

LexisNexis® PowerInvoice™
Custom Rates and Report
Layout
User Guide

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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.

Search
Custom
Reallocation
User-Defined
Allocation Profiles

Data has been processed through 10/27/2015.
September billing data is final.

Custom
100%

Apply Allocation Profile: NO PROFILE DEFINED View Profile

Apply Profile: BAKER01 View Add Edit Copy Delete

Standard Date Range: Month to date (10/01/2015-10/15/2015)

Custom Date Range: From Sep 1 2015 To Oct 15 2015

Account Number(s): ALL List...

User Name(s): ALL List...

Custom User List(s): ALL List...

Member Profile Name(s): ALL List...

Client ID(s): ALL List...

User ID(s): ALL List...

Master Feature Name(s): ALL List...

Report:
 Custom Detail by Client/User
 Custom Detail by User/Client
 Include Research Description with Detail Report
 User-Defined Format: Add Edit Copy Delete
TEST WITH 142
UAT TEST UDF

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

Suppress Report Title : Yes No

Include Page Break between Client Id in Custom Reports: Yes No

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.

Custom Settings - Add
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 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

[Reset All Activity Descriptions](#)

↑

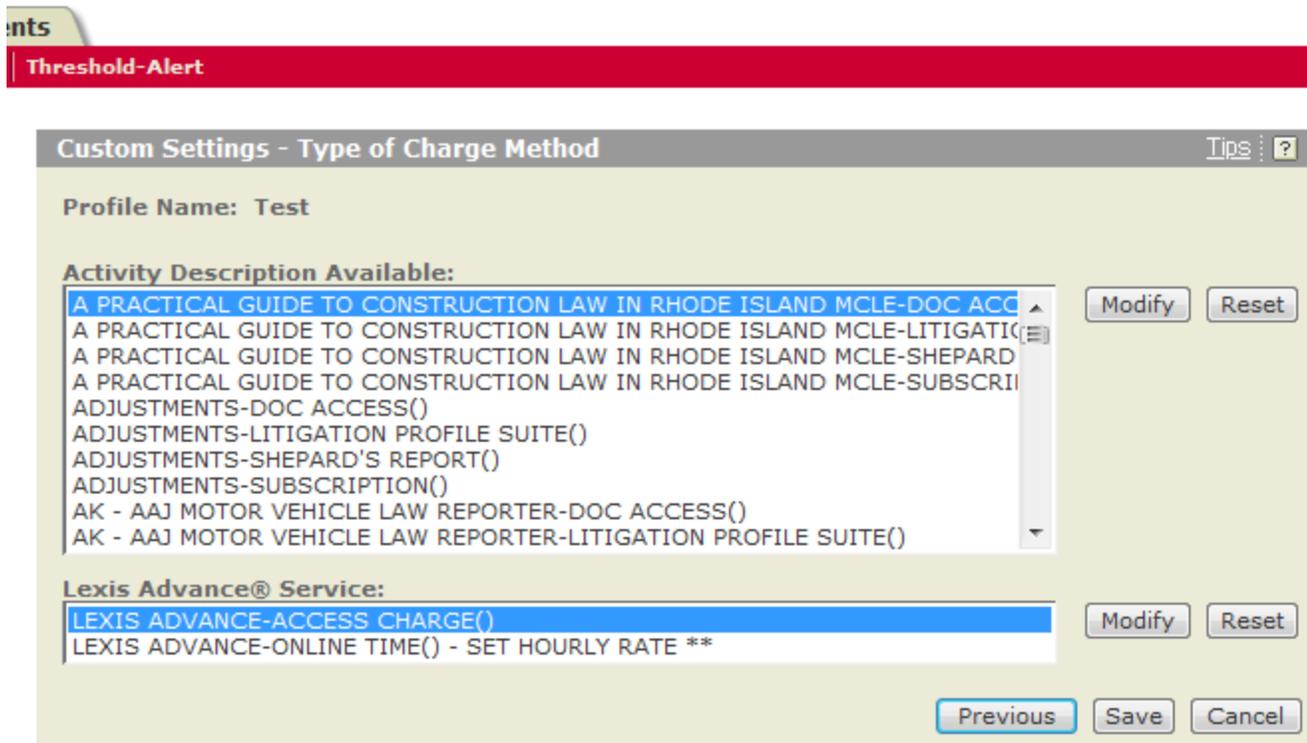
↓

How do I set fixed rates?

