LexisNexis Account Insights

User Guide

Updated April 10, 2024

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Glossary of key terms

Chargeback: a chargeback is a process of recovering legal costs from a client after the legal services have been provided. In the context of LexisNexis products, chargebacks refer to the costs of usage of our products (like accessing documents and running searches) being passed onto the law firms' or organizations' clients.

Contract Gross Amount: represents the dollar amount to be applied as a chargeback within a LexisNexis platform, as determined by the pricing model that the subscribing organization uses.

Contract Net Amount: represents the pro rated dollar amount to be applied as a chargeback within a LexisNexis platform. The dollar amount is pro rated based on the organization's total subscription value and the total organizational usage over a specified time period.

Custom Allocation: a feature within LexisNexis Account Insights that allows a user to define the total subscription value for all the platforms that an organization subscribes to, for the purposes of calculating pro rated chargebacks.

Default Allocation: a feature within LexisNexis Account Insights that applies a pricing model that the subscribing organization uses to the Contract Gross Amount of a specific usage activity.

Doc-Access Pricing Model, a.k.a. Default Pricing Model: one of two standard pricing models that LexisNexis Canada offers to their clients. This model assigns a $0 Contract Gross Amount for running a search, but assigns a $10 or a $15 Contract Gross Amount for accessing primary sources (cases, legislation, and case & legislation citators), depending on the action. The Contract Gross Amount values for secondary sources within this model are generally comparable to the Contract Gross Amount values within the Search and Document Access Pricing Model.

Fixed Rate Allocation: a feature within LexisNexis Account Insights that allows a user to create custom pricing for a specific usage activity.

LNAI: abbreviation of LexisNexis Account Insights

Non Usage Products: a list of all products for which LexisNexis Account Insights is unable to capture usage, like Law360 Canada.

Report Layout: a feature within LexisNexis Account Insights that allows users to customize how a chargeback report looks like. The customization is done by arranging the columns of the report in the user's preferred order.

Search and Document Access Pricing Model, a.k.a. Hybrid Pricing Model: one of two standard pricing models that LexisNexis Canada offers to their clients. This model assigns a $0 Contract Gross Amount for accessing primary sources (cases, legislation, and case & legislation citators), but assigns a $19 Contract Gross Amount for running a search. The Contract Gross Amount values for secondary sources within this model are generally comparable to the Contract Gross Amount values within the Doc-Access Pricing Model.

Scheduled Reports: alerts that a user can create based on the report that they have run within LexisNexis Account Insights.

Total Subscription Value: the total value of all products that an organization subscribes to with LexisNexis Canada. By default, the total subscription value consists of Usage Products only; however, users can also opt to include Non Usage Products in the total subscription value.

Usage Products: a list of all products for which LexisNexis Account Insights is able to capture usage, e.g. Lexis Advance Quicklaw, Practical Guidance, Lexis+ Canada, and more.

Comparison of key terms in LexisNexis Account Insights and PowerInvoice

LexisNexis Account Insights	PowerInvoice
Create Report	Partially equivalent to the **Search** tab, which is used to run regular, non-customized reports. Unlike the **Create Report** tab in LNAI, the **Search** tab did not have the ability to load customized pricing or customized report layouts. There are also some unique features within **Create Report** that are just not available in PowerInvoice, like the ability to amend the total subscription value that gets reported in the **CONTRACT NET AMOUNT** column.
Report Layouts	Equivalent to **User-Defined** tab as well as the **User-Defined Format** within the **Custom** tab, all of which allowed users to customize how a report looked like. Unlike **Report Layouts** in LNAI, the reports generated in PowerInvoice were not transferrable throughout different tabs. For example, a report customized under **User-Defined** tab was not visible in the **Custom** tab.
Custom Allocation	Equivalent to **Reallocation** tab. Unlike **Custom Allocation** in LNAI, the **Reallocation** tab was often not able to get a precise amount that the user needed for the total subscription value.
Fixed Rate Allocation	Equivalent to the **Custom** tab and creating a **Custom Pricing Profile.**
Scheduled Reports	Equivalent to **Alerts**.

How do I log into LexisNexis Account Insights?

To log into LexisNexis Account Insights, please use the following link: https://signin.lexisnexis.com/lnaccess/app/signin?aci=lai&back=https%3a%2f%2faccountinsights.lexisnexis.com%2f

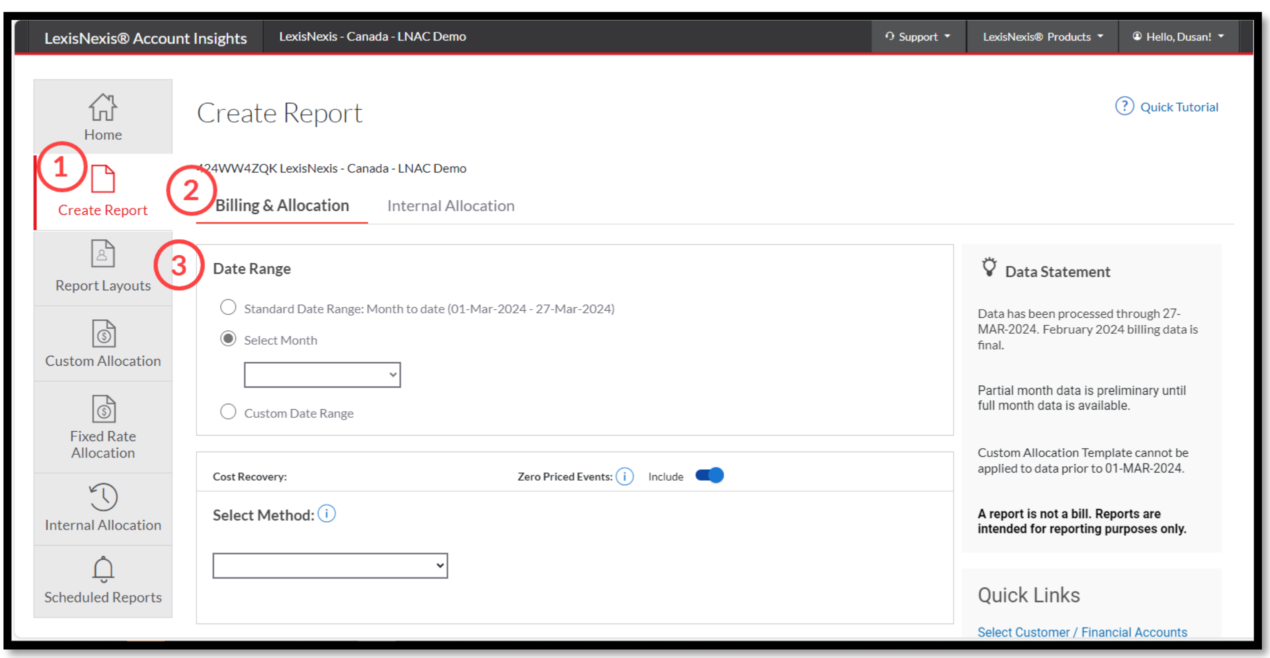
How do I run a simple usage report?

Reporting is the main purpose of LexisNexis Account Insights. Our reports allow you to gauge usage of your subscriptions as well as to get chargeback information for billable activities.

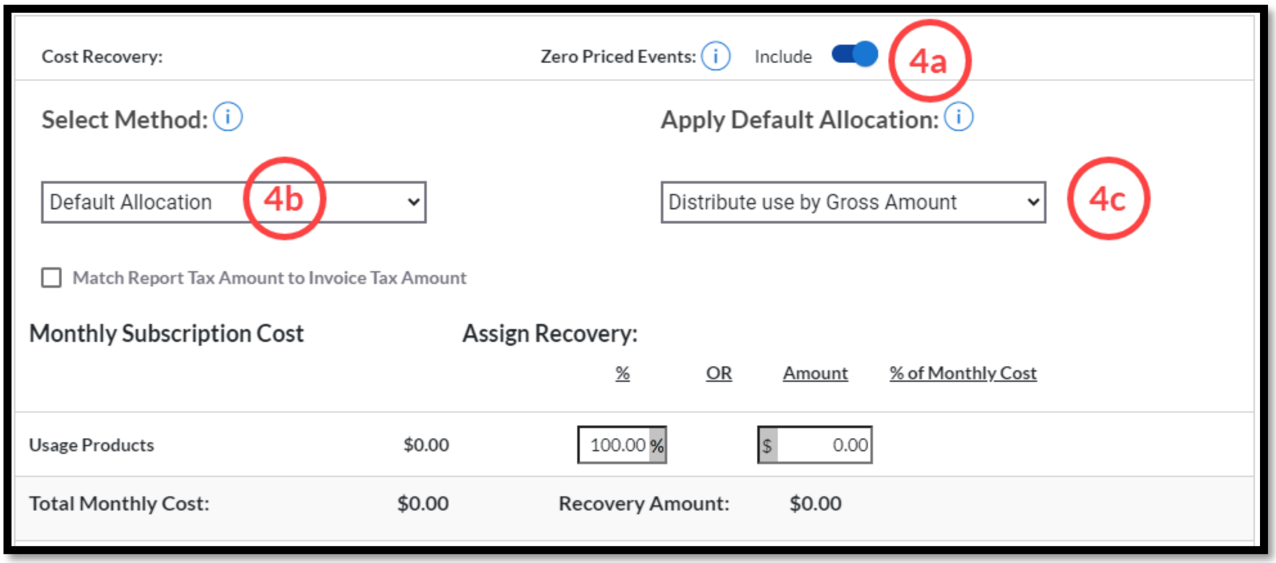
There are several ways you can customize your reports. You can read more about them under **How do I customize the look of my report?**, **How do I customize pricing for individual activities in my report?**, and **How do I customize the total value for all platform subscriptions in my report?**

In this example, however, we will explain just one, simple way to do it.

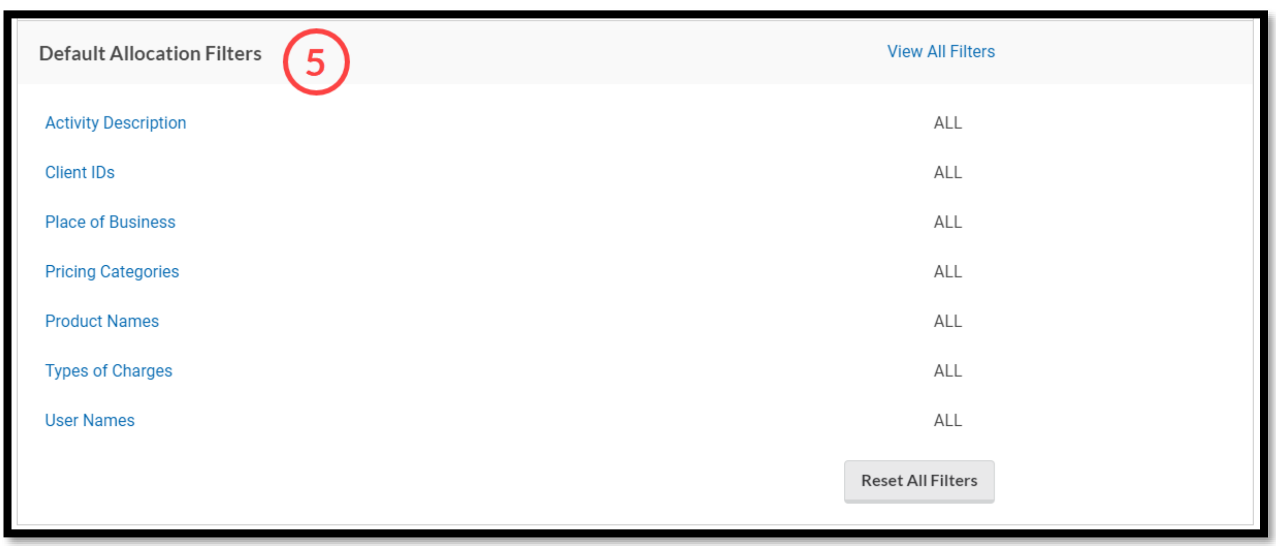
1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure you are on the **Billing & Allocation** option.
3. Select the **Date Range** for which you want to run the report. There are 3 options:
   a. **Standard Date Range**: runs a **Month-to-date** report, i.e. from the 1st of the month to the current day in the month;
   b. **Select Month**: runs a report for the entire month you select, e.g. if you select **February 2024**, it will run a report from **February 1, 2024** to **February 29, 2024;**
   c. **Custom Date Range**: run a report for the specified data range.



4. Next, within the **Cost Recovery** pod, select the desired cost recovery method.
    a. Before you choose a method, we recommend to toggle on the **Include** option for **Zero Priced Events**, in order to ensure all usage is displayed.
    b. Select **Default Allocation** and then select **Distribute use by Gross Amount.**
    c. Leave as default the **Monthly Subscription Cost** charges.



