

LexisNexis® PowerInvoice™
User Guide for Law Firms

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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.

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:

The screenshot shows the PowerInvoice search interface. At the top, there is a 'Search' header with a 'Tos' link. Below this, there are several sections for configuring the search:

- Apply Allocation Profile:** A dropdown menu set to 'NO PROFILE DEFINED' with a 'View Profile' button next to it.
- Standard Date Range:** A radio button selected for 'Month to date (09/01/2016-09/01/2016)' with a 'Reset All List Links' button below it.
- Custom Date Range:** Radio buttons for 'From' and 'To' with dropdown menus for month and year (e.g., Sep, 1, 2016).
- Filters:** Two columns of text input fields, each with a 'List ...' link. The fields are: 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). All fields contain the text 'ALL'.
- * Report Sections:** A link to 'Sample Reports' with a note: '(To see how the reports look and the kind of information they provide, click [Sample Reports](#))'.
- Clear Selections:** A section with multiple checkboxes for report options:
 - Account Summary
 - Credits
 - Detail Report
 - Detail by Client/User
 - Detail by User/Client
 - Include Research Description
 - Complimentary/Trial Use
 - Excluded Report
 - Summary by Financial Account
 - Summary by Client
 - Masked
 - Summary by Client/User/User ID
 - Summary by Client/User/User ID/Date
 - Summary by Activity Description
 - Summary by User
 - Summary by User/Date
- Report Details:** A section with a radio button selected for 'Yes' and a 'No' option. Text: 'Display allocation of subscription charges? (Your choice affects this search only. Go to the [Preferences](#) to change the allocations default)'. Below this is a link: 'View/Change ASCII Settings'.
- ASCII Download Options:** Radio buttons for 'Yes' and 'No'.
- Include Account Details on Reports:** Radio buttons for 'Yes' and 'No'.
- * Entry Required** label.
- View** and **Download** buttons at the bottom right.

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.

-
- If you would like access to the **Custom** and **Reallocation** tabs for further options, please contact your LexisNexis representative.

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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

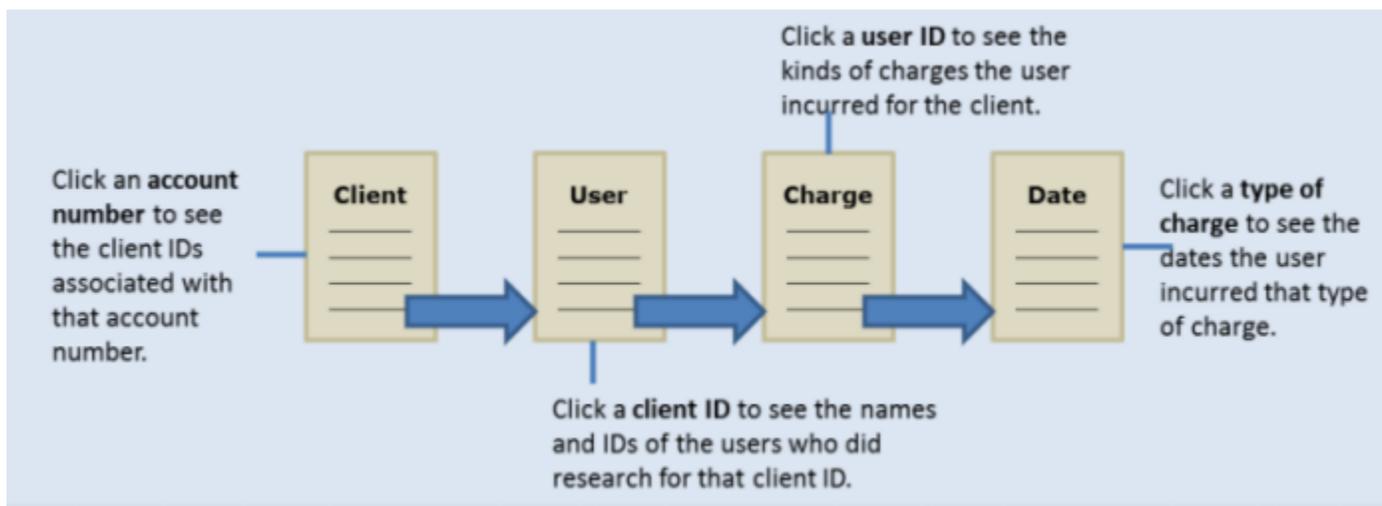
Report 1 of 3

*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.

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
Total:	\$95.00	\$2,666.82	\$2,761.82	\$114.00	(\$6.76)	\$107.24	\$2,876.36	\$0.00	\$0.00	\$0.00	\$2,933.36

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): 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"/>
Activity Description(s): List ... <input type="text" value="ALL"/>	Type of Charge(s): List ... <input type="text" value="ALL"/>
User Group(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"/>	Pricing Category(s): List ... <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**

View Download

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
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	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
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	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
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

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 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 Sunday	<input type="radio"/> Bi-Monthly	When data is processed through the and the last day of the month 1
	<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

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

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 and the last day of the month <input type="text" value="1"/>
	<input type="radio"/> Update data from previous week's use		
	<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.