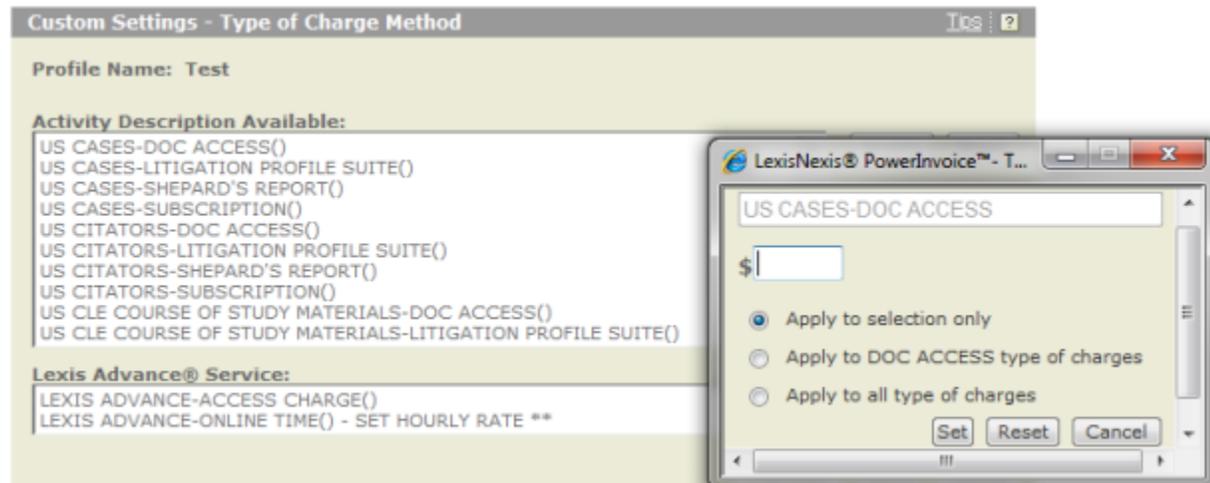
If you've selected the **Set Rate by Type of Charge Method**, you can:

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?

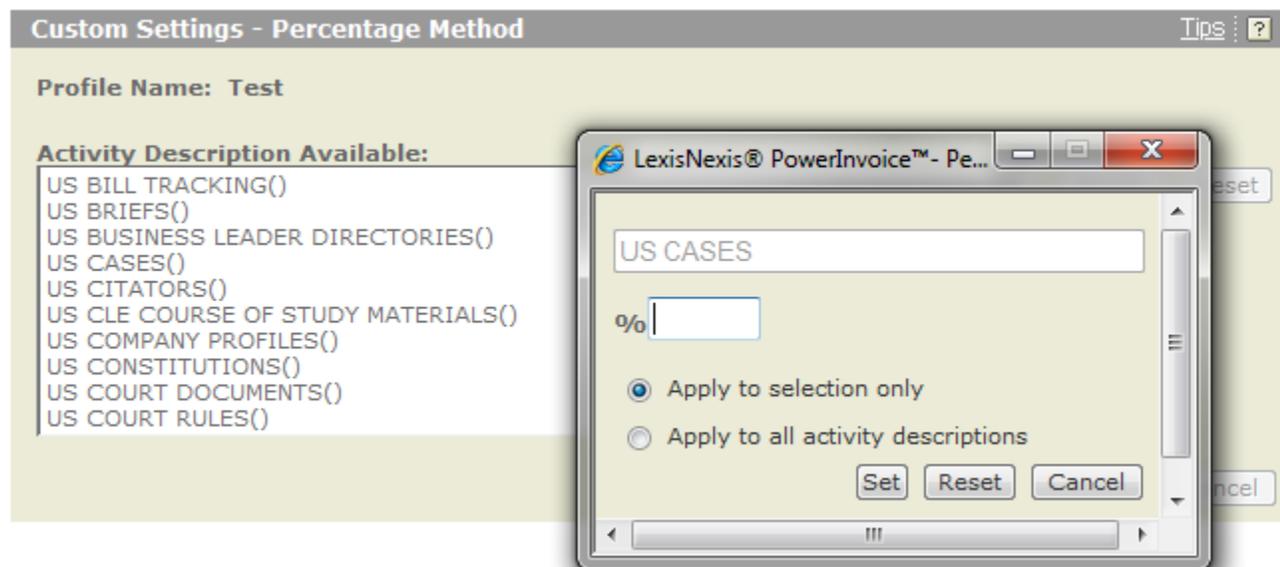
If you've selected Set Percentage Rate by Activity Description, you can:

