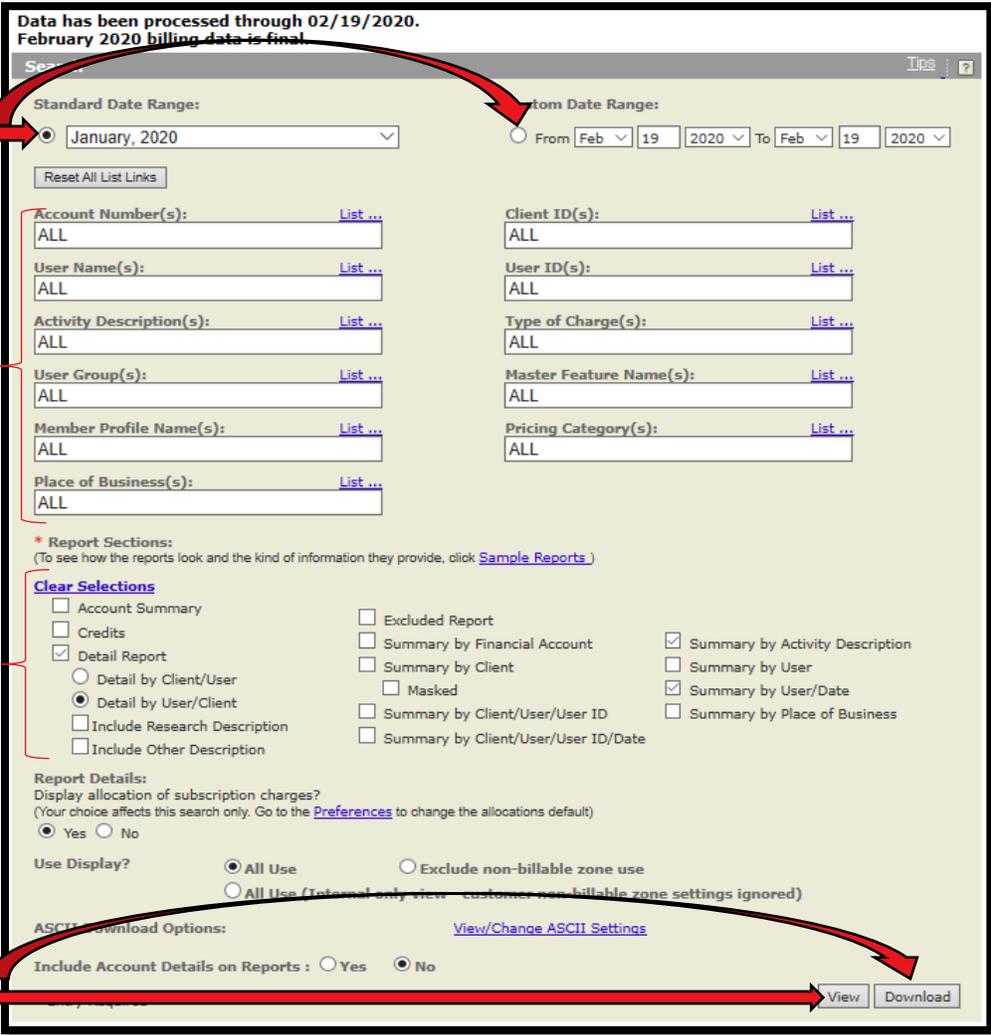


Tip Sheet | **PowerInvoice: Billing Functionality**

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



The screenshot shows the PowerInvoice search report interface. Red callout boxes with arrows point to the following features:

