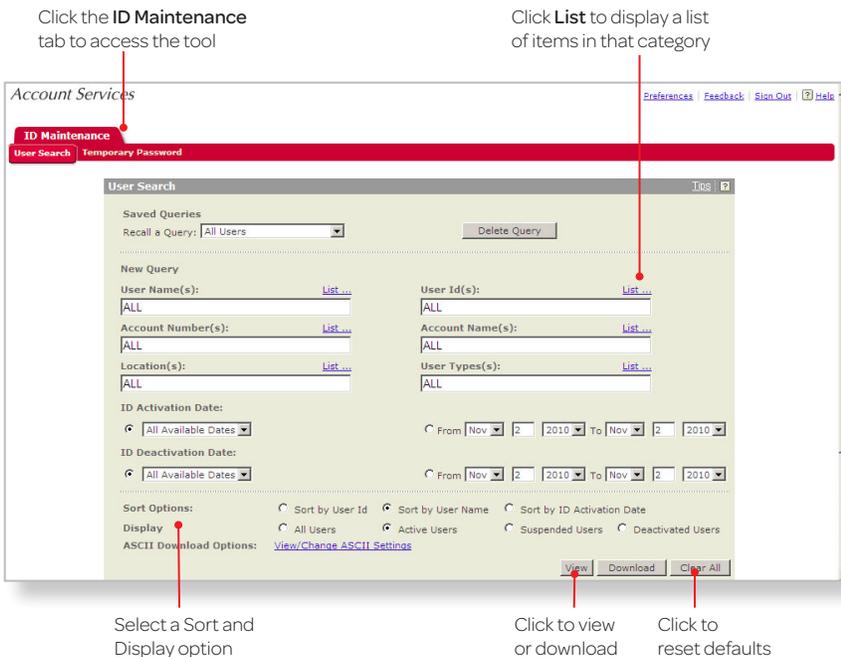


# ID Maintenance Tool User Guide

Easily manage your users' *lexis.com*® IDs with this time-saving tool.

The ID Maintenance tool, available via a new tab on the PowerInvoice™ service, lets you manage your users' *lexis.com*® IDs. You can search your LexisNexis® users to locate specific sets of IDs; edit, deactivate or add new IDs, as needed; and view and/or reset passwords. For example, if an individual will be serving in a temporary position, you can instruct the system to automatically deactivate that user's ID on the date you specify. If an individual forgets his or her ID, you can use the tool to assist that user. Now, for billgroups you manage without access to personally identifiable information, you can specify the format you prefer for new-user temporary passwords. Because the ID Maintenance tool is Web based, all changes take place right away.



If you are a specified administrator, a special tab for ID Maintenance will display at the top of your PowerInvoice screen. Click this tab to display the User Search form, which is the “home page” of the ID Maintenance tool, used in all of its functions.

## The ID Maintenance Tool Home Page

You can access the basic functions of the ID Maintenance tool from the User Search form. This form allows you to search for information on users, accounts and locations related to the IDs in your firm.

You may search by specific user name(s), account number(s) (billgroup, e.g., 123ABC), location(s), user ID(s) and account name(s) (firm name, e.g., Madison & Marbury), or you can view all at one time. If you click **List**, located at the top right of each search box, you can display a list of all the items in that category, e.g., a list of all user names.

To generate a list of specific users, user IDs, etc., within your organization:

1. Select one or more options that will best narrow your results to the data you want.
2. Select how you want your results sorted: By user ID or name, or by activation date. Then select the users to include in the report view: All users, active users, suspended users or deactivated users.
3. Click **View** to display your results or click **Download** to have them downloaded to a file on your PC.

Your search results are displayed on the User List page. If you selected Download, a Download Maintenance Activity form appears to let you indicate the download format and range of pages you want to receive.

**Note:** To reset all the fields back to the default settings, click **Clear All**.

## The User List Page

The User List page displays IDs that match your query. Each row shows details such as User ID, User Name, User Status and more.