5. Ensure that **Default Allocation Filters** are selected as **ALL.**



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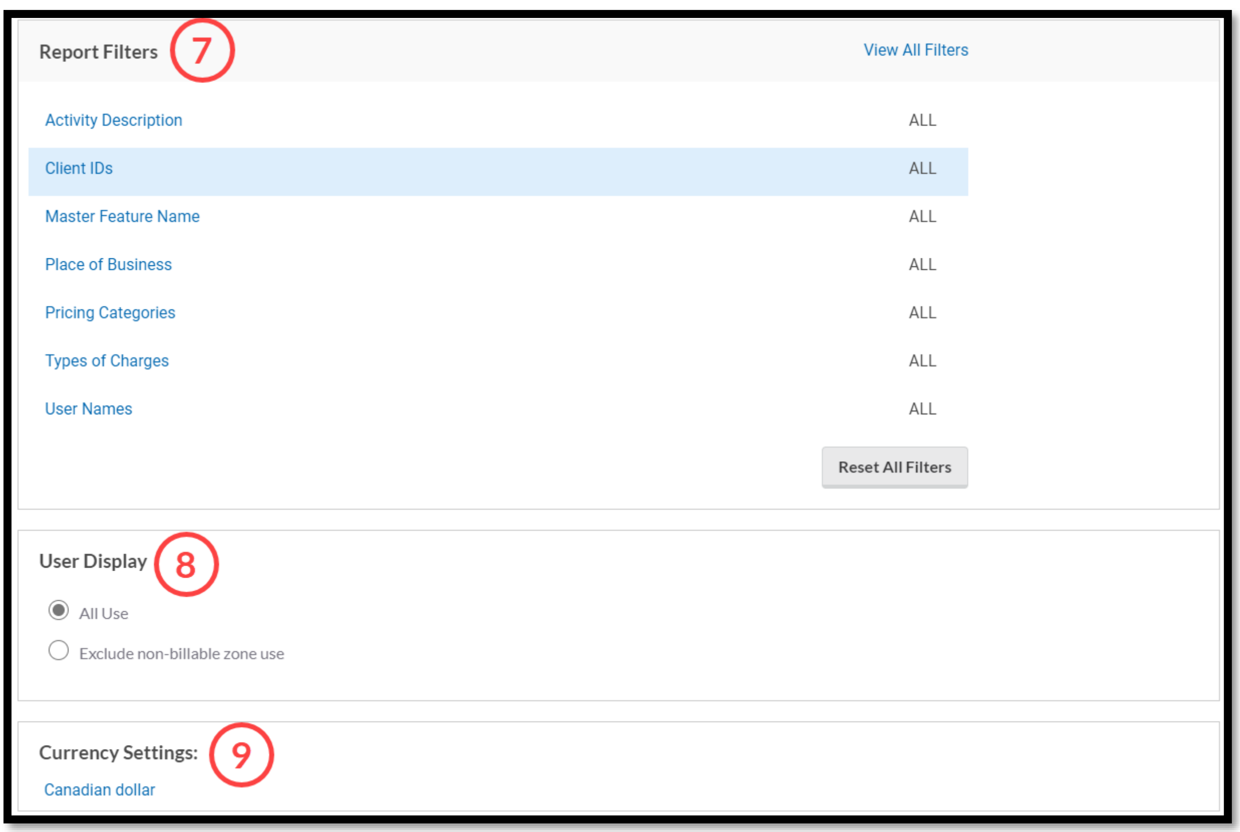
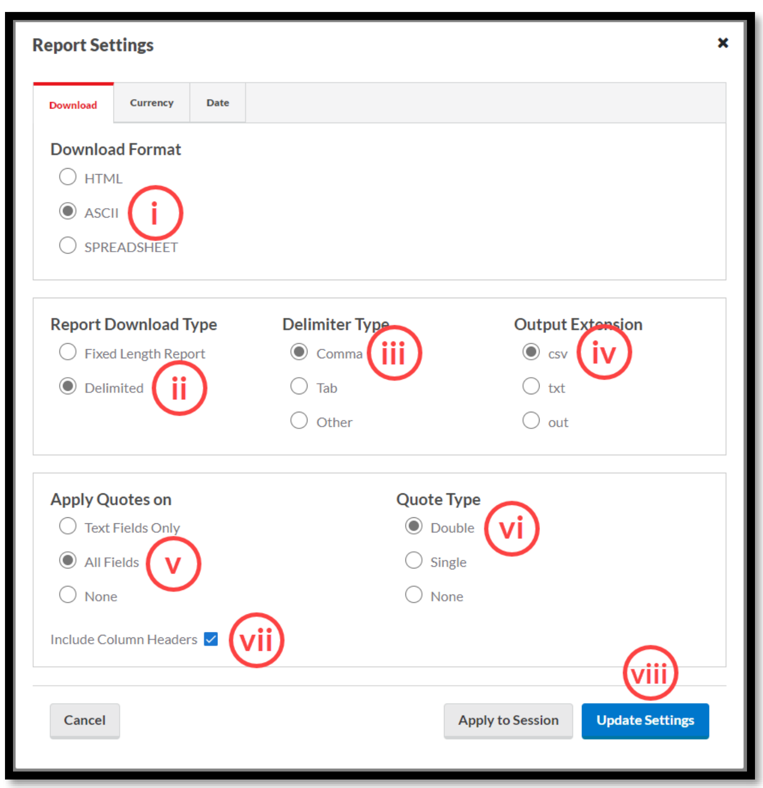
6. Under **Standard Report Selection**, select **Detail Report** and then leave **Detail by Client/User.**

7. Ensure that **Report Filters** are selected as **ALL.**
8. Under **User Display**, leave in **All Use** option.
9. Under **Currency Settings**, leave in **Canadian dollar.**



10. Before running the report, consider the following 2 options:
    a. If you are looking to download a report immediately, then select your preferred settings under **Download Settings** by clicking the format link.
    b. Once chosen, click the **Download** button. For best reporting output, we recommend the following settings:
        i. Download Format = ASCII
        ii. Report Download Type = Delimited
        iii. Delimiter Type = Comma
        iv. Output Extension = csv
        v. Apply Quotes on = All Fields
        vi. Quote Type = Double
        vii. Include Column Headers = checked
        viii. Click **Update Settings** to ensure all these settings are set as default in the future.



c. If you are looking to view the report, you can skip the **Download Settings** considerations and simply click the **View** button.

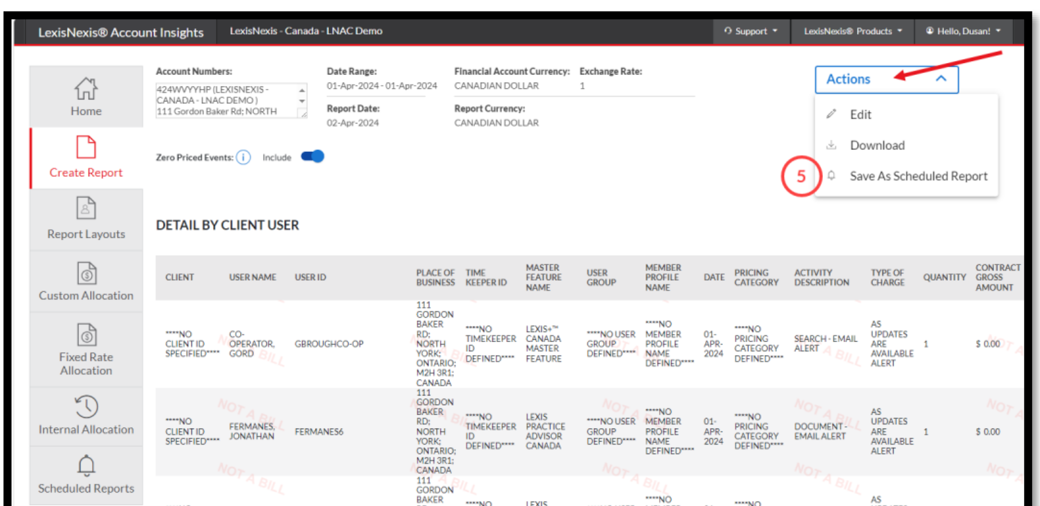
How do I create an alert?

Creating alerts allows you to automate usage and chargeback reporting. In LexisNexis Account Insights, alerts are called **Scheduled Reports**, whereas in PowerInvoice, these features were called **Alerts**.

Follow the process below to set up an alert for your organization.

1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure to select appropriate **Cost Recovery Methods**, **Report Layouts / Standard Report Selections**, and apply desired filters, if any.
    a. To see more details about choosing the right cost recovery method and report layout for your needs, please review the following step-by-step-instructions:
        i. How do I run a simple usage report?
        ii. How do I customize the look of my report?
        iii. How do I customize pricing for individual activities in my report?
        iv. How do I customize the total value for all platform subscriptions in my report?
3. **IMPORTANT**: The **Date Range** selection is irrelevant when creating an alert.
4. Once everything is selected, click the **View** button.

5. In the top right-hand corner, under the **Actions** button, select **Save As Scheduled Report** option.



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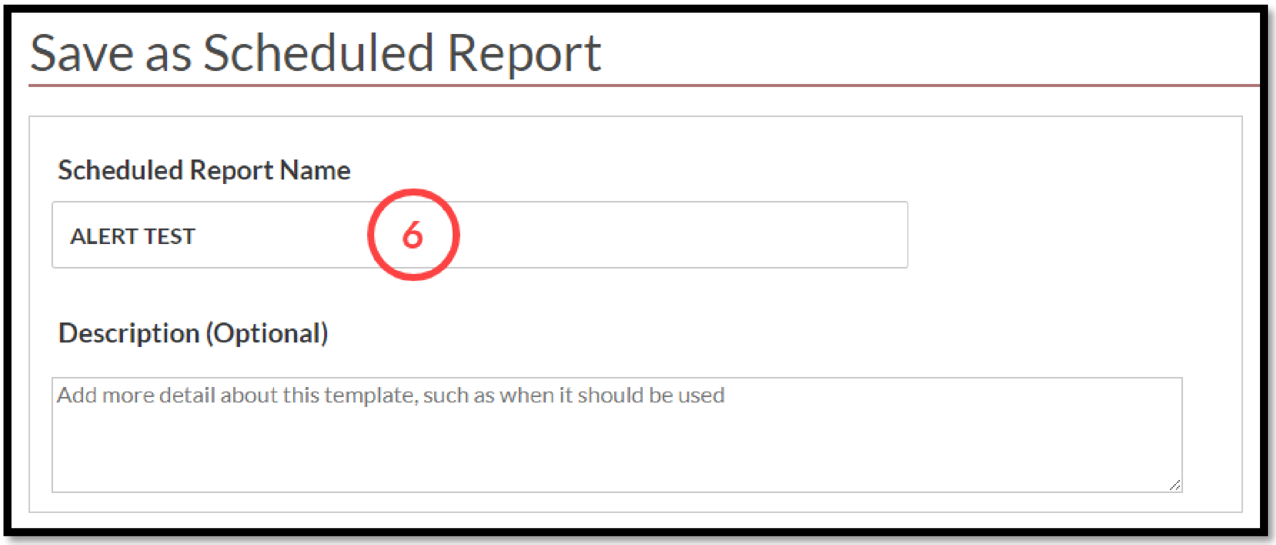
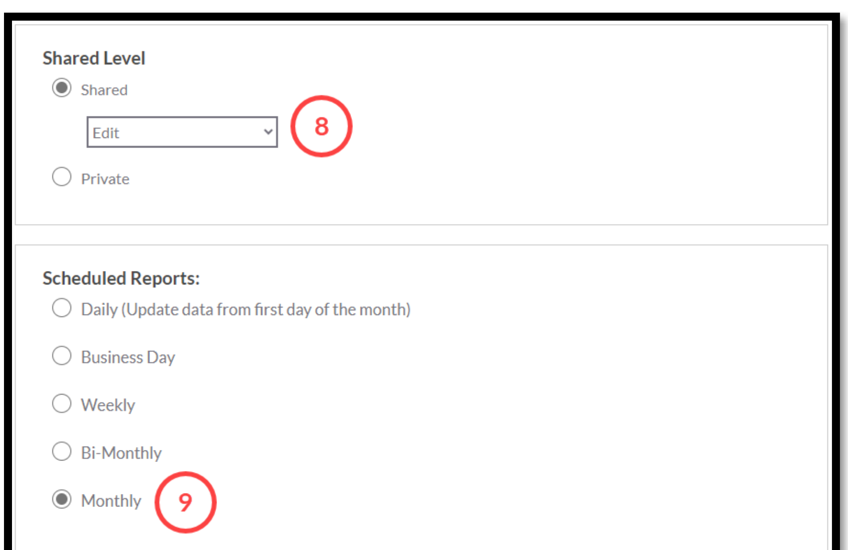
6. Enter the name of your report in **Scheduled Report Name** box. If you want, enter a description of the report.



7. Leave the **Description** and **Cost Recovery** pods as they are.
8. Under **Shared Level** pod, select if you would like this alert to be visible to all administrators in your organization **(Shared)** or only to you **(Private)**.
    a. We recommend that you choose the **Shared > Edit** option, because if you are away for whatever reason and the alert needs to be amended, other users would be able to go in and make the necessary changes.
9. Under **Scheduled Reports** pod, select the cadence with which you would like to receive the report.



