LexisNexis® PowerInvoice™ User Guide for Corporate/ Government

February 07, 2017

Contents

Getting Started with PowerInvoice

The PowerInvoice service brings current, comprehensive LexisNexis® billing data to your desktop. With secured access via the Internet, LexisNexis legal research billing has never been easier. The PowerInvoice service maintains 24 full months of billing information.

What You'll Need to Use PowerInvoice

In order to use the PowerInvoice service, you'll need to:

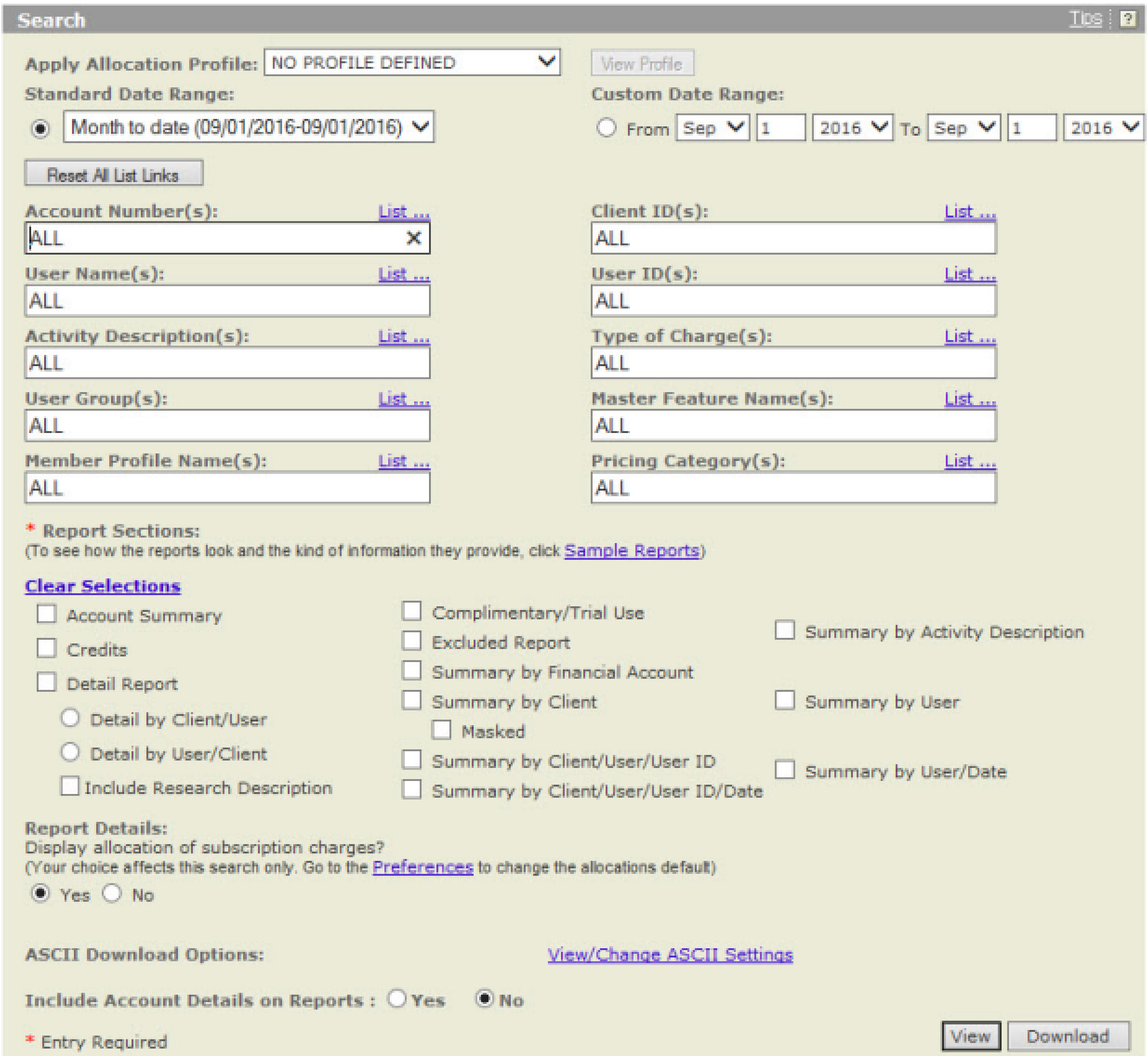
- Have LexisNexis PowerInvoice authorizations assigned to your Lexis Advance® ID
- Use one of these browsers or a higher version:
  - Microsoft® Internet Explorer® 11 on Windows® 8.1
  - Microsoft Internet Explorer 8 on Windows 7
  - Google™ Chrome™ 32.x
  - Firefox® 26.x
  - Safari® 7.x on Mac® OS 10.x

  These browsers are no longer supported:
  - Microsoft Internet Explorer 6.0
  - Microsoft Internet Explorer 7.0

How do I get started using PowerInvoice?

1. Open your browser and enter the PowerInvoice URL (www.lexisnexis.com/NewPowerInvoice) in the address field (or click the link from My Lexis™ to LexisNexis PowerInvoice.
2. Enter your ID and password and click **Sign In**.

Here's what you'll see:



On this page, you can:

- Choose from the available options on this page to retrieve reports showing document access, access charge, and other LexisNexis Activity Description charges.
- Click the **Reset All List Link** button to change the value on each option to "All".
- Click the **Preferences** link at the top of the page to change the way your reports are displayed. For example, you can change the default format for downloaded files.
- Click the **Sign Out** link to leave PowerInvoice.
- Click the **Help** link for complete information about how to use the service.

Legal Credits

Working with Billing Data

The LexisNexis PowerInvoice service gives you instant access to up to 24 months (plus the current month) of LexisNexis billing data for your organization. Just fill out a PowerInvoice search form to locate the one or more billing reports you want to retrieve. You can then browse through them online, print a copy of the ones you want or download the data to your PC.

How do I find billing data?

1. Choose options to find and format your report:
   - Review the date through which billing data is available above the gray bar.
   - Select a **Standard Date Range** to find billing data for a specified date range. You can select month to date; a single week in the past few weeks; any complete month within the previous twelve months; or a customized date range.
   - Click the **List...** link next to **Account Numbers** to see a list of possible sub-accounts.
   - Click the **Sample Reports** link to see how various reports look and what data they provide.
   - Click the **Clear Selections** link to clear all report sections selected.
   - Use the checkboxes to choose the report sections depending on the type of data you want to receive. (If your organization uses client masking and you need to see client IDs in the masked format, be sure to click "Masked".)
   - Use the **Report Details** options to choose whether to display allocation of subscription charges.
   - Choose whether or not you'd like to **Suppress Report Title**.
   - Click the **View/Change ASCII Settings** link to choose a download format.

     Note:
     If you have viewed or changed ASCII settings and you have entered a custom date range, please verify the values that you entered have been retained. If they have not, you will need to select them again.

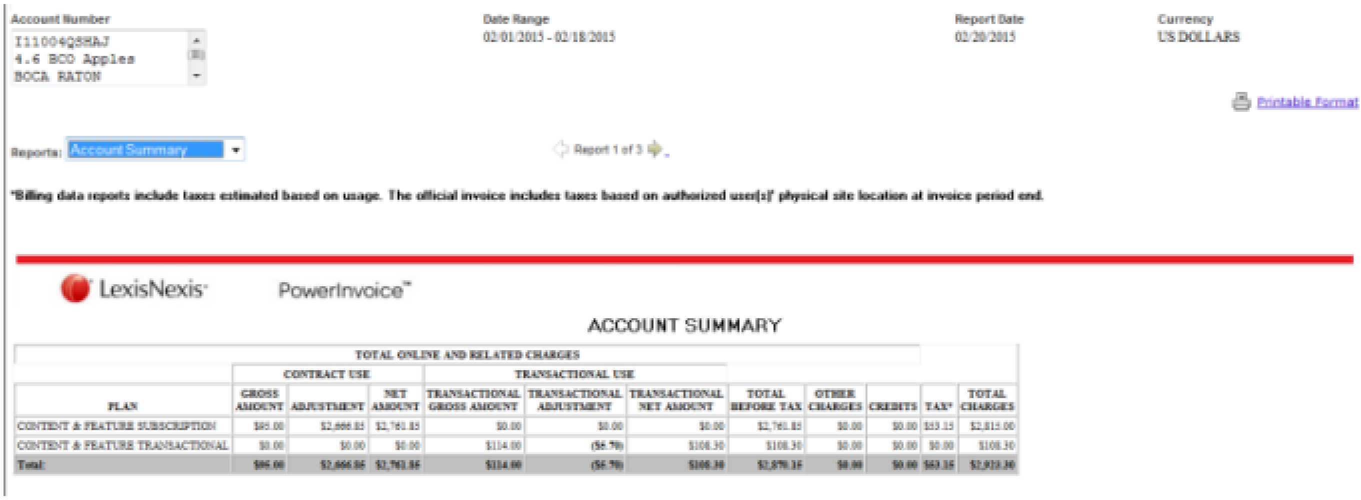
   - Select your preference for **Include Account Details on Reports**. This includes the following additional information for the financial account at the bottom of your report: Name, Number, Place of Business/Address
2. Once you've made your selections, choose how you want to work with your report:
   - Click **View** to view the reports online.
   - Click **Download** to save the reports to your desired location.

How do I view billing data?

A retrieved billing report will look similar to the one below. At this point, you're ready to manage your billing data.

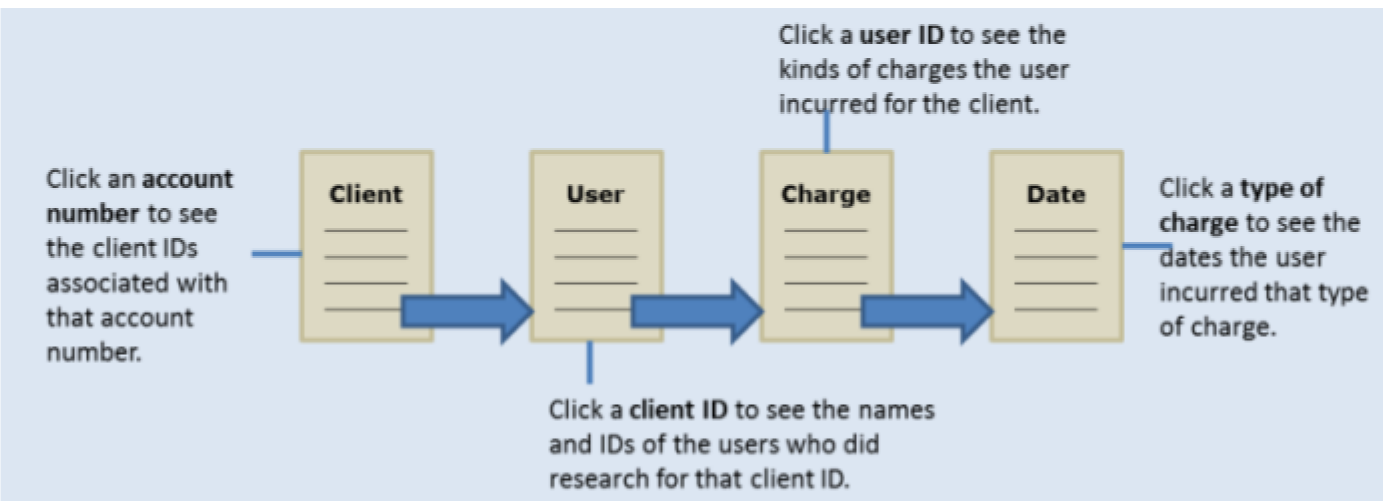
Options available while viewing billing data include:

- Click the **Save As Alert** link to save your billing search as an Alert.
- Use the **Reports** drop-down list to go directly to any report.
- Click the forward or back arrows to go directly to the next or previous report.