To manage multiple user IDs, check the box next to each user name and click the **Actions** option to complete the function.

To manage a single ID, click the appropriate link in the column on the far right of this page.

This page allows you to:

- **Edit IDs:** Click the **Edit** link to display an Edit User form. (See page 5 for instructions.)
- **Investigate:** Click this link to complete a form and the LexisNexis® security team can begin an investigation into any unauthorized use.
- **Clone IDs:** Click this link to create a new user ID with entitlements that are similar to those of the existing user. The Clone ID form asks you to identify the user who will be assigned this new ID. (See page 3 for instructions.)
- **Suspend:** Click this link to quickly and temporarily suspend a user ID. You can reactivate a suspended ID up to 12 months.
- **Deactivate IDs:** Click the **Deactivate** link to quickly and permanently delete a user ID. (See page 5 for instructions.)

By checking multiple check boxes you can suspend, reactivate or deactivate multiple Id's at one time.

**Account Services** [Preferences](#) | [Feedback](#) | [Sign Out](#) | [Help](#)

**ID Maintenance** [Download](#) | [Edit Search](#) | [User List](#)

User Search | Temporary Password

Report Date: 11/02/2010

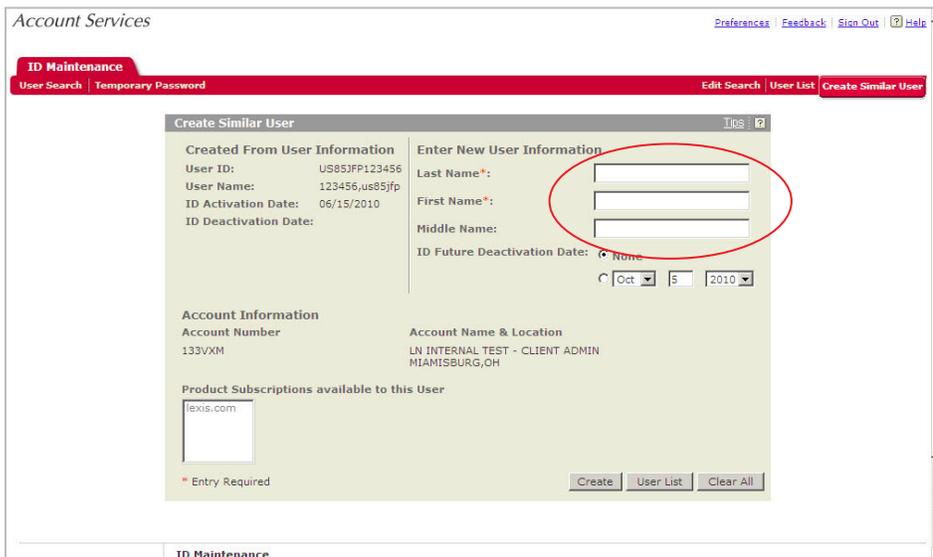
**User List**  
4 user(s) found  
Users 1 thru 4

Go to User List Page: 1 ▼

	Account Number	Account Name & Location	ID Activation Date	ID Deactivation Date	User ID Operations		
<input type="checkbox"/>		LN INTERNAL TEST - CLIENT ADMIN MIAMISBURG,OH	02/27/2008	09/15/2010	<a href="#">Edit</a> <a href="#">Investigate</a> <a href="#">Clone</a> <a href="#">Suspend</a> <a href="#">Deactivate</a>		
<input type="checkbox"/>	9FQGNP	ATest, NewU1	ACTIVE	133	LN INTERNAL TEST - CLIENT ADMIN MIAMISBURG,OH	10/22/2007	<a href="#">Edit</a> <a href="#">Investigate</a> <a href="#">Clone</a> <a href="#">Suspend</a> <a href="#">Deactivate</a>
<input type="checkbox"/>	TEST1	Smith, John	ACTIVE	133	LN INTERNAL TEST - CLIENT ADMIN MIAMISBURG,OH	10/26/2007	<a href="#">Edit</a> <a href="#">Investigate</a> <a href="#">Clone</a> <a href="#">Suspend</a> <a href="#">Deactivate</a>
<input type="checkbox"/>	187VETZ	Bass, Sue	ACTIVE	133	LN INTERNAL TEST - CLIENT ADMIN MIAMISBURG,OH	03/05/2008	<a href="#">Edit</a> <a href="#">Investigate</a> <a href="#">Clone</a> <a href="#">Suspend</a> <a href="#">Deactivate</a>