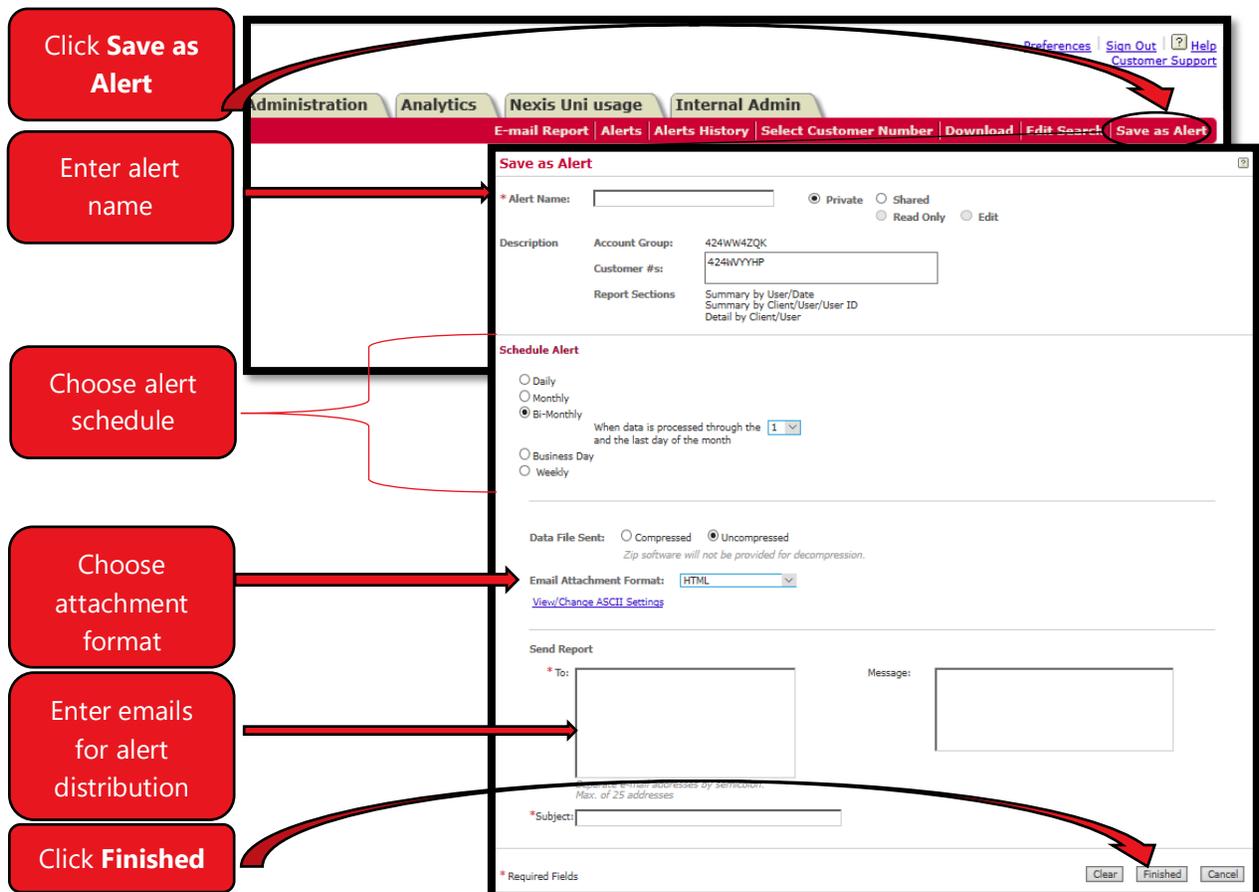
- Select Date Range:** Points to the 'Standard Date Range' dropdown menu set to 'January, 2020' and the 'Custom Date Range' section with 'From Feb 19 2020 To Feb 19 2020'.
- Filter data options:** Points to the various filter fields such as 'Account Number(s)', 'User Name(s)', 'Activity Description(s)', 'User Group(s)', 'Member Profile Name(s)', 'Place of Business(s)', 'Client ID(s)', 'User ID(s)', 'Type of Charge(s)', 'Master Feature Name(s)', and 'Pricing Category(s)'. Each field has a 'List ...' link.
- Select report type(s):** Points to the 'Clear Selections' section where various report options are checked, including 'Detail Report', 'Detail by User/Client', 'Summary by Activity Description', 'Summary by User/Date', and 'Summary by Place of Business'.
- View the report in browser or Download in HTML, ASCII or Excel format:** Points to the 'View' and 'Download' buttons at the bottom right of the interface.

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.



