



My Lexis™

MY LEXIS™ ADMINISTRATOR USER GUIDE

My Lexis™ is a tool for account administrators that allows them to manage their own or other users' information, for Admin and Super Admin users. The application works differently depending on your level of access. For instance, End users only have access to the My Profile page, while Super Admin users have access to all of the application's functions.

Accessing My Lexis

There are two ways of accessing *My Lexis*, from a direct URL (<https://mylexis.lexisnexis.com>) or from the Lexis Advance® product.

First Time Sign In

The first time you sign in to *My Lexis*, you are required to build a personal profile by completing the following fields: ID, new password, confirm new password, security question, answer, email address and confirm email address. When you have completed all the fields, click the **Next** button.

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Dashboard

The screenshot shows the My Lexis™ Dashboard. At the top, there are navigation tabs: Home (selected), User Information, Customer Information, and Client ID Information. Below the tabs, there are two main sections: Dashboard and My Profile. The Dashboard section contains a 'Narrow By...' filter box (labeled E) with sections for 'You've selected' (From Sep 29, 2015 To Oct 29, 2015), 'Search Within Results' (with a text box and OK button), 'Type' (with options: Add, Edit, Delete, Select Multiple, More), 'Sub-type' (with options: User, User Authorizations, Public Records, Select Multiple, More), 'Status' (with options: New, Pending, Scheduled, Select Multiple, More), and 'Creation Date' (with From and To text boxes and an OK button). To the right of the filter box, there are three buttons: Refresh (labeled B), Download to Excel (labeled C), and Print (labeled D). Below these buttons is a table (labeled A) with the following data:

Request ID	Type	Dependent On	Admin	Creation Date	Scheduled	Last Action	Status
38407	Reset Single Password		LexisNexis®	29 Sep 2015	29 Sep 2015	29 Sep 2015	Successful

A. The **Dashboard** of activities created for an account appears in the main section of the page.

B. **Refresh** the dashboard of activities by clicking the Refresh button.

C. **Download** the list of users to Excel® using the Download to Excel button.

D. **Print a list** of activities from an account by using the Print button.

E. **Refine your search** by using the Narrow By... box. Filter by:

- **Search Within Results:** Text box can be used to type text to search for users for an account
- **Type:** Filter by types of activities
- **Sub-type:** Filter by sub-types of activities
- **Status:** Filter by New, Pending or Scheduled activities
- **Creation Date:** Insert dates in the From and To text boxes to search for activities by creation date

My Profile

The screenshot shows the 'My Lexis' interface with a navigation bar containing 'Home', 'User Information', 'Customer Information', and 'Client ID Information'. Below this is a 'Dashboard' section with a 'My Profile' link. The main content area is divided into three sections, each with an expandable header and an 'Edit' button:

- Customer Details (A):** Shows 'User ID: Jane.Smith' and 'Password: *****'. Below these are two hyperlinks: 'Change ID' and 'Change Password'. A 'Tips' link is located in the top right corner of this section.
- Personal Details (B):** Lists 'First Name: Jane', 'Last Name: Smith', 'Preferred Name', 'Position: Legal Admin', 'Bar Membership', 'Practice Areas', 'Law School', and 'Graduation Year'.
- Contact Details (C):** Lists 'Email: Jane.Smith@lexisnexis.com', 'Alternate Email', 'Work Phone', 'Extension', 'Mobile', 'Fax', 'Preferred Contact Method', 'Language Preference: en-US', 'Display Preference: en-US', and 'Time Zone: (GMT-05:00) Eastern Time (US & Canada)'.

My Profile is where you can edit your personal information in *My Lexis*. This screen is available to all Lexis Advance users. Access this section in *My Lexis* by clicking the Home tab and then clicking My Profile. Expand each section and click the Edit button to change personal profile information.

A. Customer Details is where you can change basic user information by clicking the two hyperlinks to change your ID or password.

B. Personal Details is where you can edit personal details such as edit your position, add or edit attorney information or change your name.

C. Contact Details is where you can add or update contact information such as your email addresses, phone numbers, preferred contact method, language preference and time zone.

Users Dashboard

The **My Lexis Users** section is where you can create single or multiple users, suspend, delete, reset passwords, resend user IDs, resend welcome emails, and create and manage **Custom User Lists**.

A. Refine your search by using the Narrow By... box.

Filter by:

- Search Within Results
- Custom User Lists
- Authorizations
- My Lexis™ Role
- Place of Business
- Creation Date
- User Status
- Position
- Public Records
- Financial Account

B. Download User List is where you can download a list of users to Microsoft® Excel.

C. Add Users can be used to create new single users or multiple users to an account.

D. User names appear in the main section of the Users screen. Click the Name hyperlink to perform the following action on a user:

- Suspend
- Delete
- Reset Password
- Resend User ID
- Resend Welcome ID

From this section users may also update user information and product authorizations.