**User List**  
Users 1 thru 4

Go to User List Page: 1 ▼

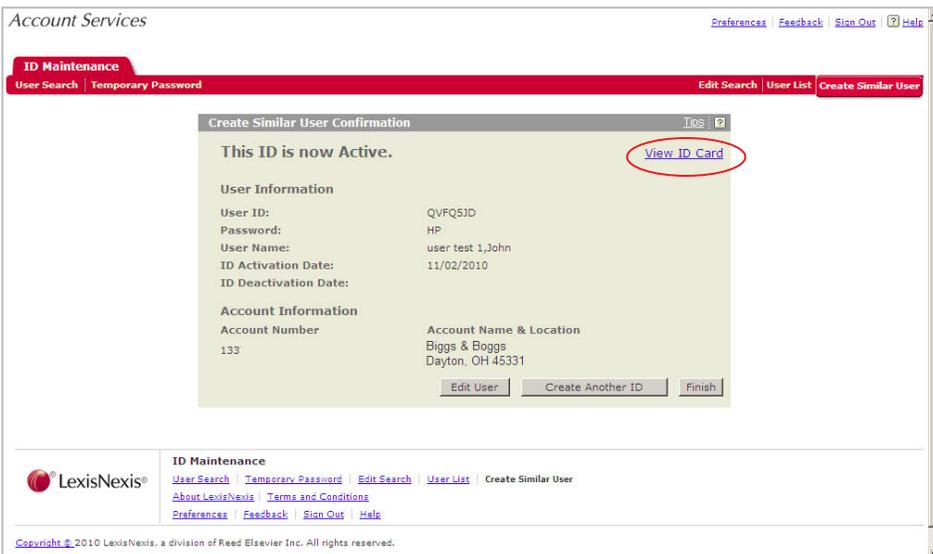


## Create a New ID

You can create new IDs by selecting an existing user who has the entitlements your new ID needs. The ID Maintenance tool will automatically use the setup options and entitlements information from that person's user ID as a template to create a new user ID. When you identify an ID with the entitlements you want to use, click the **Clone** link on the User List page. Fill in the required fields, which include Last Name and First Name.\* If you wish to deactivate the ID at a specified time in the future (for summer associates, for example), click the radio button next to the date boxes and select the date on which you want the ID to be deactivated. Click Create, and a new ID with the same entitlements as the model will be created.

When you create a new ID, a confirmation screen will display.

\*These are the only fields you can change.



## Confirmation Screen

The new ID number and temporary password display on the screen, along with other identification information. This password is temporary and will need to be changed by the end user upon the first log on. You can also view and/or print an ID card by clicking **View ID Card**. (The temporary password will not be printed on the card.)

Note: The card will be printed to your local printer.

## Specify Temporary Password Format

For billgroups you manage without access to personally identifiable information, you have the option of specifying a preferred format for new-user temporary passwords. To make management easier, you can choose the user's last name or a custom format rather than a randomly generated temporary password. Of course, users will still select a permanent password upon first log on.

The screenshot shows the 'ID Maintenance' section of the Account Services interface. It features a table with the following columns: Billgroup Number, Billgroup Name, Location, Password Setting, and Select all in view. The table lists six billgroups, all currently set to 'Randomly Generated'. A 'Custom temporary password' section is visible at the bottom left.

