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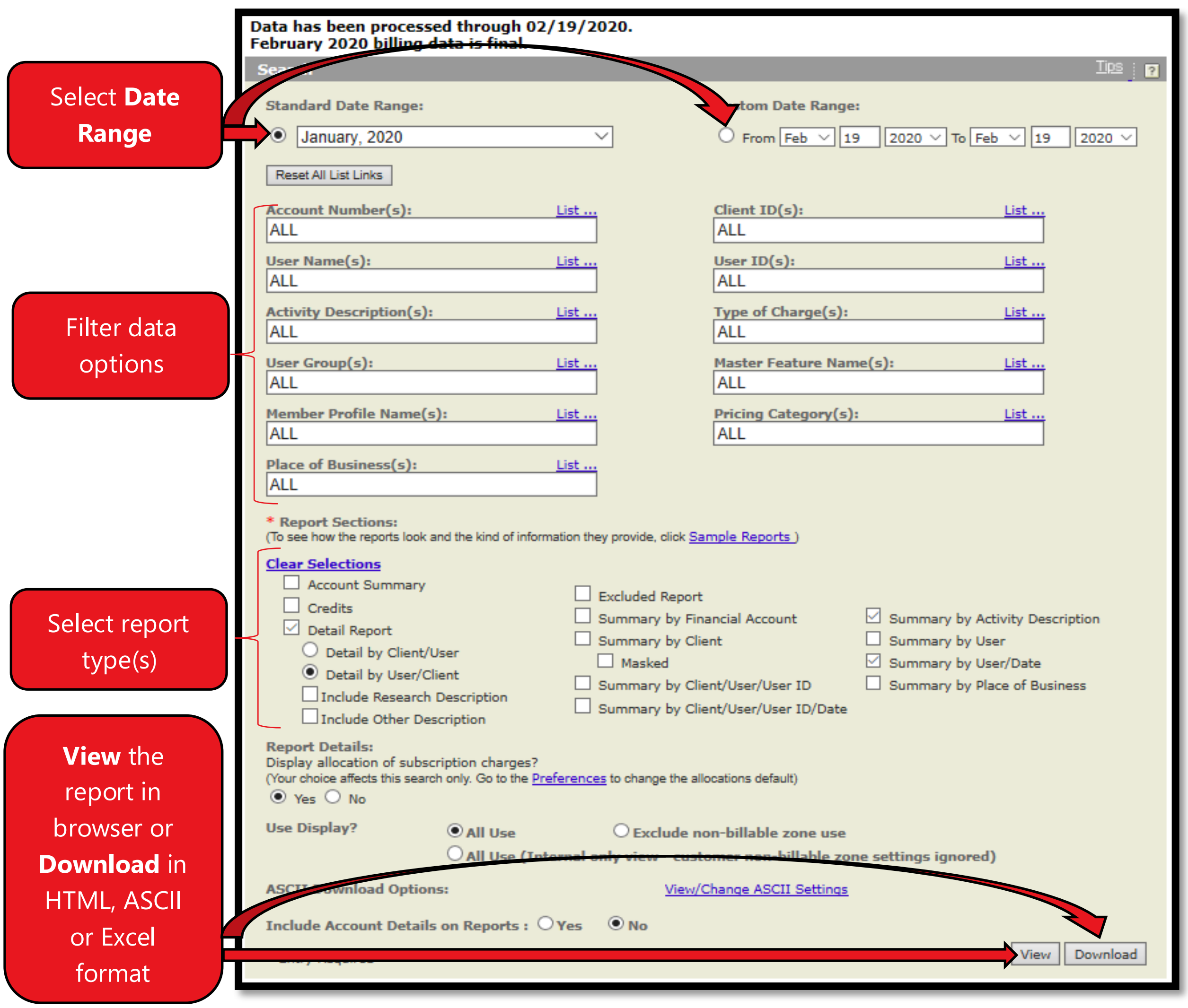
Tip Sheet | PowerInvoice: Billing Functionality

PowerInvoice is an essential tool for legal research cost recovery. This tip sheet will show you how to run basic search reports, create alerts, and set custom prices and user-defined reports in order to accommodate your cost recovery needs.