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:

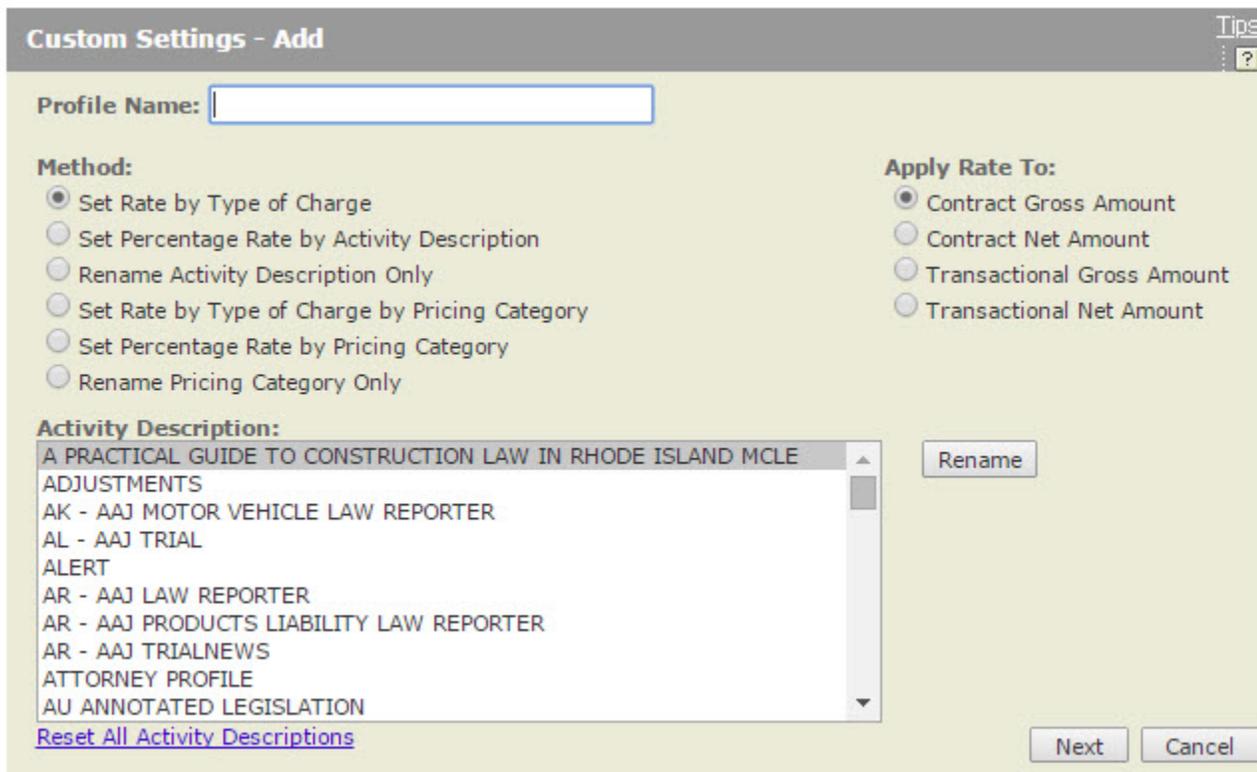
The rate you enter indicates the percentage rate you wish to recover, not the discount rate. If you enter 25, you'll recover 25 cents on the dollar; if you enter 125, you'll recover 125 cents on the dollar.

