

LexisNexis® PowerInvoice™  
User Guide for Corporate/  
Government

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## 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.

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## 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](http://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:

The screenshot shows the 'Search' interface for PowerInvoice. It includes a search bar, a 'View Profile' button, and various filters. The 'Apply Allocation Profile' is set to 'NO PROFILE DEFINED'. The 'Standard Date Range' is 'Month to date (09/01/2016-09/01/2016)'. The 'Custom Date Range' is set to 'From Sep 1 2016 To Sep 1 2016'. There are several input fields for filters, all set to 'ALL': Account Number(s), Client ID(s), User Name(s), User ID(s), Activity Description(s), Type of Charge(s), User Group(s), Master Feature Name(s), Member Profile Name(s), and Pricing Category(s). Below these are 'Report Sections' with checkboxes for various report types like 'Account Summary', 'Credits', 'Detail Report', etc. There are also 'Report Details' and 'ASCII Download Options' sections. At the bottom, there are 'View' and 'Download' buttons.

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.

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## 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.

Account Number: I11004Q5RAJ  
4.6 BCD Apples  
BOCA RATON

Date Range: 02/01/2015 - 02/18/2015

Report Date: 02/20/2015

Currency: US DOLLARS

Reports: Account Summary

Report 1 of 3

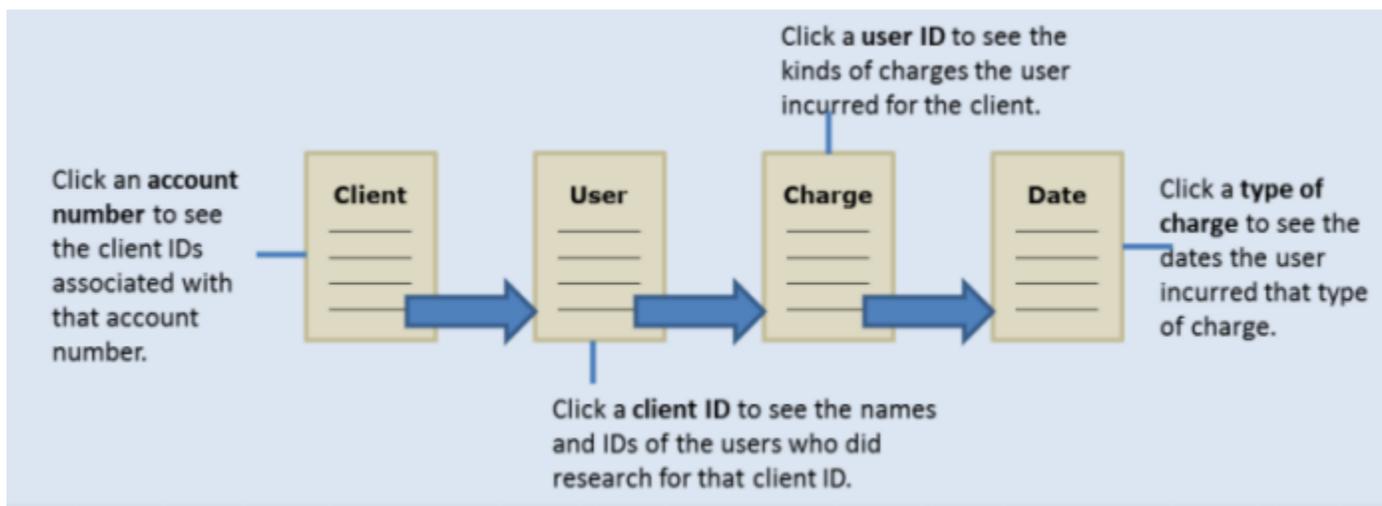
\*Billing data reports include taxes estimated based on usage. The official invoice includes taxes based on authorized user(s)' physical site location at invoice period end.

