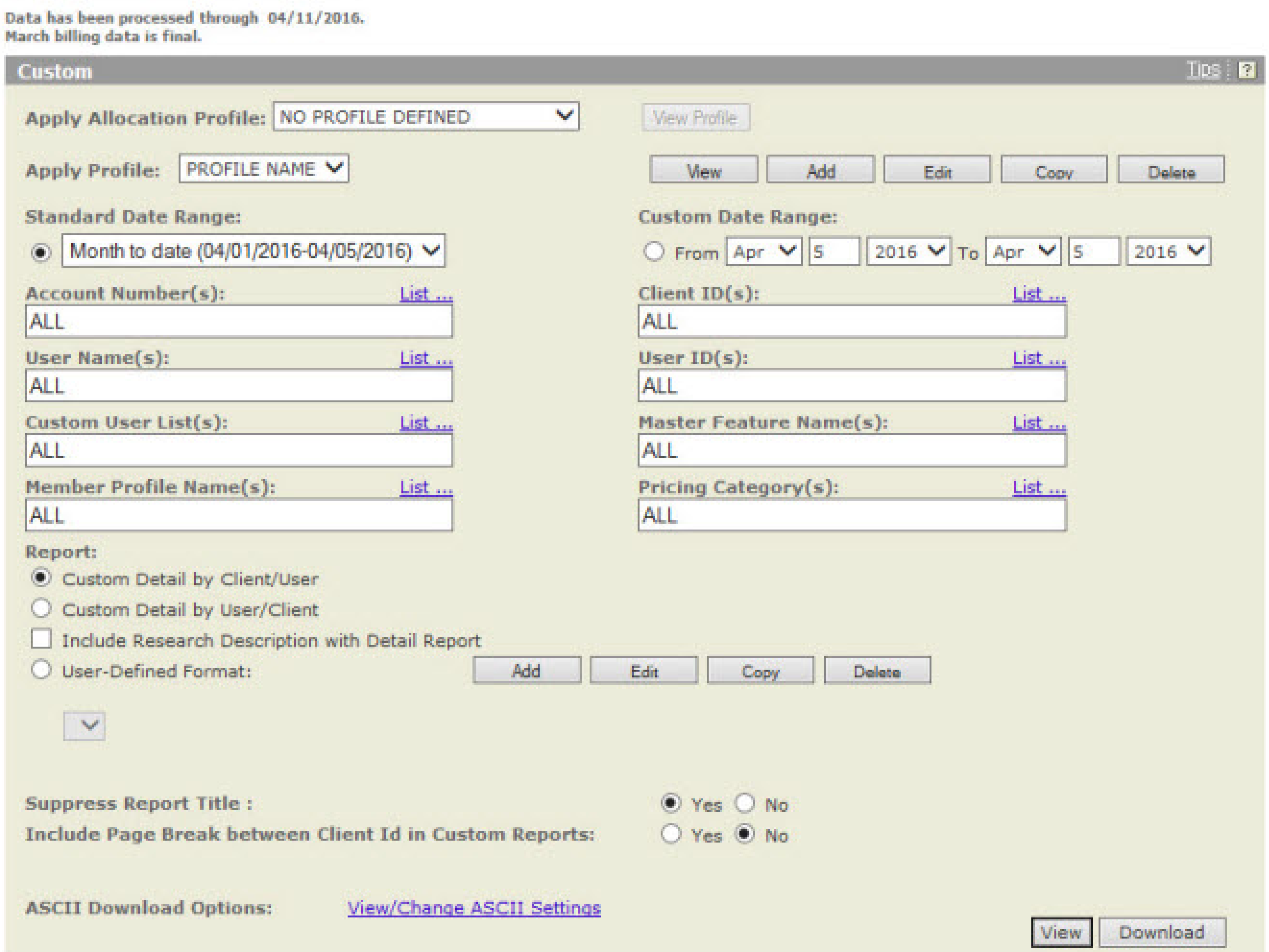
1. Select an existing profile.
2. Click **Delete**.



How do I apply a profile to billing data?

Once you've created one or more custom profiles you can apply one to your billing data.

1. From the list of existing profiles, select the one you want to apply.
2. Choose the date range of the billing data you wish to retrieve - either one of the standard date ranges on the list or a custom date range.
3. (Optional) If desired, choose one or more account numbers, client IDs, user names, and/or user IDs.
4. Select the report to run.
5. Click the **View/Change ASCII Settings** link to modify those settings.
6. Once you've made all your selections, click **View** to view your billing data with your selected profile applied.
7. Once you've made your selections, click **Download** to download your billing data with your selected profile applied.



