LexisNexis® Account Centre User Guide

Please note: All screens shown may change slightly as new features and enhancements are added .

Log in:
www.advance.lexis.com/pacific

Learn in:
www.knowledge-network.lexisnexis.com.au/home/

LexisNexis®

This guide shows you where to find—and how to use—LexisNexis® Account Centre features you'll use often. Keep this guide handy for reference.

Contents

Browser Compatibility

The supported browsers and operating systems are the same as Lexis Advance.

Platform:

- Windows 7
- Windows 8.1
- Windows 10
- Mac OSX

Browser:

- IE11, Edge
- Chrome (latest version)
- Firefox (latest version)
- Safari 8 & 9

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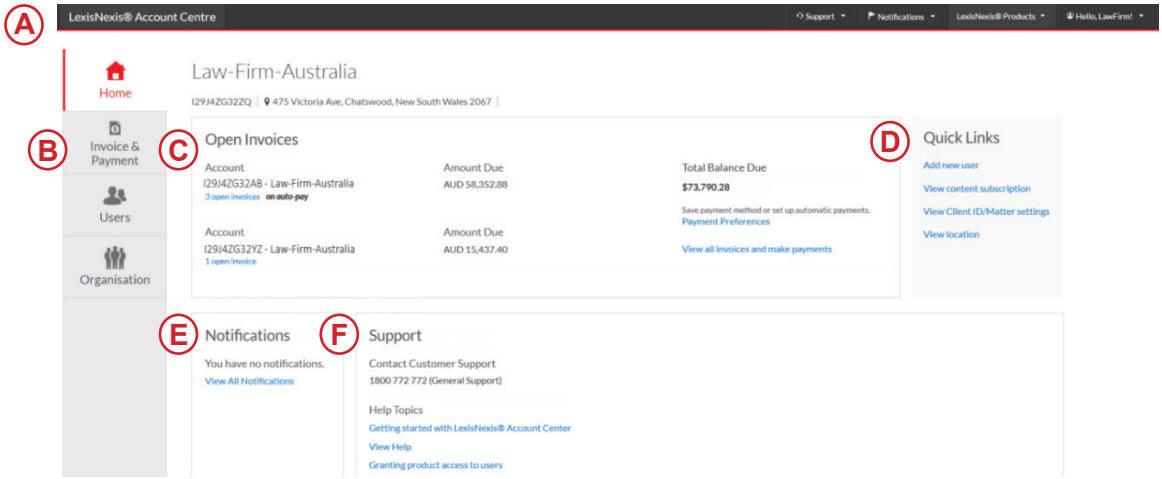
Getting Started: Home



The LexisNexis Account Centre home page gives you access to all of your actionable tasks, plus at-a-glance information about important areas of your account.

(A) The global **Navigation Bar** provides access to Support options, Notifications, LexisNexis Products, and your Profile options.

(B) The left **Navigation Bar** provides access to Invoices and Payments, Users, and Organisation information.

(C) The **Open Invoices** pod provides access to pay an invoice, review open invoices, or set up credit card payment preferences.

(D) The **Quick Links** pod on the right side of the page provides quick access to frequently used tasks.

(E) The **Notifications** pod is where the administrator receives notification for changes to payment information such as deleted and updated credit cards.

(F) The **Support** pod contains options for contacting **Customer Support** as well as **Help topics** and **Online tutorials**.