Custom User Lists can be created by inserting check marks next to user names and clicking the **Add to Custom User List** button.

Managing Users

The screenshot displays the My Lexis user management interface. At the top, there are navigation tabs: Home, User Information (selected), Customer Information, and Client ID Information. Below these are sub-tabs: Users, Custom User Lists, User Templates, and Identity Profiles. The main content area is divided into several sections, each with an 'Edit' button and a circular callout letter:

- User Information and Data:** Contains fields for Prefix, First Name (John), Last Name (Doe), Position (CMO/Chief Marketing Officer), Practice Areas, Place of Business (5555 Wisconsin Avenue, Dayton, Ohio 45000), Custom User Lists, and Credentialing Status (NOT_CREDENTIALLED). A dropdown menu is open, showing options: Suspend, Delete, Reset Password, Resend User ID, and Resend Welcome Email.
- Mailing Address:** Contains fields for Country (United States), Address 1 (9443 Springboro Pike), Address 2, Address 3, City (Miamisburg), State (Ohio), Zip Code (45342), and County.
- Product Authorization:** Lists various product features and their authorization status, such as Lexis Advance® Standard Features, Lexis Advance® Core Features, Lexis Advance® Additional Features, Lexis Advance® Content (CA Primary, NY Primary), and Account Administration Features.
- Public Records Preferences:** Contains fields for Public Record Access (NO_PUBLIC_RECORDS) and Effective Public Records Access.

- A. Suspend users** by clicking Suspend. This action should be performed if a user is on temporary leave. **Delete users** by clicking Delete. The user should be deleted if they no longer work for the organization. **Reset passwords** by clicking **Reset Password** for users who want to have their passwords reset. **Resend user ID** information by clicking **Resend User ID**. **Resend welcome emails** by clicking **Resend Welcome Email**.

- B. Edit User Information and Data** by clicking the Edit button that appears next to this section header. Here you can edit information such as your name, email address, phone number, preferred method of contact, language preference, time zone and position.

- C. Mailing Address** is the address invoices are delivered to and it may be edited by external administrators.

- D. Product Authorizations** may be edited by clicking the Edit button that appears next to this section header. Here users may change which products they have access to viewing.

- E. Public Records Preferences** access levels may be viewed in this section of *My Lexis*.

Customer User Lists

My Lexis™

Home **User Information** Customer Information Client ID Information

Users **Custom User Lists** User Templates Identity Profiles

Delete List **B** [Tips](#)

Select All 1 Lists Clear Selection | 1 Lists Selected

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<input type="checkbox"/>	Custom User List Name	No. of Users	Creation Date	Created By	Last Updated Date	Last Updated By
<input checked="" type="checkbox"/>	Summer Associates	2	20 Apr 2015	Doe, John	20 Apr 2015	Doe, Jane

A

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Customers may create Custom User Lists to display users based on a specified criteria. For example, Custom User Lists could display all summer associates to facilitate bulk editing these groups. In this area of *My Lexis*, Custom Lists may be modified or deleted.

A. Click the Custom User List name hyperlink to remove or add users from a Custom User List.

B. Delete Custom User Lists by inserting a check mark next to the Custom User List and clicking the Delete List button.

User Templates

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Home **User Information** Customer Information Client ID Information

Users Custom User Lists **User Templates** Identity Profiles

Delete Selected User Templates **B** [Tips](#) Create New User Template **C**

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<input type="checkbox"/>	User Template Name	Creation Date	Created By	Last Updated Date	Last Updated By
<input checked="" type="checkbox"/>	Fall Associates A	20 Apr 2015	Doe, John	20 Apr 2015	Doe, Jane

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My Lexis has the capability to support defined User Creation Templates allowing administrators to create templates for users with similar data profiles and authorizations. For example, an administrator may have a summer or fall associate template.

A. Click the User Template Name hyperlink to update details such as User Template Details, Product Authorizations, and Public Records Preferences to the User Template. You can also delete the template from this page.

B. To delete selected user templates, insert a check mark next to the template(s) you wish to delete and click the Delete Selected User Templates button.