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



The screenshot shows a dialog box titled "Custom Settings - Add" with a "Tips" icon in the top right corner. The "Profile Name:" field is empty. Under the "Method:" section, the "Rename Activity Description Only" radio button is selected. Under the "Apply Rate To:" section, the "Contract Gross Amount" radio button is selected. The "Activity Description:" list contains the following items: "A PRACTICAL GUIDE TO CONSTRUCTION LAW IN RHODE ISLAND MCLE", "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", and "AU ANNOTATED LEGISLATION". A "Reset All Activity Descriptions" link is at the bottom left of the list. A "Rename" button is to the right of the list. At the bottom right, there are "Next" and "Cancel" buttons.

Rename Pop-up Window

Custom Settings - Add Tips ?

Profile Name:

Method:

- Set Rate by Type of Charge
- Set Percentage Rate by Activity Description
- Rename Activity Description Only

Apply Rate To:

- Contract Gross Amount
- Contract Net Amount
- Transactional Gross Amount
- Transactional Net Amount

Activity Description:

- US ANALYST REPORTS
- US ATTORNEY DIRECTORIES
- US BILL TEXT
- US BILL TRACKING
- US BRIEFS
- US BUSINESS LEADER DIRECTORIES
- US CASES
- US CITATORS
- US CLE COURSE OF STUDY MATERIALS
- US COMPANY PROFILES

[Reset All Activity Descriptions](#)

LexisNexis® PowerInvoice™ - Se...

Current Description:

New Description:

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 Icons ?

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 ...	Client ID(s): List ...
ALL	ALL
User Name(s): List ...	User ID(s): List ...
ALL	ALL
Custom User List(s): List ...	Master Feature Name(s): List ...
ALL	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

[Reset All Activity Descriptions](#)

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 Iics ?

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 ... <input type="text" value="ALL"/>	Client ID(s): List ... <input type="text" value="ALL"/>
User Name(s): List ... <input type="text" value="ALL"/>	User ID(s): List ... <input type="text" value="ALL"/>
Custom User List(s): List ... <input type="text" value="ALL"/>	Master Feature Name(s): List ... <input type="text" value="ALL"/>
Member Profile Name(s): List ... <input type="text" value="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 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