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**ACCOUNT SUMMARY**

PLAN	CONTRACT USE			TRANSACTIONAL USE			TOTAL BEFORE TAX	OTHER CHARGES	CREDITS	TAX*	TOTAL CHARGES
	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT					
CONTENT & FEATURE SUBSCRIPTION	\$95.00	\$2,666.82	\$2,761.82	\$0.00	\$0.00	\$0.00	\$2,761.82	\$0.00	\$0.00	\$0.00	\$2,811.00
CONTENT & FEATURE TRANSACTIONAL	\$0.00	\$0.00	\$0.00	\$114.00	(\$6.76)	\$107.24	\$108.30	\$0.00	\$0.00	\$0.00	\$108.30
<b>Total:</b>	<b>\$95.00</b>	<b>\$2,666.82</b>	<b>\$2,761.82</b>	<b>\$114.00</b>	<b>(\$6.76)</b>	<b>\$107.24</b>	<b>\$2,876.36</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,933.36</b>

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.

Search
Tip

Apply Allocation Profile: NO PROFILE DEFINED [View Profile](#)

Standard Date Range: Month to date (09/01/2016-09/01/2016)

Custom Date Range: From Sep 1 2016 To Sep 1 2016

[Reset All List Links](#)

Account Number(s): <a href="#">List ...</a>	Client ID(s): <a href="#">List ...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
User Name(s): <a href="#">List ...</a>	User ID(s): <a href="#">List ...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
Activity Description(s): <a href="#">List ...</a>	Type of Charge(s): <a href="#">List ...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
User Group(s): <a href="#">List ...</a>	Master Feature Name(s): <a href="#">List ...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
Member Profile Name(s): <a href="#">List ...</a>	Pricing Category(s): <a href="#">List ...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>

**\* Report Sections:**  
(To see how the reports look and the kind of information they provide, click [Sample Reports](#))

**Clear Selections**

<input type="checkbox"/> Account Summary	<input type="checkbox"/> Complimentary/Trial Use	<input type="checkbox"/> Summary by Activity Description
<input type="checkbox"/> Credits	<input type="checkbox"/> Excluded Report	<input type="checkbox"/> Summary by User
<input type="checkbox"/> Detail Report	<input type="checkbox"/> Summary by Financial Account	<input type="checkbox"/> Summary by User/Date
<input type="radio"/> Detail by Client/User	<input type="checkbox"/> Summary by Client	
<input type="radio"/> Detail by User/Client	<input type="checkbox"/> Masked	
<input type="checkbox"/> Include Research Description	<input type="checkbox"/> Summary by Client/User/User ID	
	<input type="checkbox"/> Summary by Client/User/User ID/Date	

**Report Details:**  
Display allocation of subscription charges?  
(Your choice affects this search only. Go to the [Preferences](#) to change the allocations default)

Yes  No

ASCII Download Options: [View/Change ASCII Settings](#)

Include Account Details on Reports :  Yes  No

**\* Entry Required**

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## 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.

LexisNexis PowerInvoice™																		
DETAIL BY CLIENT/USER/DATE/ACTIVITY DESCRIPTION/TYPE OF CHARGE																		
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			TRANSACTIONAL USE			TOTAL BEFORE TAX
												GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT	
LEXIS ADVANCE RESEARCH	****NO USER GROUP DEFINED****	****NO MEMBER PROFILE NAME DEFINED****	22002840.990000	PITZER, JAMES	JLSPITZER04	****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
<b>Sub-Total:</b>												\$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	JLSPITZER04	****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
<b>Sub-Total:</b>												\$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	JLSPITZER04	****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
<b>Sub-Total:</b>												\$60.00	\$63.66	\$123.66	\$0.00	\$0.00	\$0.00	\$123.66
<b>Total:</b>												\$180.00	\$191.00	\$371.00	\$0.00	\$0.00	\$0.00	\$371.00

1 - 3 of 3

Alert Name	Status	Frequency
<a href="#">FIRST_ALERT_46</a>	A	D
<a href="#">I11004QSIPO TEST ALERT</a>	A	D
<a href="#">MID_ALERT</a>	A	D

1 - 3 of 3

View/Update Alert Parameters Ics 2

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.

View/Update Alert Parameters Tos ?

Alert Name:	TEST1
Account Group:	I11004TJQM9
Customer #s:	I11004TJQM9
Reports Selected	Detail by Client/User
Created Date:	09-JUL-15
Last Modified Date:	09-JUL-15
Schedule Report:	Daily
Monthly Data File:	No
Data File Sent:	Uncompressed
Email Attachment Format:	ASCII DELIMITED
Send Report To:	jim.pitzer@lexisnexis.com

---

Suspend Alert:

From Jul 10 2015 To Jul 10 2015 Suspend

---

Edit Parameters Run Now Copy Report Delete Cancel

Re-Run Alert Tos ?