1. Running Basic Search Reports

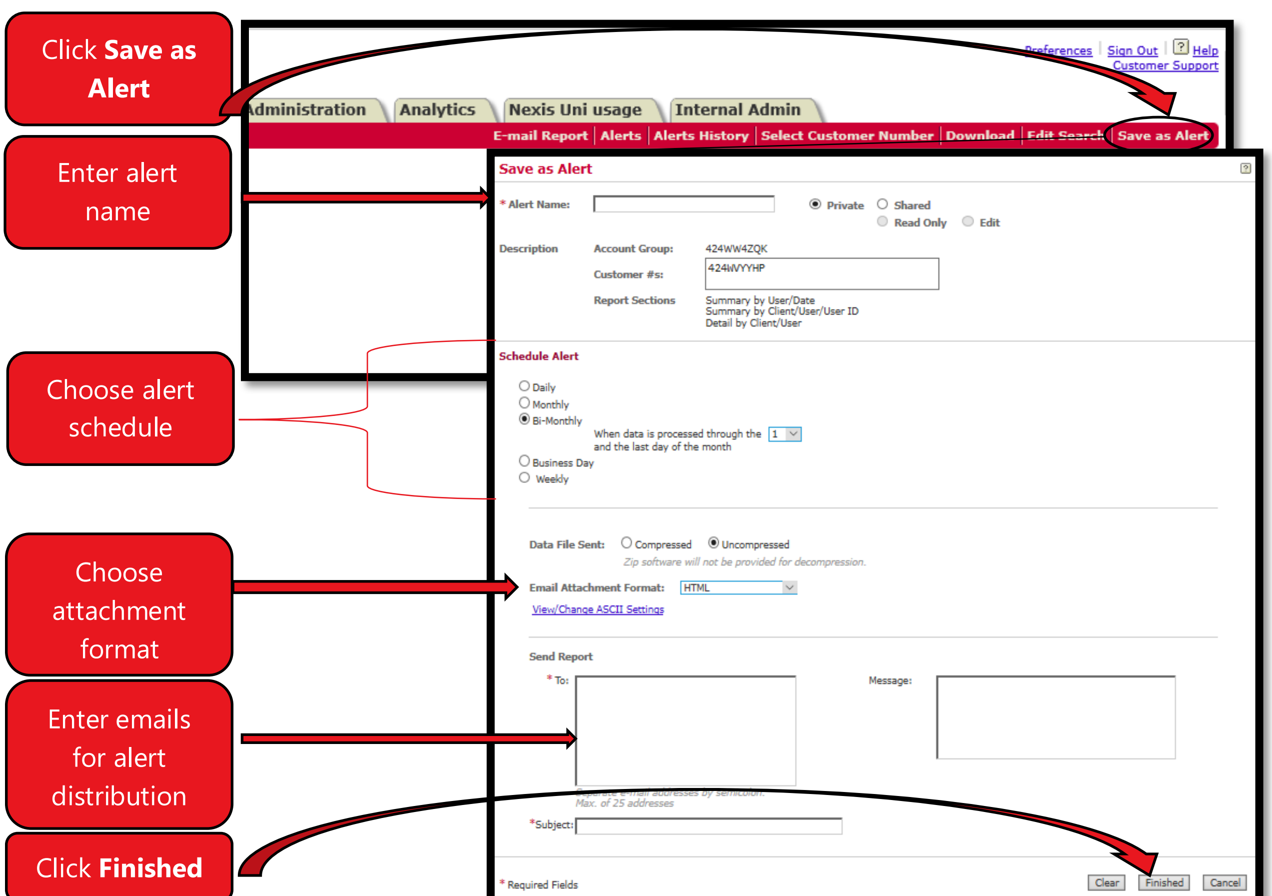


TIPS FOR RUNNING BASIC SEARCH REPORTS

- Filtering the data options customizes data that you want to appear in your reports.
- Report types display the data differently. Explore the ones that are already available to determine the best fit for your needs.
- To download a file in **PDF**, select **View**, then click on **Printable Format** link. Once the new window opens, click the **Save as** button.
- PowerInvoice does not offer real-time usage information. Generally, there will be a 24-48h delay in data availability.