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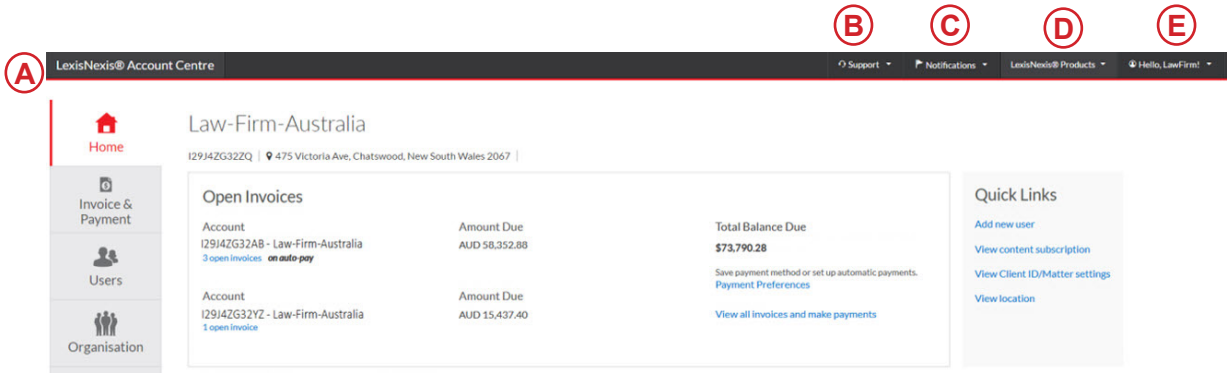
Getting Started: Global Navigation Bar



(A) **LexisNexis Account Centre**. Click to return to the LexisNexis Account Centre Home page.

(B) **Support.** Click the drop-down menu to view the Customer Support phone number, access Help screens, and provide Feedback or suggestions.

(C) **Notifications.** The administrator will receive notification for changes to payment information such as deleted and updated credit card information.

(D) **LexisNexis Products.** Click the drop-down menu to access LexisNexis products e.g. Lexis Advance and LexisNexis Practical Guidance.

(E) **Hello, User !** Click the drop-down to edit profile information and sign out.

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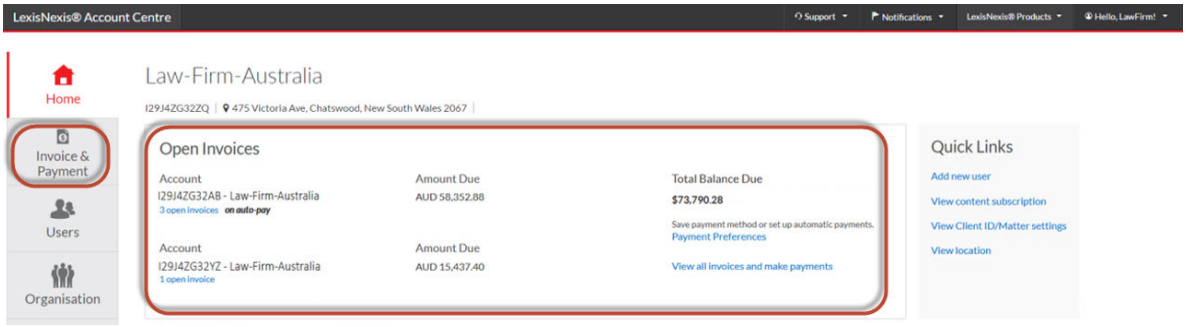
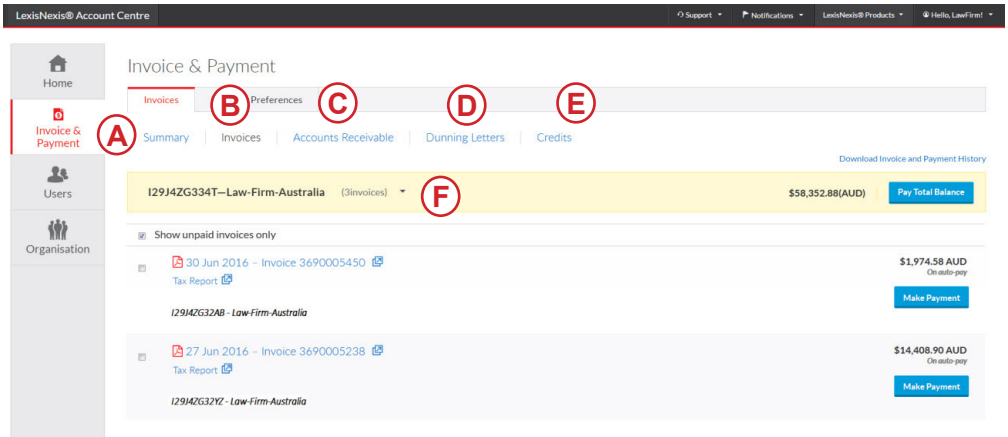
Invoices and Payments

Accessing Invoice & Payments

This information can be accessed through the Open Invoices pod or from the Invoice & Payments tab on the left navigation bar.