Select or enter a date range to run "I11004QSIPO TEST ALERT".  
The parameters for this alert are shown below.

Account Group: I11004QSIPO  
Customer #s: I11004QSIPO  
Report Sections: Detail by Client/User

Standard range  
Month to date (02/01/2015-02/18/2015)

Custom range  
 From Feb 21 2015 To Feb 21 2015

Reset View Download... Cancel

## 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.

**Edit Saved Alert Parameters** ?

Alert Name:	I11004QSIPO TEST ALERT	Client ID:	ALL
Account Group:	I11004QSIPO	Charge Type:	ALL
Customer #s:	I11004QSIPO	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**

<input checked="" type="radio"/> Daily	<input checked="" type="radio"/> Update data from previous day's use	<input type="radio"/> Monthly	<input type="radio"/> When data is preliminary
	<input type="radio"/> Update data from first day of the month		<input type="radio"/> When data is final
<input type="radio"/> Business Day	<input type="radio"/> Update data from previous day's use		
	<input type="radio"/> Update data from first day of the month		
<input type="radio"/> Weekly	Receive file on <span style="border: 1px solid #ccc; padding: 2px;">Sunday</span>	<input type="radio"/> Bi-Monthly	When data is processed through the and the last day of the month <span style="border: 1px solid #ccc; padding: 2px;">1</span>
	<input type="radio"/> Update data from previous week's use		
	<input type="radio"/> Update data from first day of the month		

## How do I update an alert?

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

**Re-Run Alert** Tips ?

Select or enter a date range to run "I11004QSIPO TEST ALERT".  
The parameters for this alert are shown below.

Account Group: I11004QSIPO  
Customer #s: I11004QSIPO  
Report Sections: Detail by Client/User

Standard range  
Month to date (02/01/2015-02/18/2015) ▼

Custom range  
From Feb ▼ 21 2015 ▼ To Feb ▼ 21 2015 ▼

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.

Copy Saved Alert Parameters

Alert Name:	<input type="text"/>	Client ID:	ALL
Account Group:	I11004QSIP0	Charge Type:	ALL
Customer #s:	I11004QSIP0	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

- |  |  |                                  |   |
|--|--|----------------------------------|---|
| <input checked="" type="radio"/> Daily | <input checked="" type="radio"/> Update data from previous day's use | <input type="radio"/> Monthly    | <input type="radio"/> When data is preliminary                    |
|  | <input type="radio"/> Update data from first day of the month        |                                  | <input type="radio"/> When data is final                          |
| <input type="radio"/> Business Day     | <input type="radio"/> Update data from previous day's use            |                                  |   |
|  | <input type="radio"/> Update data from first day of the month        |                                  |   |
| <input type="radio"/> Weekly           | Receive file on <input type="text" value="Sunday"/>                  | <input type="radio"/> Bi-Monthly | When data is processed through the <input type="text" value="1"/> |
|  | <input type="radio"/> Update data from previous week's use           |                                  | and the last day of the month                                     |
|  | <input type="radio"/> Update data from first 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:

[Click here to View/Change Ascii Options for this Alert.](#)

Send Report

\* To:

Message:

Separate e-mail addresses by semicolon.  
Max. of 25 addresses

Subject:

\* Required Fields

Clear Finished Cancel

## 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.

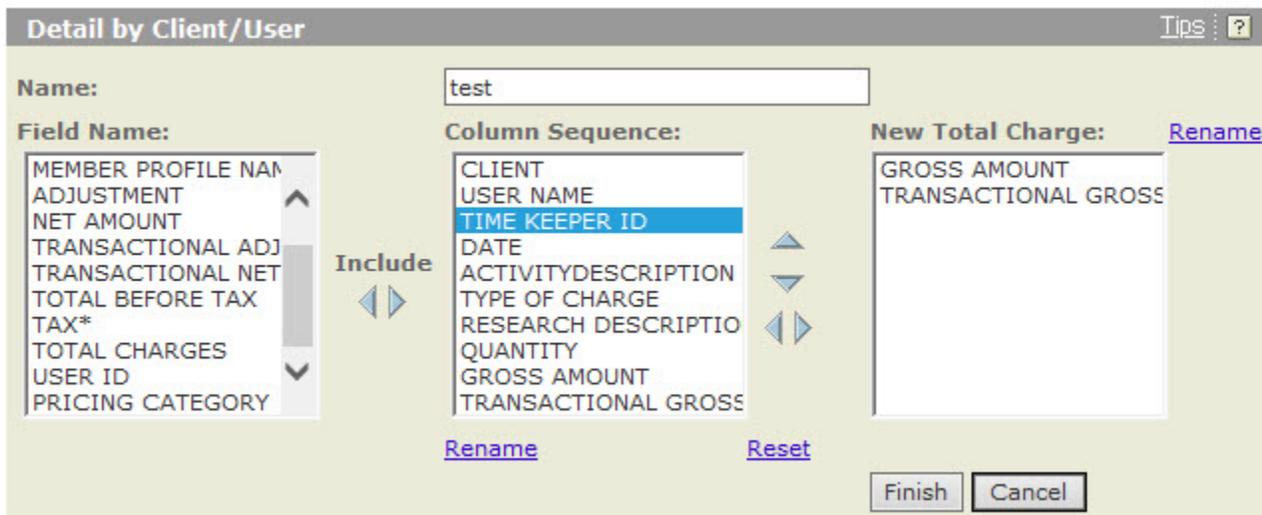
### Select Base Report

**Select Base Report** Tips ?

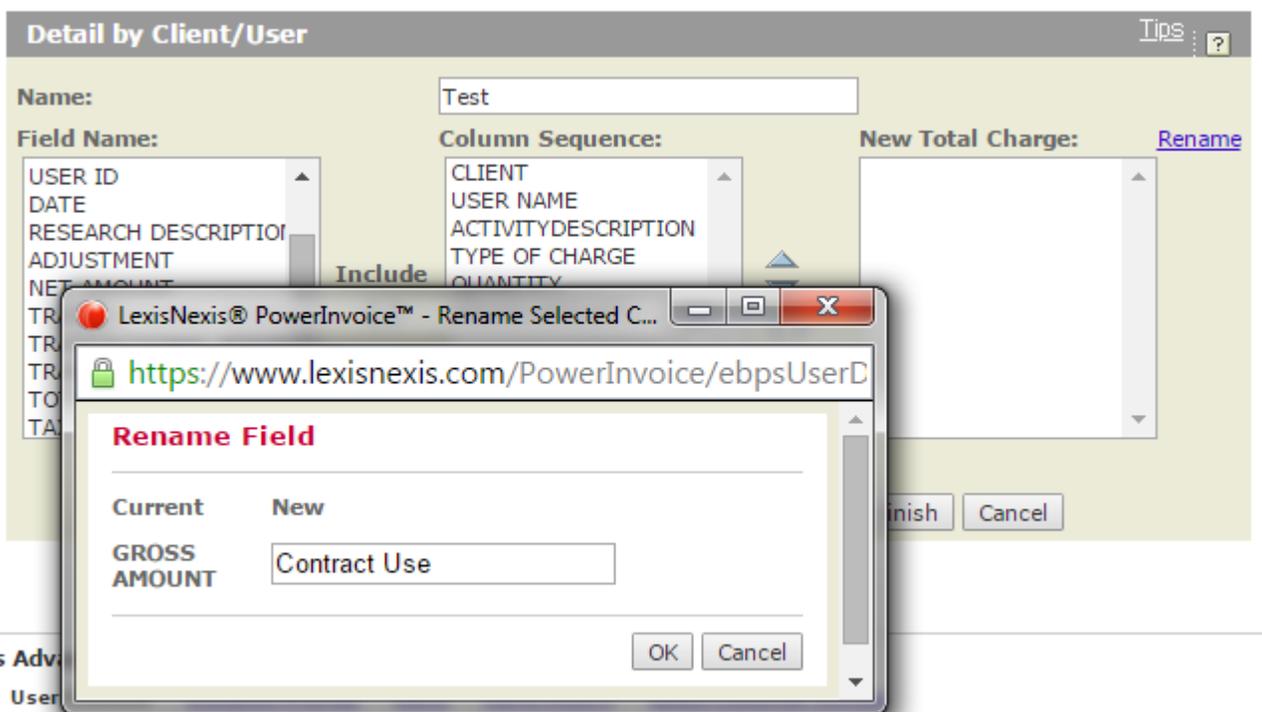
(To see how the reports look and the kind of information they provide, click [Sample Reports](#))