1 You may not set percentage rates for recovery of costs for citator services.

User-Defined Reports

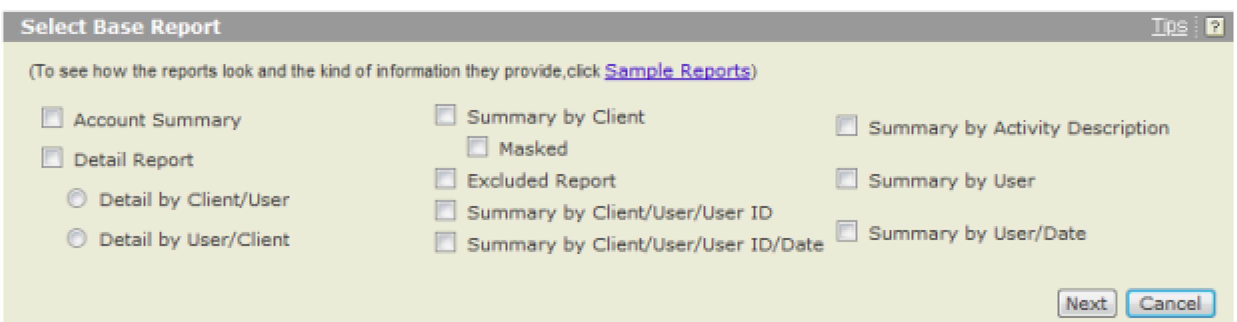
How do I create a report format?

You have the option of structuring your own report format using the User-Defined Reports page.

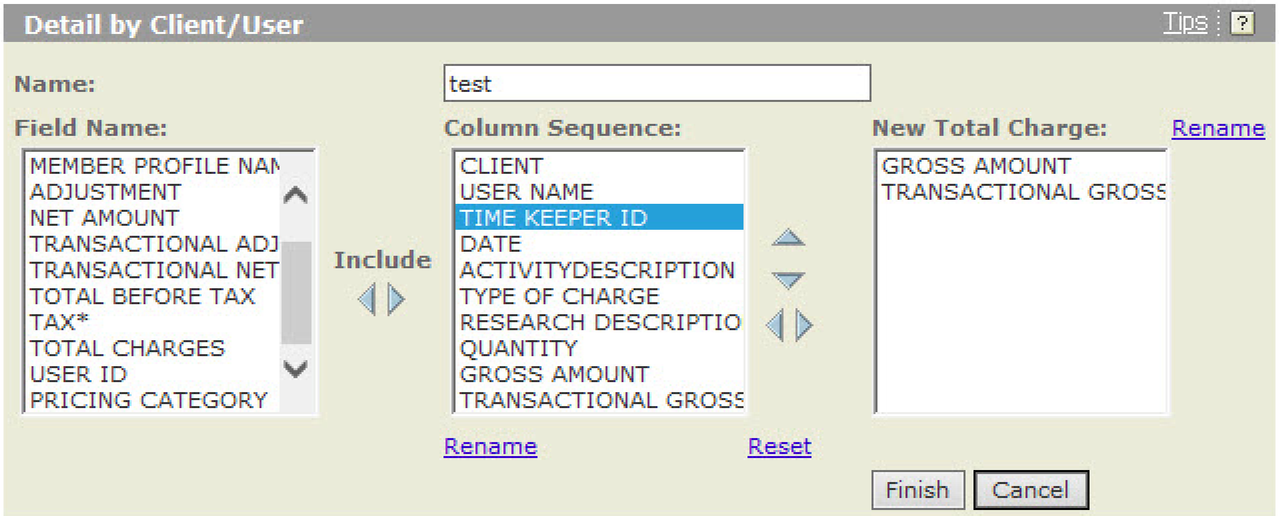
1. Click **Add** to create a new user-defined report format. The Select Base Report page appears, as shown below.
2. Select the desired PowerInvoice report.
3. Click **Next** to continue with creating a user-defined layout. The Detail by Client/User page appears, as shown below.
4. Provide a name for the user-defined layout.
5. Select data columns to include in the layout.
6. Click the right or left arrow to add or remove columns in the report.
7. Highlight the column name; then click the up or down arrow to set the order of the columns.
8. Double-click the field name or click **Rename** to change the column header.
9. If you select **Rename**, enter the new column header name.
10. Click **OK** to save the new header name.
11. The new column name appears in parentheses next to the old name.
12. Click **Finish** to complete the task.

Note:
A new Total Charge column is available in your user-defined reports.