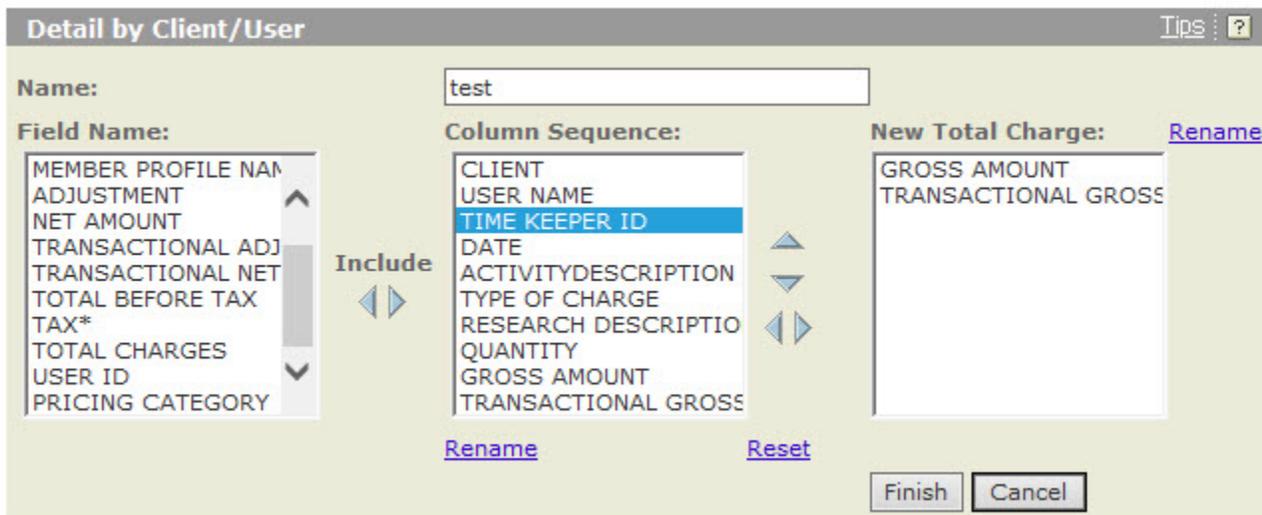
Select Base Report

Select Base Report Tips ?

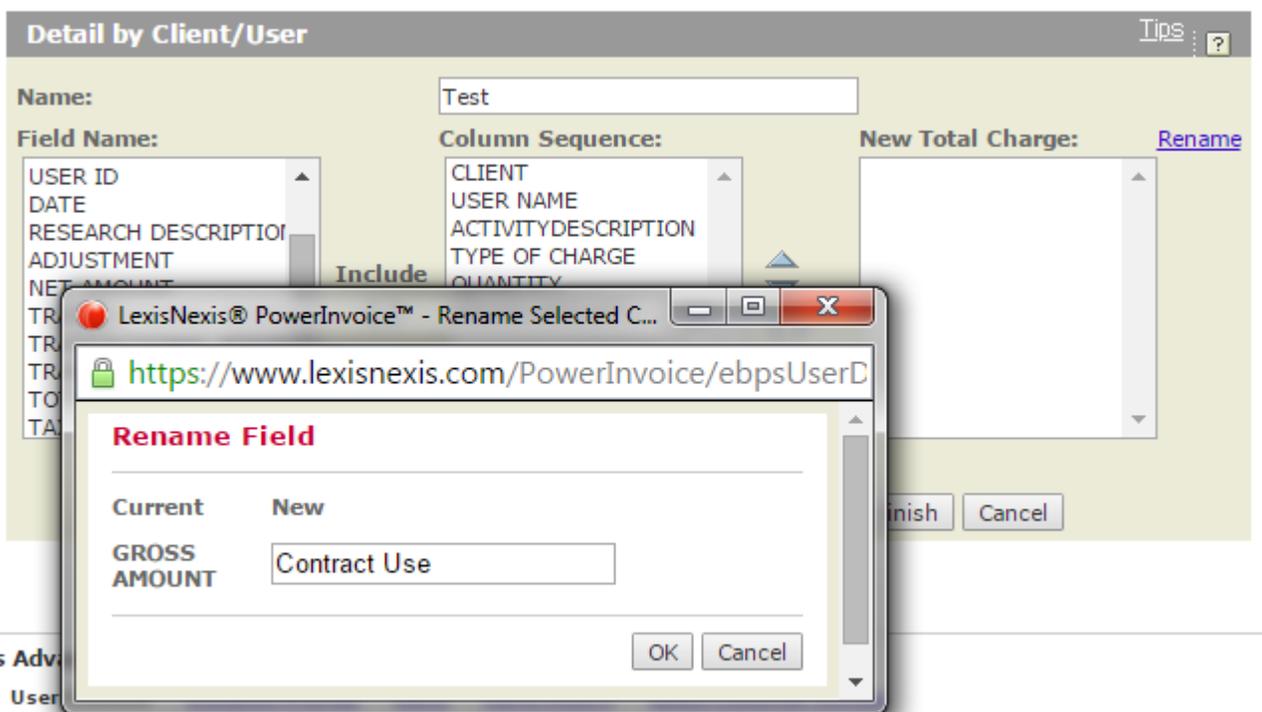
(To see how the reports look and the kind of information they provide, click [Sample Reports](#))

<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

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  **Reset** 

[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 shows the 'User-Defined Reports' window. At the top, there's a title bar with 'User-Defined Reports' and a help icon. Below the title bar, there's a section for 'Apply Allocation Profile' with a dropdown menu set to 'NO PROFILE DEFINED' and a 'View Profile' button. To the right, there are buttons for 'Add', 'Edit', 'Copy', and 'Delete'. Below this, there's a 'Reports' field containing 'TEST 1'. The 'Standard Date Range' section has a radio button selected for 'Month to date (09/01/2016-09/01/2016)' and a 'Reset All List Links' button. The 'Custom Date Range' section has a radio button selected for 'From' and a date range selector set to 'Sep 1 2016 To Sep 1 2016'. There are two columns of filter fields, each with a 'List...' link. The left column includes 'Account Number(s): ALL', 'User Name(s): ALL', 'User Group(s): ALL', and 'Member Profile Name(s): ALL'. The right column includes 'Client ID(s): ALL', 'User ID(s): ALL', 'Master Feature Name(s): ALL', and 'Pricing Category(s): ALL'. At the bottom left, there's a link for 'View/Change ASCII Settings' under the heading 'ASCII Download Options:'. At the bottom right, there are 'View' and 'Download' buttons.

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

Custom
Titles

Apply Allocation Profile: NO PROFILE DEFINED View Profile

Apply Profile: NEW TOTAL View Add Edit Copy Delete

Standard Date Range: Month to date (09/01/2016-09/01/2016) Reset All List Links

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

Account Number(s): List ...

User Name(s): List ...

User Group(s): List ...

Member Profile Name(s): List ...

Client ID(s): List ...

User ID(s): List ...

Master Feature Name(s): List ...