The screenshot shows the 'Save as Alert' form in the LexisNexis interface. The form is titled 'Save as Alert' and includes the following fields and options:

- Alert Name:** A text input field.
- Privacy:** Radio buttons for Private (selected), Shared, Read Only, and Edit.
- Description:** A text area.
- Account Group:** 424WW4ZQK
- Customer #s:** 424WYYHP
- Report Sections:** Summary by User/Date, Summary by Client/User/User ID, Detail by Client/User.
- Schedule Alert:** Radio buttons for Daily, Monthly, Bi-Monthly (selected), Business Day, and Weekly. A dropdown menu shows '1' for the frequency.
- Data File Sent:** Radio buttons for Compressed and Uncompressed (selected). A note states: 'Zip software will not be provided for decompression.'
- Email Attachment Format:** A dropdown menu set to HTML. A link 'View/Change ASCII Settings' is provided.
- Send Report:** A section with a 'To:' field (with a note 'Max. of 25 addresses') and a 'Message:' text area.
- Subject:** A text input field.
- Buttons:** Clear, Finished, and Cancel.

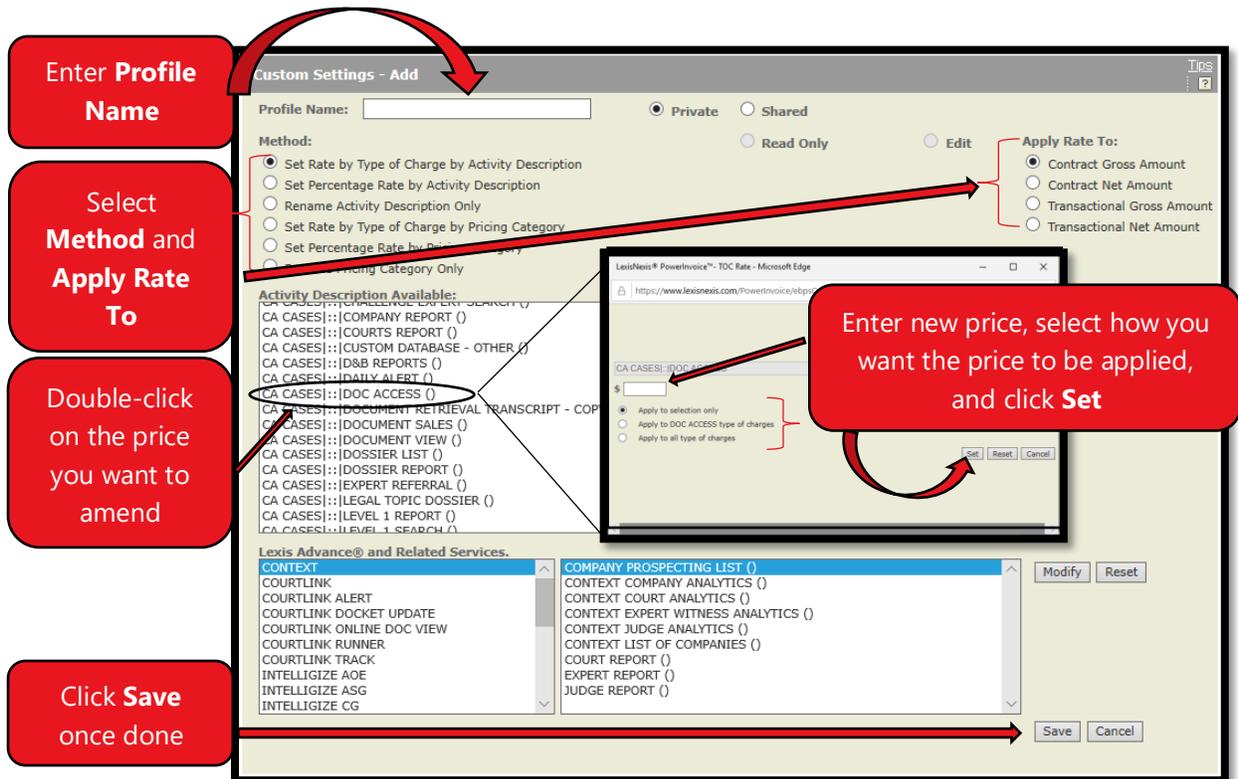
Red callout boxes on the left side of the image provide instructions for each step:

- Click **Save as Alert** (points to the 'Save as Alert' button in the top right of the interface).
- Enter alert name (points to the 'Alert Name' input field).
- Choose alert schedule (points to the 'Schedule Alert' section).
- Choose attachment format (points to the 'Email Attachment Format' dropdown).
- Enter emails for alert distribution (points to the 'To:' field).
- Click **Finished** (points to the 'Finished' button).