(A) **Summary.** This page only appears if there are multiple financial accounts to choose from.

(B) **Invoices.** Use this page to view your invoices, view or print a PDF of an invoice and make payments.

(C) **Accounts Receivable.** This page allows you to view or print accounts receivable statements.You may also request an accounts receivable statement here.

(D) **Dunning Letters.** Use this page to view or print notices to you for overdue payments on your account.

(E) **Credits.** View or print credit memos for your account.

(F) **Multiple Financial Accounts.** Drop down option to select from multiple financial accounts from the **Invoices** view.

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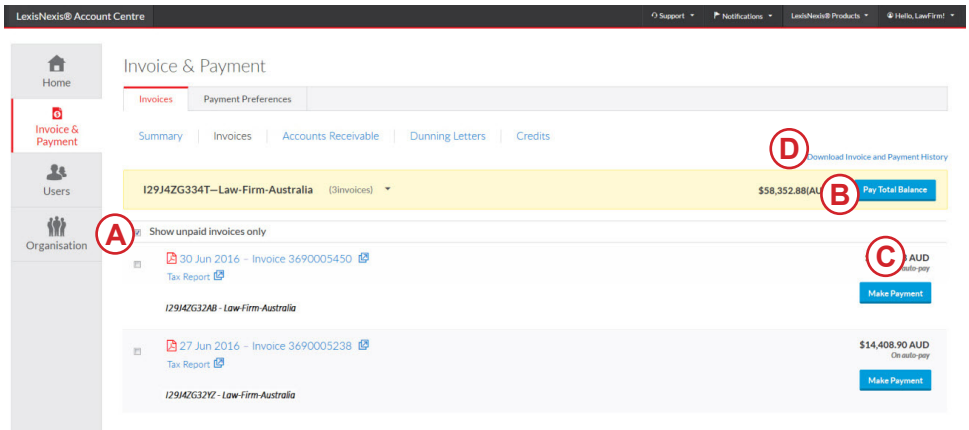
Invoices and Payments : Invoices



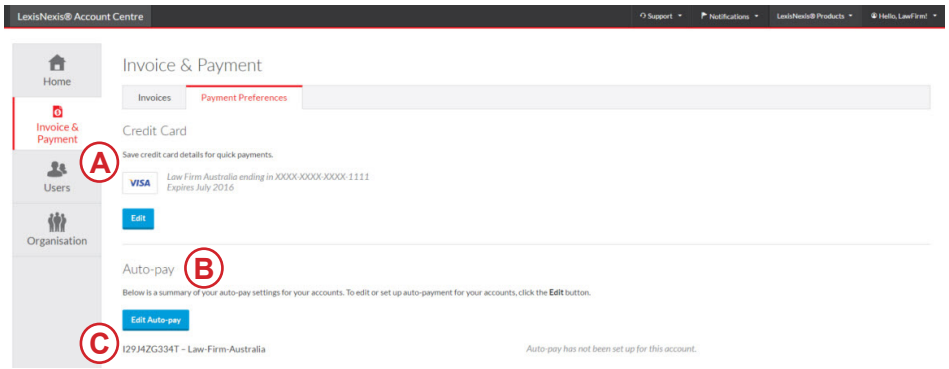
(A) **Show unpaid invoices only**. Select this checkbox to see only open invoices from the **Invoices** view.

(B) **Pay Total Balance.** Select this button to pay the entire amount owed for this account.

(C) **Make Payment.** Select this button to pay specific invoices or multiple invoices.

(D) **Download Invoice and Payment History**. This link will download history.

Invoices and Payments: Payment Preferences



(A) **Credit Card.** Select this to save or edit a credit card for making payments. For security reasons individual users can only view and edit their own payment preferences.

(B) **Auto-pay.** Allows LexisNexis to automatically debit your registered credit card for the fulll open invoice total on your account.

(C) **Edit auto-pay.** Click this button to edit or set up auto-payment for your account.