Pricing Category(s): 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

DEMO 1
 NEW TOTAL UDF
 TEST FOR PAGE BREAK

Suppress Report Title : Yes No

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

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

↑

↓

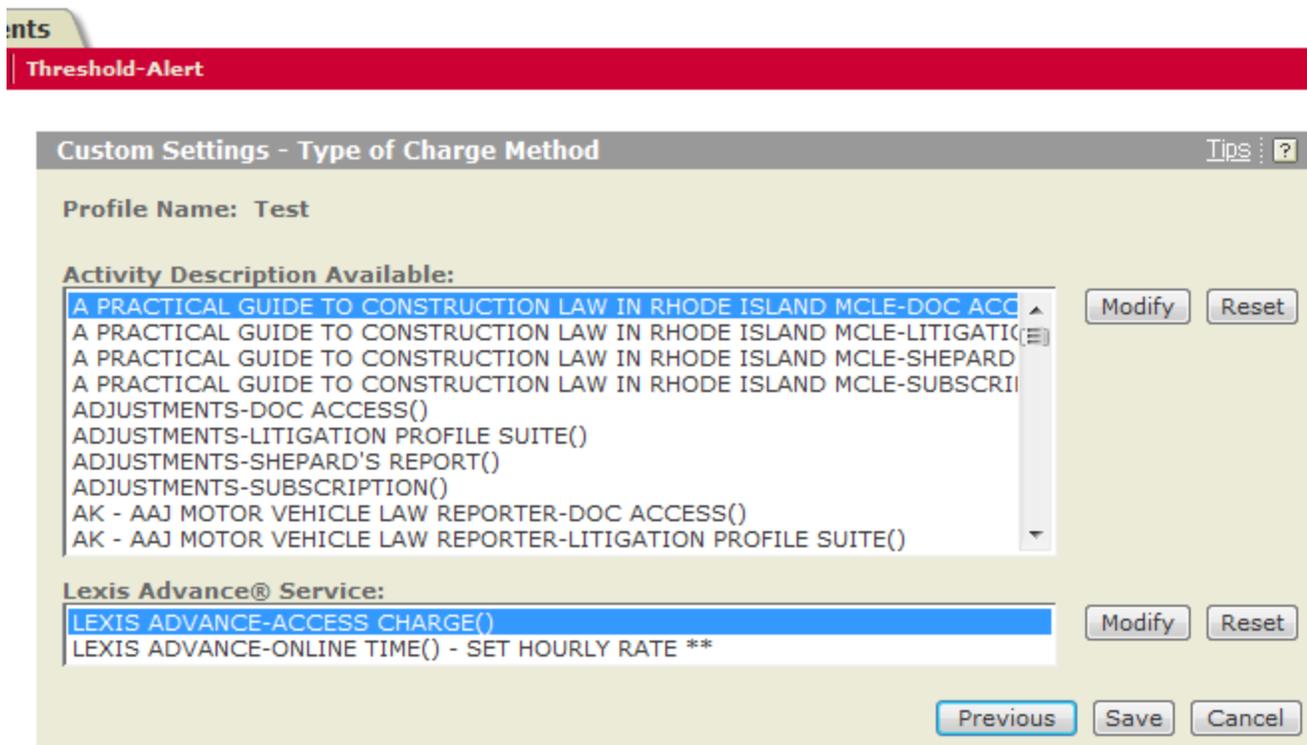
[Reset All Activity Descriptions](#)

How do I set fixed rates?

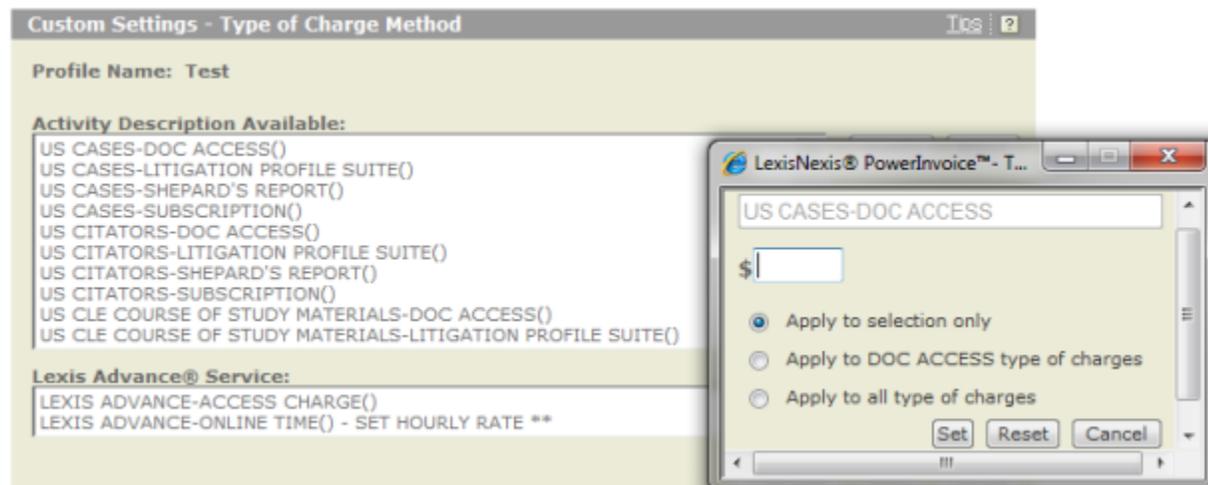
If you've selected the **Set Rate by Type of Charge Method**, you can:

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.