<input type="checkbox"/> Account Summary	<input type="checkbox"/> Summary by Client	<input type="checkbox"/> Summary by Activity Description
<input type="checkbox"/> Detail Report	<input type="checkbox"/> Masked	<input type="checkbox"/> Summary by User
<input checked="" type="radio"/> Detail by Client/User	<input type="checkbox"/> Excluded Report	<input type="checkbox"/> Summary by User/Date
<input type="radio"/> Detail by User/Client	<input type="checkbox"/> Summary by Client/User/User ID	
	<input type="checkbox"/> Summary by Client/User/User ID/Date	

### Detail by Client/User



### Rename Field



### Detail by Client/User - Resequenced

**Detail by Client/User** Tips ?

Name:

Field Name:   
MEMBER PROFILE NAME ▲  
USER ID  
DATE  
RESEARCH DESCRIPTION  
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

**User-Defined Reports** Tos ?

Apply Allocation Profile: NO PROFILE DEFINED

Reports: TEST 1

Standard Date Range:  Month to date (09/01/2016-09/01/2016)

Custom Date Range:  From Sep  2016 To Sep  2016

Account Number(s): <a href="#">List...</a>	Client ID(s): <a href="#">List...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
User Name(s): <a href="#">List...</a>	User ID(s): <a href="#">List...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
User Group(s): <a href="#">List...</a>	Master Feature Name(s): <a href="#">List...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>
Member Profile Name(s): <a href="#">List...</a>	Pricing Category(s): <a href="#">List...</a>
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>

ASCII Download Options: [View/Change ASCII Settings](#)

## 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.

The screenshot shows a software interface with a navigation bar at the top. The navigation bar has tabs for 'Billing Data', 'Administration', and 'Analytics'. Below these are sub-tabs: 'Search', 'Custom', 'Reallocation', 'User-Defined', 'Threshold-Alert', and 'Allocation Profiles'. The 'Threshold-Alert' tab is currently selected. Below the navigation bar, there is a section titled 'Threshold Alerts'. Under this section, there is a 'Reports:' label followed by a text input field containing the text 'TEST' and 'TEST FOR CONTRACT GROSS' on two lines. To the right of the input field is an 'Add' button.

## 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**.

**Threshold Alert Criteria** Tips ?

Client ID(s)

User ID(s)

Activity Description(s)

Pricing Category

User Name(s)

User Group(s)

### Create Threshold Alert Based On Client Id

<b>* Threshold Alert Name:</b>	<input style="width: 100%;" type="text"/>
<b>* Client ID(s)</b>	<input style="width: 100%;" type="text" value="ALL"/> <a href="#">List ...</a>
<b>Contract Gross Limit</b>	<input style="width: 100%;" type="text" value="0.00"/>
<b>Contract Net Limit</b>	<input style="width: 100%;" type="text" value="0.00"/>
<b>Transactional Gross Limit</b>	<input style="width: 100%;" type="text" value="0.00"/>
<b>Transactional Net Limit</b>	<input style="width: 100%;" type="text" value="0.00"/>
<b>Total before Tax Limit</b>	<input style="width: 100%;" type="text" value="0.00"/>

An email notification will be sent when the amount specified has been met

<p><b>* To:</b> <input style="width: 100%; height: 100px;" type="text"/></p> <p style="font-size: small; margin-top: 5px;"><i>Seperate e-mail addresses by comma. Max. of 25 addresses</i></p> <p><b>Subject:</b> <input style="width: 100%;" type="text" value="PowerInvoice threshold notification - Client ID"/></p>	<p><b>Message:</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <p>This is the PowerInvoice threshold notification you requested. Please sign-in to PowerInvoice for additional use details.</p> </div>
---	---

**\* Required Fields**

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. Select a **User Name**.
4. Select which **Financial Account Information** you'd like this user to have assigned to them.
5. Click **Finish**.

Manage Account Assignment    Manage Allocation Profile Access

Look up User Name's

User Name	Financial Account Information
JAMES PITZER	Select the financial account the user can view.
	<input checked="" type="checkbox"/> Select All
	<input checked="" type="checkbox"/> LexisNexis LA Test Power_Invoice Pitzer Miamisburg OH

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## 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



#### Saved Chart Profiles

Select a Chart Profile from the drop down box and click on an action.