- The message **Data has been processed through MM/DD/YYYY** represents the last date a billable activity was performed in LexisNexis platforms. If we imagine that today is April 15, 2020 and user sees that data has been processed through February 19, 2020, this means that the last billable activity in LexisNexis systems was performed on February 19. If a user tried to pull a report for March 2020, PowerInvoice will return an error, because there is no data to extract since no one used LexisNexis products in that time period.

2. Creating Alerts

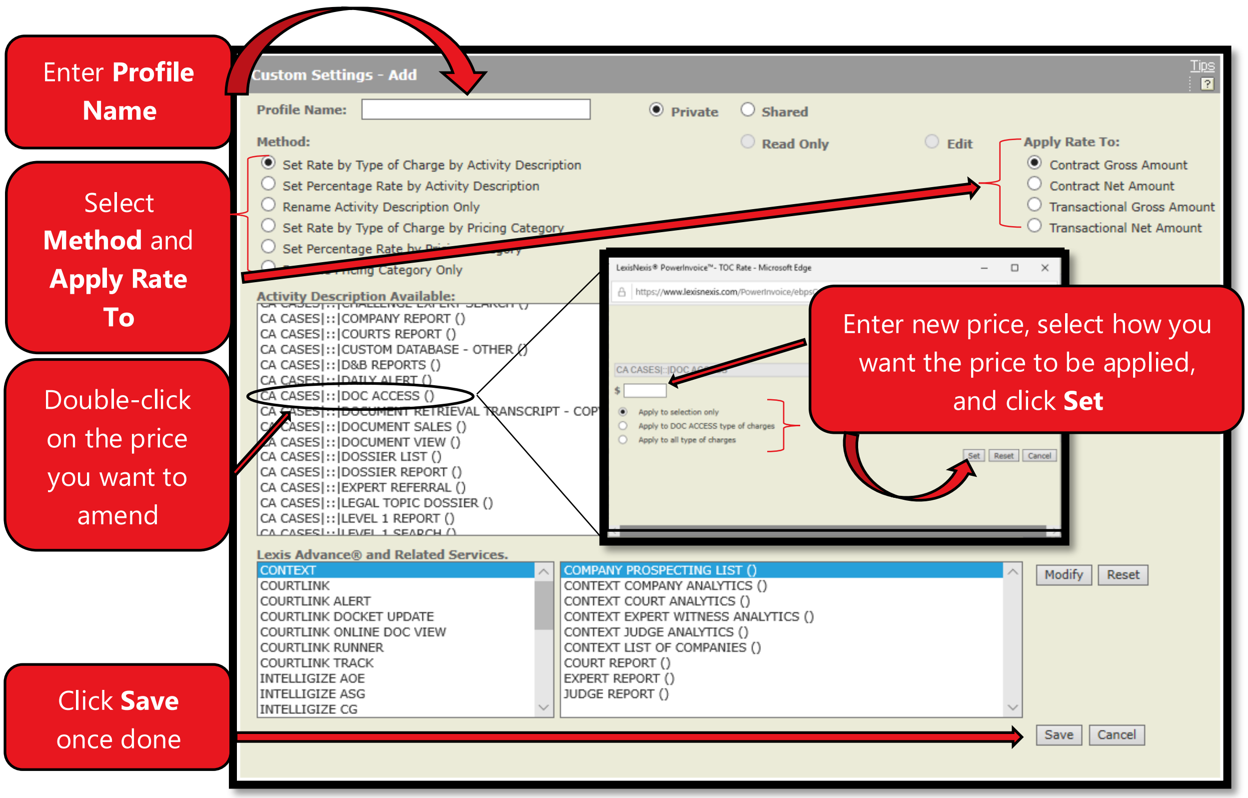
Alerts can be created for **Search**, **Custom**, **Reallocation**, and **User-Defined** tabs. Once the **View** button has been clicked, the user can set up an alert for the report.