	TOTAL ONLINE AND RELATED CHARGES										
	CONTRACT USE			TRANSACTIONAL USE							
PLAN	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT	TOTAL BEFORE TAX	OTHER CHARGES	CREDITS	TAX*	TOTAL CHARGES
CONTENT & FEATURE SUBSCRIPTION	$95.00	$2,666.85	$2,761.85	$0.00	$0.00	$0.00	$2,761.85	$0.00	$0.00	$53.15	$2,815.00
CONTENT & FEATURE TRANSACTIONAL	$0.00	$0.00	$0.00	$114.00	($5.70)	$108.30	$108.30	$0.00	$0.00	$0.00	$108.30
Total:	$95.00	$2,666.85	$2,761.85	$114.00	($5.70)	$108.30	$2,870.15	$0.00	$0.00	$53.15	$2,923.30

The billing data you retrieve may contain several layers of data. The visual cue that can unfold more detail is the magnifying glass. This appears in front of any report category with more data. You can move through these layers easily by clicking the magnifying glass.

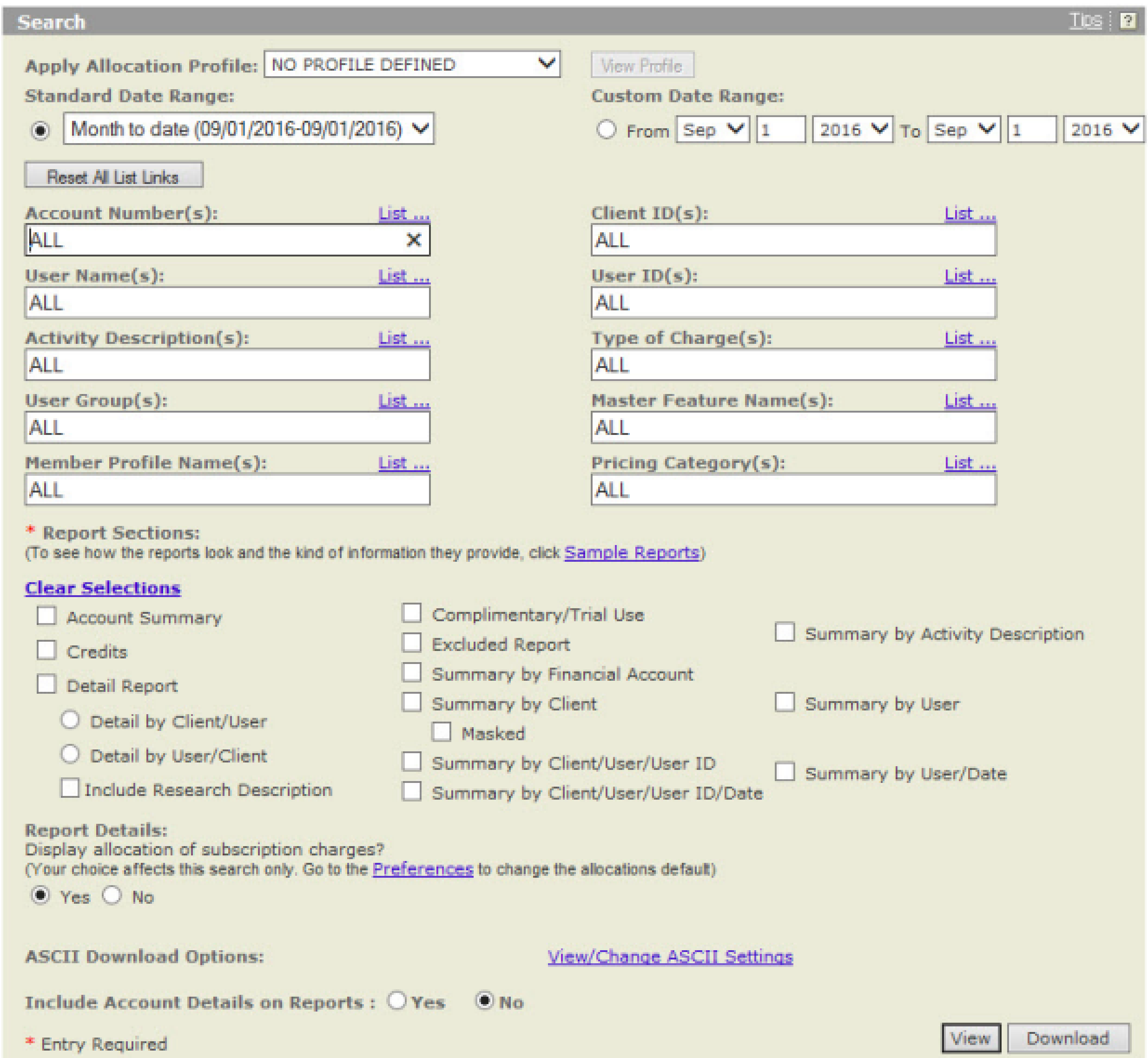


How do I download a billing report?

You can download billing reports to your PC so you can print or manage your data. Once you've made your selections:

- Click **Download** to proceed with the report download.
- Select one or more reports to download using the **Range** options.
- Click the **Reset All List Link** button to change the value on each option to "All".
- Choose a **Download Format**.
- Click the **View/Change ASCII Settings** link, if desired.
- Select your preference for **Include Account Details on Reports**. This includes the following additional information for the financial account at the bottom of your report: Name, Number, Place of Business/Address
- Click **Download**.

Tip:
To print billing reports, either download the report first or use the Printable Format feature.



How do I email or print a report?

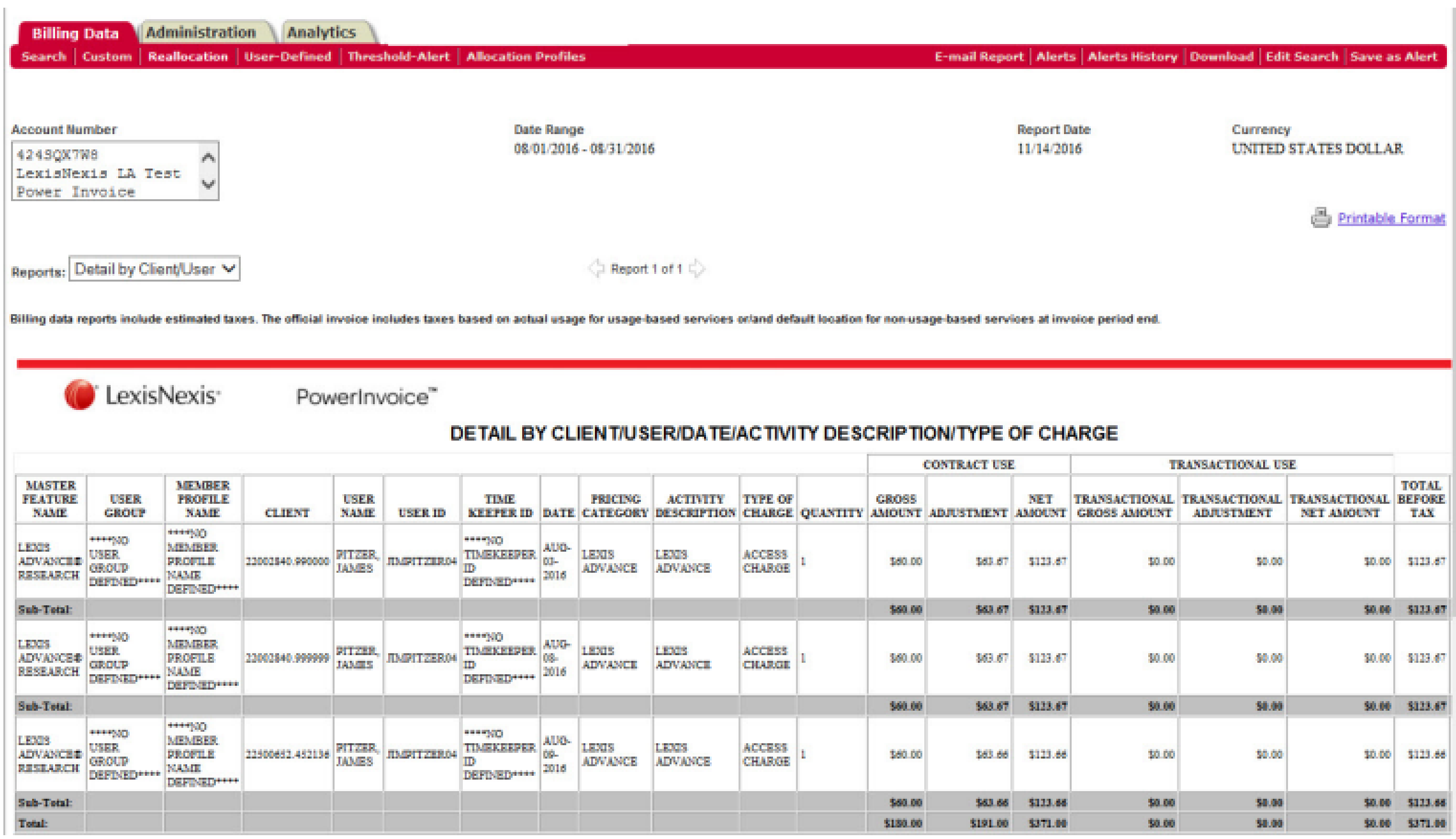
1. To send a PowerInvoice report to one or more individuals, click **Email Report**.
2. Enter email information, such as email address, subject and a message.
3. Select to compress the data file.
4. Select the format in which to send the report.
5. Click **Send Email** to send the report
6. Click **Printable Format** to generate a report in a printer-friendly layout.

Alerts

How do I save an alert?

Once you find the appropriate billing data, you can save the billing search as an Alert to receive automatic updates.

1. Click **Save as Alert**.
2. Enter a name for the Alert.
3. Select an update frequency for your Alert results using the options under **Schedule Alert**.
4. Choose whether or not you want to receive a monthly data file.
5. Choose whether or not you want to receive the Alert file compressed or uncompressed (no zip software provided).
6. Select an email attachment format using the drop-down list.
7. Enter the **To**, **Subject**, and **Message** information.
8. Select **Finished** to save the Alert.