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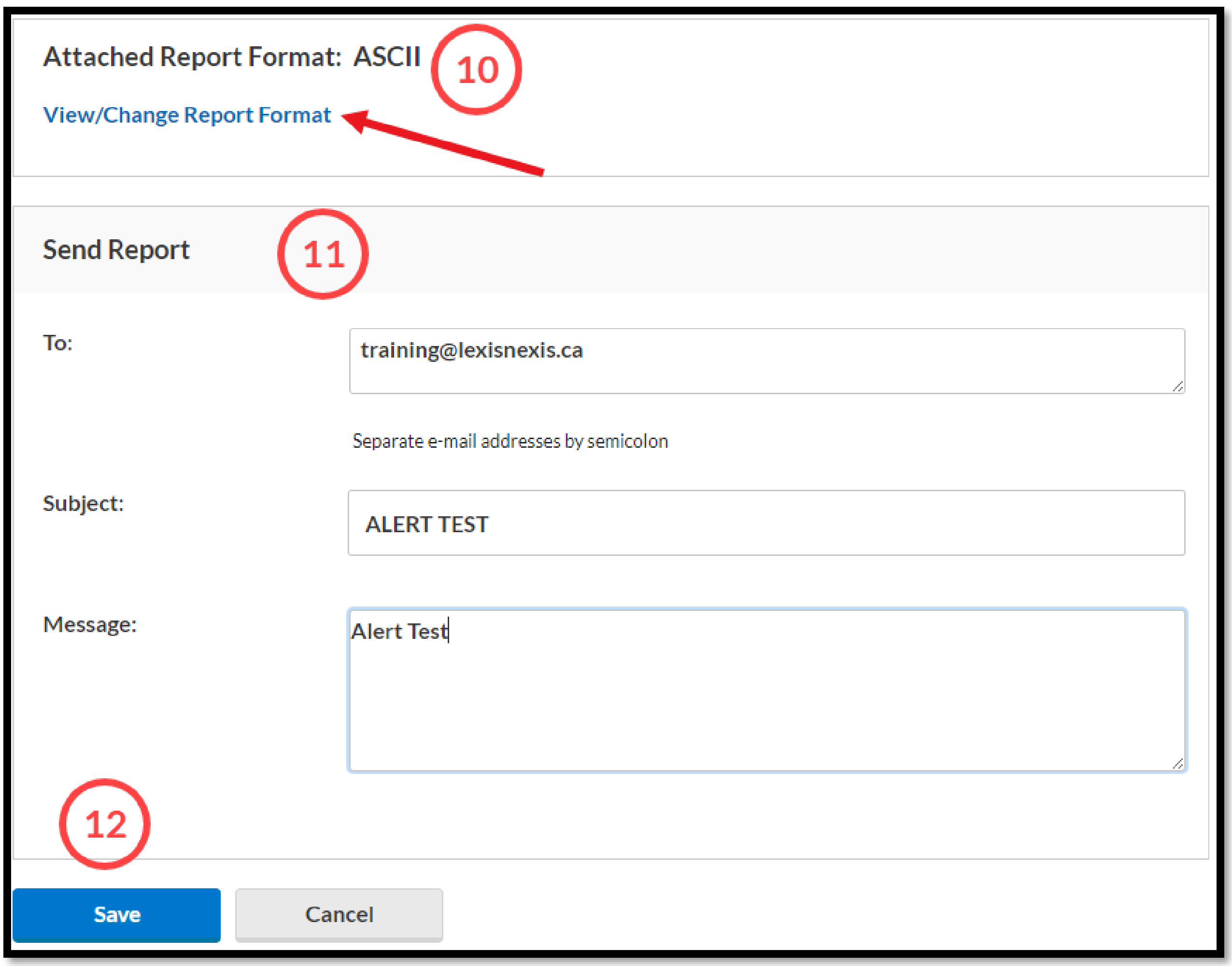
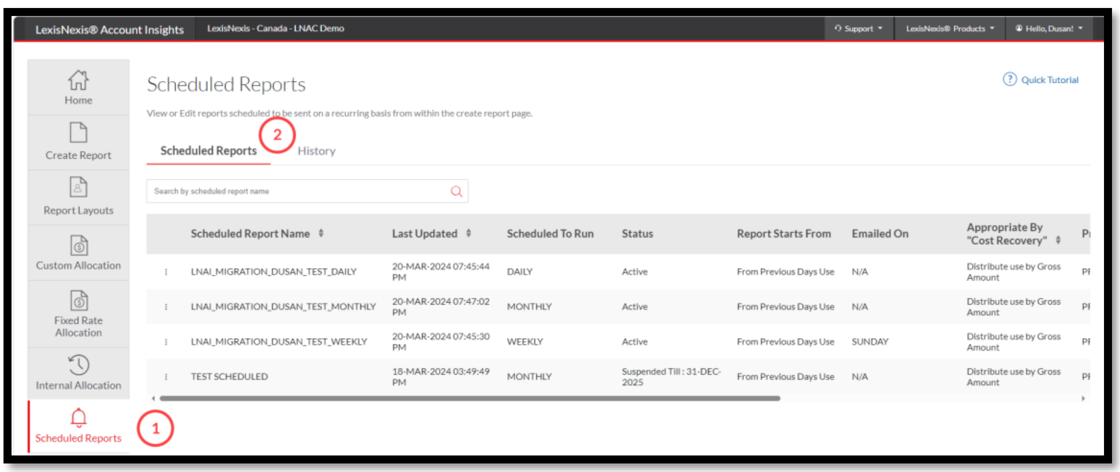
10. Under **Attached Report Format**, choose the report format that is right for you by clicking on the **View/Change Report Format** link.
    a. If you are looking for a classic Excel spreadsheet look, we recommend the ASCII report in a **.CSV** format.
    b. If you are looking to export the report as a **.TXT** file, you can now select that explicitly within the ASCII option.
11. Under **Send Report**, write in the following information:
    a. All email addresses that should be included in the reception of the alert;
    b. The **Subject** line that will appear in the alert email; and,
    c. A message, if any, that will appear in the body of the alert email.
12. Once you are satisfied with your selections, click the **Save** button.

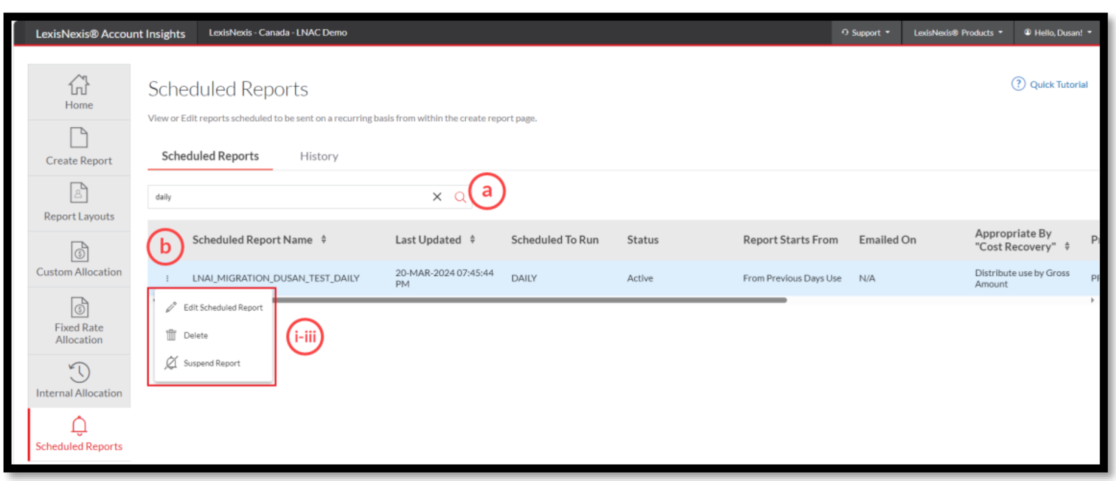


Where can I see all the alerts that have been created for my organization?

Having an overview of all your alerts can help you manage your organization's reporting and ensure the right information is obtained at the right time.

1. From anywhere within LexisNexis Account Insights, click the **Scheduled Reports** tab.
2. Under the **Scheduled Reports** option, you can see all the alerts for the organization that either you have created or have been shared with you by others.
    a. To find an alert, type a part of its name and click **Enter** or the **Magnifying Glass** icon.
    b. To make amendments to an alert, click on the **vertical three-dots icon** and then:
        i. Click **Edit Scheduled Report** to edit the alert's parameters;
        ii. Click **Delete** to remove the alert; or,
        iii. Click **Suspend Report** to stop the alert from being sent without having it deleted.





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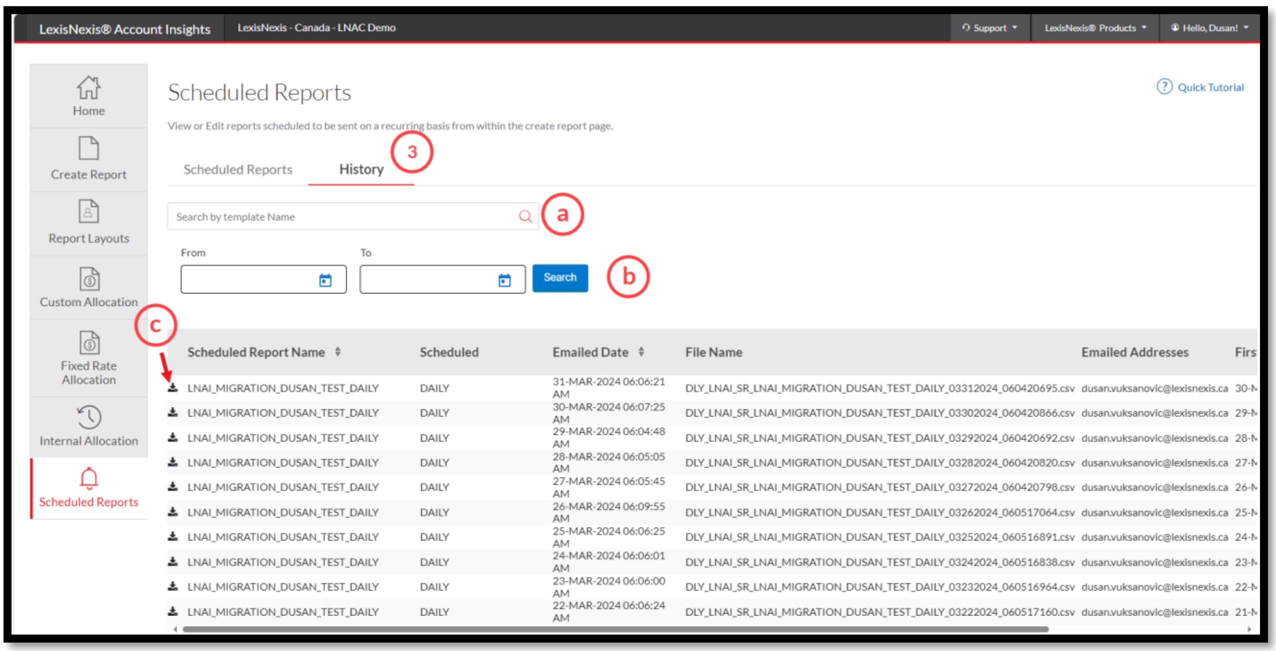
3. Under the **History** option, you can see the history of when each alert has been generated and sent. This is especially useful if you were unable to receive an alert to your email, for whatever reason.
    a. To find an alert, start typing the name of the alert in **Search by template name** box.
    b. To narrow down the alert by date, select the dates within the **From** and **To** boxes and then click the **Search** button.
    c. To download the alert, click the **Download** icon on the left-hand side of the list.