C. Create New User Template by clicking this button and walking through the steps and entering information.

Customer Information

My Lexis™

Home | User Information | **Customer Information** | Client ID Information

Customer Details | Customer Authorizations | Agreements

A **Customer Details** Tips Edit

Customer Name: Lexis Nexis Account
 Customer Number: urn:ecm:111004QSHAD
 Number of Lawyers: 10
 Practice Areas: _____
 Main Phone Number: +1 (937) 888-5555

Fax: _____
 Alternate Phone Number: _____
 Customer Website: _____
 Primary Place of Business: 555 Wisconsin Avenue, Dayton, Ohio 45000

B **Place of Business**

Add New Place of Business **D**

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Type	Address	City/Suburb	State	Zip Code	Country	Credentialing Location	Status	Users
	987 South Plumb Street	DAYTON	Ohio	45000	United States	None	Y	2
	123 North Main Street	DAYTON	Ohio	45000	United Kingdom	None	Y	0
P	5555 Wisconsin Avenue	DAYTON	Ohio	45000	United States	None	Y	10

C **Identity Providers**
No identity providers selected.

Invoice Contacts

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Financial Account Number	Financial Account Name	First Name	Last Name	Email	Work Phone	Mobile
No data to display.						

The Customer Information screen allows you to edit customer details such as places of business, change Customer Authorizations, and view and download customer contracts.

- A. Customer Details** allow a customer to edit customer details such as a place of business, identity providers and invoice contacts.
- B. Customer Authorizations** allow changes to be delivered to third party storage.
- C. Agreements** allow customers to view and download their existing LexisNexis® contracts by clicking this section.
- D. Click the Add New Place of Business** button to add a new address for an organization. Existing places of business can be modified by clicking the address hyperlink for the address you want to modify.

Client ID Information

The screenshot shows the 'My Lexis' interface with the 'Client ID Information' tab selected. The page has a navigation bar with 'Home', 'User Information', 'Customer Information', 'Client ID Information', and 'Search Results'. Below the navigation bar, there are two tabs: 'Client ID Settings' and 'Client ID List'. The 'Client ID Settings' tab is active, showing a settings table. A circular callout 'A' points to the 'Edit' button in the top right corner of the settings section. Another circular callout 'B' points to the 'Client Mask Format' field in the table. The table lists various settings such as 'Client Mandatory', 'Client Mask Format', 'Use Third Party Client Validation', 'Use Lexis Advance Client Validation', 'Client Validation Fields', 'Delimiter', and 'Include Company Name/Logo'. The footer contains the LexisNexis logo, links for 'About LexisNexis', 'Privacy Policy', and 'Terms & Conditions', along with copyright information for 2016 and the RELX Group logo.

Client ID Settings	
Client Mandatory	Yes
Client Mask Format	NNNNAAAA
Use Third Party Client Validation	No
Use Lexis Advance Client Validation	Yes
Client Validation Fields	Client ID : Visible but not mandatory Client Name : Visible but not mandatory Matter ID : Visible but not mandatory Matter Name : Visible but not mandatory
Delimiter	
Include Company Name/Logo	No

The Client ID Information allows customers to require users to enter a valid Client ID when performing research. Customers can view what was entered in the Billing Data reports of the LexisNexis® PowerInvoice™ management tool.

A. Edit allows a customer to make updates to Client ID Settings.

B. Client Mask Format requires a Lexis Advance user to enter a specific Mask Format prior to running a search.

Third Party Client Validation requires users to enter specific data prior to running a search. The data entered must match what is on the customer's system.

Lexis Advance Client Validation allows customers to upload Client Information in *My Lexis*. Lexis Advance users must enter the Client information that matches exactly what exists in the *My Lexis* database.

System Requirements

Screen Resolution	1024 x 768 optimal screen resolution
Operating Systems	<p>Certified:</p> <p>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</p> <p>Supported:</p> <p>Microsoft Internet Explorer 8, 9, 10</p> <p>Unsupported:</p> <p>Microsoft Internet Explorer 6.0 Microsoft Internet Explorer 7.0</p> <p>Caution</p> <p>Users will receive this error message when using Microsoft Internet Explorer 6.0: Microsoft Internet Explorer—You are using an unsupported browser. The supported browsers are Internet Explorer 7 and higher, Firefox 2.0.0.2 and higher, and Google Chrome 1.0 or higher.</p>

Microsoft Internet Explorer 8 Troubleshooting:

Super Admins or Admins may experience an issue after signing in to *My Lexis* and will not be able to perform any functions when using Microsoft Internet Explorer 8. If they try to edit their profile or click on another tab, they will receive a JavaScript error, and the cursor icon (hour glass or default blue circle) will appear as if waiting on an action or response.

For Microsoft Internet Explorer 8.x users, follow these steps to correct this issue:

1. In Internet Explorer, navigate to Tools > Internet Options > Advanced tab.
2. In the list of Settings, scroll down to the Security section.
3. Select Enable native XML HTTP support.
4. Click Apply.
5. Click OK.