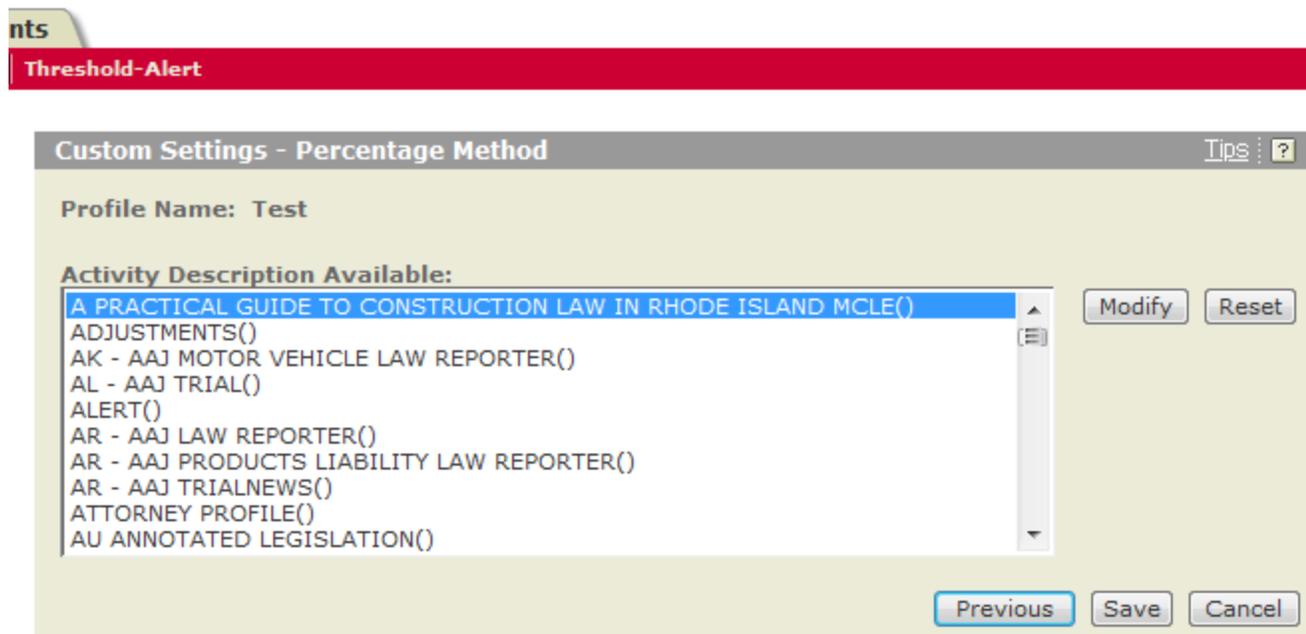
2. Once you've set an amount, click **Set**.
3. Click **Reset** to reset the dollar amount field.

How do I set percentage rates?

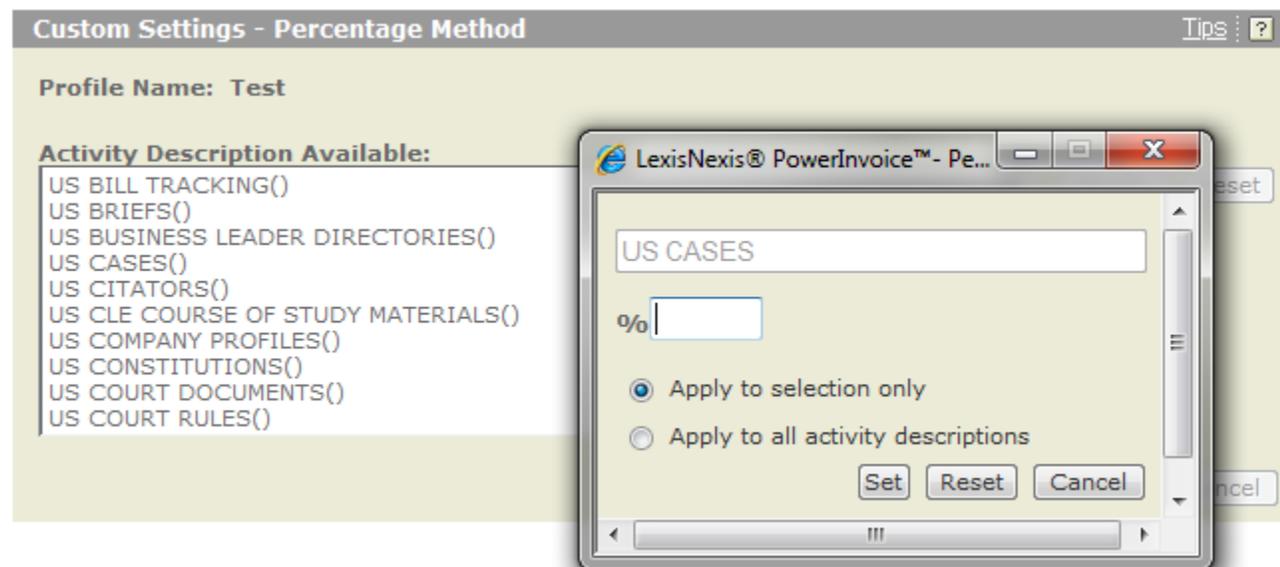
If you've selected Set Percentage Rate by Activity Description, you can:

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

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 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
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[Reset All Activity Descriptions](#)

Rename Next Cancel

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. (Optional) Click the **Reset All List Link** button to change the value on each option to "All".
5. Choose the method of recovery.
6. 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 Title

Apply Allocation Profile: NO PROFILE DEFINED View Profile

Apply Profile: NEW TOTAL View Add Edit Copy Delete

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): 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"/>
User Group(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"/>	Pricing Category(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

DEMO 1
 NEW TOTAL UDF
 TEST FOR PAGE BREAK

Suppress Report Title : Yes No

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

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

Custom Tips ?

Apply Allocation Profile: **NO PROFILE DEFINED** View Profile

Apply Profile: **NEW TOTAL** View Add Edit Copy Delete

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): List ... ALL	Client ID(s): List ... ALL
User Name(s): List ... ALL	User ID(s): List ... ALL
User Group(s): List ... ALL	Master Feature Name(s): List ... ALL
Member Profile Name(s): List ... ALL	Pricing Category(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

DEMO 1
 NEW TOTAL UDF
 TEST FOR PAGE BREAK

Suppress Report Title : Yes No

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
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[Reset All Activity Descriptions](#) Rename

Next Cancel

How do I delete a profile?

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

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

Data has been processed through 09/14/2016.
August billing data is final.