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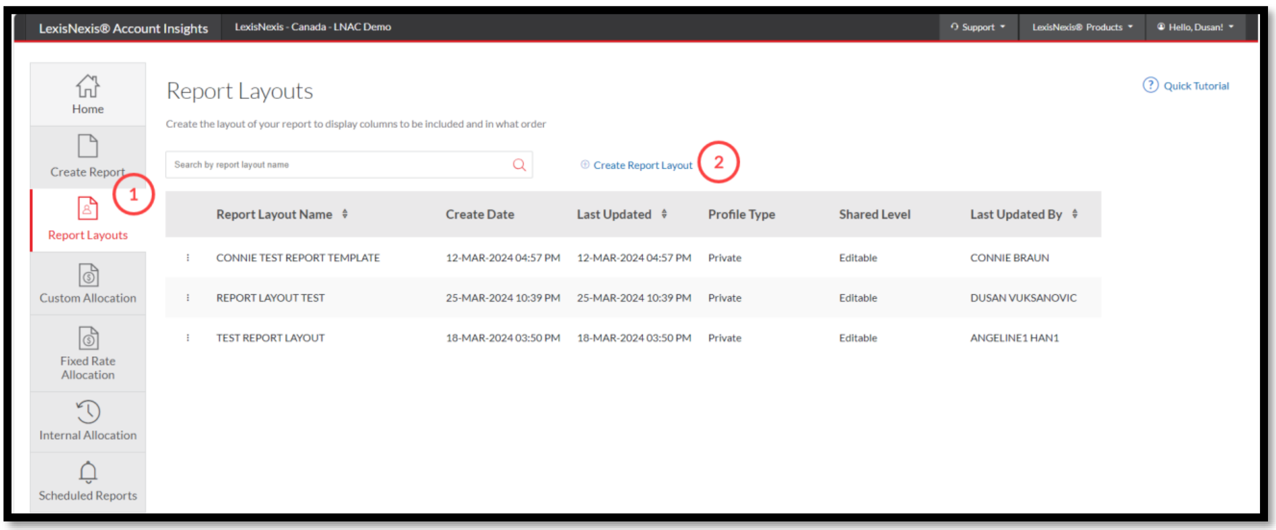
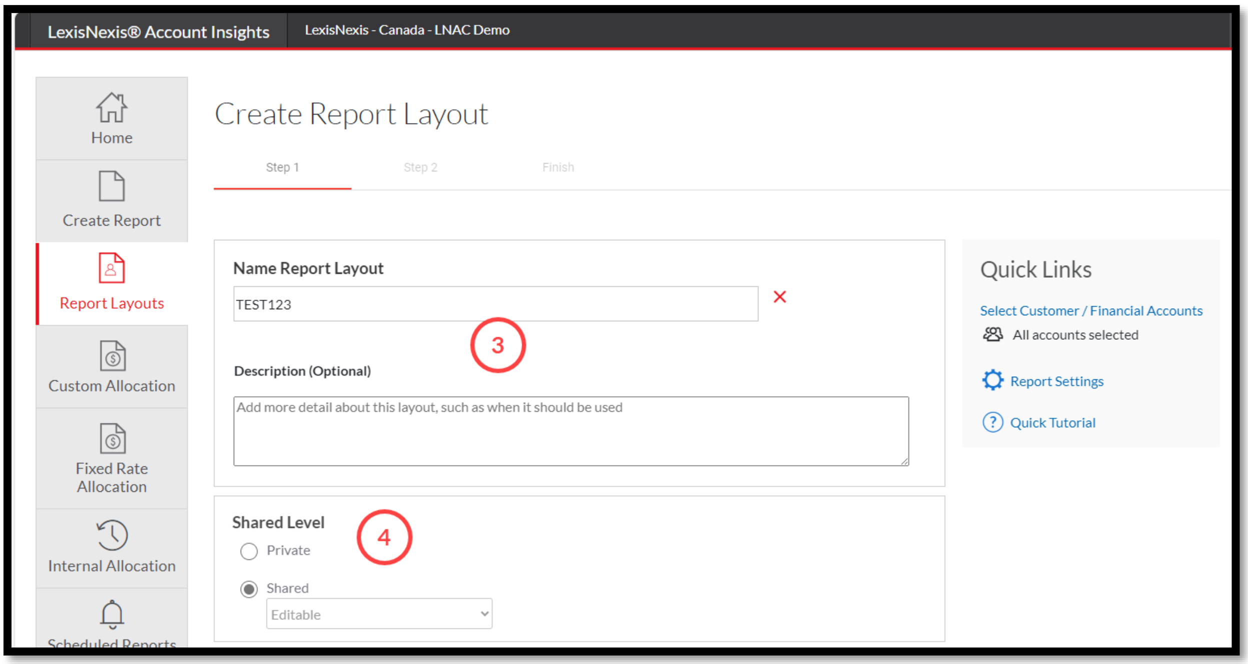
How do I customize the look of my report?

Customizing your usage and chargeback reports gives you the freedom to only see the usage and chargeback data relevant to you and your organization. In LexisNexis Account Insights, this feature is called **Report Layouts**, whereas in PowerInvoice, it was called **User-Defined Reports**.

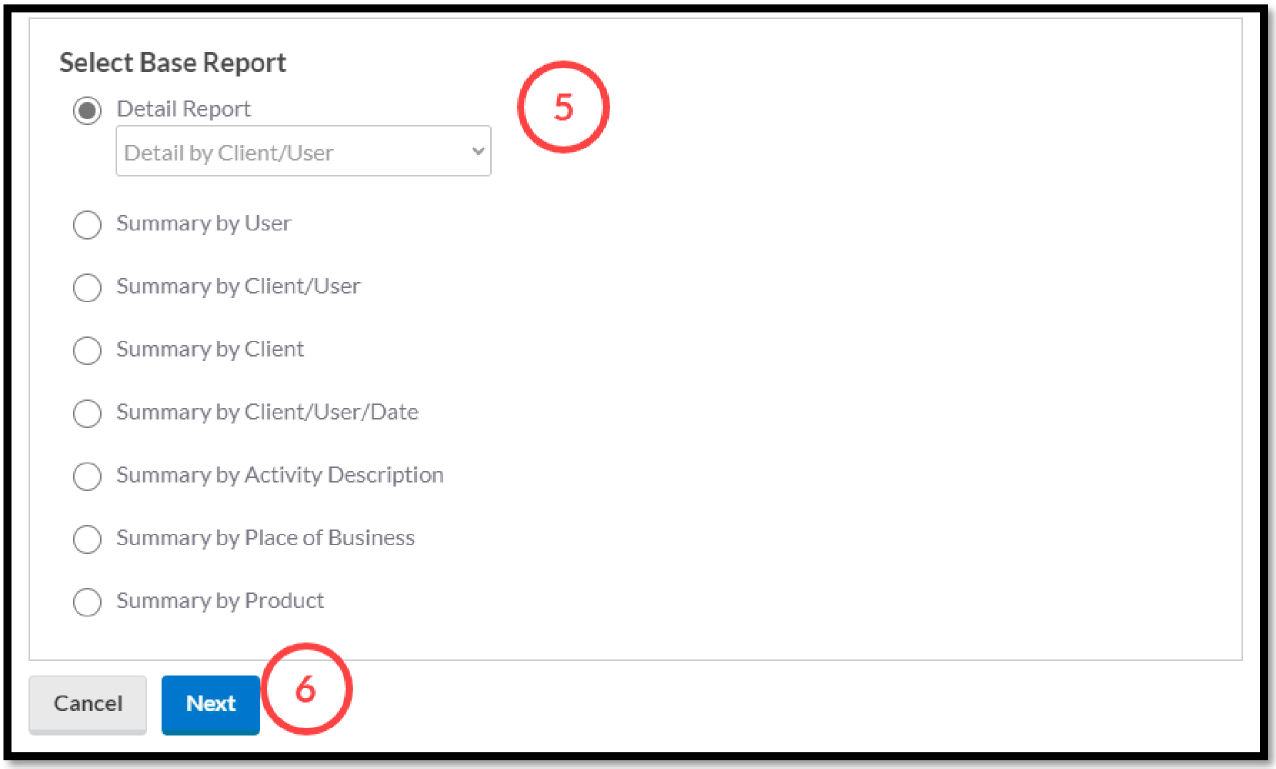
1. From anywhere within LexisNexis Account Insights, click on the **Report Layouts** tab.
2. Click the **Create Report Layout** link.



3. Give a name to your custom report layout under **Name Report Layout** box. If you want, enter the description of the report layout in the next box.
4. Under **Shared Level**, select if you would like this report to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
    a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.



5. Under **Select Base Report**, choose **Detail Report > Detail by Client/User** or **Detail by User/Client**. These two reports will give you the most options from which you can customize your report layout.
6. Click the **Next** button.



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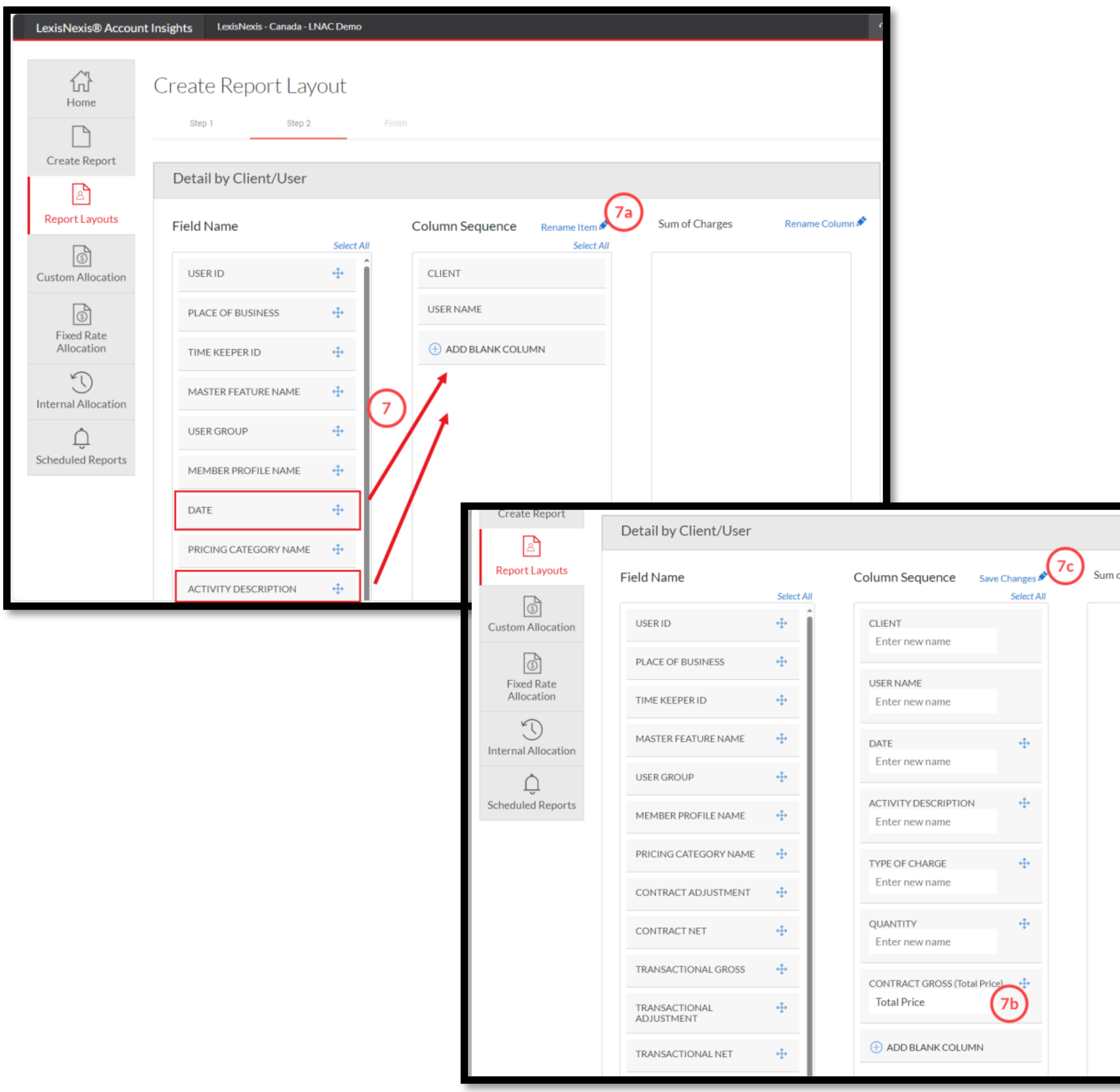
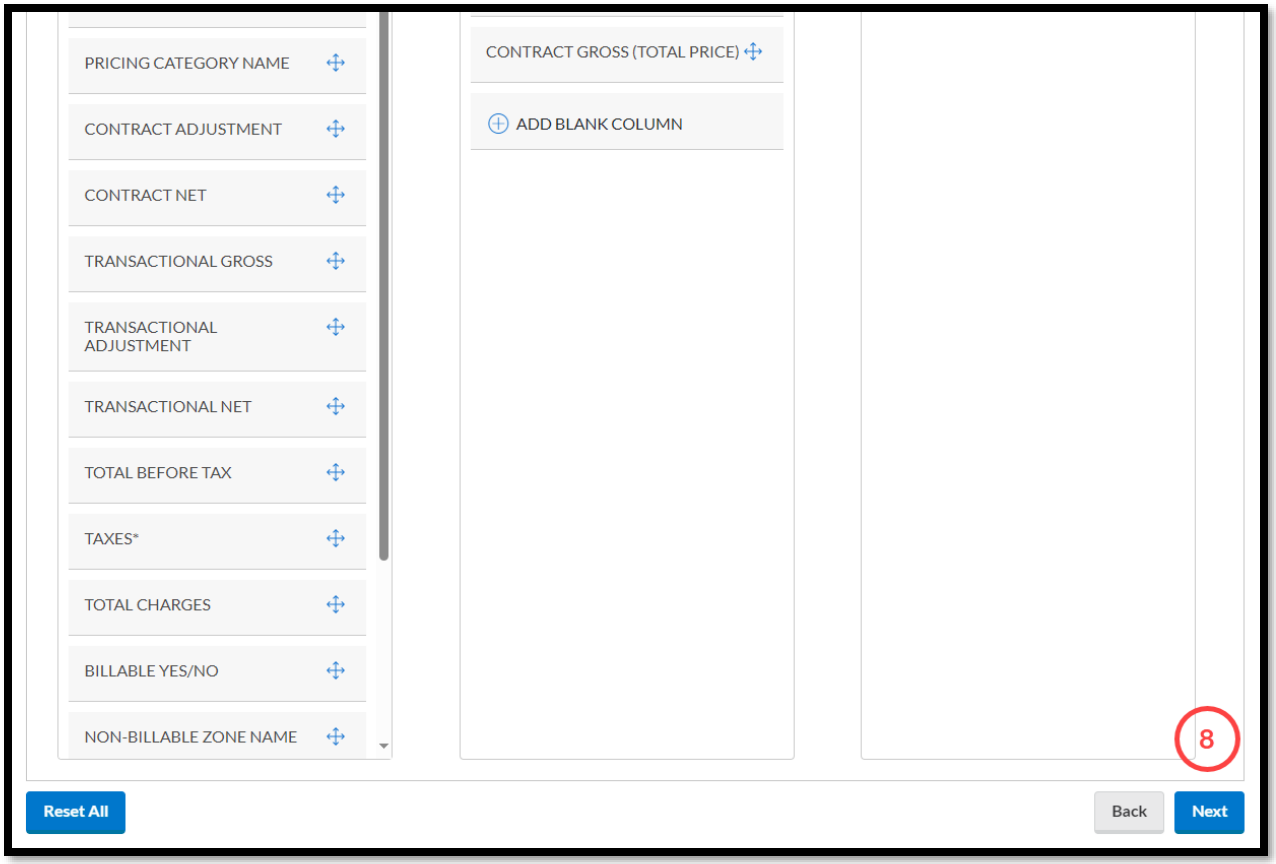
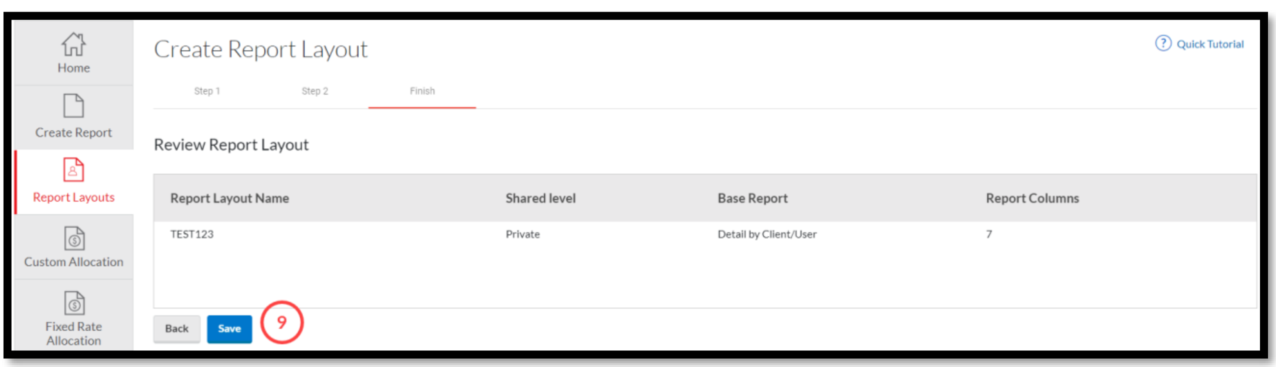
7. Drag-and-drop the columns that you want to include in the report layout within the **Column Sequence** option. Note that, in our example, the order of the first 2 columns cannot be altered.
    a. If needed, you can customize the names of your columns by clicking the **Rename Item** link.
    b. Once clicked, type in the new column name in the relevant field.
    c. Finally, click **Save Changes**. (NOTE: Even though the old name is still being displayed in the report layout creation steps, only the newly edited name will display once you actually run the report.)