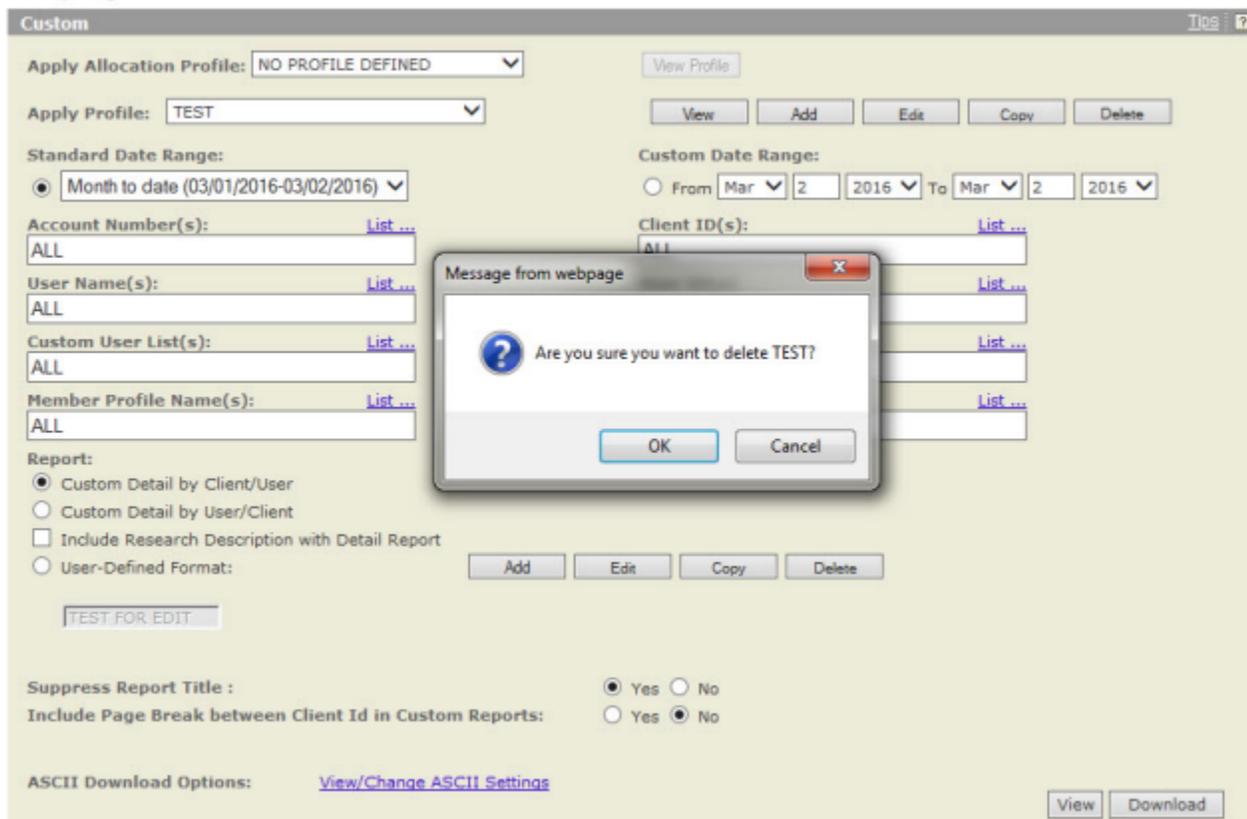
[Reset All Activity Descriptions](#)

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**.

Data has been processed through 03/03/2016.
February billing data is final.



The screenshot displays a web application interface for managing profiles. The main window is titled "Custom" and contains various configuration options. A modal dialog box is overlaid on the interface, asking for confirmation to delete a profile.

Custom [Help]

Apply Allocation Profile: NO PROFILE DEFINED [View Profile]

Apply Profile: TEST [View] [Add] [Edit] [Copy] [Delete]

Standard Date Range: Month to date (03/01/2016-03/02/2016) [Custom Date Range: From Mar 2 2016 To Mar 2 2016]

Account Number(s): ALL [List ...]

User Name(s): ALL [List ...]

Custom User List(s): ALL [List ...]

Member Profile Name(s): ALL [List ...]

Report: Custom Detail by Client/User Custom Detail by User/Client Include Research Description with Detail Report User-Defined Format: [Add] [Edit] [Copy] [Delete]

TEST FOR EDIT

Suppress Report Title: Yes No

Include Page Break between Client Id in Custom Reports: Yes No

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

Message from webpage

Are you sure you want to delete TEST?

[OK] [Cancel]

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.

Data has been processed through 04/11/2016.
 March billing data is final.