3. Creating Custom Chargeback Prices

PowerInvoice has 2 pricing models: **Doc-Access (Default) Model** and **Search (Hybrid) Model**. A pricing model for your firm can be set up in LexisNexis Account Centre. For more information on how prices are allocated per content type in these models, click here.

If users want to customize prices for types of charges or activities, they can do that by clicking on the **Custom** tab in the top, left-hand panel.



You can now use this pricing profile to get the billing information you need for cost recovery.

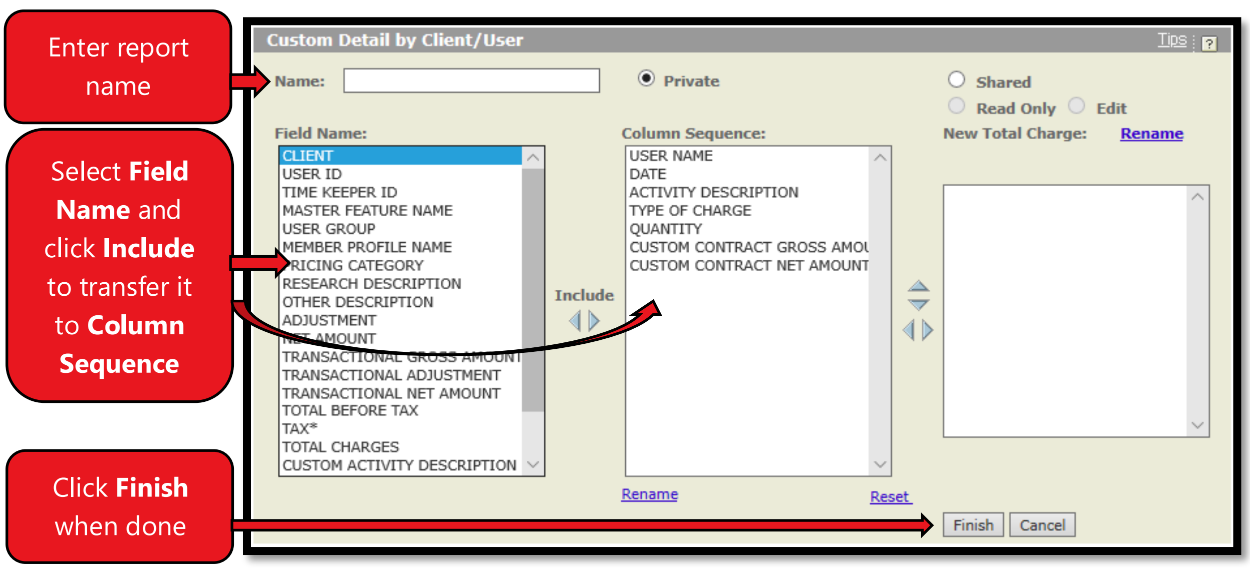
TIPS FOR CREATING CUSTOM PRICES

- The above form will only load automatically if you have never set up a pricing profile before. If you need to set up an additional profile, click **Custom** tab and then click **Add** button next to the **Apply Profile** dropdown menu.
- **Shared** radio button means that users can share your custom pricing profile with other colleagues with access to PowerInvoice. **Private** keeps it accessible only to the profile's author.