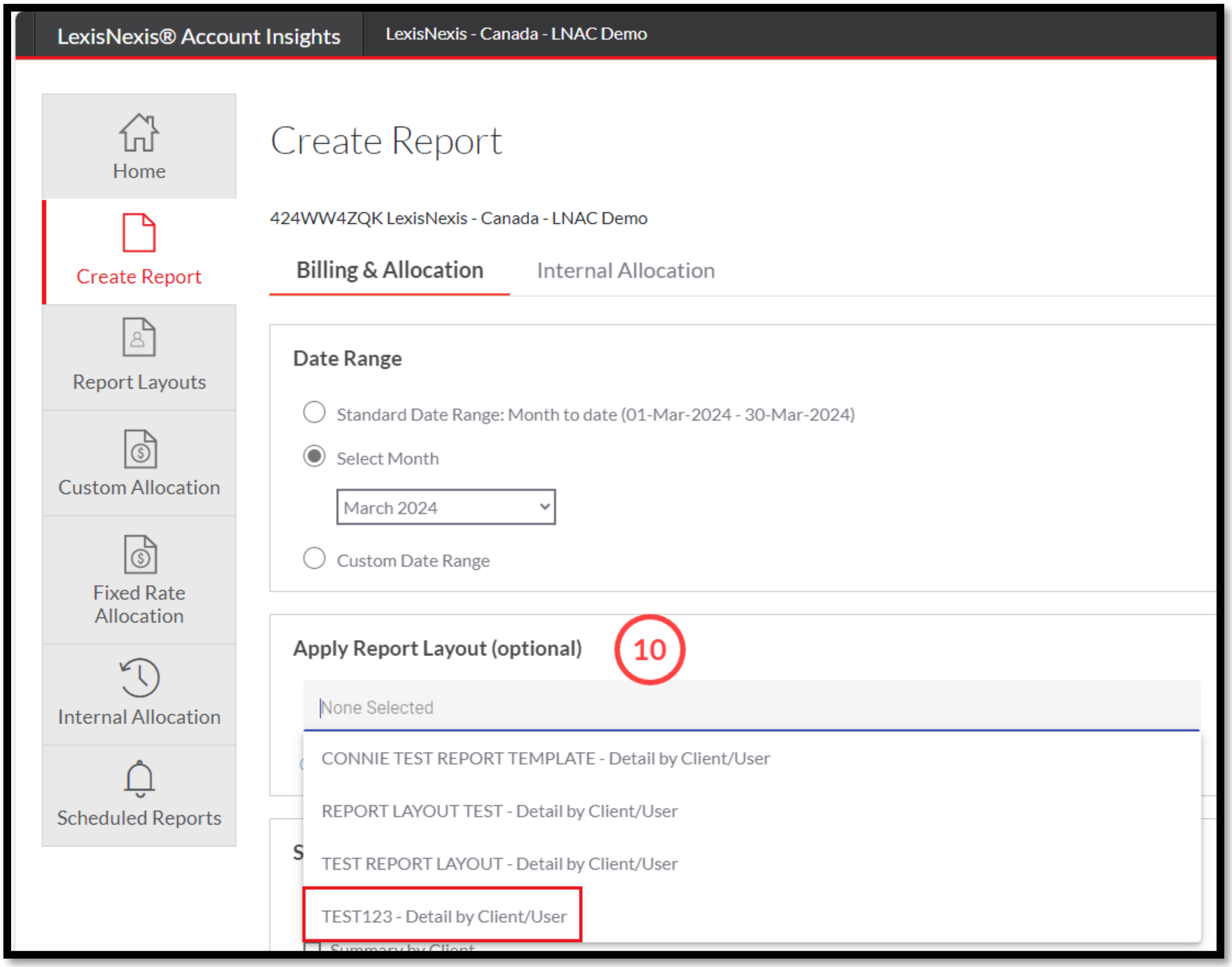
8. Once you are happy with your selections, click **Next** at the bottom of the page.



9. If everything is in order, click the **Save** button to create the new report layout.



10. You can select this newly created layout to your reports when you click **Create Report** tab > **Apply Report Layout (optional) >** click the **None selected** box for a dropdown display



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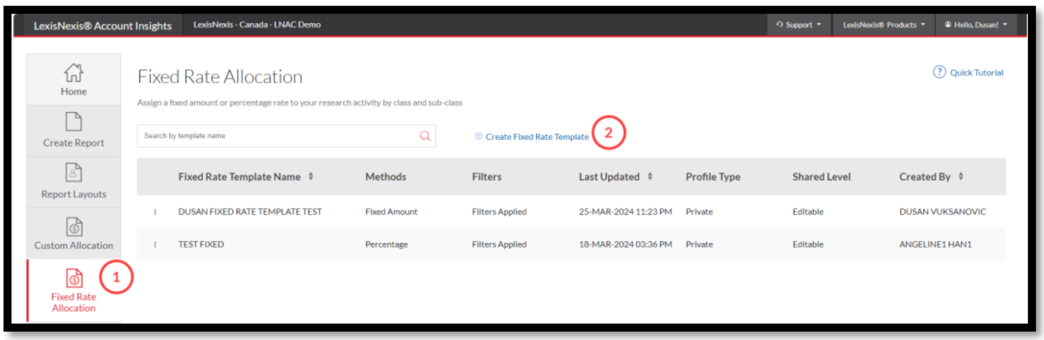
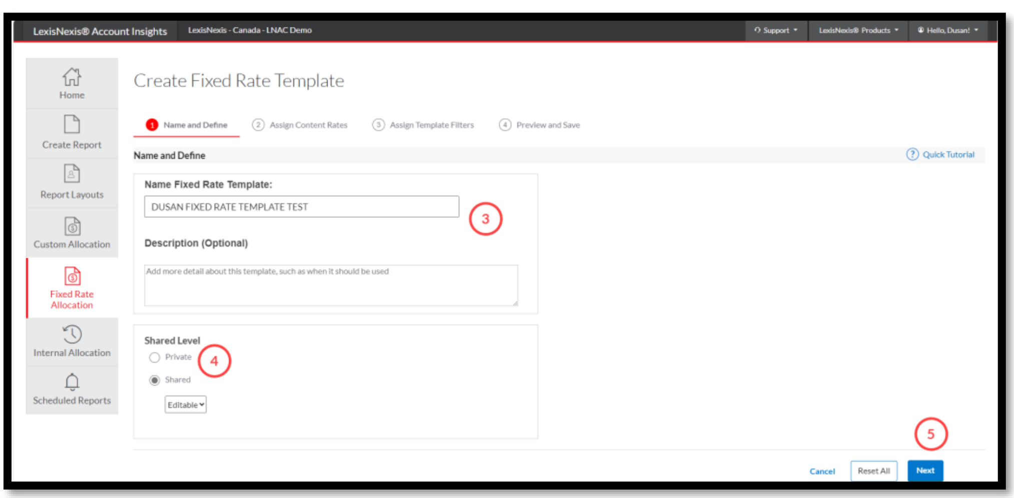
How do I customize pricing for individual activities in my report?

Customizing pricing allows you to create your own price list for the purposes of client chargeback, rather than relying on LexisNexis pricing models. In LexisNexis Account Insights, custom pricing is called **Fixed Rate Allocation**, whereas in PowerInvoice, it was called **Custom Pricing**.

1. From anywhere within LexisNexis Account Insights, click the **Fixed Rate Allocation** tab.
2. Click the **Fixed Rate Template** link.



3. Give a name to your **Fixed Rate Template** under the **Name Fixed Rate Template** box. If you want, enter the description of the Fixed Rate Template in the next box.
4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
    a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.
5. Click **Next**.