MASTER FEATURE NAME	USER GROUP	MEMBER PROFILE NAME	CLIENT	USER NAME	USER ID	TIME KEEPER ID	DATE	PRICING CATEGORY	ACTIVITY DESCRIPTION	TYPE OF CHARGE	QUANTITY	CONTRACT USE: GROSS AMOUNT	CONTRACT USE: ADJUSTMENT	CONTRACT USE: NET AMOUNT	TRANSACTIONAL USE: TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL USE: TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL USE: TRANSACTIONAL NET AMOUNT	TOTAL BEFORE TAX
LEXIS ADVANCE® RESEARCH	****NO USER GROUP DEFINED****	****NO MEMBER PROFILE NAME DEFINED****	22002840.990000	PITZER, JAMES	JIMPITZER04	****NO TIMEKEEPER ID DEFINED****	AUG-03-2016	LEXIS ADVANCE	LEXIS ADVANCE	ACCESS CHARGE	1	$60.00	$63.67	$123.67	$0.00	$0.00	$0.00	$123.67
Sub-Total:												$60.00	$63.67	$123.67	$0.00	$0.00	$0.00	$123.67
LEXIS ADVANCE® RESEARCH	****NO USER GROUP DEFINED****	****NO MEMBER PROFILE NAME DEFINED****	22002840.999999	PITZER, JAMES	JIMPITZER04	****NO TIMEKEEPER ID DEFINED****	AUG-08-2016	LEXIS ADVANCE	LEXIS ADVANCE	ACCESS CHARGE	1	$60.00	$63.67	$123.67	$0.00	$0.00	$0.00	$123.67
Sub-Total:												$60.00	$63.67	$123.67	$0.00	$0.00	$0.00	$123.67
LEXIS ADVANCE® RESEARCH	****NO USER GROUP DEFINED****	****NO MEMBER PROFILE NAME DEFINED****	22500652.452136	PITZER, JAMES	JIMPITZER04	****NO TIMEKEEPER ID DEFINED****	AUG-09-2016	LEXIS ADVANCE	LEXIS ADVANCE	ACCESS CHARGE	1	$60.00	$63.66	$123.66	$0.00	$0.00	$0.00	$123.66
Sub-Total:												$60.00	$63.66	$123.66	$0.00	$0.00	$0.00	$123.66
Total:												$180.00	$191.00	$371.00	$0.00	$0.00	$0.00	$371.00

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reshold-Alert

1 - 3 of 3

Alert Name	Status	Frequency
FIRST_ALERT_46	A	D
I11004QSIPO TEST ALERT	A	D
MID_ALERT	A	D

1 - 3 of 3

View/Update Alert Parameters Tips ?

Alert Name:	I11004QSIPO TEST ALERT
Account Group:	I11004QSIPO
Customer #s:	I11004QSIPO
Reports Selected	Detail by Client/User
Created Date:	20-FEB-15
Last Modified Date:	20-FEB-15
Schedule Report:	Daily
Monthly Data File:	No
Data File Sent:	Uncompressed
Email Attachment Format:	HTML
Send Report To:	jim.pitzer@lexisnexis.com

Suspend Alert:

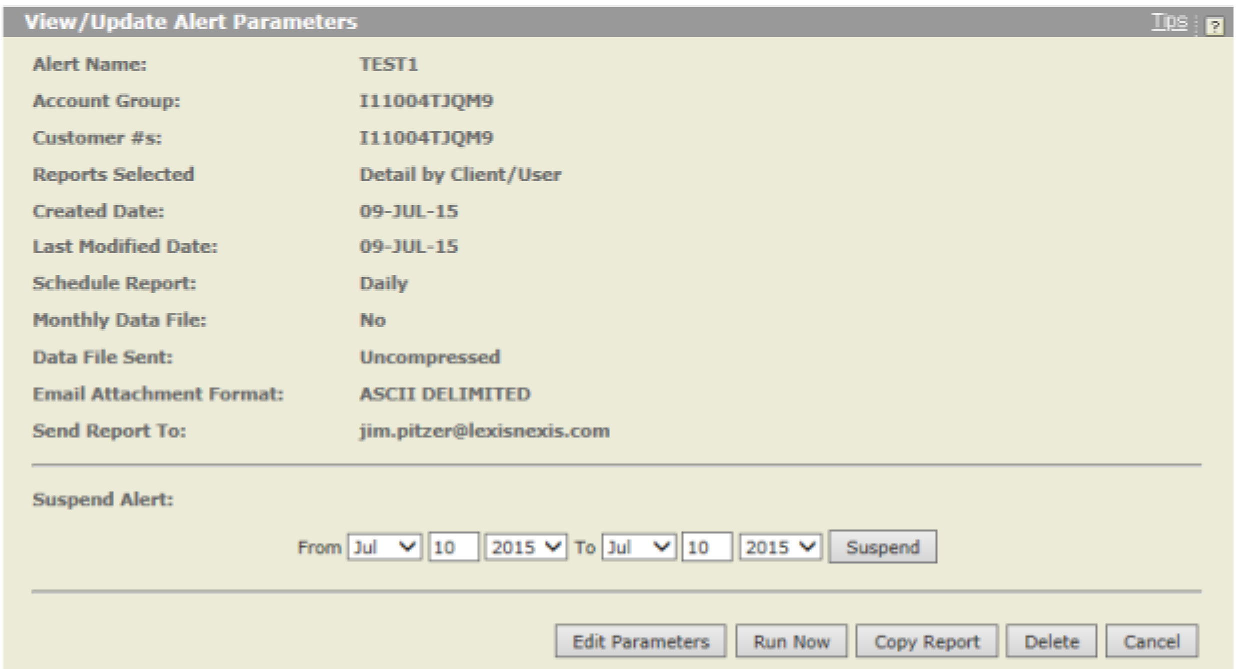
From Feb 21 2015 To Feb 21 2015 [Suspend]

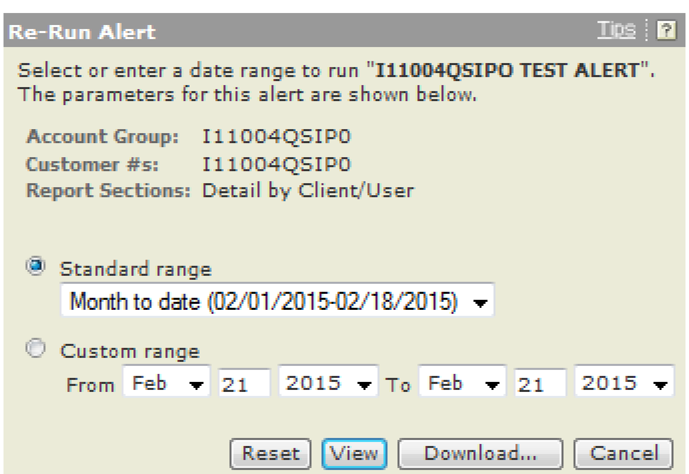
[Edit Parameters] [Run Now] [Copy Report] [Delete] [Cancel]

How do I view a saved alert?

You can view and make changes to any of your saved Alerts at any time.

1. Click **Alerts** to see a list of saved Alerts.
2. Click an Alert Name to view the report settings. Alert Name, Status and Frequency are displayed.
3. Select an **Alert Name** to see the report settings. The next screen displays the parameters for the Alert you selected.
4. To suspend an Alert for a specified period, enter a date range and click Suspend.
5. Click **Edit Parameters** to change any of the settings.



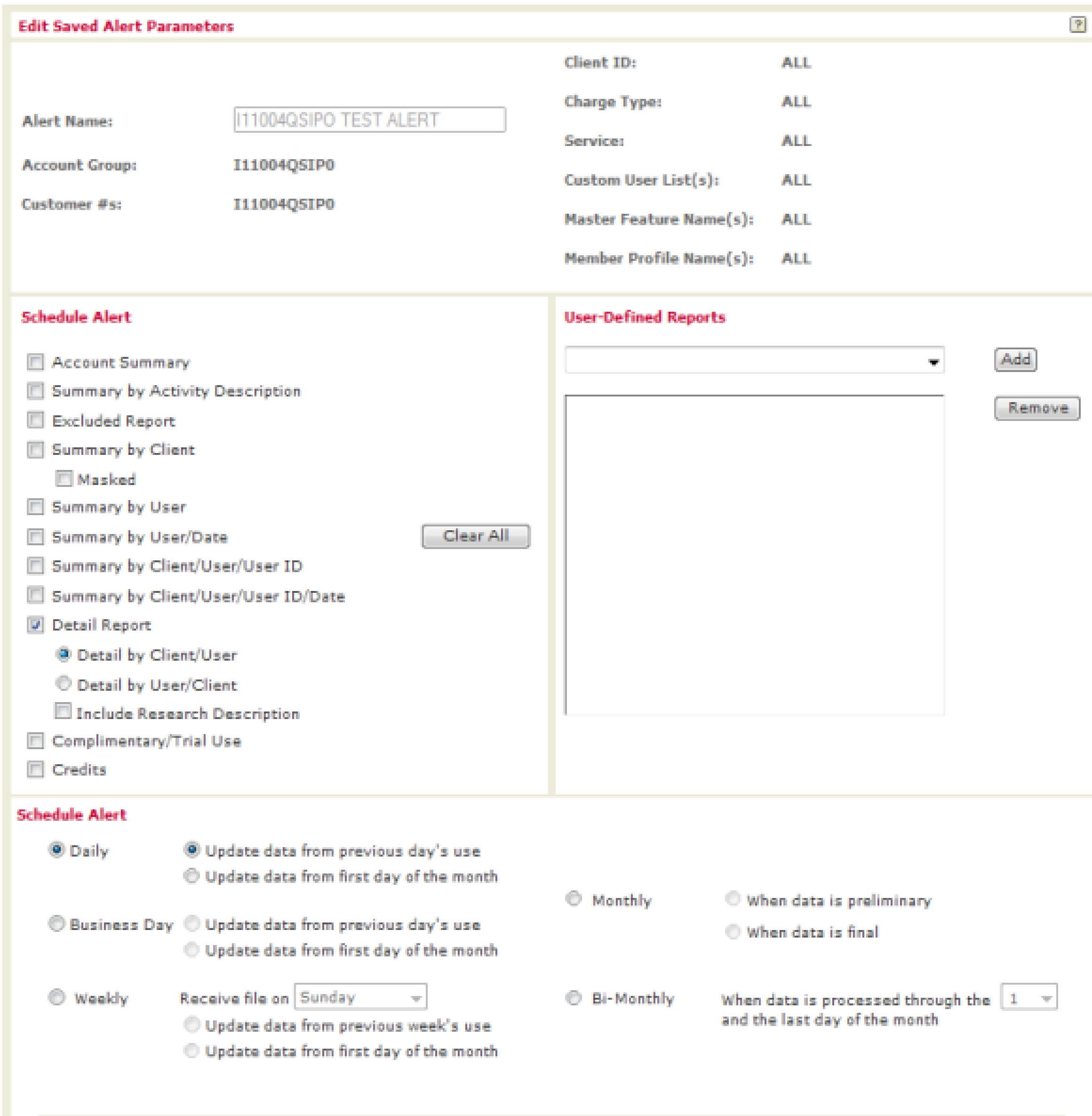


How do I edit saved alert parameters?

After selecting Edit Parameters, you can edit the parameters of a saved Alert.

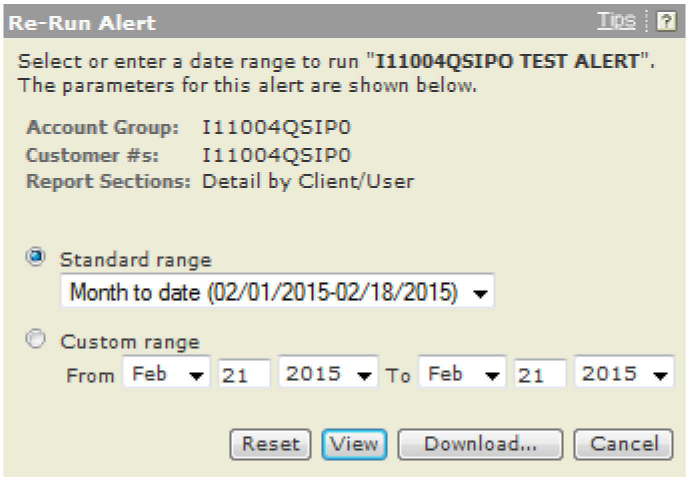
You can view or modify:

- Select a new report.
- Change Alert update frequency.
- Select whether you want to receive the file compressed and specify a download format.
- Change the report's recipients, subject, or message.
- Select **Finished** to save the Alert.