- Option **Apply to DOC ACCESS type of charges** means that the price you enter will apply to <u>all types of charges</u> that are labelled as **DOC ACCESS ()**. For example, if users want to apply $0 of chargeback to all Canadian document access activities (like access to cases, legislation, legal encyclopedias, textbooks, etc.), they can double-click on any activity description that is labelled as **DOC ACCESS (),** enter **$0** in the box, select **Apply to DOC ACCESS type of charges** and click **Set**.
- Option **Apply to all type of charges** means that the price you enter will apply to <u>all types of charges</u> across all activities.

4. Creating User-Defined (Custom) Reports

Users can create User-Defined Reports from 3 different tabs: **Custom**, **Reallocation**, and **User-Defined**. To create this custom report in any of the tabs, click the **Add** button next to the **User-Defined Format** dropdown, and then select any of the 2 base report options.



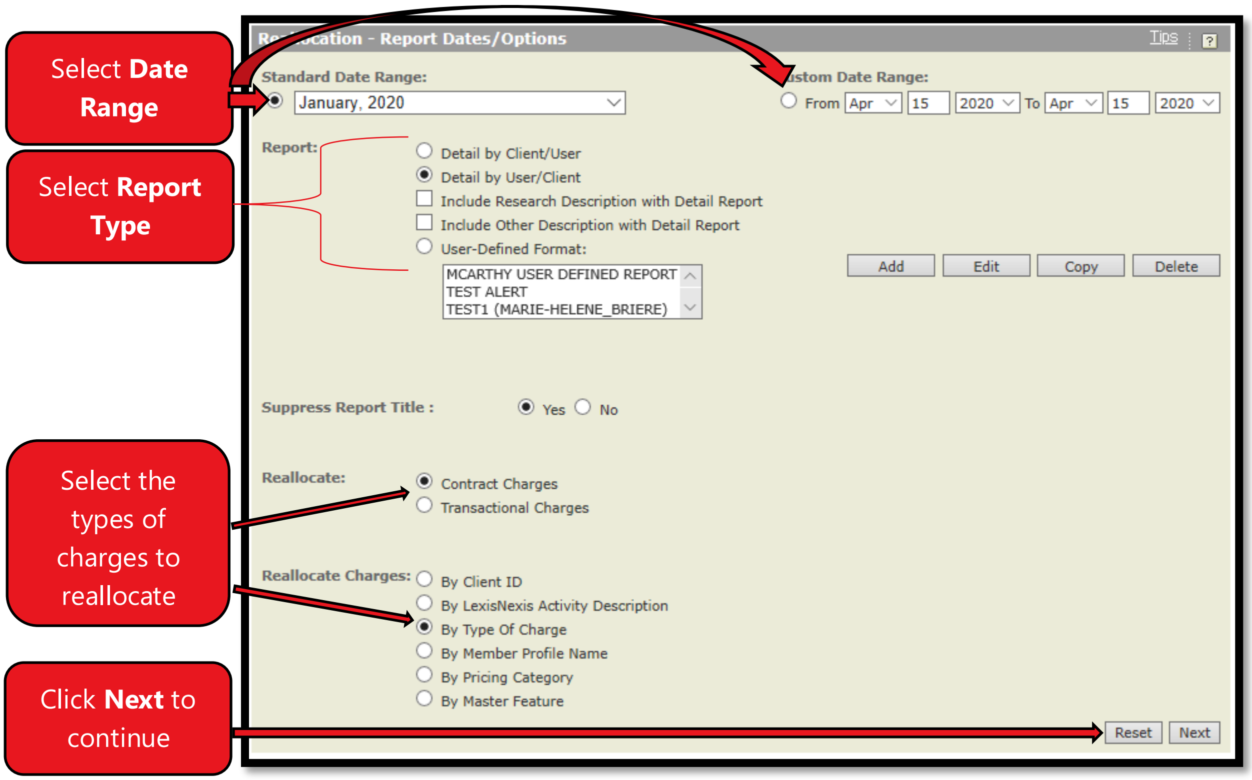
You can now use this report to get the billing information you need for cost recovery.