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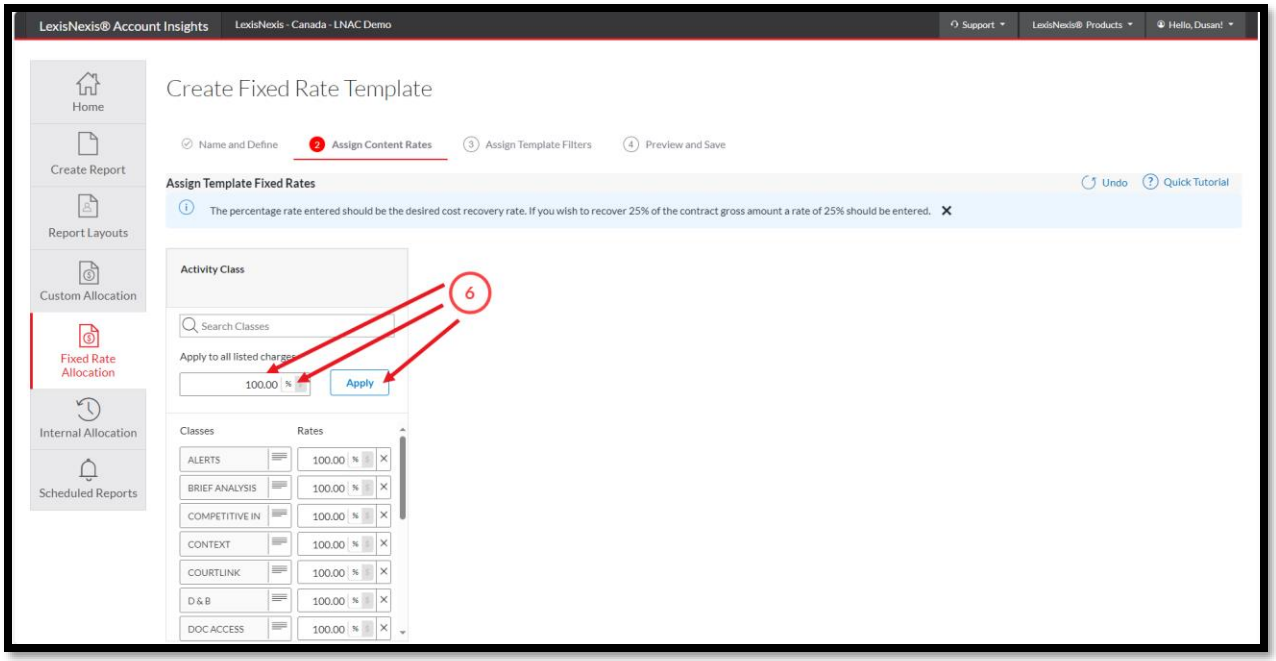
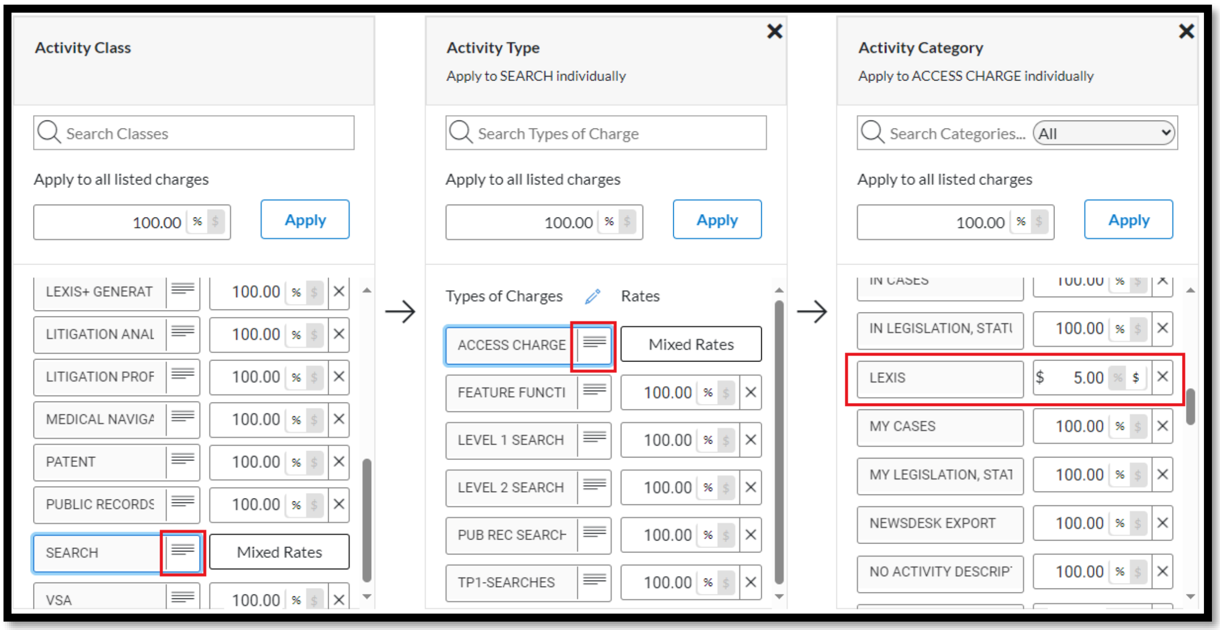
6. Because all fields **<u>must have</u>** some value, we recommend that you first enter the value of **<u>100.00%</u>** in the **Apply to all listed charges** box and click the **Apply** button.

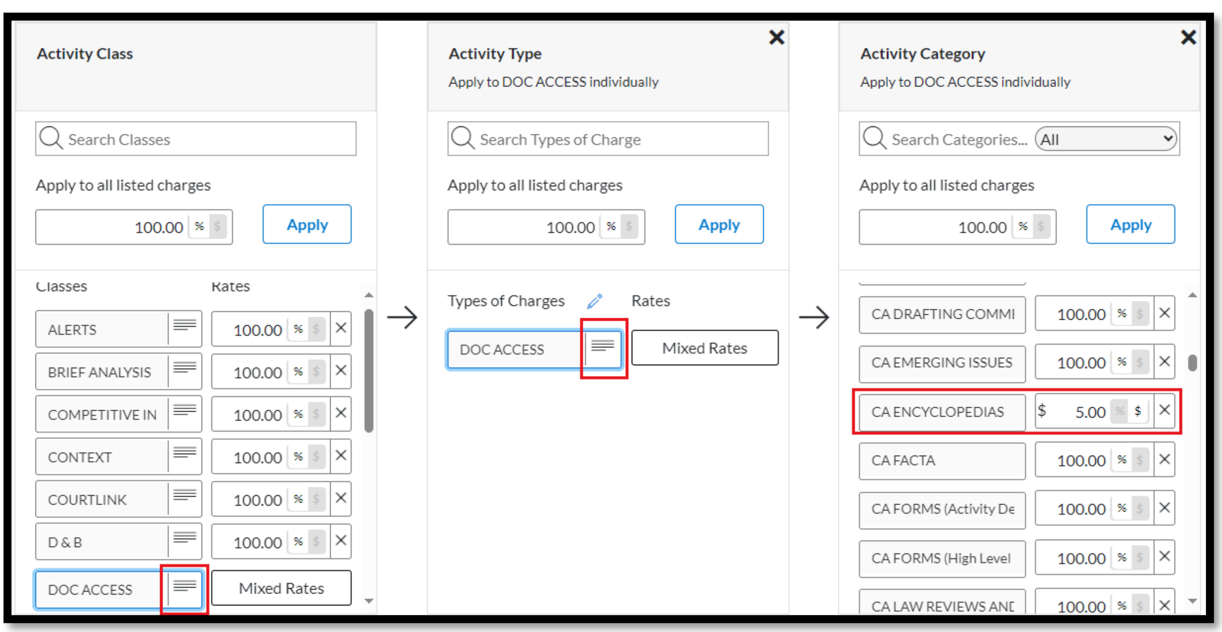


7. Now, you can go in and customize not just each class, but specific activity types and activity categories. Below, you can find a pathway how to amend the pricing for some of the most common activities in our platforms. We will imagine that we want to change the activity to be charged back at $5.

a. **Running a search:**
CLASS = SEARCH ➔ TYPES OF CHARGES = ACCESS CHARGE ➔ ACTIVITY CATEGORY = LEXIS, switch to dollar sign and enter the value **5.00**



b. **Accessing a secondary source (e.g. legal encyclopedia):**
CLASS = DOC ACCESS ➔ TYPES OF CHARGES = DOC ACCESS ➔ ACTIVITY CATEGORY = CA ENCYCLOPEDIAS, switch to dollar sign and enter the value **5.00**



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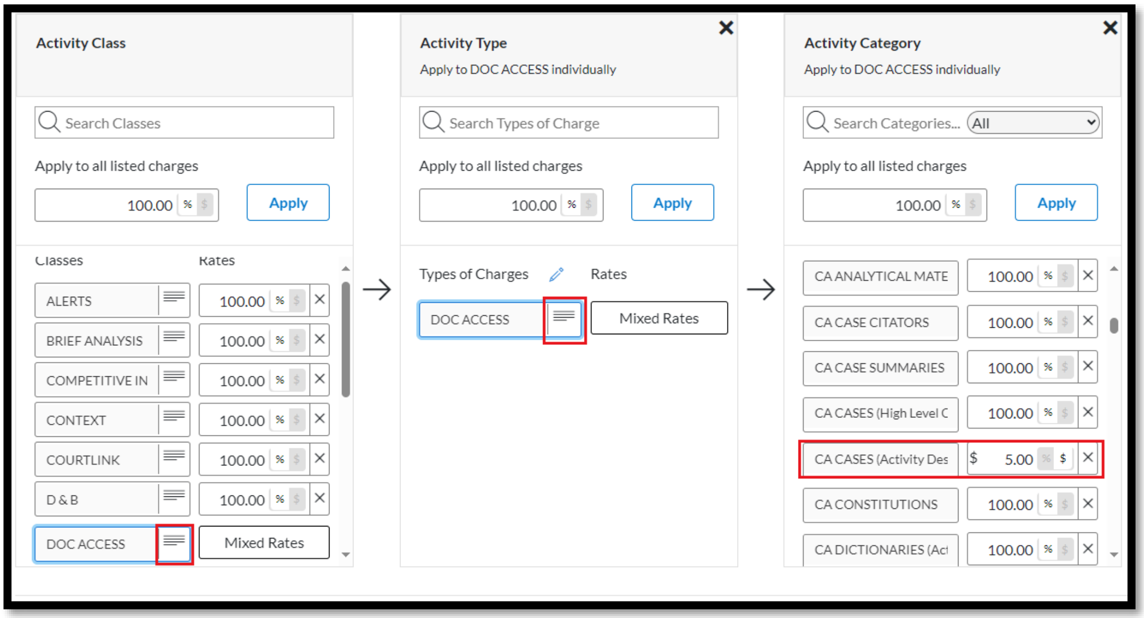
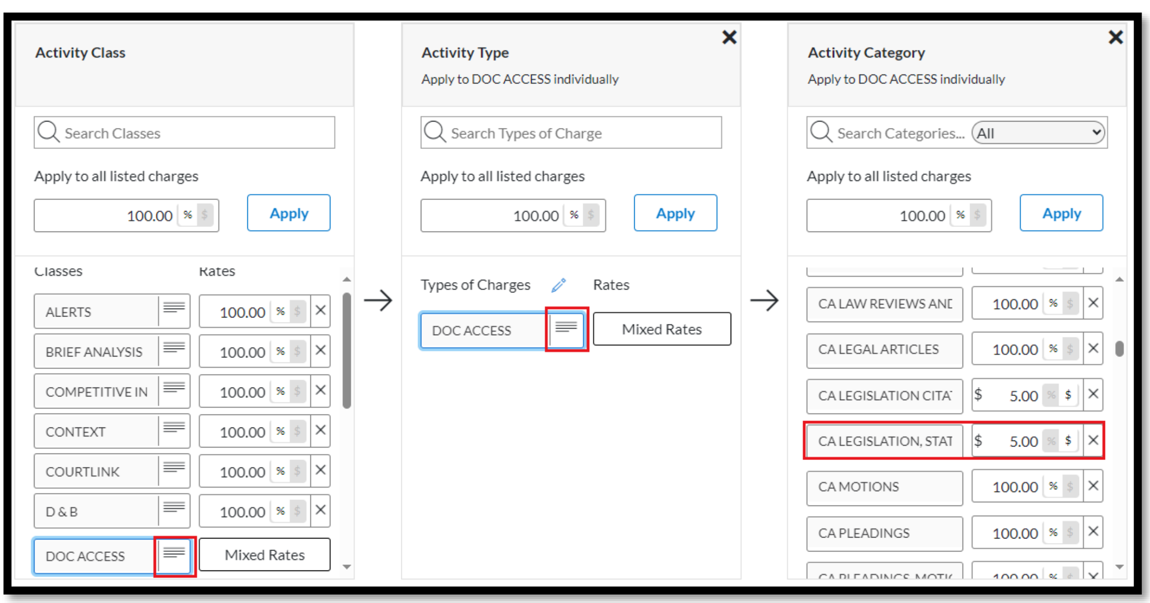
c. **Accessing caselaw:**
CLASS = DOC ACCESS ➔ TYPES OF CHARGES = DOC ACCESS ➔ ACTIVITY CATEGORY = CA CASES (Activity Description), switch to dollar sign and enter the value **5.00**



d. **Accessing legislation**:
CLASS = DOC ACCESS ➔ TYPES OF CHARGES = DOC ACCESS ➔ ACTIVITY CATEGORY = CA LEGISLATION, STATUTORY CODES AND COURT RULES, switch to dollar sign and enter the value **5.00**