How do I update an alert?

You can choose to update Alert results at any time by clicking **Run Now**.

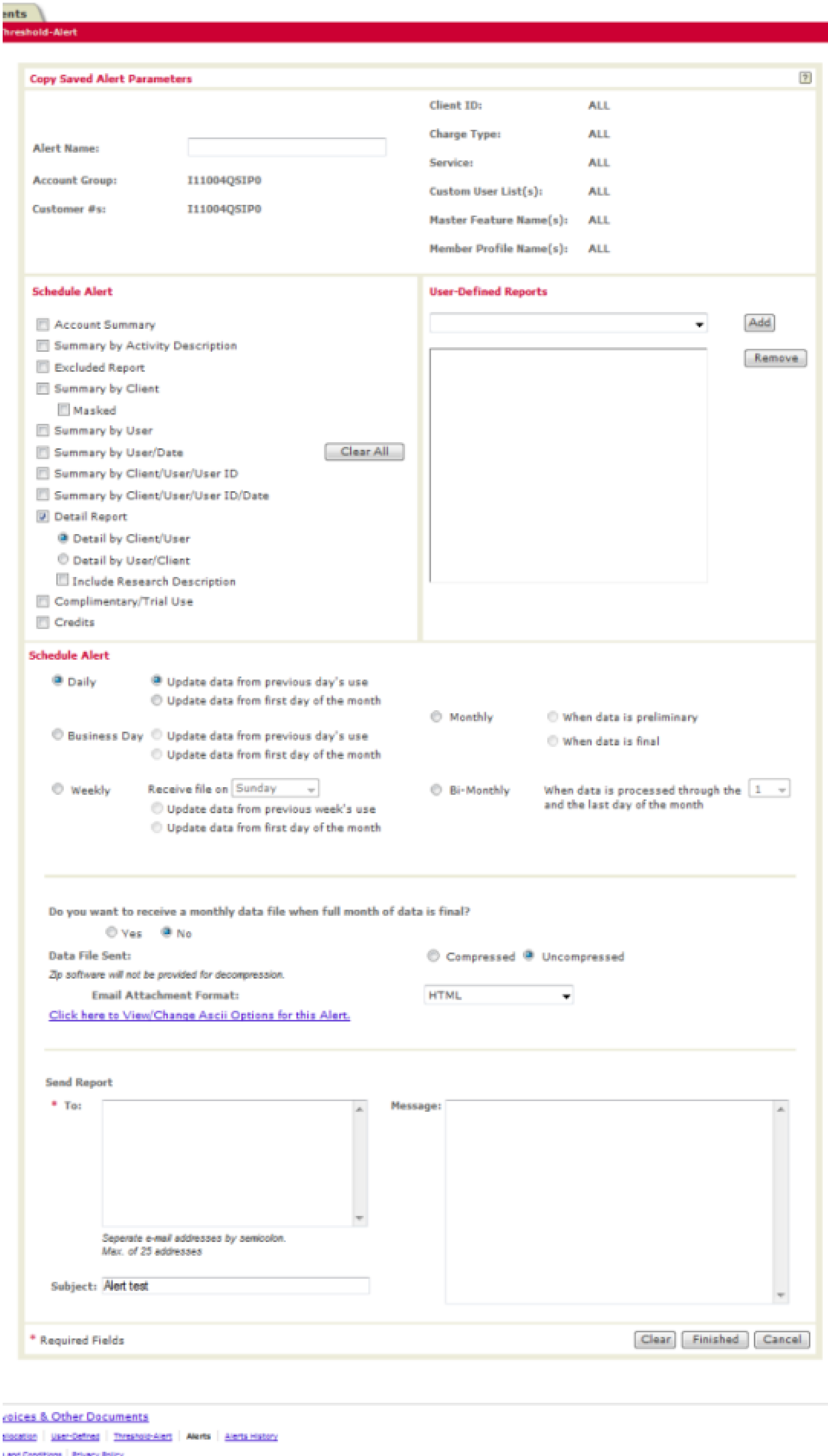


You can:

- Select a date range or specify your own date range.
- Choose an action:
  - Click **Reset** to reset date range selection
  - Click **View** to view report results
  - Click **Download** to download report data
  - Click **Cancel** to return to the previous screen

How do I copy saved alert parameters?

1. Enter an **Alert Name**.
2. Select a new report.
3. Choose options to **Schedule Alert**.
4. Select how you want to receive the file **-** compressed or specify a download format.
5. Change the report's recipients, subject, or message.
6. Select **Finished** to save the alert.



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Threshold-Alert
Copy Saved Alert Parameters
Alert Name:
Account Group: I11004QSIP0
Customer #s: I11004QSIP0
Client ID: ALL
Charge Type: ALL
Service: ALL
Custom User List(s): ALL
Master Feature Name(s): ALL
Member Profile Name(s): ALL
Schedule Alert
Account Summary
Summary by Activity Description
Excluded Report
Summary by Client
Masked
Summary by User
Summary by User/Date
Clear All
Summary by Client/User/User ID
Summary by Client/User/User ID/Date
Detail Report
Detail by Client/User
Detail by User/Client
Include Research Description
Complimentary/Trial Use
Credits
User-Defined Reports
Add
Remove
Schedule Alert
Daily
Update data from previous day's use
Update data from first day of the month
Monthly
When data is preliminary
When data is final
Business Day
Update data from previous day's use
Update data from first day of the month
Weekly
Receive file on Sunday
Update data from previous week's use
Update data from first day of the month
Bi-Monthly
When data is processed through the 1
and the last day of the month
Do you want to receive a monthly data file when full month of data is final?
Yes
No
Data File Sent:
Compressed
Uncompressed
Zip software will not be provided for decompression.
Email Attachment Format:
HTML
Click here to View/Change Ascii Options for this Alert.
Send Report
* To:
Message:
Seperate e-mail addresses by semicolon.
Max. of 25 addresses
Subject: Alert test
* Required Fields
Clear
Finished
Cancel
oices & Other Documents
Alerts
Alerts History

User-Defined Reports

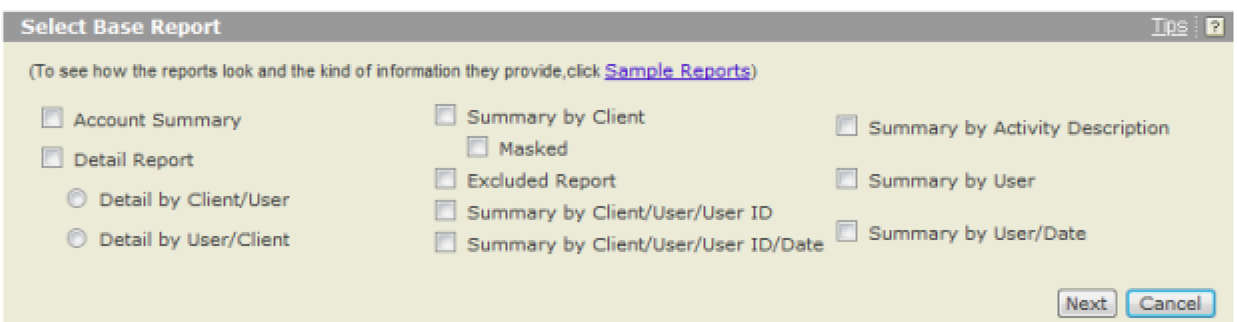
How do I create a report format?

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

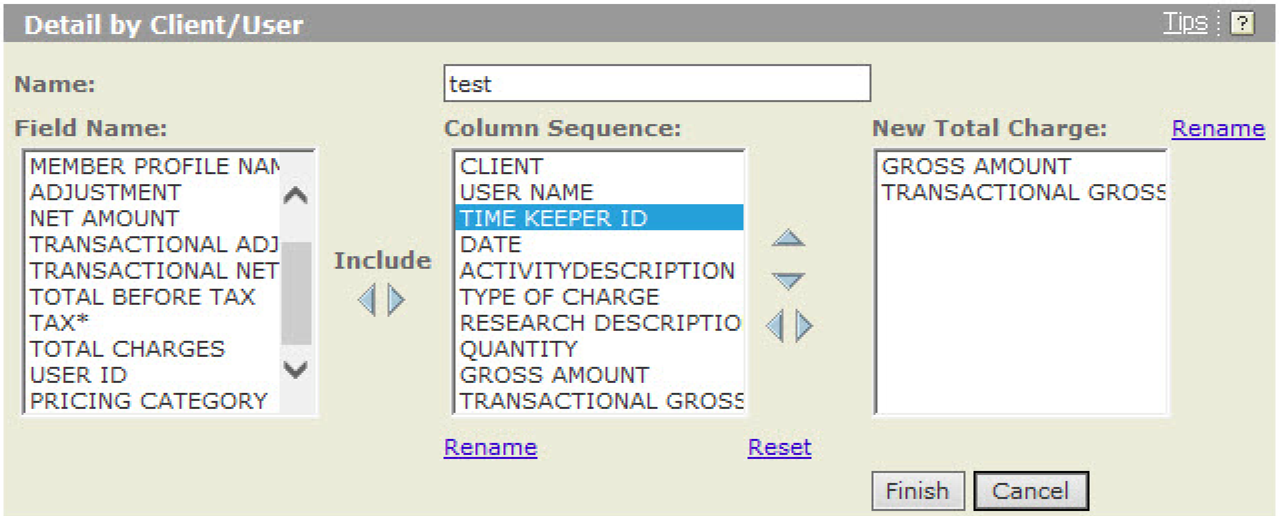
1. Click **Add** to create a new user-defined report format. The Select Base Report page appears, as shown below.
2. Select the desired PowerInvoice report.
3. Click **Next** to continue with creating a user-defined layout. The Detail by Client/User page appears, as shown below.
4. Provide a name for 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.