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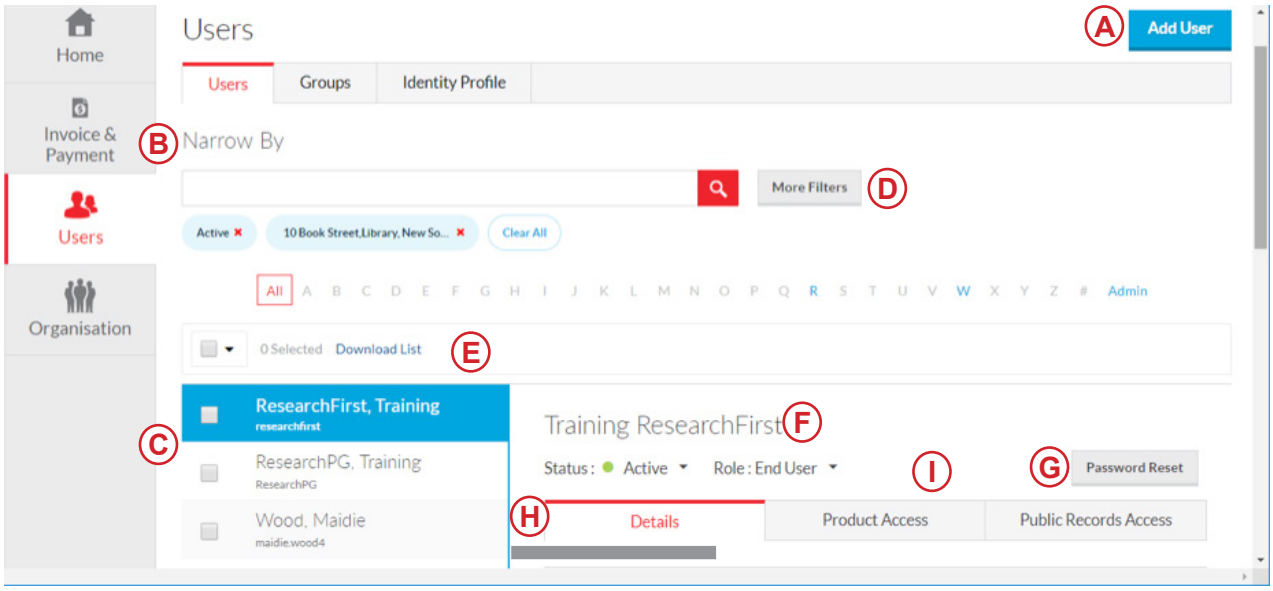
Users

User information is accessible via the user tab on the left navigation bar.



Use this page to manage users within your organisation.

Accessing Invoice & Payments

(A) **Add User.** Select this to add a new user to your organisation.

(B) **Narrow By.** Search by name or ID. Use one or more of the filters in this area to narrow your search.

(C) **Download List.** Use this link to download list of users.

(D) **Filter.** Search alphabetically by surname or select **Admin** to view alll users with administrator access.

Individual User Functions

(E) **Status.** Select this drop-down list to change the status.

(F) **Role.** Select this drop-down to change user's role. Choices include end user and admin.

(G) **Reset Password.** Select this to issue the user a new temporary password.

(H) **Details**. Select this tab to view and edit the general information for the user.

(I) **Product Access**. Select this tab to view and edit the user's product access.