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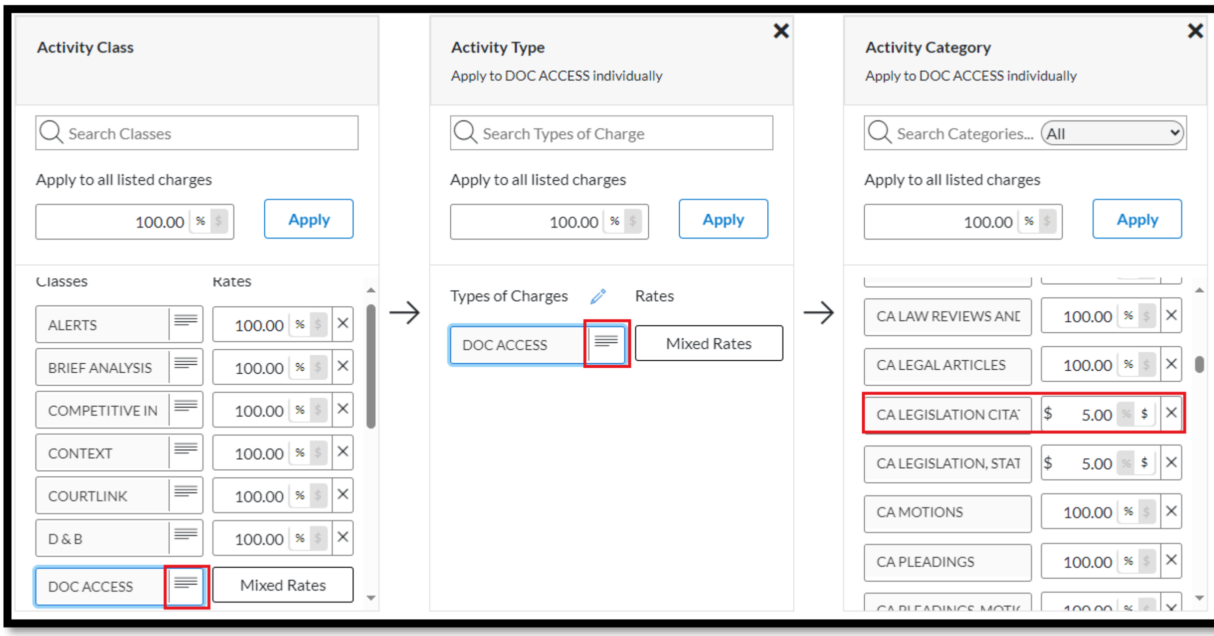
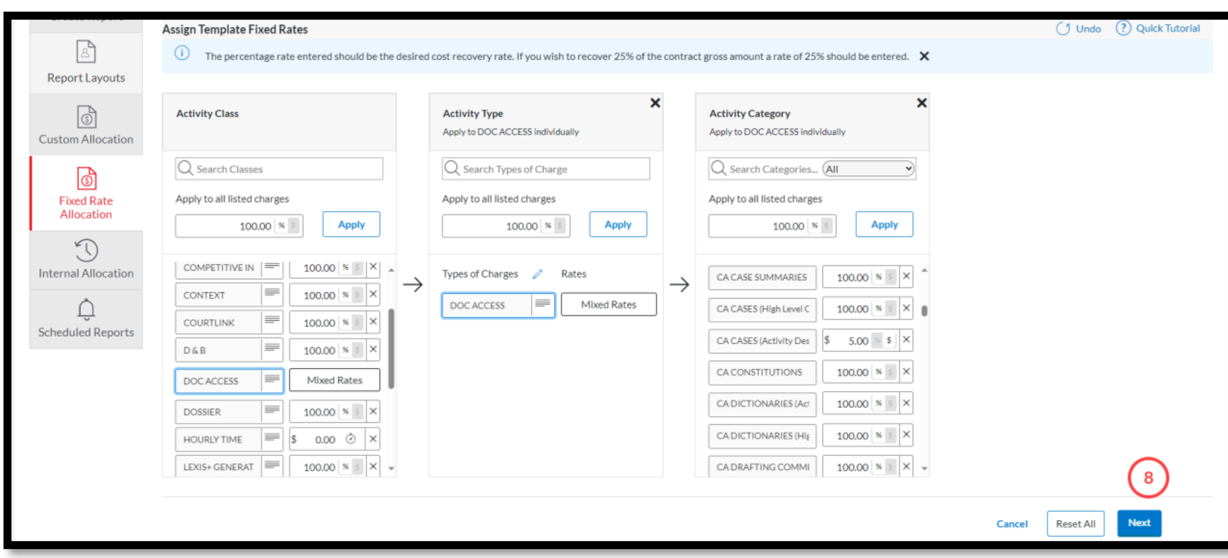
e. Accessing caselaw or legislation citator
CLASS = DOC ACCESS ➔ TYPES OF CHARGES = DOC ACCESS ➔ CA LEGISLATION CITATORS or CA CASE CITATORS, switch to dollar sign and enter the value **5.00**



8. Once you are happy with your amendments of individual item prices, click **Next**.



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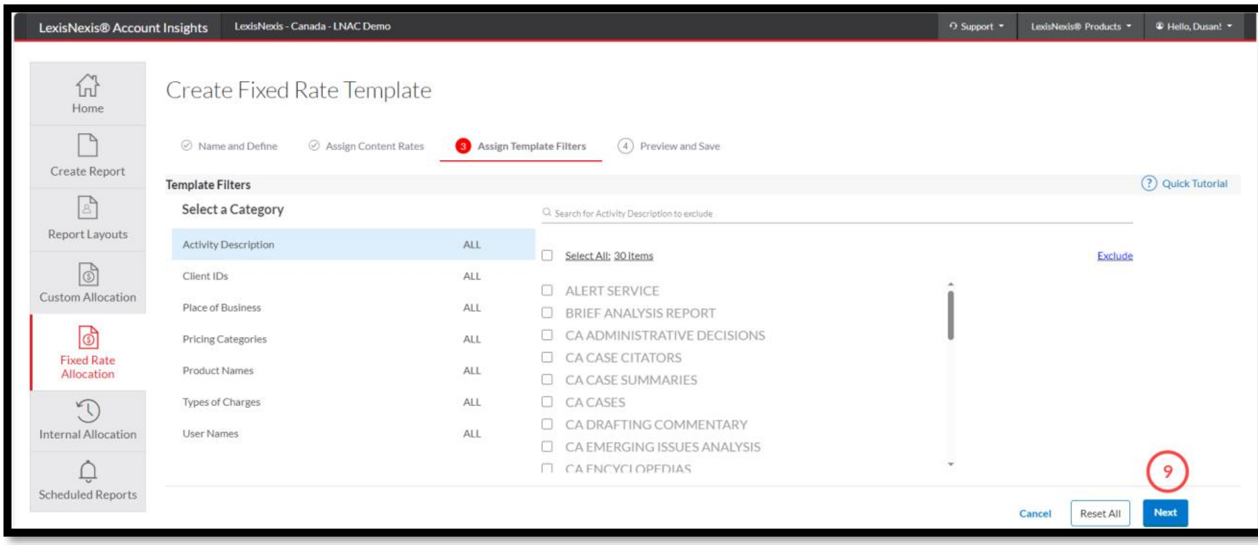
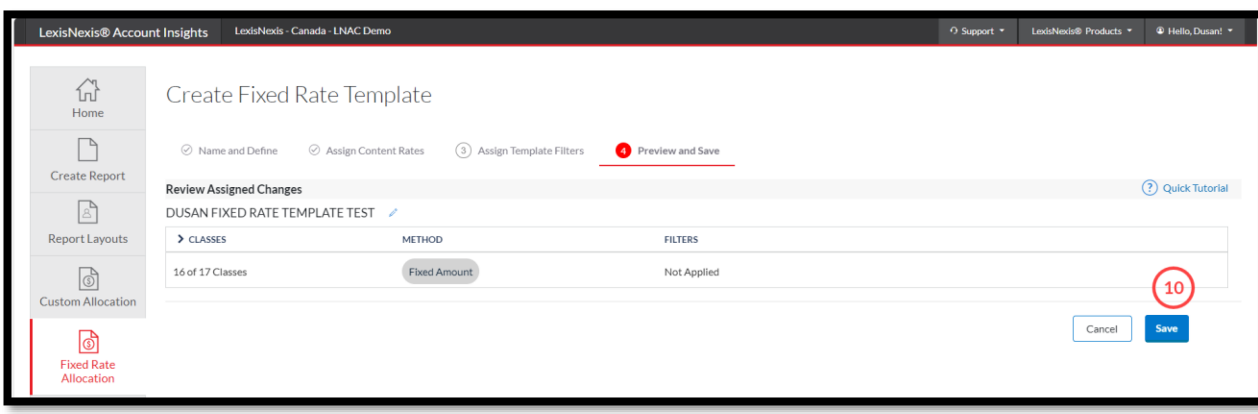
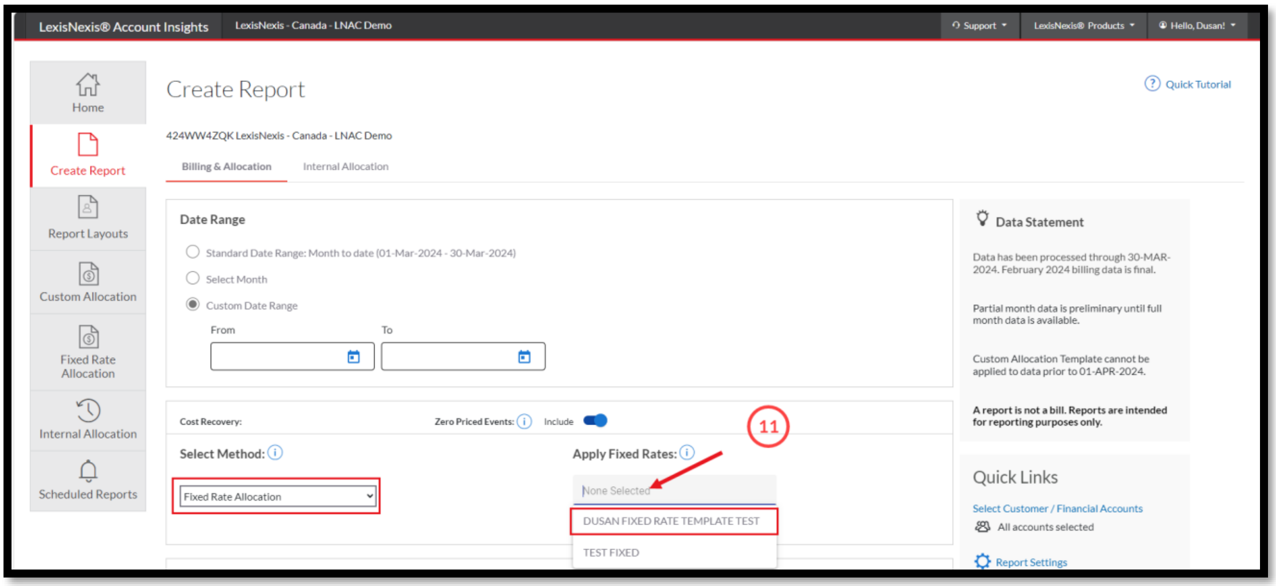
9. If you are looking to completely exclude specific items, you can select them from the list under the **Assign Template Filters** step.
    a. If yes, select the items you wish to exclude.
    b. If not, just click **Next**.



10. Finally, if you are happy with all your settings, click the **Save** button.



11. You can apply this newly created Gross Amount custom pricing to individual usage items when you click **Create Report** tab > **Select Method = Fixed Rate Allocation** > **Apply Fixed Rates** = click on the grey box and select the name of your Fixed Rate Allocation template



12. When you run the report, the new pricing will be displayed under the column **CONTRACT NET AMOUNT**.

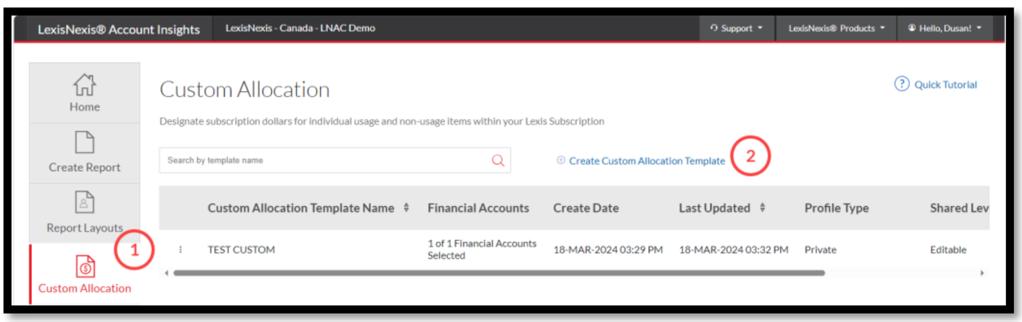
IMPORTANT NOTE FOR PRICING CUSTOMIZATION:
Only activities that have a **Contract Gross Amount** value that is higher than $0 can be customized. All values that have a **Contract Gross Amount** value of $0 cannot be customized. This is one of the reasons why users should carefully decide whether to have a **Doc-Access Pricing Model, a.k.a. Default Pricing Model** or **Search and Document Access Pricing Model, a.k.a. Hybrid Pricing Model**.

If your organization is looking to customize pricing, we recommend selecting the **Search and Document Access Pricing Model**. The reason is that, via this model, access to all primary sources (like caselaw, legislation, and case & legislation citators) will carry a **Gross Contract Amount** of $0 and you will be able to modify the chargeback value of running a search as well as accessing secondary sources, like textbooks, legal encyclopedias, commentaries, law reviews and journals.

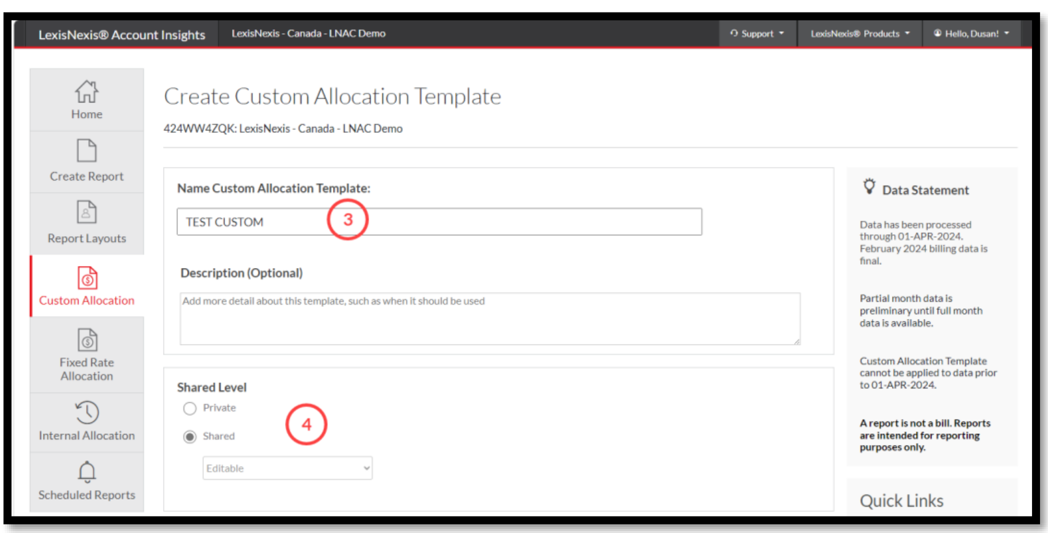
How do I customize the total value for all platform subscriptions in my report?