The screenshot shows a web application interface for managing profiles. The main window is titled 'Custom' and contains several sections:

- Apply Allocation Profile:** A dropdown menu set to 'NO PROFILE DEFINED' and a 'View Profile' button.
- Apply Profile:** A dropdown menu set to 'TEST 1' and buttons for 'View', 'Add', 'Edit', 'Copy', and 'Delete'.
- Standard Date Range:** A dropdown menu set to 'Month to date (09/01/2016-09/01/2016)'.
- Custom Date Range:** Radio buttons for 'From' and 'To' with date pickers for 'Sep 1 2016'.
- Account Number(s):** A text input field containing 'ALL' and a 'List...' button.
- User Name(s):** A text input field containing 'ALL' and a 'List...' button.
- Custom User List(s):** A text input field containing 'ALL' and a 'List...' button.
- Member Profile Name(s):** A text input field containing 'ALL' and a 'List...' button.
- 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:'. Below these are 'Add', 'Edit', 'Copy', and 'Delete' buttons.
- Suppress Report Title:** Radio buttons for 'Yes' (selected) and 'No'.

A modal dialog box titled 'Message from webpage' is overlaid on the interface. It contains a question mark icon and the text 'Are you sure you want to delete TEST 1?'. The dialog has 'OK' and 'Cancel' buttons.

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. (Optional) Click the **Reset All List Link** button to change the value on each option to "All".
5. Select the report to run.
6. Click the **View/Change ASCII Settings** link to modify those settings.

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.

7. Once you've made all your selections, click **View** to view your billing data with your selected profile applied.
8. Once you've made your selections, click **Download** to download your billing data with your selected profile applied.

Custom

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

Apply Profile: **NEW TOTAL** [View](#) [Add](#) [Edit](#) [Copy](#) [Delete](#)

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): [List ...](#)
ALL

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

User Group(s): [List ...](#)
ALL

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

Client ID(s): [List ...](#)
ALL

User ID(s): [List ...](#)
ALL

Master Feature Name(s): [List ...](#)
ALL

Pricing Category(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](#)

DEMO 1
NEW TOTAL UDF
TEST FOR PAGE BREAK

Suppress Report Title : Yes No

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

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

PowerInvoice™ Reallocation

The Reallocation feature in PowerInvoice allows you to identify, reallocate or remove completely non-billable research charges.

The PowerInvoice reports used for reallocation are the **Detail Client by User**, **Detail User by Client** and **Summary by Client** reports. At the **Reallocation – Report Dates/Options** screen, you can perform the tasks listed on the following pages.

How do I use the reallocation feature?

The Reallocation feature in PowerInvoice allows you to identify, reallocate or remove completely non-billable research charges.

The PowerInvoice reports used for reallocation are the Detail Client by User, Detail User by Client, and Summary by Client reports. At the “Reallocation – Report Dates/Options” screen, you can select from the following options:

1. Choose one of the standard date range options or create your own custom date range.
2. Determine how you want the detail report sorted by choosing either the Client/User or User/Client order.
3. Choose whether to **Suppress Report Title**.
4. Choose to reallocate contract charges or transactional charges.
5. Choose to reallocate charges By Client ID, By LexisNexis Activity Description, By Type of Charge, or By Member Profile Name.
6. Click **Next** to continue the reallocation process.

The screenshot shows the 'Custom' report configuration interface. A modal dialog box titled 'Message from webpage' is centered on the screen, asking 'Are you sure you want to delete NEW TOTAL?' with 'OK' and 'Cancel' buttons. The background interface includes the following elements:

- Apply Allocation Profile:** NO PROFILE DEFINED (dropdown), with a 'View Profile' button.
- Apply Profile:** NEW TOTAL (dropdown), with 'View', 'Add', 'Edit', 'Copy', and 'Delete' buttons.
- Standard Date Range:** Month to date (09/01/2016-09/01/2016) (dropdown).
- Custom Date Range:** From Sep 1 2016 To Sep 1 2016 (date pickers).
- Reset All List Links** button.
- Account Number(s):** ALL (text input), with a 'List ...' link.
- User Name(s):** ALL (text input), with a 'List ...' link.
- User Group(s):** ALL (text input), with a 'List ...' link.
- Member Profile Name(s):** ALL (text input), with a 'List ...' link.
- Report:**
 - Custom Detail by Client/User
 - Custom Detail by User/Client
 - Include Research Description with Detail Report
 - User-Defined Format: (with 'Add', 'Edit', 'Copy', 'Delete' buttons)
- Preview:** DEMO 1, NEW TOTAL UDF, TEST.FOR.PAGE.BREAK
- Suppress Report Title:** Yes No

Reallocating Contract or Transactional Charges

You have the choice of reallocating contract charges, which will help you recover the cost of your flat-rate contract or use-discount plan by dispersing non-billable charges among the billable clients on the PowerInvoice report. You also have the option of reallocating transactional charges from non-billable to billable clients.

However, contract charges can only be reallocated to other contract charges and transactional charges can only be reallocated to other transactional charges. You cannot reallocate transactional charges to contract charges and vice versa.

Reallocating by Client ID, LexisNexis® Activity Description, Type of Charge, Member Profile or Pricing Category

You can also choose whether to reallocate non-billable LexisNexis Activity Description charges or non-billable client charges. For example, you may choose to reallocate all US Cases charges to the other activity description charges on your PowerInvoice report, such as US Codes or US Administrative Materials. The other option would be to reallocate non-billable client charges to billable clients. It is not possible to generate one report that will reallocate charges for both non-billable LexisNexis Activity Descriptions and clients.