Billgroup Number	Billgroup Name	Location	Password Setting	Select all in view
133VXK	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXM	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXN	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXP	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXQ	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>

From the ID Maintenance tab, click the **Temporary Password** secondary tab.

Click a checkbox in the right-hand column to select a billgroup, and then click **Edit Settings**.

The screenshot shows the 'Edit Temporary Password Settings' dialog box open over the table. The dialog has three radio button options: 'Randomly Generated', 'User's Last Name', and 'Custom'. The 'Custom' option is selected, and a text input field contains 'Firm Name'. Below the input field, there is a note: 'Temporary password must be 2-20 characters in length and must not include special characters except @ \_ -'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

Click the radio button for your selected temporary password setting: Randomly Generated, User's Last Name or a custom format such as Firm Name. Click **Save**.

The screenshot shows the 'ID Maintenance' section after the settings have been updated. The 'Password Setting' column now shows 'FirmName' for billgroups 133VXM and 133VXN, and 'User's Last Name' for billgroup 133VXP. The other billgroups remain set to 'Randomly Generated'.

Billgroup Number	Billgroup Name	Location	Password Setting	Select all in view
133VXK	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXM	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	FirmName	<input type="checkbox"/>
133VXN	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	User's Last Name	<input type="checkbox"/>
133VXP	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>
133VXQ	LN INTERNAL TEST - CLIENT ADMIN	MIAMISBURG, OH	Randomly Generated	<input type="checkbox"/>

Updated settings appear in the fourth column under Password Setting. (Billgroups that have access to personally identifiable information require higher security settings and will not allow changes from the Randomly Generated setting.)

The next time you create an ID, the temporary password format will match your updated settings.

## Edit User IDs

To edit a user ID, click **Edit** next to the ID you want to edit on the User List page. An Edit User form will display. This screen is useful for modifying user profiles if people change their names e.g., when getting married. All changes are made right away, as this is a Web-based product.

## View and Reset Passwords

Under certain circumstances, you can securely view passwords using the ID Maintenance tool. As the PowerInvoice administrator, you would need to sign the Password Administration Service Agreement enabling you to view passwords. In addition, the user would need to have a password that is strengthened for security purposes. With those provisions in place, you can click the **Display Password** button to provide the user with his or her password. For more information, contact your account representative.

When you reset a user's password, a new temporary password will pop up on this screen, allowing you to provide the temporary password to the end user. As soon as you click to another page, go back or click on another user, the new password will appear as starred out to protect the security of the password. This tool is useful for resetting individual IDs but is not designed to be used as a firm-wide password change tool.

## Deactivate or Suspend IDs

To permanently deactivate or temporarily suspend a user ID, click the appropriate link next to that user ID on the User List page. You will be asked to confirm that you actually want to deactivate or suspend that ID.

The screenshot shows the 'Edit User' form in the 'Account Services' application. The form is titled 'Edit User' and has a 'Tips' icon. It is divided into several sections: 'Edit User Information', 'Account Information', and 'Compliance Investigation'. The 'Edit User Information' section includes fields for User ID (0NPD9JY), ID Status (ACTIVE), Data Status (Not Restricted), Last Name, First Name, Middle Name, and Password. The Password field is masked with asterisks. Two buttons, 'Reset Password' and 'Display Password', are circled in red. The 'Account Information' section includes Account Number (133VXXK) and Account Name & Location (LN INTERNAL TEST - CLIENT ADMIN, MIAMISBURG, OH). The 'Compliance Investigation' section includes a 'Submit ID for investigation' link and a note that an entry is required. At the bottom right, there are 'Save' and 'User List' buttons.

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*With the ID Maintenance tool, you can easily create and manage your lexis.com user IDs. The tool is especially useful for generating IDs quickly or deactivating IDs as individuals leave the firm.*

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If you have questions regarding the ID Maintenance tool, please contact your LexisNexis account representative or LexisNexis® Customer Support at 800.543.6862.