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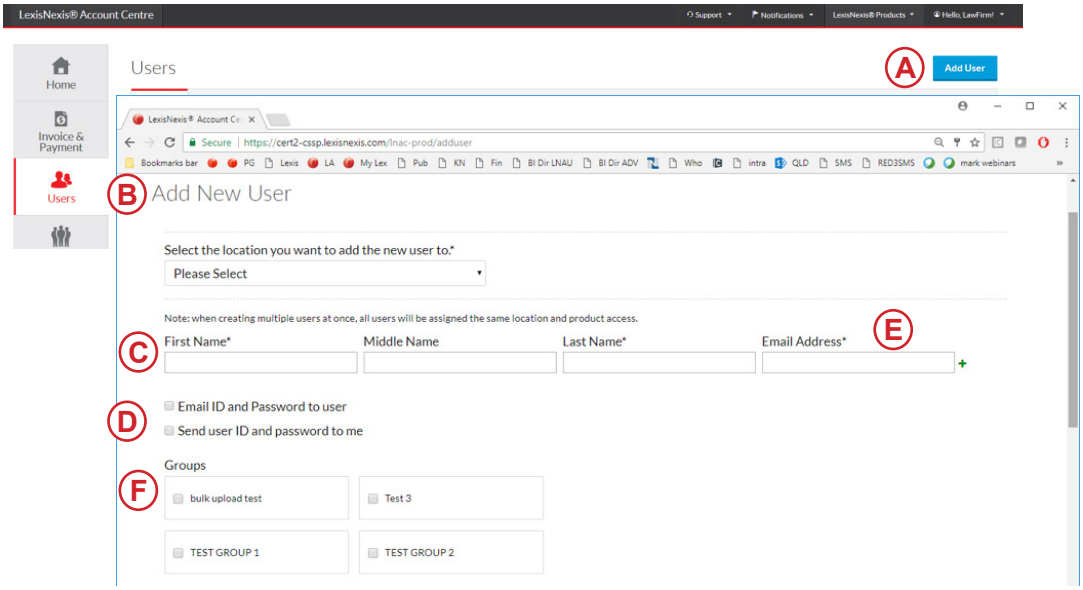
Users: Add User



(A) Click the **Add User** button.

(B) **Enter** required information (identified by an asterisk).

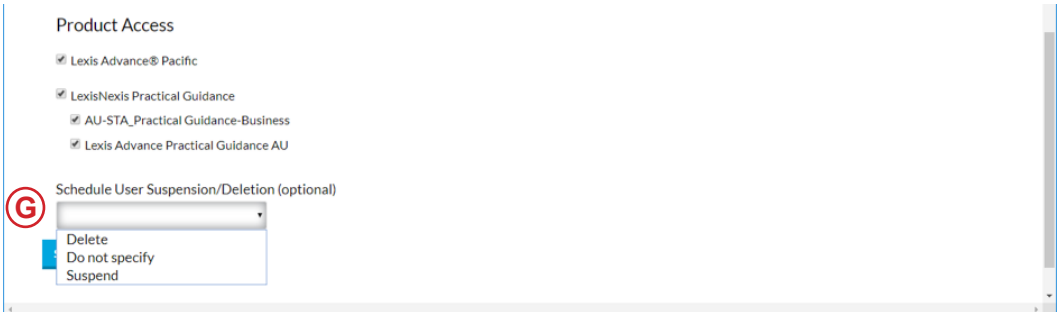
(C) **Optional:** To generate and send a welcome e-mail, select either **E-mail ID and Password to user** or **Send user ID and password to me**. *Note: ID and temporary password will be displayed on the following screen once you press submit.*

(D) Insert check mark next to desired **Product Access**.
Note: If you have multiple financial accounts, select the relevant account

(E) To create additional users, click the **Create Additional Users** button. Note: All users will be created with the same product access.

(F) Click **Submit**.

(G) Schedule user suspension/deletion (optional) Use this button to set an automatic deletion or suspension date when you set up the account.