Reallocation - Select Non-billable Clients

Billable Clients

9908
4444-5555-TESTING SOMETHING
TUESDAY
****NO CLIENT ID SPECIFIED****
COLD
1122
HALLOWEEN
4444
6666
3344
7777-1111-MORE STUFF TO DO
2222-4444-MY STUFF

Non-billable Clients

Mark/Unmark Client for Exclusion

Gross Contract Amount: \$ 242.99
Net Contract Amount: \$ 351.92

Non-billable Gross Amount: \$ 0.00
Non-billable Net Amount: \$ 0.00

Billable Recovery Rate
Reallocate Gross Use at: 100 %
Reallocate Net Use at: 100 %

Client ID(s): [List...](#)
ALL

Zero Cost Records
 Include zero cost records in output
 Do not include zero cost records in output

Non-billable Display
 Include Non-billable Clients in output
 Do not include Non-billable Clients in output

Reallocating Fixed Charges

The next step in the reallocation process is to select which fixed charges (if any) you would like to reallocate. Fixed charges are not applicable to everyone and the following screen will only appear if you do have monthly fixed charges:

Select	Date	AccountNumber	City	Description	Amount
<input type="checkbox"/>	02/01/2015	I11004QUCNI	MASON	LEXIS® FOR MICROSOFT OFFICE WITH DOCUMENT TOOLS	\$ 40.00
<input type="checkbox"/>	02/01/2015	I11004QUCNI	MASON	LEXIS ADVANCE® FOR TAX	\$ 5.17

Fixed Charge Amount
 Override Fixed Charge Amount

Previous Next Cancel

If you wish to reallocate these fixed charges, select the charge to the left of the item. As you select these items, the box at the bottom of the screen will display the total of the fixed charges you want to reallocate.

If you select the radio button for Fixed Charge Amount, the amount shown in this box will be reallocated. If you select the radio button for Override Fixed Charge Amount, you can enter in the amount you want to reallocate instead.

Once the fixed charges (if any) have been selected, the screen at right will appear with a list of the Client IDs entered for the selected date range.

Billable Clients
 9908
 4444-5555-TESTING SOMETHING
 TUESDAY
 ****NO CLIENT ID SPECIFIED****
 COLD
 1122
 HALLOWEEN
 4444
 6666
 3344
 7777-1111-MORE STUFF TO DO
 2222-4444-MY STUFF

Non-billable Clients

Gross Contract Amount: \$ 242.99
 Net Contract Amount: \$ 351.92

Billable Recovery Rate
 Reallocate Gross Use at: 100 %
 Reallocate Net Use at: 100 %

Zero Cost Records
 Include zero cost records in output
 Do not include zero cost records in output

Non-billable Gross Amount: \$ 0.00
 Non-billable Net Amount: \$ 0.00

Client ID(s): ALL

Non-billable Display
 Include Non-billable Clients in output
 Do not include Non-billable Clients in output

All Client IDs or activity descriptions will appear in the box on the left—Billable Clients. You can move Client IDs to the box on the right—Non-billable Clients— by highlighting non-billable Client IDs and using the arrow buttons in the middle. As you move Client IDs to the box on the right, the spaces underneath for Non-billable gross and net amounts will reflect the charges associated with these clients. The middle column of boxes will display the customer's total gross and net contract or transactional amount for the selected time period.

The billable recovery rate input field allows you the option to specify the percentage rate at which the gross and net usages will be reallocated. In other words, the percentage rates you select will be applied to the figures displayed in the Non-Billable Gross/Net Amount fields on the far right side of the screen. For example, if you enter 50% in the "Reallocate Gross Use at" field, one half of the total unexcluded non-billable charges displayed in the Non-Billable Gross Amount field will be distributed among your billable clients when the Reallocation report is generated.

Zero-cost Records

You can eliminate any zero-cost records included in the Reallocation report. If you choose this option, any billing record with a total amount equal to \$0 will be removed.

Tip:

Choosing not to include zero-cost records may streamline the report and make it easier to read.

Non-billable Display

You can also determine whether you want the non-billable client/service information to appear in the Reallocation report.

Reallocation - Select Non-billable Clients
Tab

Billable Clients

9508
 4444-5555-TESTING SOMETHING
 TUESDAY
 *****NO CLIENT ID SPECIFIED*****
 COLD
 1122
 HALLOWEEN
 4444
 6666
 3344
 7777-1111-MORE STUFF TO DO
 2222-4444-MY STUFF

Non-billable Clients

(Empty list)

Gross Contract Amount: \$ 242.99

Net Contract Amount: \$ 351.92

Billable Recovery Rate

Reallocate Gross Use at: 100 %

Reallocate Net Use at: 100 %

Zero Cost Records

Include zero cost records in output

Do not include zero cost records in output

Non-billable Gross Amount: \$ 0.00

Non-billable Net Amount: \$ 0.00

Client ID(s): [List...](#)

Non-billable Display

Include Non-billable Clients in output

Do not include Non-billable Clients in output

Marking or Unmarking Items for Exclusion

This button is located beneath the list of non-billable clients/services and is used to identify and isolate those items you do not wish to reallocate. Simply click the item in the list above and then click the **Mark/Unmark** button to mark it for exclusion. Any charges associated with the item will be removed from the total non-billable charges and will not be reallocated. The item will remain in the non-billable list, and >>>EXCLUDE<<< will be appended to the item's name. If you wish to reallocate these fixed charges, select the charge by placing a check mark in the box to the left of the item. As you select these items, the box at the bottom of the screen will display the total of the fixed charges you want to reallocate.

Selecting the item and clicking the **Mark/Unmark** button again will remove the >>>EXCLUDE<<< sign next to the item and add it back in to the Reallocation report's calculations. Once these selections have been made, you may either view the report online or download the report. You can also select to download the report after you have viewed it online. The report can be downloaded in HTML, ASCII, or spreadsheet format. If you choose ASCII, you can select from the following ASCII settings:

- Fixed Length—Each column is defined by a set length and width.
- Delimited—Instead of a fixed length format, the fields are separated by a character such as a tab or comma.

If you choose delimited, then you must choose from the following:

- Delimiter Type—a column separator (delimiter) is used to denote breaks between fields of data. Comma and tab are common column delimiters, but the Other field is where you can input any other column delimiter. For example: pipe symbol (|) exclamation mark (!) question mark (?) period (.) etc.
- Quote—By quoting the Text Fields, applications like Excel® will not attempt to convert the data within the quotes. In some cases, without quotes, data is read and converted by Excel into a formula. By quoting the text, the data is left as is and displays correctly.
- Quote Type—This is user- or time- and billing-application preference as to the type of quote used, double or single quotes.
- Include Column Headers—You can also choose to include/not include the column headings when downloading the report.