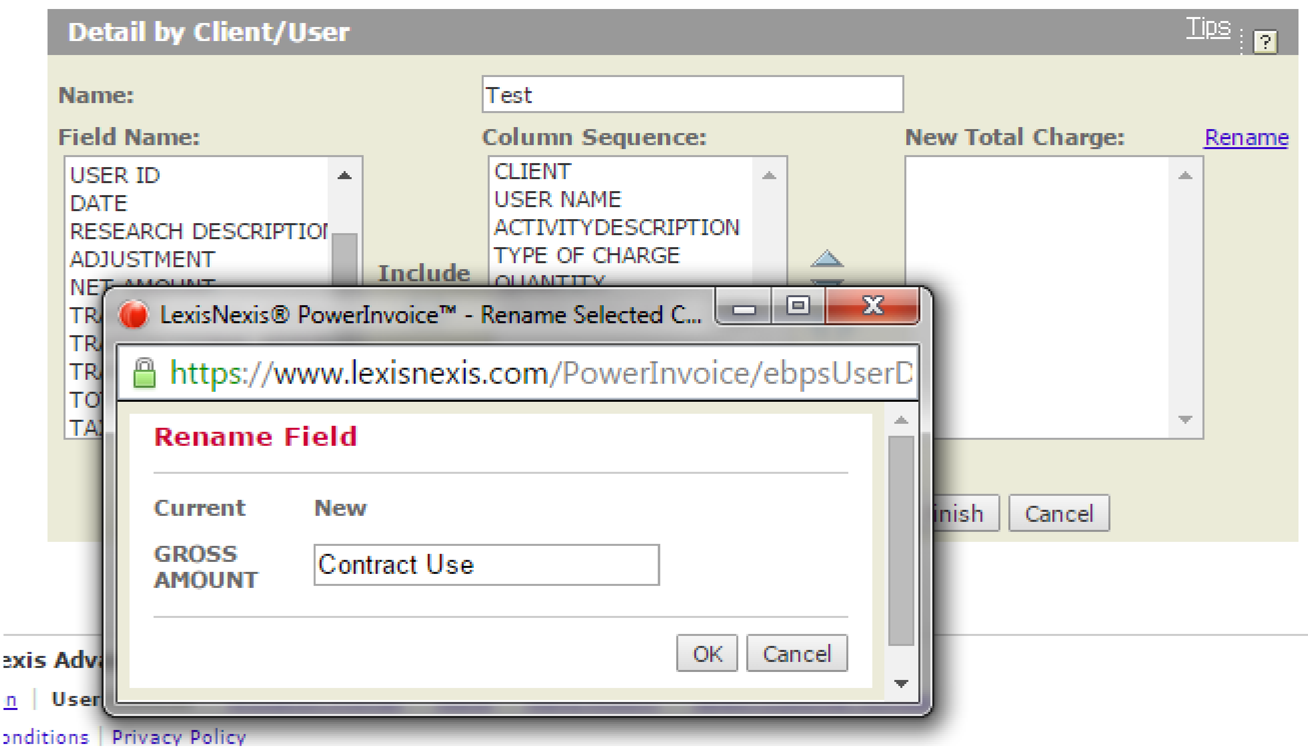
Select Base Report



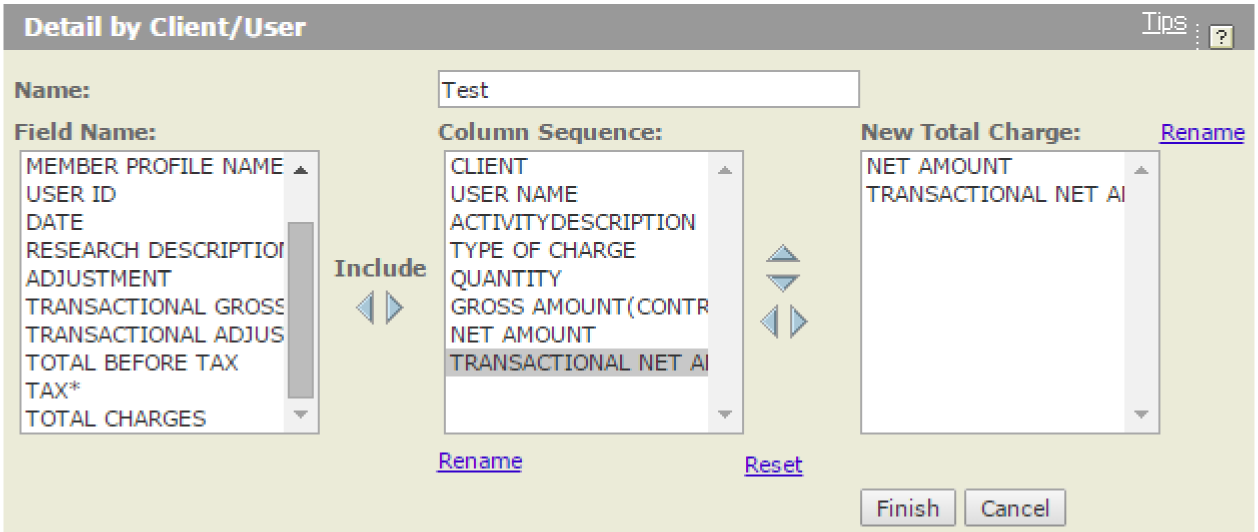
Detail by Client/User



Rename Field

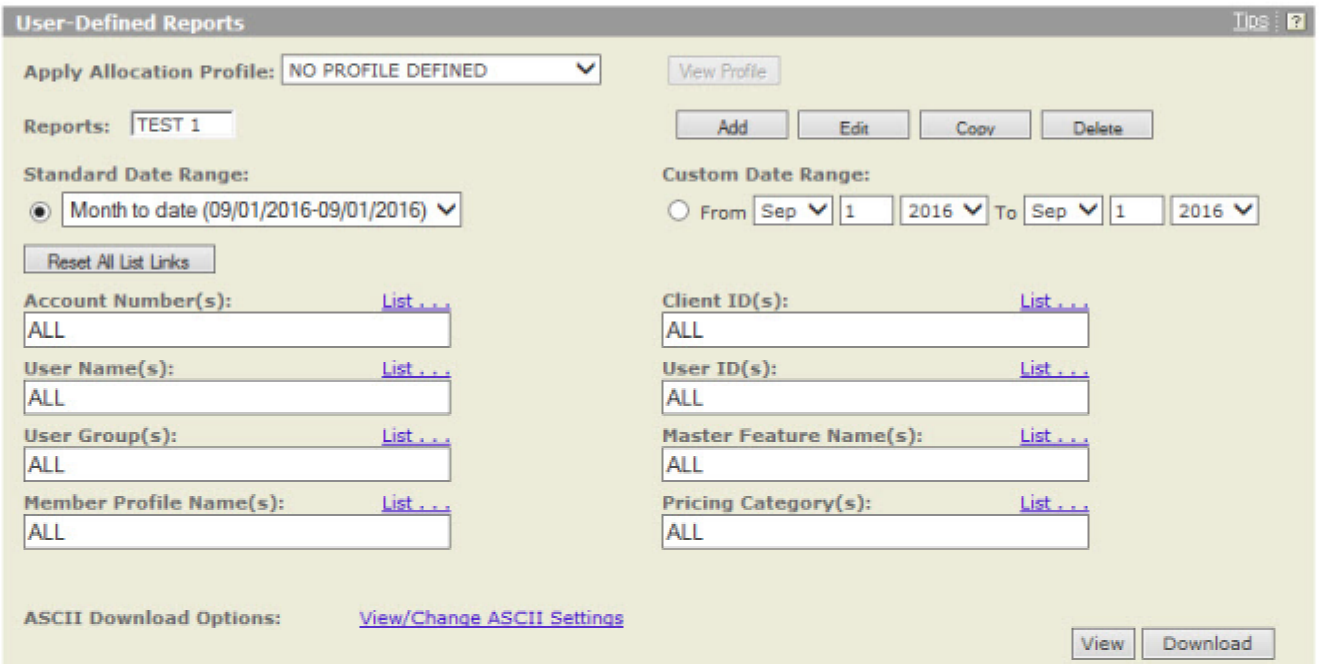


Detail by Client/User - Resequenced


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

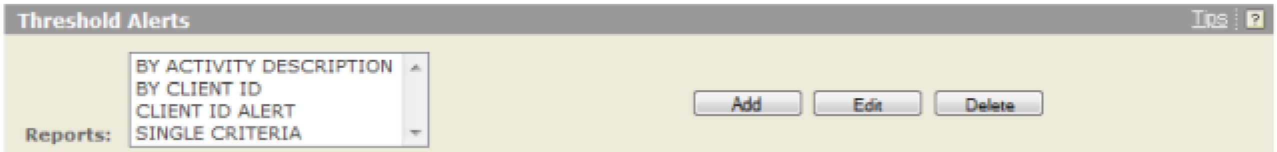
How do I view or download information from user-defined reports?

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



Threshold Alerts

You can Add, View, Edit, Copy, or Delete a threshold alert, using the buttons provided on the **Threshold Alerts** tab under the **Billing Data** tab.



What are Threshold Alerts?

Threshold Alerts allow you to set up an alert to notify you when certain thresholds have been reached.

Thresholds available include:

- Contract Gross Limit (amount before monies are taken off/added to meet contract amount)
- Contract Net Limit (amount after monies are taken off/added to meet contract amount)
- Transactional Gross Limit
- Transactional Net limit
- Total Charge Limit

How do I add a new Threshold Alert?

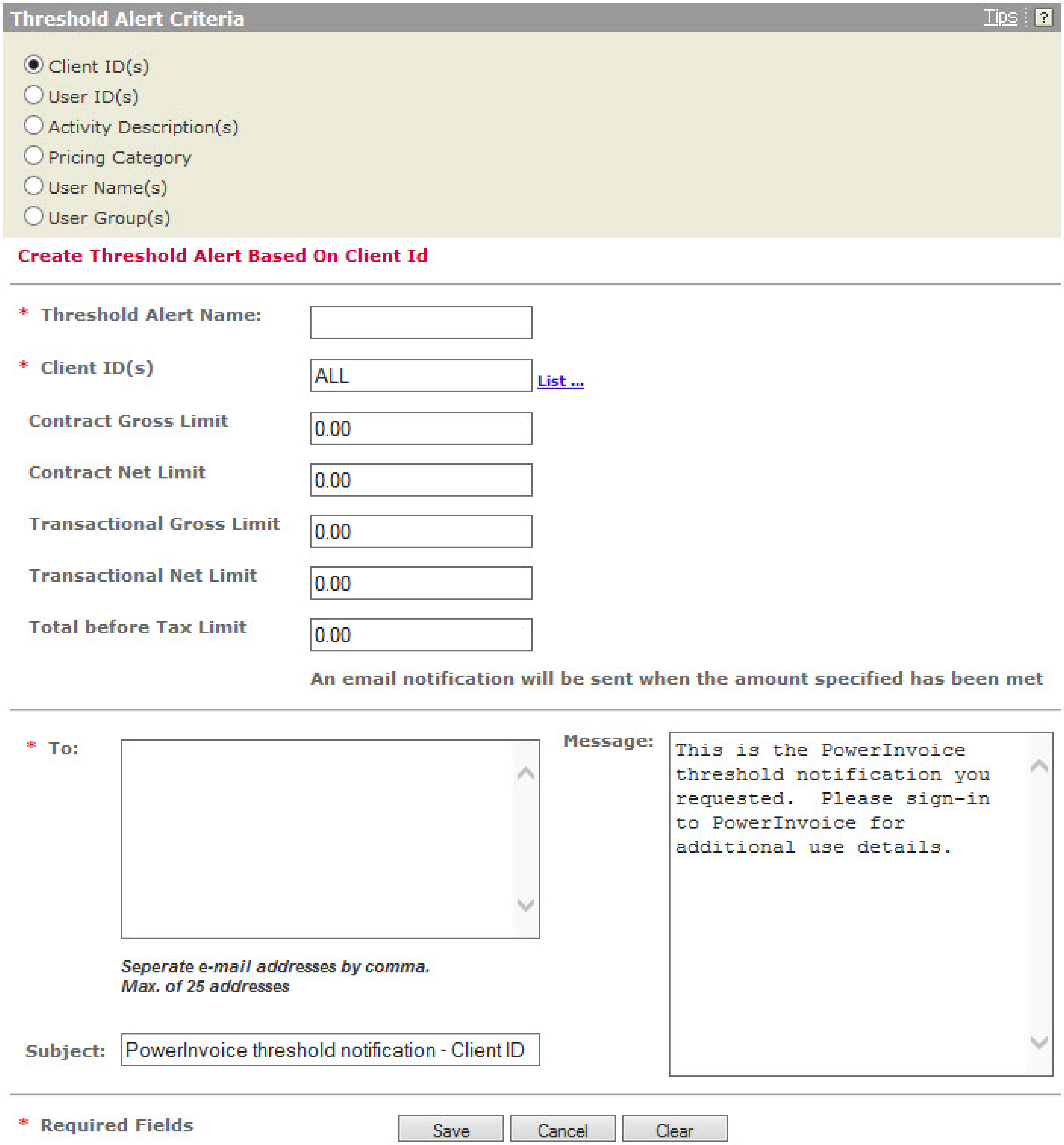
1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Click **Add** to create a new threshold alert.
4. Enter a **Threshold Alert Name**.
5. Select the **Client ID(s)** you want to use.
6. Enter threshold values in one or more of the limit boxes.
   - Contract Gross Limit
   - Contract Net Limit
   - Transactional Gross limit
   - Transactional Net Limit
   - Total before Tax Limit
7. Enter up to 25 addresses in the **To** email addresses box.
8. Enter or modify the current **Message**.
9. Enter or modify the **Subject** for the email.
10. Click **Save** to create the threshold alert.