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.



The screenshot shows the 'Custom Settings - Add' form in the LexisNexis Account Centre. The form includes a 'Profile Name' field, radio buttons for 'Private' and 'Shared', and radio buttons for 'Read Only' and 'Edit'. Under the 'Method' section, several options are listed, with 'Set Rate by Type of Charge by Activity Description' selected. The 'Apply Rate To' section has radio buttons for 'Contract Gross Amount', 'Contract Net Amount', 'Transactional Gross Amount', and 'Transactional Net Amount'. A list of 'Activity Description Available' items is shown, with 'CA CASES:::IDOC ACCESS ()' selected. A pop-up window shows a price input field with a dollar sign, radio buttons for 'Apply to selection only', 'Apply to DOC ACCESS type of charges', and 'Apply to all type of charges', and 'Set', 'Reset', and 'Cancel' buttons. A 'Save' button is at the bottom right of the main form.

Enter Profile Name

Select Method and Apply Rate To

Double-click on the price you want to amend

Click Save once done

Enter new price, select how you want the price to be applied, and click Set

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

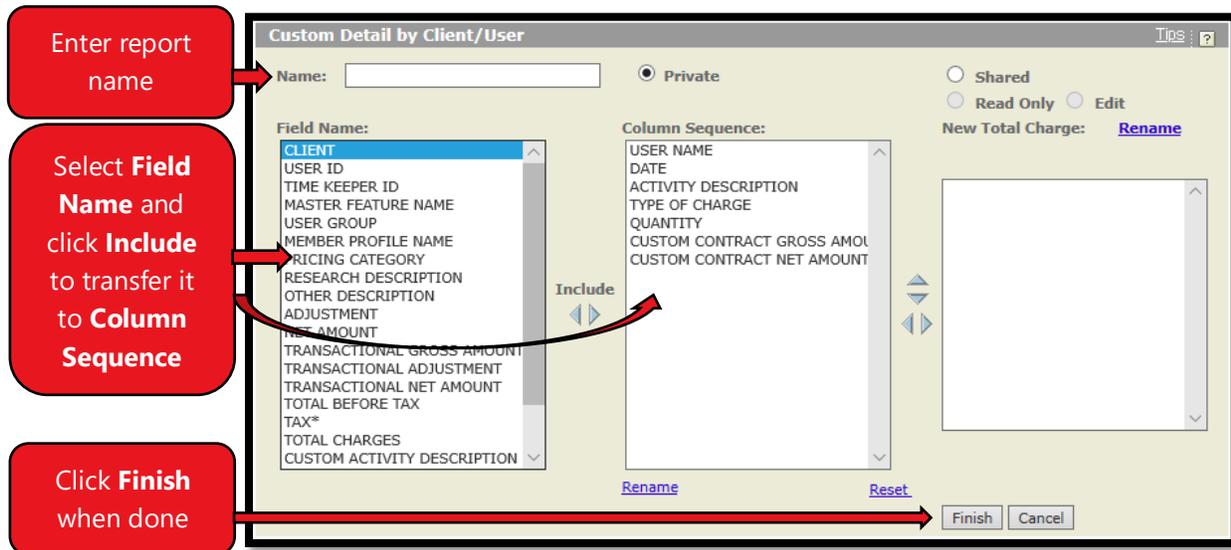
TIPS FOR CREATING CUSTOM PRICES

- 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 all types of charges 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 all types of charges 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.



Enter report name

Select **Field Name** and click **Include** to transfer it to **Column Sequence**