Reallocation Report

The Reallocation report is identical to the Detail by Client/User (or User/Client) Date/Service/Type of Charge report with two additional columns on the right.

One column shows the reallocated gross amounts and the other shows the reallocated net amounts. The column heading will either say "Reallocated Contract Gross/Net Amount" or "Reallocated Transactional Gross/Net Amount" depending on what type of charges you select to be reallocated. An example of the report appears below.

REALLOCATION DETAIL BY CLIENT/USER/DATE/ACTIVITY DESCRIPTION/TYPER OF CHARGE

USER ID	DATE	ACTIVITY DESCRIPTION	TYPE OF CHARGE	QUANTITY	CONTRACT USE			TRANSACTIONAL USE			TOTAL BEFORE TAX	TOTAL TAX*	TOTAL CHARGES	REALLOCATED CONTRACT GROSS AMOUNT	REALLOCATED CONTRACT NET AMOUNT
					GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT					
BLANK	FEB-01-2013	TRANSACTIONAL COMMITMENT	TRANSACTIONAL COMMITMENT ADJ	1	\$0.00	\$0.00	\$0.00	\$0.00	\$112.90	\$112.90	\$112.90	\$0.00	\$112.90	\$0.00	\$0.00
					\$0.00	\$0.00	\$0.00	\$0.00	\$112.90	\$112.90	\$112.90	\$0.00	\$112.90	\$0.00	\$0.00
OVERCOMBLEU1	FEB-11-2013	SHEPARD'S	SHEPARD'S REPORT	2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	FEB-13-2013	US CASES	DOC ACCESS	2	\$18.00	\$11.78	\$49.78	\$0.00	\$0.00	\$0.00	\$49.78	\$1.40	\$13.38	\$0.00	\$0.00
	FEB-18-2013	SHEPARD'S	SHEPARD'S REPORT	2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		US CASES	DOC ACCESS	2	\$0.00	\$0.00	\$0.00	\$18.00	\$0.00	\$18.00	\$18.00	\$1.78	\$40.78	\$0.00	\$0.00
					\$18.00	\$11.78	\$49.78	\$18.00	\$0.00	\$18.00	\$17.78	\$4.24	\$44.12	\$0.00	\$0.00
OVERCOMBLEU1	FEB-11-2013	US CASES	DOC ACCESS	2	\$0.00	\$0.00	\$0.00	\$18.00	(\$11.40)	\$28.80	\$28.80	\$1.93	\$28.53	\$0.00	\$0.00
	FEB-														

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**.

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

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

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

<p>* To: <input style="width: 100%; height: 100%;" 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>Subject: <input style="width: 100%;" type="text" value="PowerInvoice threshold notification - Client ID"/></p>	<p>Message:</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.

Allocation Profiles

All Organizational Customers can view allocation profiles in LexisNexis® PowerInvoice™ service. This allows for non-billable use to be removed and not impact billing for billback purposes.

You can Add, View, Edit, Copy, or Delete an allocation profile, using the buttons provided on the **Allocation Profiles** tab under the **Billing Data** tab.

The screenshot shows the 'Allocation Profiles' interface. At the top, there is a title bar with 'Allocation Profiles' and a user icon. Below the title bar, there is a section for 'Apply Allocation Profile' with a dropdown menu set to 'NO PROFILE DEFINED'. To the right of this are buttons for 'View', 'Add', 'Edit', 'Copy', and 'Delete'. Below this is a 'Standard Date Range' section with a radio button selected for 'Month to date (09/01/2016-09/01/2016)' and a 'Custom Date Range' section with radio buttons for 'From' and 'To' with date pickers. A 'Reset All List Links' button is located below the date ranges. The main area contains several search filters, each with a text input field and a 'List ...' link: 'User Name(s): ALL', 'Activity Description(s): ALL', 'User Group(s): ALL', 'Member Profile Name(s): ALL', 'Pricing Category(s): ALL', 'Client ID(s): ALL', 'User ID(s): ALL', 'Type of Charge(s): ALL', and 'Master Feature Name(s): ALL'. At the bottom, there is a section for '* Report Sections:' with a link to 'Sample Reports'. Below this is a 'Clear Selections' section with several checkboxes and radio buttons for report options: 'Detail Report', 'Summary by Client', 'Summary by Activity Description', 'Detail by Client/User', 'Masked', 'Summary by User', 'Detail by User/Client', 'Summary by Client/User/User ID', and 'Include Research Description', 'Summary by Client/User/User ID/Date', and 'Summary by User/Date'.

Note:

Items to note about allocation profiles include:

- It may take up to 15 minutes to get the initial report
- Results are sent using email, unless the report size is larger than 9 mb. If a report is too large, then you will need to sign in to access the report
- You can have as many allocation profiles as you'd like
- When you add an allocation profile, the new profile name is instantly available as a filter in other search forms using **Apply Allocation Profile**

How do I create a new Allocation Profile?