The screenshot shows a web-based configuration interface titled "Custom". It includes several sections for setting up a report:

- Apply Allocation Profile:** A dropdown menu currently set to "NO PROFILE DEFINED". A "View Profile" button is next to it.
- Apply Profile:** A dropdown menu set to "PROFILE NAME".
- Standard Date Range:** A dropdown menu set to "Month to date (04/01/2016-04/05/2016)".
- Custom Date Range:** Radio buttons for "From" and "To" with date pickers (Month, Day, Year). Currently set to "From Apr 5 2016 To Apr 5 2016".
- Account Number(s):** Text input field containing "ALL".
- User Name(s):** Text input field containing "ALL".
- Custom User List(s):** Text input field containing "ALL".
- Member Profile Name(s):** Text input field containing "ALL".
- Client ID(s):** Text input field containing "ALL".
- User ID(s):** Text input field containing "ALL".
- Master Feature Name(s):** Text input field containing "ALL".
- Pricing Category(s):** Text input field containing "ALL".
- Report:** Radio buttons for "Custom Detail by Client/User" (selected), "Custom Detail by User/Client", "Include Research Description with Detail Report", and "User-Defined Format".
- Buttons:** "Add", "Edit", "Copy", and "Delete" buttons are present below the report options.
- Suppress Report Title:** Radio buttons for "Yes" (selected) and "No".
- Include Page Break between Client Id in Custom Reports:** Radio buttons for "Yes" and "No" (selected).
- ASCII Download Options:** A link labeled "View/Change ASCII Settings".
- Bottom Buttons:** "View" and "Download" buttons.

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.

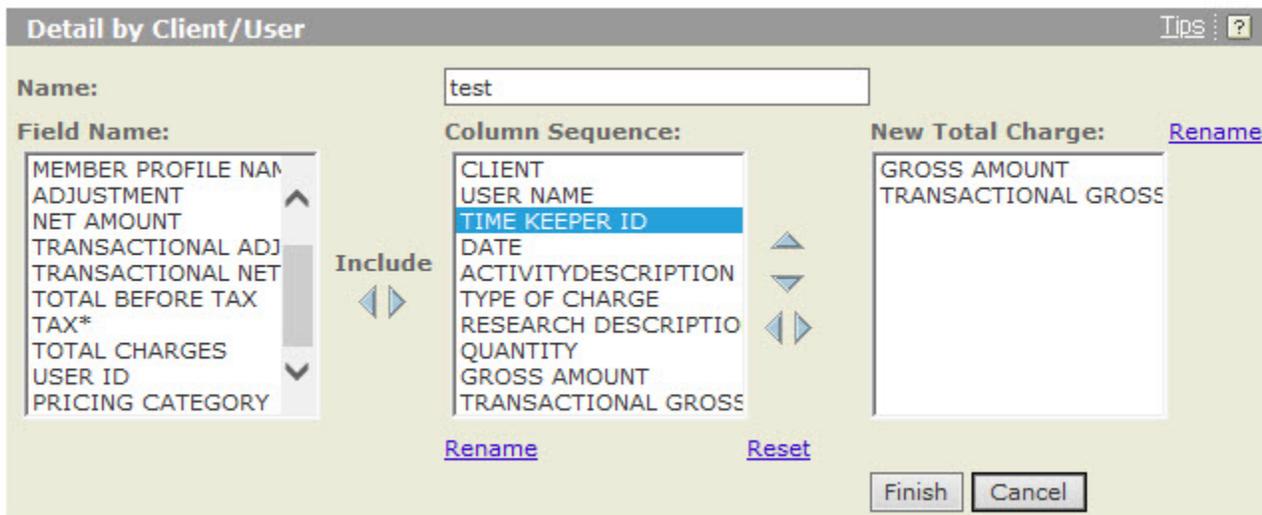
Select Base Report

Select Base Report Tips ?