The new threshold alert will now show in the Threshold Alerts **Reports** list.

You can edit and delete these threshold alerts using the appropriate buttons.

How do I edit a Threshold Alert?

1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Select a **Report**.
4. Click **Edit**.



5. Modify the information, as desired.

Note:
Click the **Reset All List Link** button to change the value on each option to "All".

6. Click **Update** to create the threshold alert.

How do I delete a Threshold Alert?

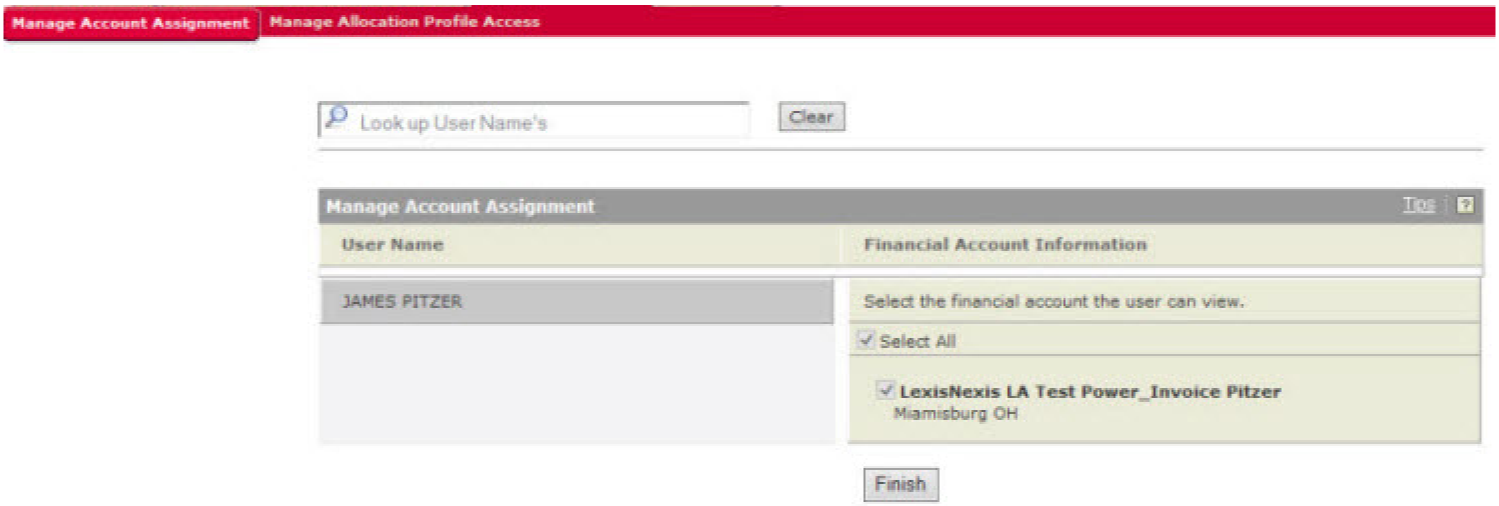
1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Select a **Report**.
4. Click **Delete**. A dialog box appears asking if you're sure you want to delete the selected threshold alert.
5. Click **OK** to confirm deletion of the selected threshold alert.

Using the Administration Tab

The LexisNexis PowerInvoice service provide PowerInvoice administrators the opportunity to assign specific users with access to one or more financial accounts.

How do I manage accounts?

1. Click the **Administration** tab.
2. Enter a User Name in the box, if desired.
3. SSelect a **User Name**.
4. Select which **Financial Account Information** you'd like this user to have assigned to them.
5. Click **Finish**.



Working with the Analytics tab

The LexisNexis PowerInvoice service provides Analytics information.

On the Analytics tab, you can select from the **Saved Chart Profiles** and then Edit, Copy, Delete or View the selected profile. Or you can click **Create Chart Profile** to set up a new chart profile, by specifying a profile name, a date range, and one or more attributes; specifying how the information will be displayed; specifying one or more functions to use; choosing whether to view by Amount or Percent; and then clicking **Finish**. Once the chart is displayed, you can then choose to **View PDF** and you can save the PDF file, if you'd like to.

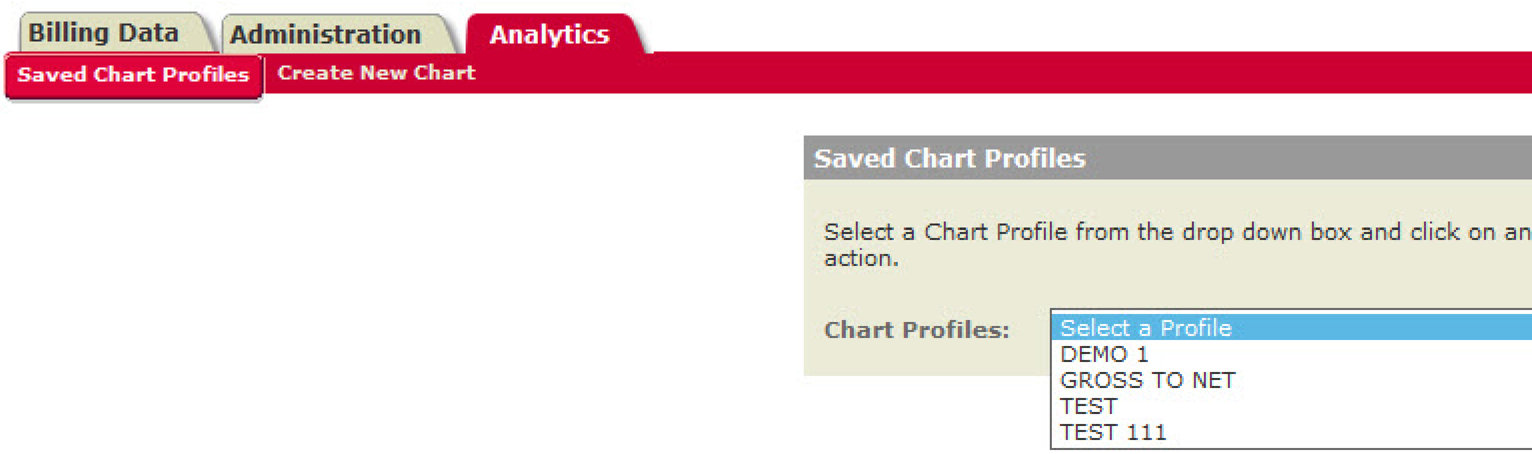
How do I work with Saved Chart Profiles?

1. Click the **Analytics** tab.
2. Select a profile name from the **Chart Profiles** drop-down list.
3. Select an Action to take: Edit, Copy, Delete, or View.
   If you select Edit or Copy, you will be taken to the **Edit Chart Profile** page, which works similarly to the Create New Chart page. See How do I create a New Chart profile?.

   If you select Delete, you will be asked to confirm your choice to delete the profile, and once you've confirmed your choice, the profile will be permanently deleted.

   If you select View, the chart will be displayed in a new window.