Chart Profiles:

Select a Profile  
DEMO 1  
GROSS TO NET  
TEST  
TEST 111

## 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.

The screenshot shows the 'Create Chart Profile' form in the Analytics tab. The form is divided into four steps, with Step 1 being the current step. The form includes the following fields and options:

- Profile Name\***: A text input field.
- Date Range**: A dropdown menu set to 'November 2016'. Below it, there are radio buttons for 'Custom Date Range' with 'From' and 'To' date pickers (Month, Day, Year).
- Attribute\***: A list of radio buttons for selecting an attribute: Client, User Name, Activity Description, Type of Charge, Account Information, Member Profile Name, Master Feature, and User Group.
- Navigation**: 'Previous' and 'Next' buttons at the bottom.

The main content area of the form is currently empty, displaying a large 'X' and the text: 'Your graph will be displayed here once you have completed the 4 step process'.

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

Create Chart Profile

Step
Step
Step
Step

1
2
3
4

**Profile Name\***

**Date Range**

February 2016 ▼

Custom Date Range

From:    ▼

To:    ▼

**Display Based on\***

- Contract Gross
- Contract Net
- Transactional Gross
- Transactional Net
- Total Charge(Includes Tax)
- Total Before Tax
- Other charges
- Quantity

LA Online time will not be included

\* Entry Required

Activity Description

X

Your graph will be displayed here once you have completed the 4 step process

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

**Create Chart Profile**

Step
Step
Step
Step

1
2
3
4

**Profile Name\***

**Date Range**

February 2016 ▼

Custom Date Range

From:  ▼   ▼

To:  ▼   ▼

**Function\***

Enter a numeric value greater than 0 in one or more of the below boxes. Only values greater than 0 will be displayed.

Greater Than or Equal To:

Less Than or Equal To:

Top Report:

Example : Top 10 clients

\* Entry Required

Activity Description
Contract Gross

X

Your graph will be displayed here once you have completed the 4 step process

4. Choose **Date Range** options.

Create Chart Profile

Step
Step
Step
Step

1
2
3
4

**Profile Name\***

**Date Range**

February 2016 ▼

Custom Date Range

From  
 ▼   ▼

To  
 ▼   ▼

**View\***

Amounts will be displayed in the Billed currency

Amount

Percent

\* Entry Required

Activity Description
Contract Gross
Greater Than or Equal To 10

Your graph will be displayed here once you have completed the 4 step process

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

Step 1
Step 2
Step 3
Step 4

Profile Name\*

Date Range

February 2016

Custom Date Range

From:

To:

View\*

Amounts will be displayed in the Billed currency

Amount

Percent

Previous
Finish

\* Entry Required

Activity Description
Contract Gross
Greater Than or Equal To 10
Amount Percent
View PDF

**TEST 123**

JAN 01, 2016 - FEB 24, 2016

Category	Amount
US CASES	\$72.51
US STATUTORY CODES	\$57.00
US LAW REVIEWS AND JOURNALS	\$55.00
SHEPARD'S	\$31.02

**TEST 123**

JAN 01, 2016 - FEB 24, 2016

Category	Percentage
US CASES	34%
US STATUTORY CODES	26%
US LAW REVIEWS AND JOURNALS	26%
SHEPARD'S	14%

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**

**Saved Chart Profiles** Help ?

Select a Chart Profile from the drop down box and click on an action.

Chart Profiles:

---

Selected Profile: DEMO 1

Actions:

## 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

General | Billing Data | Tips ?

General Preferences

Display Language: US ENGLISH

Email Delivery Language: US ENGLISH

OK Cancel

#### Billing Data Preferences

General | Billing Data | Tips ?

Billing Data

Default Explore Path:  Client/User  User/Client

Display allocation of subscription charges?  Yes  No

Include Page Break between Client ID :  Yes  No

Suppress Report Title :

On Custom Report  Yes  No

On Reallocation Report  Yes  No

Include Account Details on Reports :  Yes  No

Billed Currency: US DOLLARS

Display Currency: UNITED STATES DOLLAR

Regional Currency Display Format: US ENGLISH

Default Download Format: ASCII (DELIMITED TEXT)

Default View: SEARCH

OK Cancel

## 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