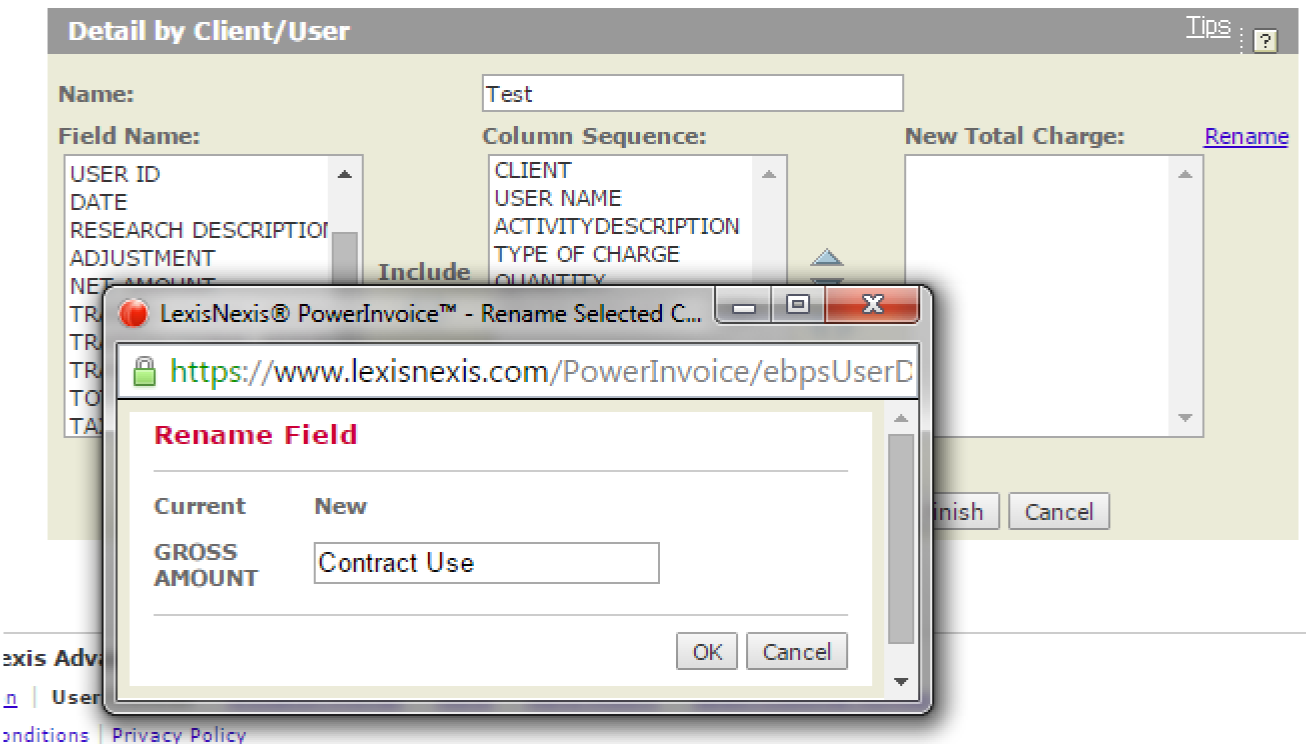
Select Base Report



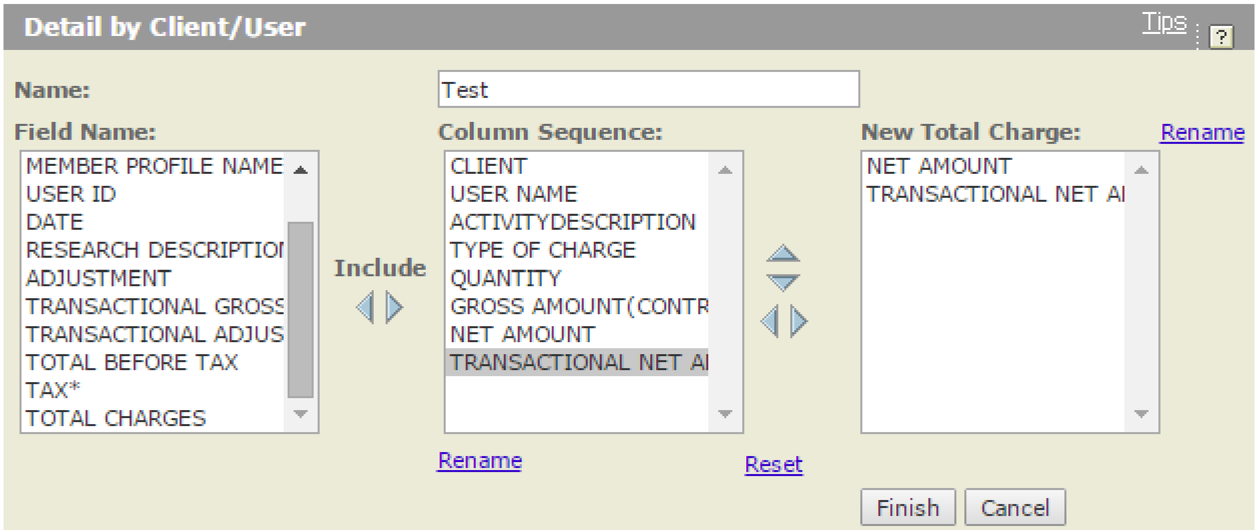
Detail by Client/User



Rename Field

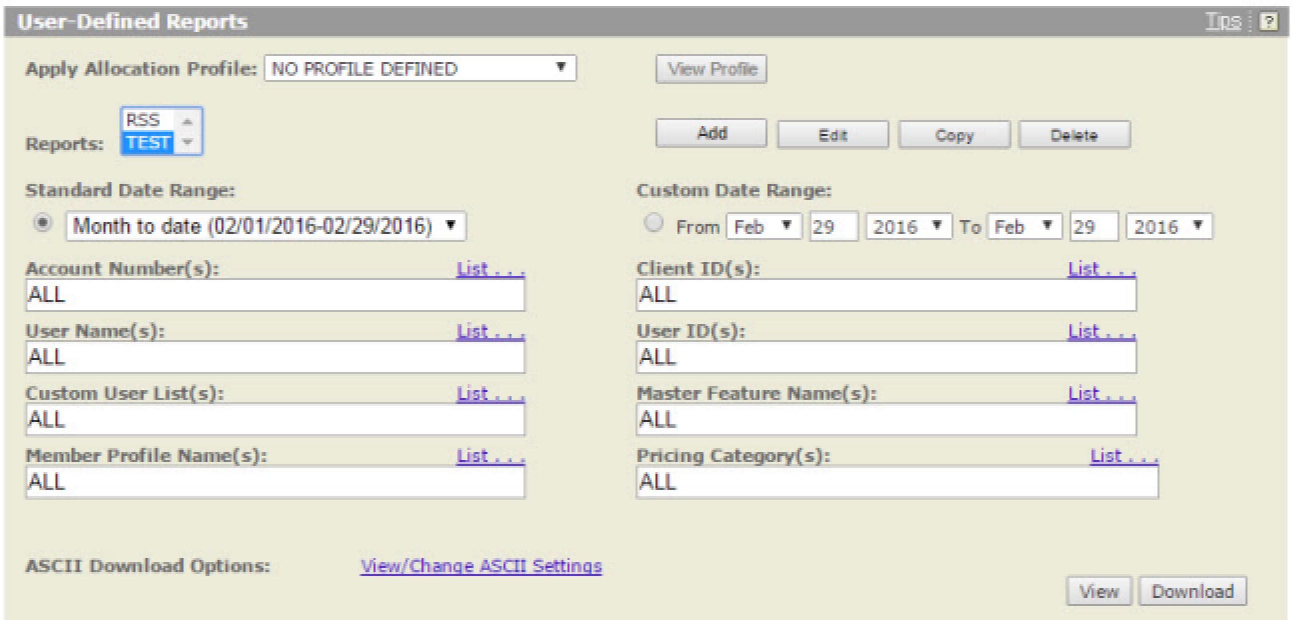


Detail by Client/User - Resequenced


Detail by Client/User
Tips
?
Name:
Test
Field Name:
MEMBER PROFILE NAME
USER ID
DATE
RESEARCH DESCRIPTIOI
ADJUSTMENT
TRANSACTIONAL GROSS
TRANSACTIONAL ADJUS
TOTAL BEFORE TAX
TAX*
TOTAL CHARGES
Include
Column Sequence:
CLIENT
USER NAME
ACTIVITYDESCRIPTION
TYPE OF CHARGE
QUANTITY
GROSS AMOUNT(CONTR
NET AMOUNT
TRANSACTIONAL NET AI
Rename
Reset
New Total Charge:
Rename
NET AMOUNT
TRANSACTIONAL NET AI
Finish
Cancel

How do I view or download information from user-defined reports?

1. Select the **User-Defined** tab to view your reports.
2. Highlight the report name that you wish to view.
3. Select a date range.
4. Click the **View/Change ASCII Settings** link to modify those settings.
5. Choose an option:
   - Click **View** to view the user-defined layout
   - Click Download to download directly to your PC



Help

When you have questions about using the LexisNexis® online services, you can:

- Click the **Help** link at the top-right corner of the screen for comprehensive help that can remain open while you're using the PowerInvoice service
- Call LexisNexis Customer Support at 1-800-543-6862