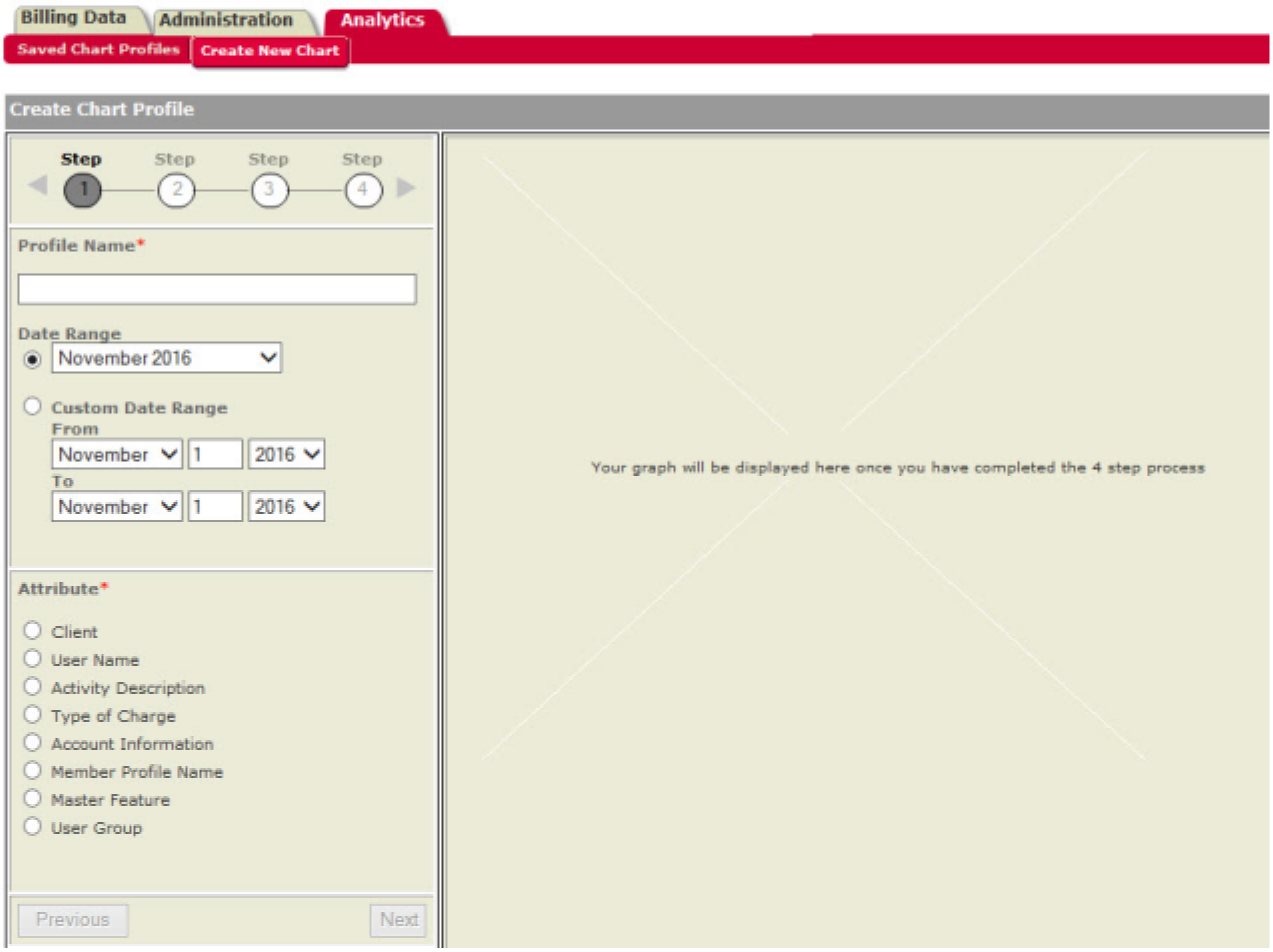
Saved Chart Profiles



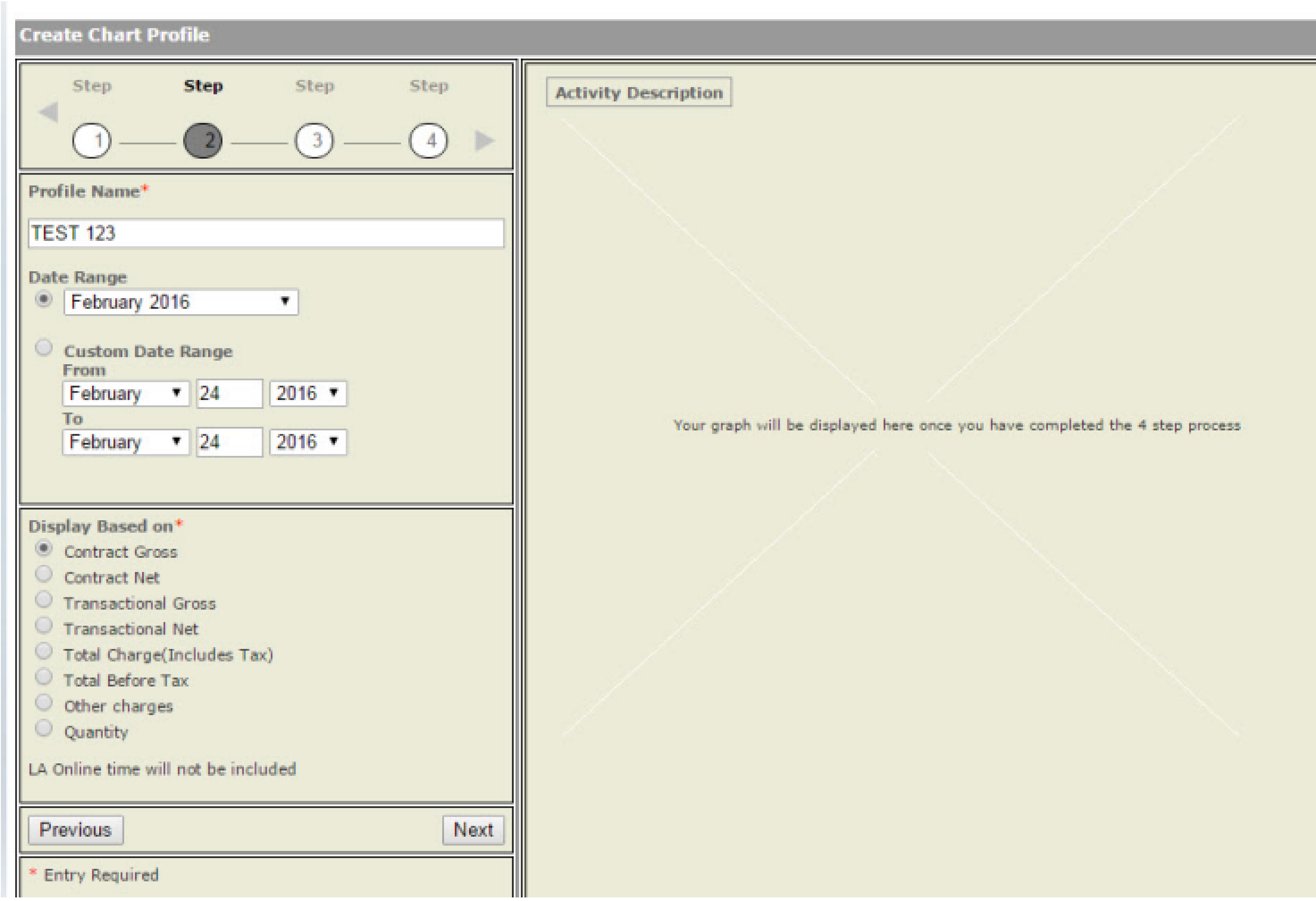
How do I create a New Chart profile?

Important:
If you click **Finish** and are told that no data matches your criteria, you can use the **Previous** and **Next** buttons to go back through the options and change them.

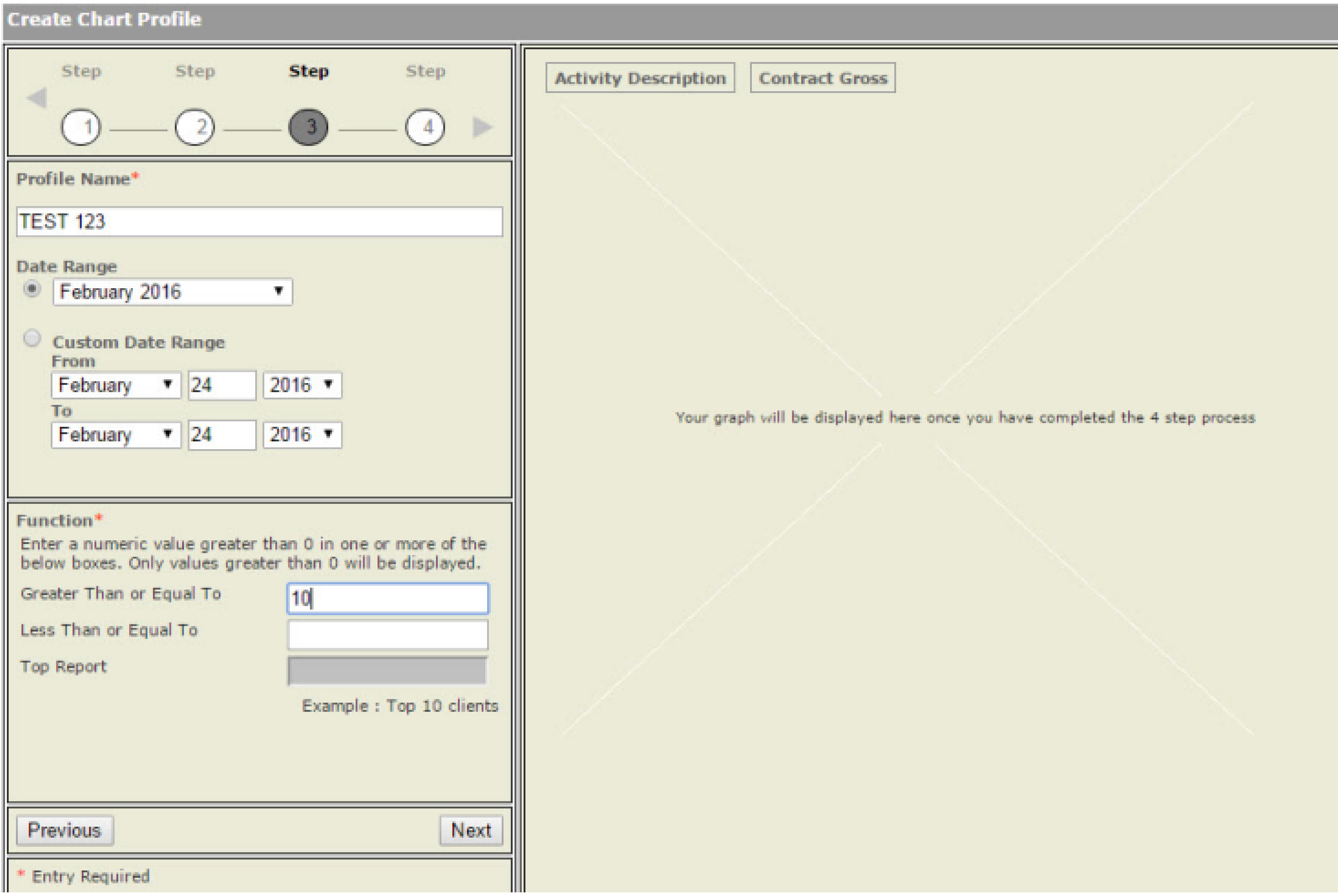
1. Click the **Analytics** tab.



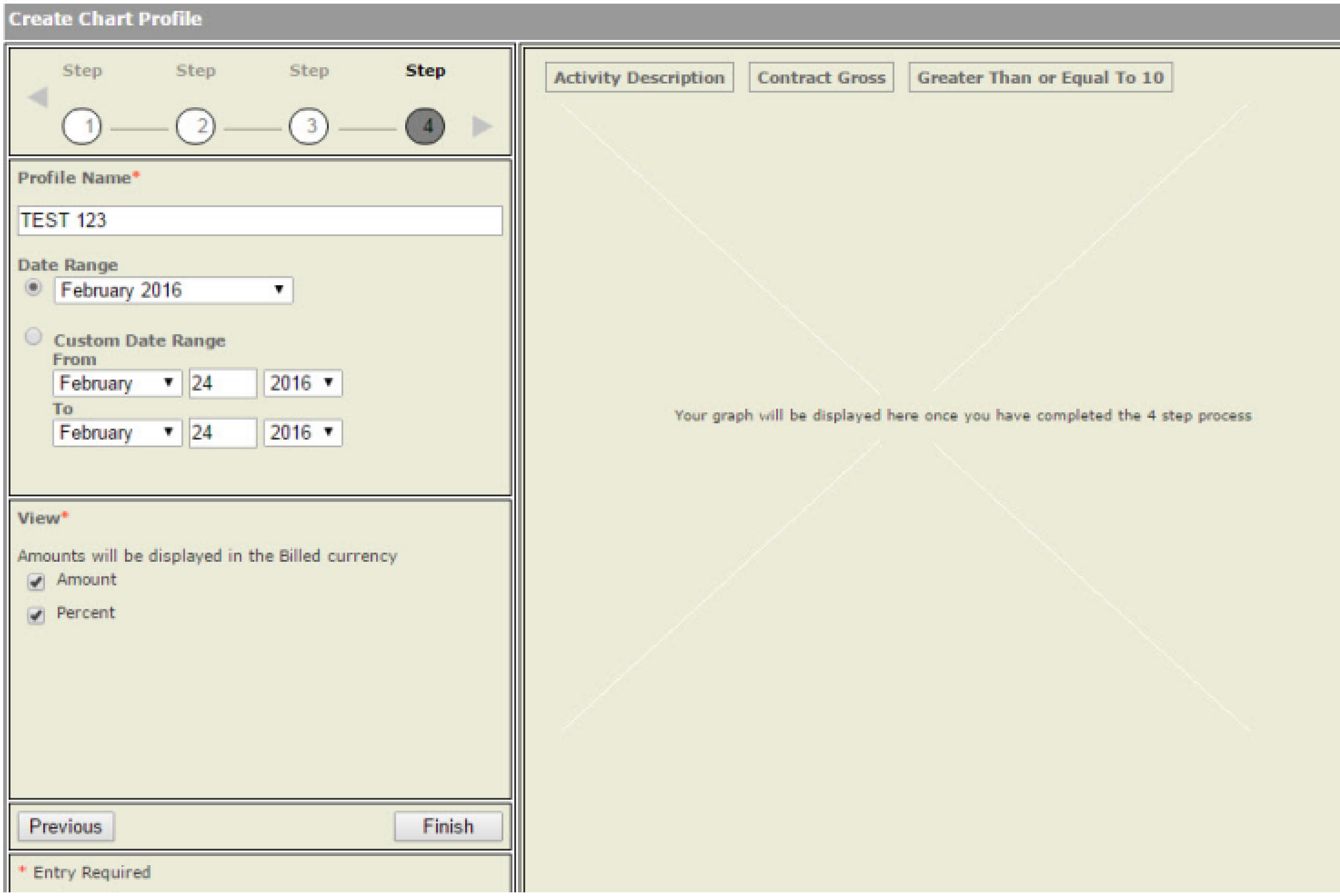
2. Click the **Create New Chart** tab.