1. Select the **Billing Data** tab.
2. Select the **Allocation Profiles** tab.
3. Click **Add** to create a new profile.

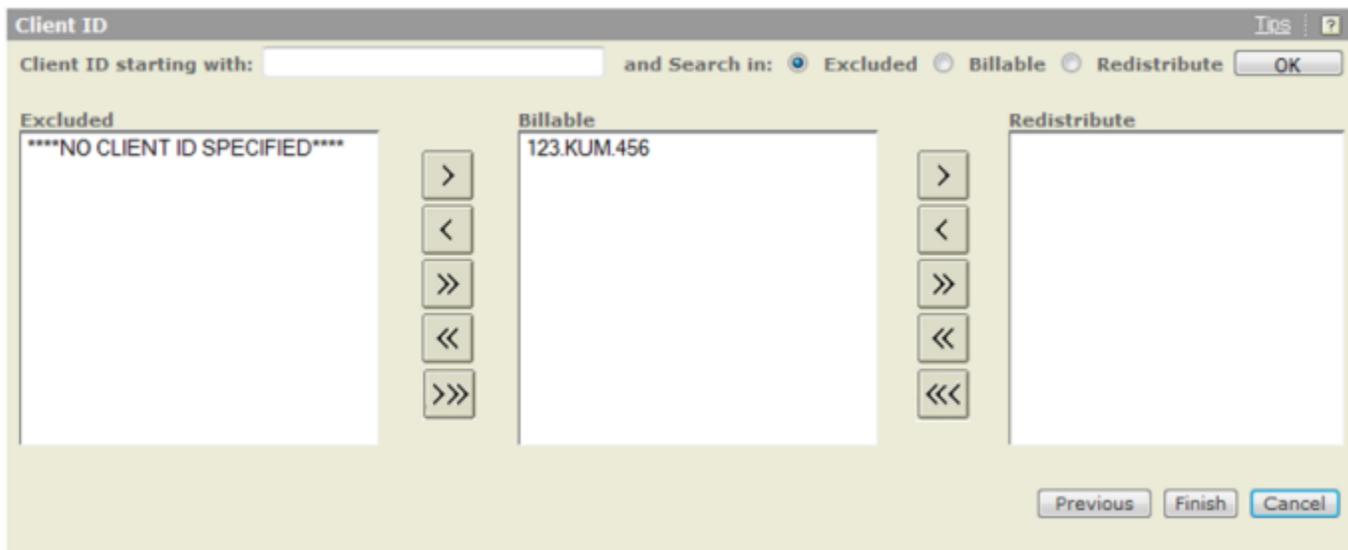
Data has been processed through 09/24/2016.
August billing data is final.

4. (Optional) Click the **Reset All List Link** button to change the value on each option to "All".
5. Select the Account Number you want to use and click **Next**.

Note:

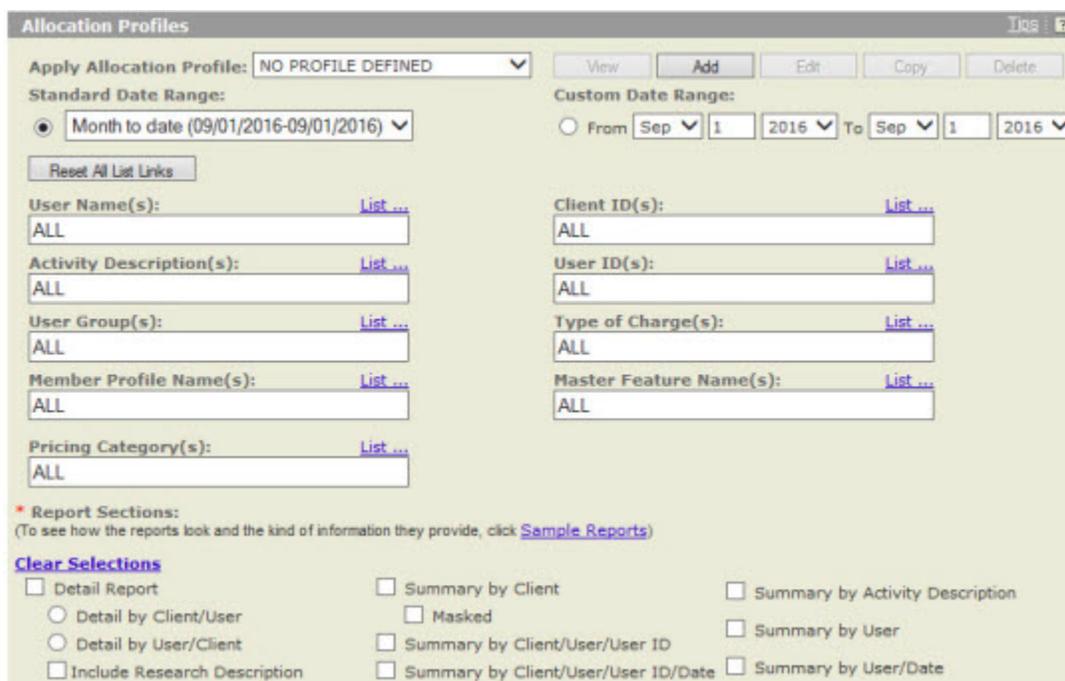
Only one Financial Account can be selected.

6. Enter a **Profile Name**.
7. Choose at least one **Report Selection Criteria** and click **Next**.
8. Move the report criteria elements to the proper columns.
 - Excluded – Removes the charges entirely
 - Billable – These are billable users, clients, etc (redistributed charges would allocate to these)
 - Redistribute – Redistributes charges amongst the other billable users, clients, etc.
9. Click **Finish** to create the Profile.



The new profile name will now show in the drop-down list to easily run the predefined allocation report.

You can edit and delete these profiles using the appropriate buttons.



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 Allocation Profile Access?

Managing allocation profile access allows a PowerInvoice administrator to assign specific users the ability to create new or edit existing allocation profiles, while other users can only select a profile to use/run data through the profile.

1. Click the **Administration** tab.
2. Click the **Manage Allocation Profile Access** tab.
3. Enter a User Name in the box, if desired.
4. Select the **Create/Edit** and/or the **View/Run** boxes for each user, as desired.
5. Click **Finish**.

Manage Account Assignment **Manage Allocation Profile Access**

Make your selections as to the PowerInvoice users who can create and edit Allocation Profiles and those users who can only run reports with the Allocation Profile settings applied

Manage Allocation Profile Access		
User Name	Create/Edit	View/Run
	<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Select All
JAMES FITZER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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' interface. At the top, there are tabs for 'Billing Data', 'Administration', and 'Analytics'. Below these are sub-tabs for 'Saved Chart Profiles' and 'Create New Chart'. The main area is titled 'Create Chart Profile' and features a 4-step progress indicator at the top, with Step 1 highlighted. The form is divided into three sections: 'Profile Name*' with a text input field; 'Date Range' with a radio button for 'November 2016' (selected) and another for 'Custom Date Range' (with 'From' and 'To' date pickers); and 'Attribute*' with a list of radio buttons: Client, User Name, Activity Description, Type of Charge, Account Information, Member Profile Name, Master Feature, and User Group. At the bottom, there are 'Previous' and 'Next' buttons. The right side of the interface is a large placeholder area with 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
 February ▾ 24 2016 ▾
 To
 February ▾ 24 2016 ▾

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	Percent
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