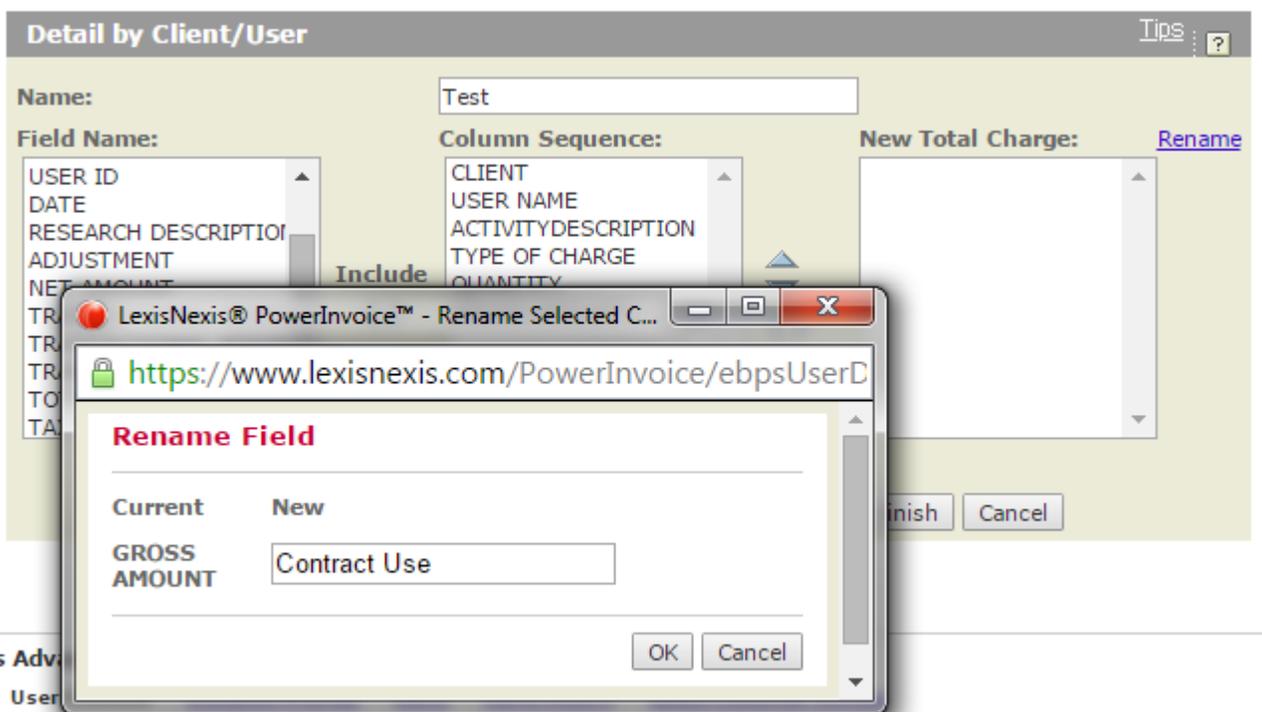
(To see how the reports look and the kind of information they provide, click [Sample Reports](#))

<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

Column Sequence:

- CLIENT
- USER NAME
- ACTIVITYDESCRIPTION
- TYPE OF CHARGE
- QUANTITY
- GROSS AMOUNT(CONTR
- NET AMOUNT
- TRANSACTIONAL NET AI

New Total Charge: [Rename](#)

- NET AMOUNT
- TRANSACTIONAL NET AI

Include ◀▶ ▲▼ ◀▶

[Rename](#) [Reset](#)

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

The screenshot displays the 'User-Defined Reports' interface. At the top, there is a header with 'User-Defined Reports' and a 'Tips ?' icon. Below the header, the 'Apply Allocation Profile' is set to 'NO PROFILE DEFINED' with a 'View Profile' button. The 'Reports' dropdown is set to 'TEST', with 'RSS' also visible. Action buttons for 'Add', 'Edit', 'Copy', and 'Delete' are present. The 'Standard Date Range' is set to 'Month to date (02/01/2016-02/29/2016)'. The 'Custom Date Range' is set to 'From Feb 29 2016 To Feb 29 2016'. There are two columns of filters, each with a 'List...' link: Account Number(s), User Name(s), Custom User List(s), Member Profile Name(s), Client ID(s), User ID(s), Master Feature Name(s), and Pricing Category(s). All filter fields are currently set to 'ALL'. At the bottom, there is an 'ASCII Download Options' section with a 'View/Change ASCII Settings' link and 'View' and 'Download' buttons.

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