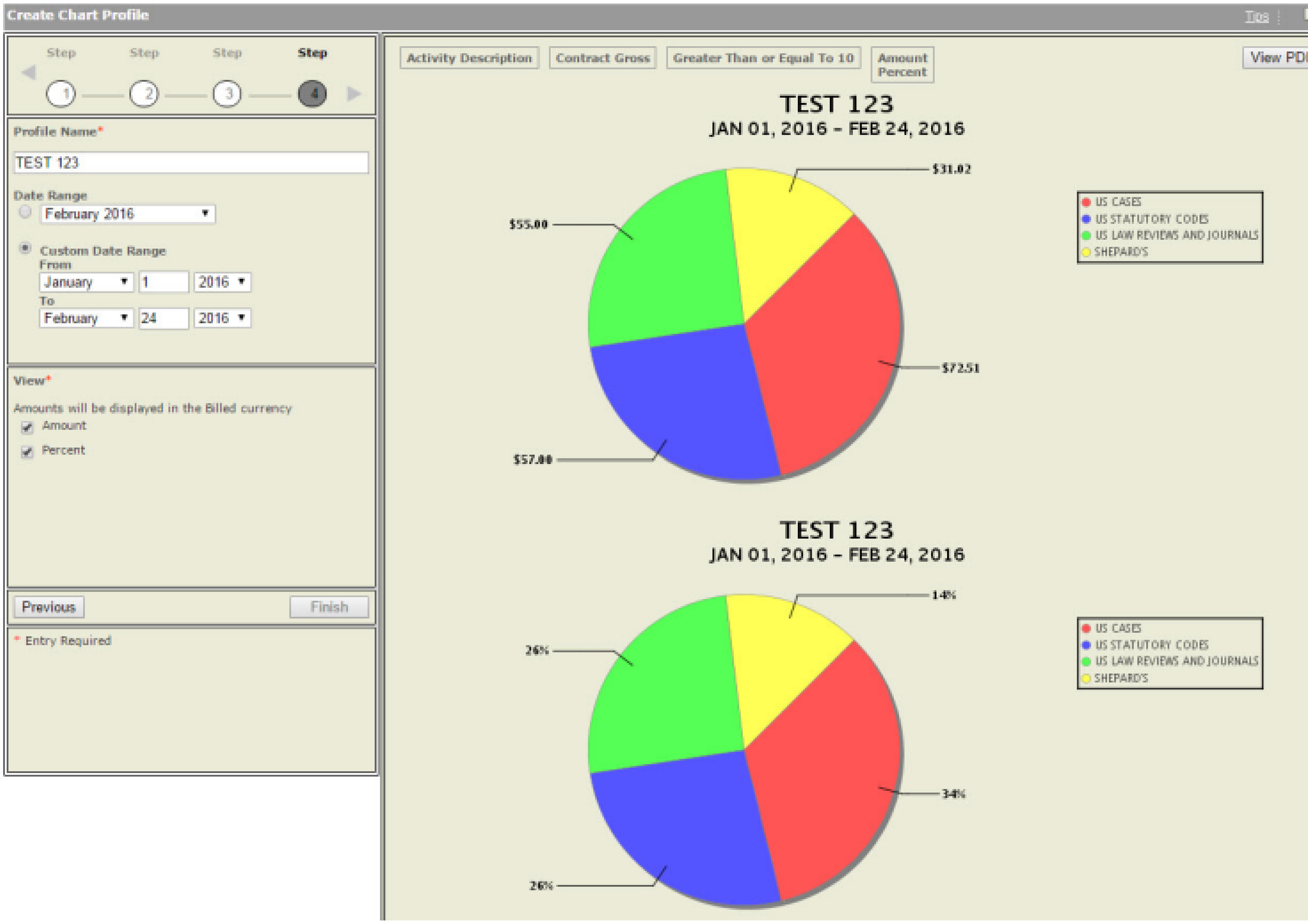
3. Enter a new **Profile Name**.



4. Choose **Date Range** options.

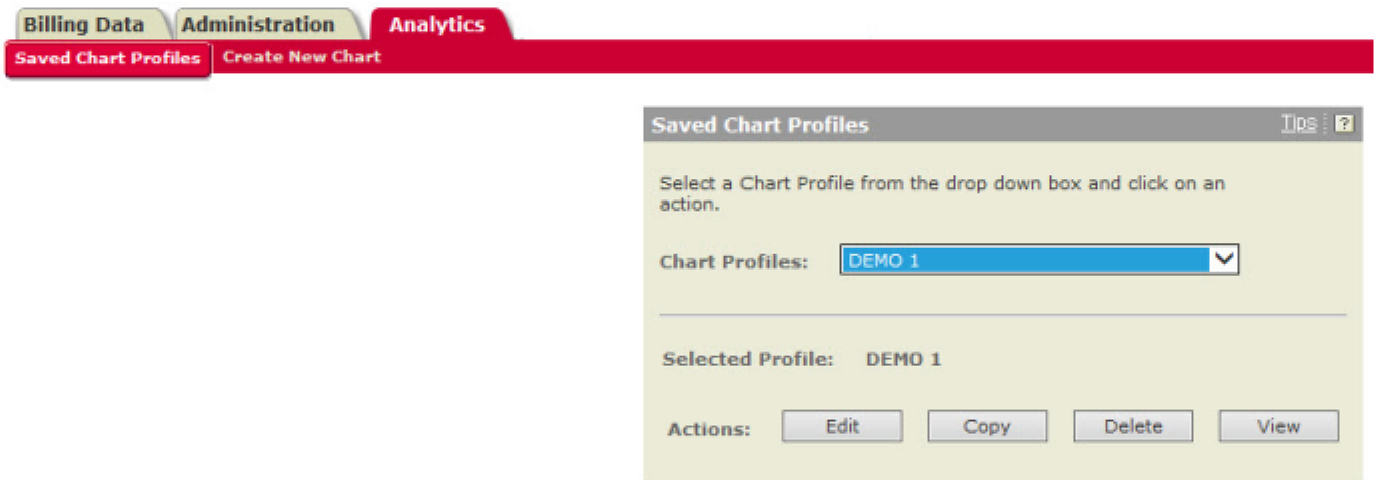


5. Select one or more boxes under **Attribute**.



6. Click **Next**.
7. Select an option under **Display Based on**.
8. Click **Next**.
9. Enter a numeric value in at least one of the **Function** boxes.
10. Click **Next**.
11. Select one or more boxes under **View**.
12. Click **Finish**. The chart is displayed to the right of the settings. You can click **View PDF** to open the chart in a PDF viewer, and use that tool to save the chart, if desired.

Edit, Copy, Delete, View Analytics Chart


Billing Data
Administration
Analytics
Saved Chart Profiles
Create New Chart
Saved Chart Profiles
Tips
Select a Chart Profile from the drop down box and click on an action.
Chart Profiles:
DEMO 1
Selected Profile:
DEMO 1
Actions:
Edit
Copy
Delete
View

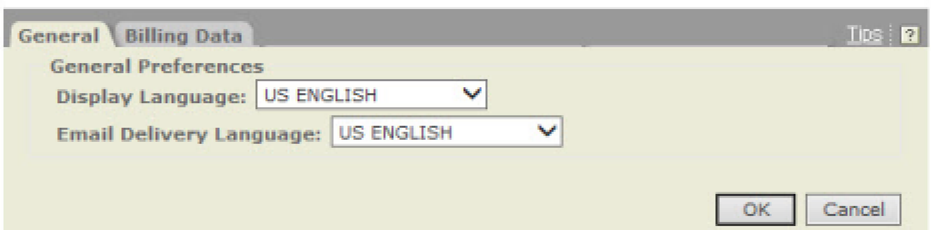
Preferences

How do I set my preferences?

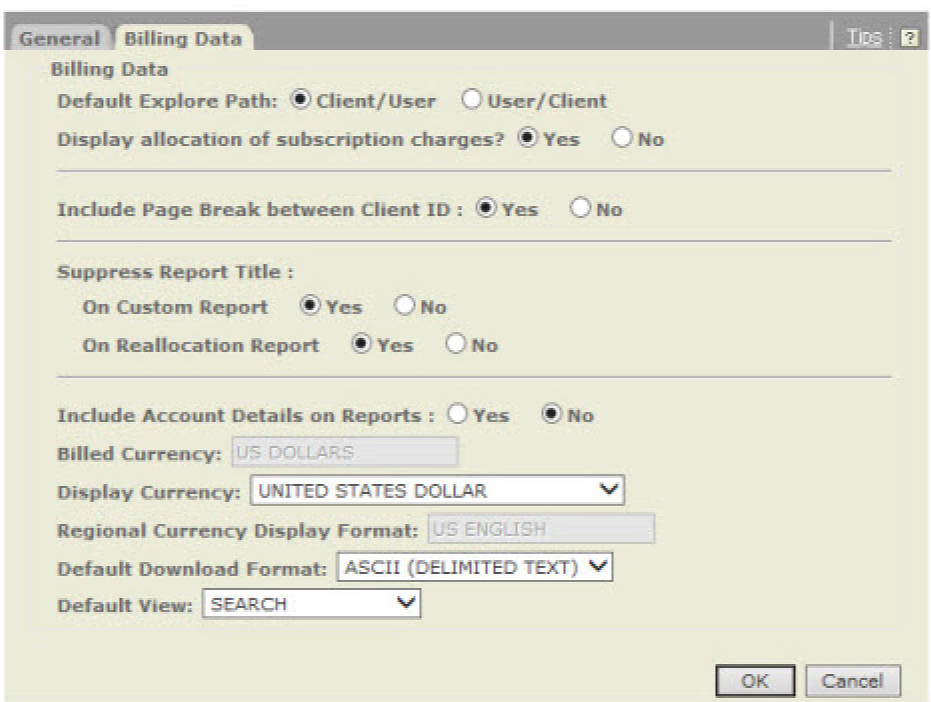
Tip:
On each Preferences tab, you must click **OK** to save any changes you make.

1. On the **General** tab, select a **Display Language** for the PowerInvoice service (does not apply to the PowerInvoice sign-on screen).
2. On the Billing Data tab, choose a **Default Explore Path** - the order in which your billing data appears in a billing report. Sort by client and then by user or by user and then by client. You can also set whether you want to **Include Account Details on Reports**.
3. Choose whether or not to see an allocation adjustment for subscription pricing charges at the account, client, service and user levels (if you choose No, you'll see gross charges only).
4. Select a **Display Currency** for the currency you wish to see displayed in your report.
5. Choose the **Default Download Format**.
6. Choose the **Default View** (page) you want displayed when you select the Billing Data tab.

General Preferences



Billing Data Preferences



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