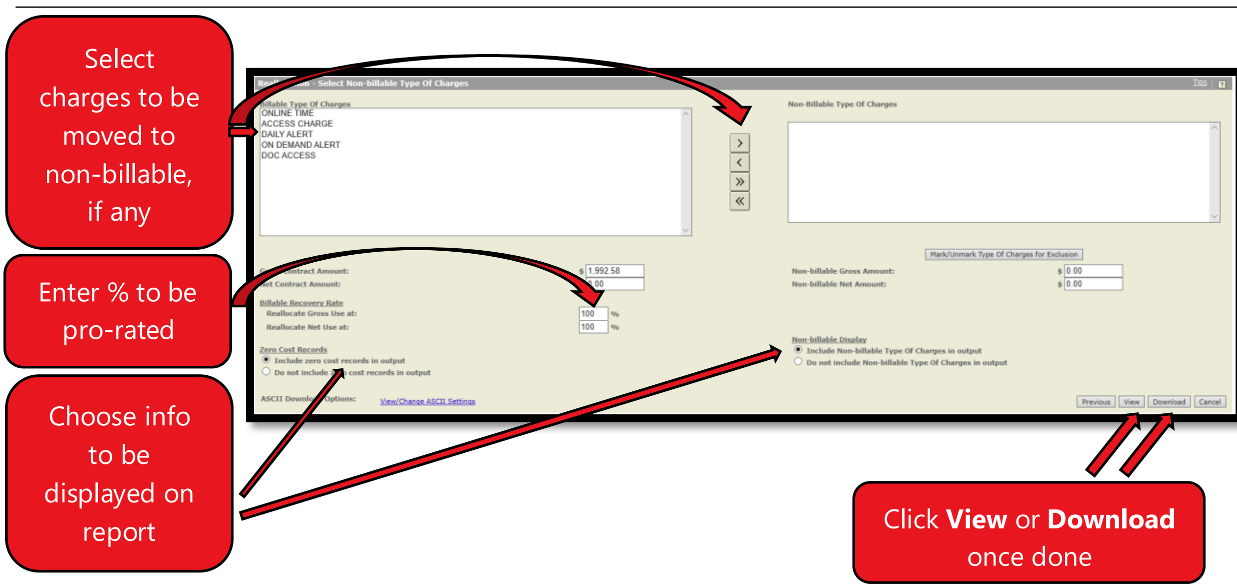
TIPS FOR CREATING USER-DEFINED REPORTS

- **Column Sequence** means exactly that – the sequence in which your selected columns will be displayed in the report.
- Each tab contains unique user-defined reports, which means that identical user-defined reports need to be created separately for individual tabs. In other words, if a user creates a user-defined report in **Custom** tab, this report will not automatically show on the **Reallocation** tab.
- Just like the custom pricing profiles, the user-defined reports can be shared with others by selecting the **Shared** radio button.

5. Creating Reallocation Reports

The **Reallocation** tab is useful for quickly identifying and reallocating, or completely removing, research charges. Running a reallocation report is a 2-step process.





TIPS FOR RUNNING REALLOCATION REPORTS

- If you need to easily pro-rate all of your charges, use **Reallocation** report. For example, if you want to pro-rate your total gross amount charge down to 70%, use the **Reallocate Gross Use at:** box to enter **70**.

For any questions or additional assistance, please contact our **Customer Service** team at 1-800-387-0899 (Monday – Friday: 7:00 AM – 11:00 PM ET, Saturday – Sunday: 9:00 AM – 11:00 PM ET) or write to us at service@lexisnexis.ca.

To arrange a training session, please contact your designated **Product Adoption and Learning Specialist** or email us at training@lexisnexis.ca.