There is a new feature in LexisNexis Account Insights that allows users to customize their own reference value for all platform subscriptions for chargeback purposes. This value is important because it serves as the reference for pro rating chargebacks within the **CONTRACT NET AMOUNT** column, ensuring that you are maximizing your total cost recovery dollars.

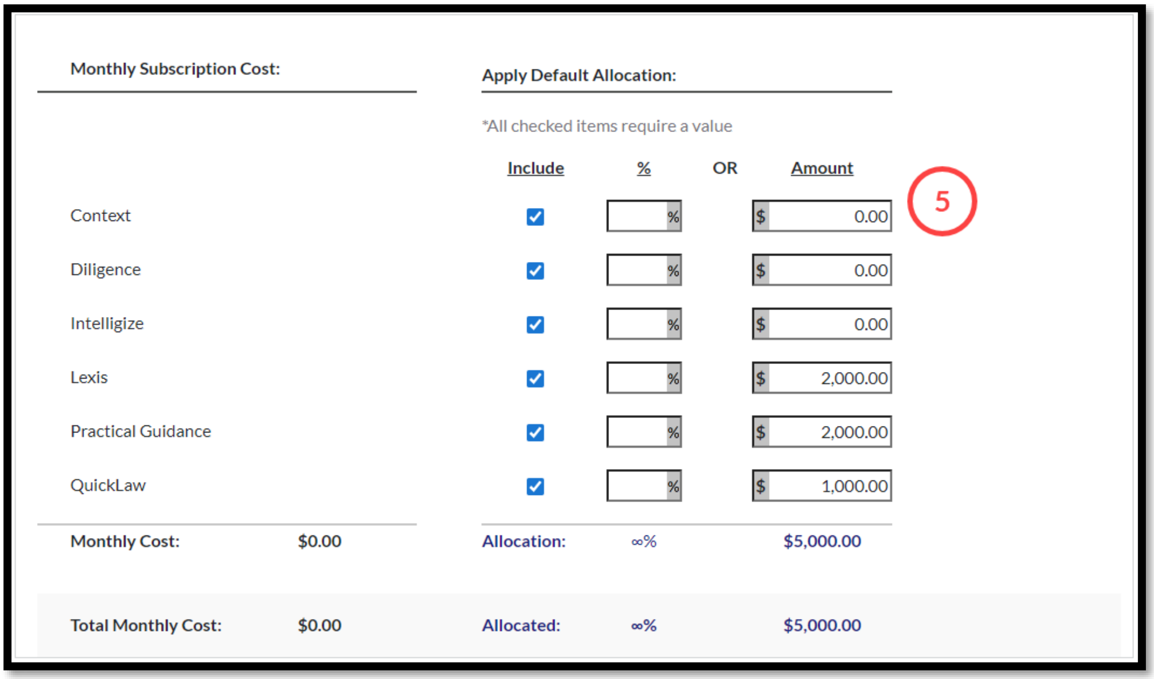
1. From anywhere within LexisNexis Account Insights, click the **Custom Allocation** tab.
2. Click the **Create Custom Allocation Template** link.



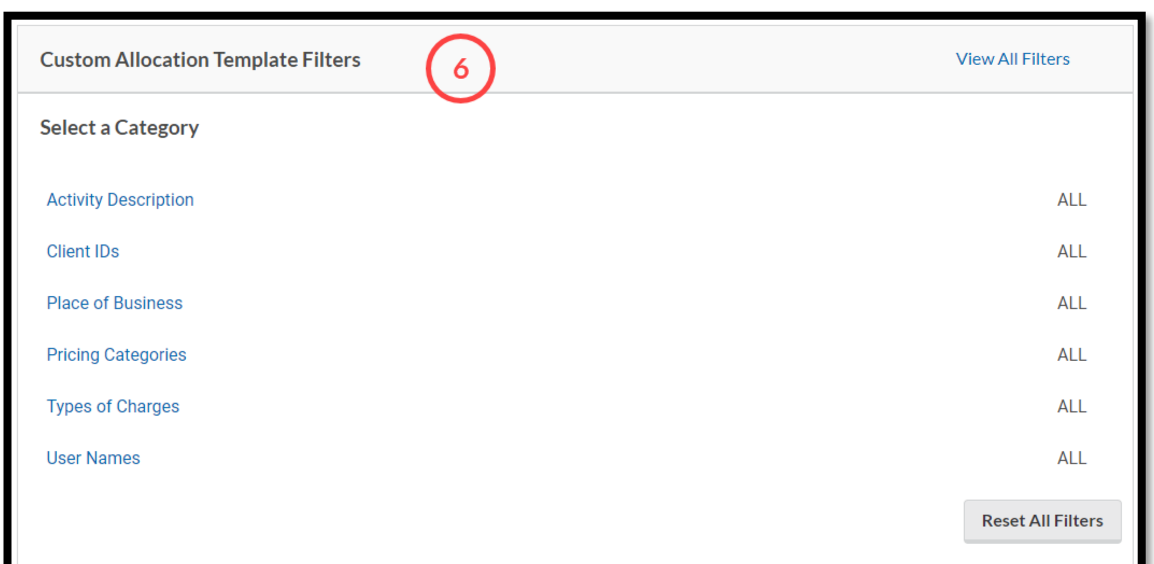
3. Give a name to your **Fixed Rate Template** under the **Name Custom Allocation Template** box. If you want, enter the description of the Custom Allocation Template in the next box.
4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
   a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.



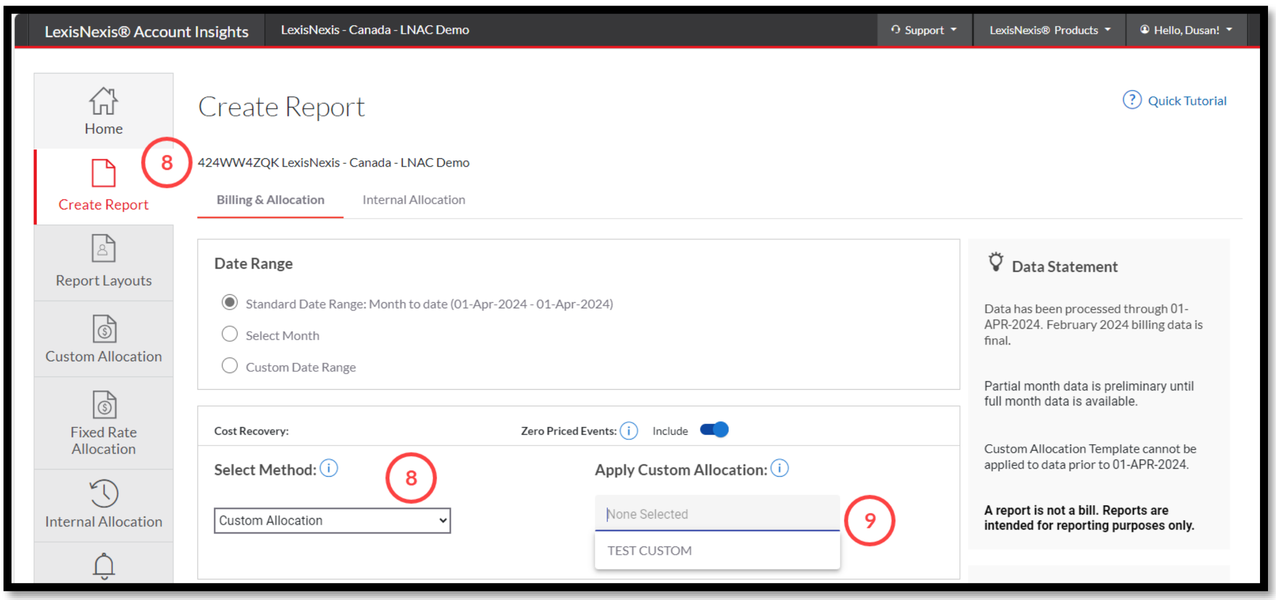
5. Next, under the **Monthly Subscription Cost** option, enter the values you wish to allocate for each Usage and Non Usage product. The values can be expressed either in dollars (e.g. $1,000.00) or as percentages of the individual product's subscription value (e.g. 25%).



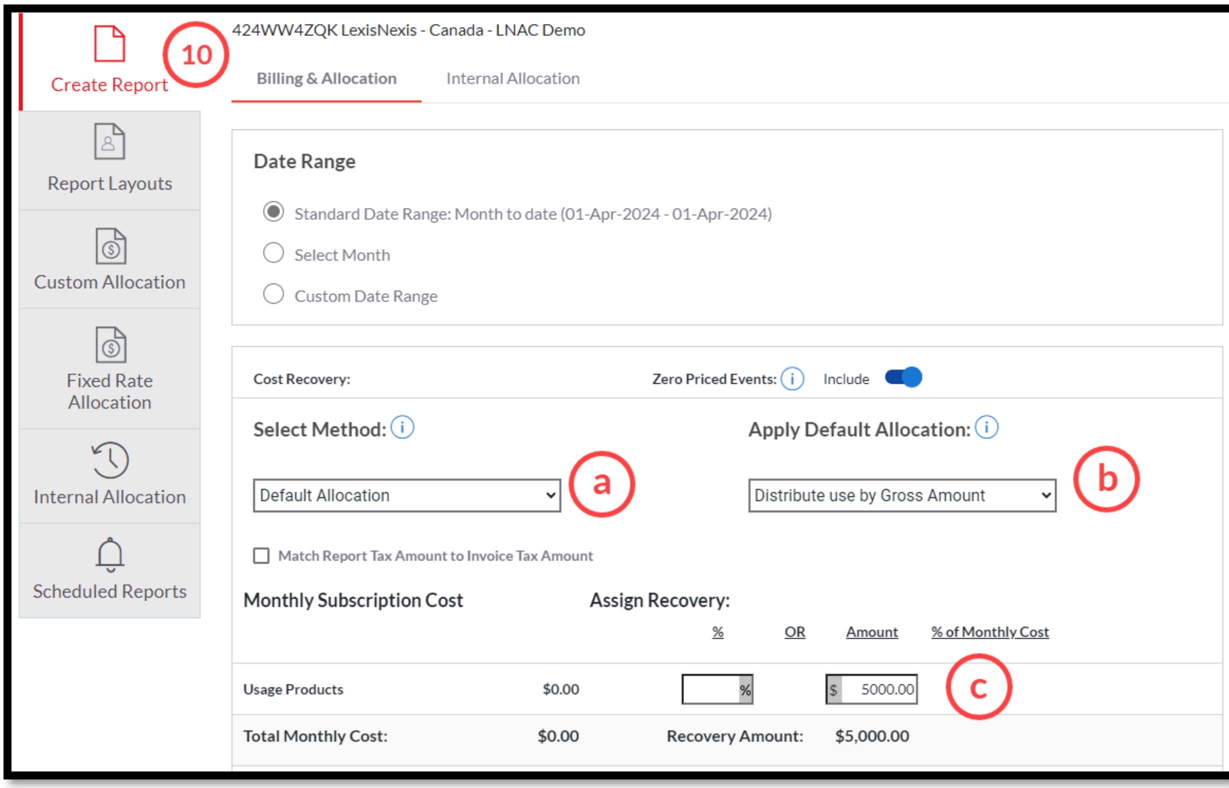
6. Under **Custom Allocation Template Filters**, make sure to exclude any categories from your custom allocation.



7. Once you are happy with your selections, click the **Save** button.
8. To assign your custom allocation as a part of a report, go to **Create Report** and under **Cost Recovery** option, click on the **Select Method** dropdown and select **Custom Allocation**.
9. Under **Apply Custom Allocation**, click the **None selected** grey box and select your custom allocation.



10. As an alternative to this process, you also do a manual custom allocation without creating a template when you are in the **Create Report** tab.
    a. Under **Cost Recovery**, click on the **Select Method** dropdown and select **Default Allocation**.
    b. Choose **Distribute use by Gross Amount**.
    c. Under the **Monthly Subscription Cost** option, assign either the dollar amount or the percentage amount to Usage and Non Usage products.



11. Once you are happy with all your selections, click **View** or **Download** to obtain the report.
12. Irrespective of the option you choose (whether through a **Custom Allocation** template or a manual allocation within the **Default Allocation** option), all pro rated chargebacks with the new Recovery Amount will be displayed in the **CONTRACT NET AMOUNT** column of the report.