Click **Finish** when done

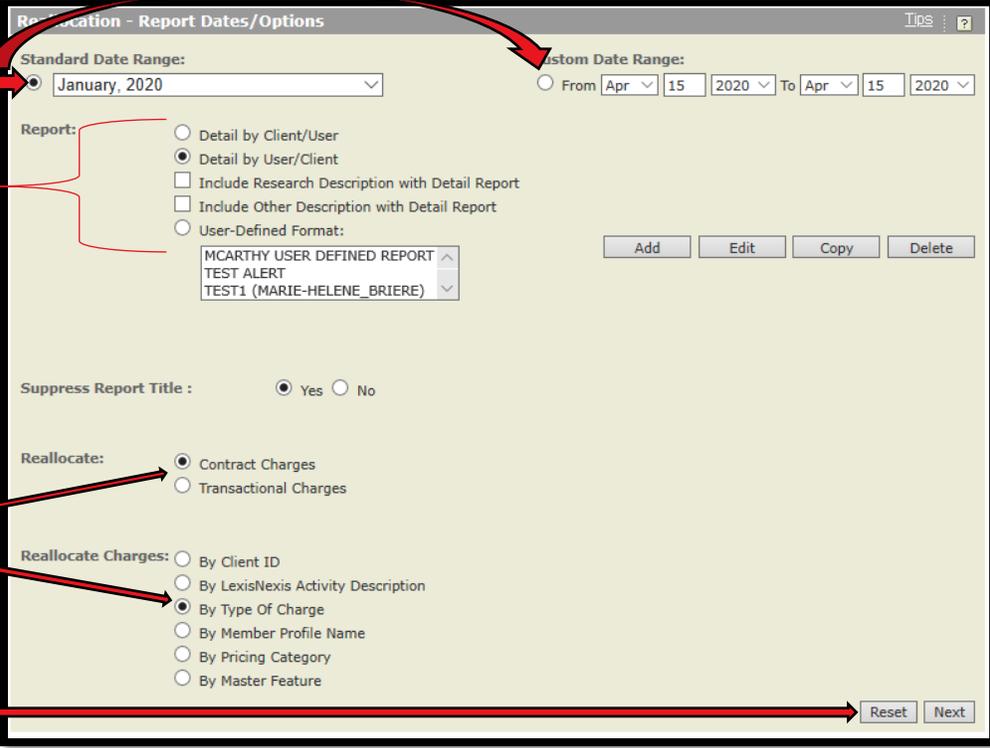
You can now use this report to get the billing information you need for cost recovery.

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.



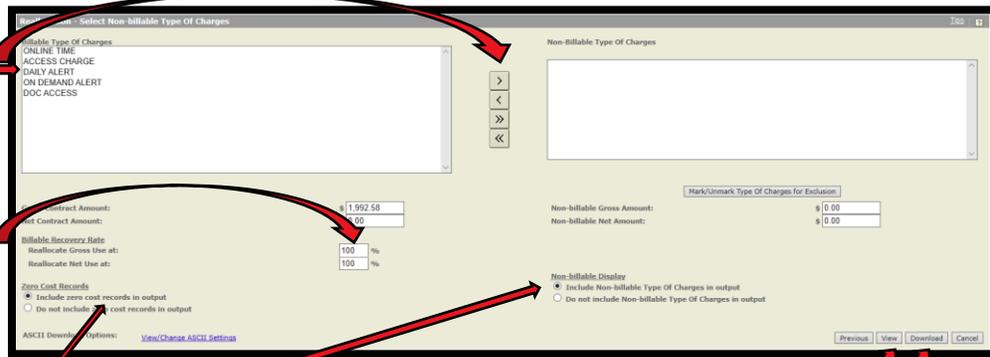
Select Date Range → Standard Date Range: January, 2020

Select Report Type → Report: Detail by Client/User, Detail by User/Client, Include Research Description with Detail Report, Include Other Description with Detail Report, User-Defined Format: MCARTHY USER DEFINED REPORT, TEST ALERT, TEST1 (MARIE-HELENE_BRIERE)

Select the types of charges to reallocate → Reallocate: Contract Charges, Transactional Charges

Click Next to continue → Reallocate Charges: By Client ID, By LexisNexis Activity Description, By Type Of Charge, By Member Profile Name, By Pricing Category, By Master Feature

Buttons: Add, Edit, Copy, Delete, Suppress Report Title: Yes No, Reset, Next



Select charges to be moved to non-billable, if any → Selectable Type Of Charges: ONLINE TIME, ACCESS CHARGE, DAILY ALERT, ON DEMAND ALERT, DOC ACCESS

Enter % to be pro-rated → Contract Amount: 1,992.58, Billable Recovery Rate: 100 %, Reallocate Gross Use at: 100 %, Reallocate Net Use at: 100 %

Choose info to be displayed on report → Non-billable Display: Include Non-billable Type Of Charges in output, Do not include Non-billable Type Of Charges in output

Buttons: Previous, View, Download, Cancel

Click View or Download once done

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.