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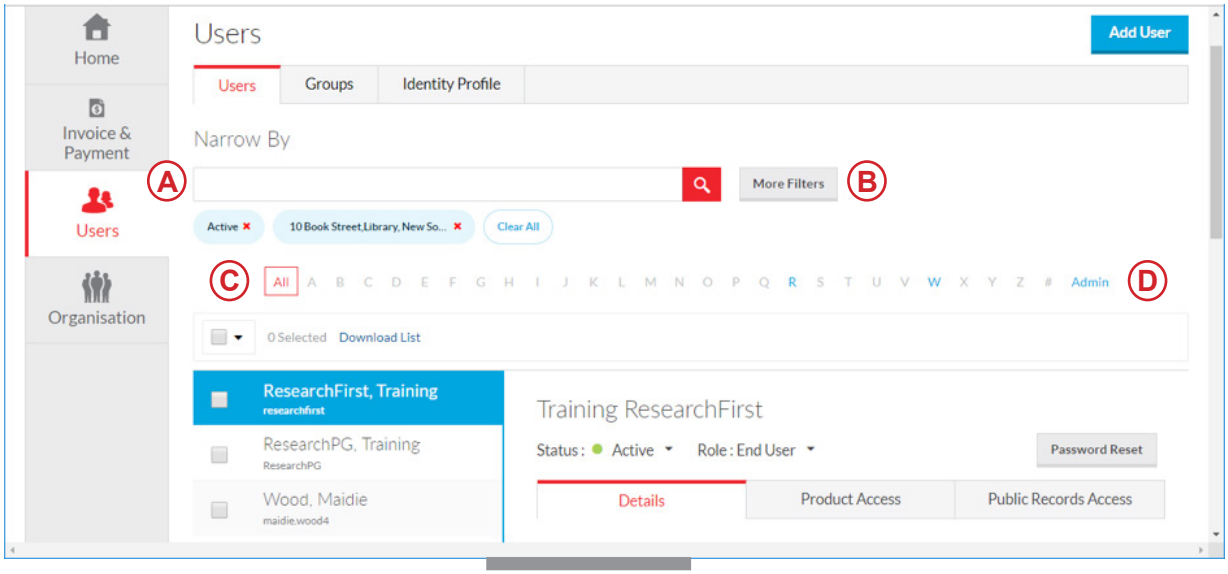
Users: Narrow By

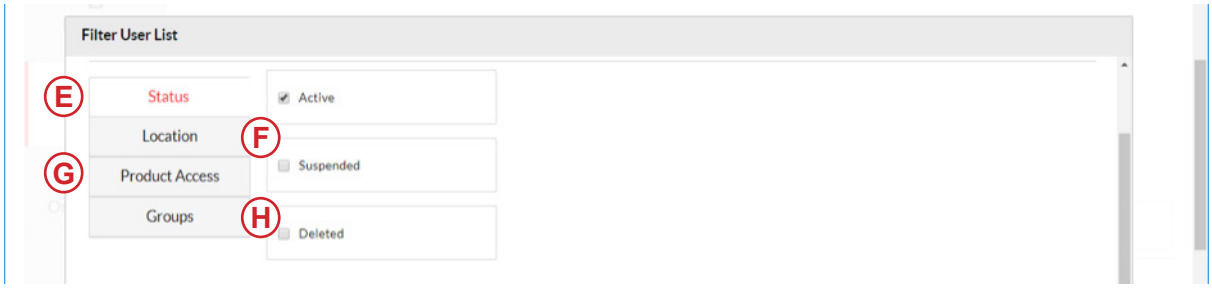


(A) **Search by Name or ID.** Enter the name or user ID of the user you want to find. Separate multiple names or IDs with a semicolon.

(B) Click **more filters** to narrow by status, location, product access or group

(C) **All/A..Z.** Use the alphabet list to filter on the user's last initial.

(D) **Admin.** Select this button to display a list of users who are administrators.



(E) Status. Select from this drop-down filter to narrow your search to users with a specific status (active, suspended or deleted).

(F) Location. Select from the location pull-down filter to narrow your search to users at a specific location.

(G) Product Access. Select from the product access pull-down filter to narrow your search to users with access to or without access to specific products.

(H) Groups. select to assign or view users assigned to a group such as practice area

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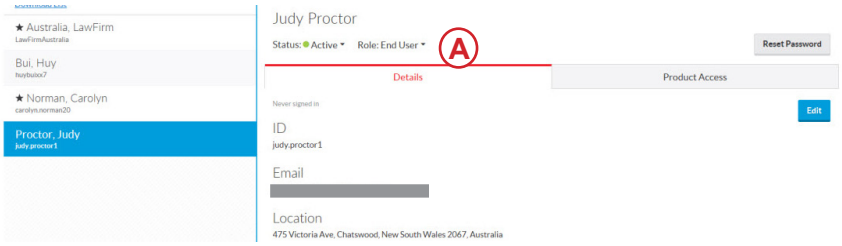
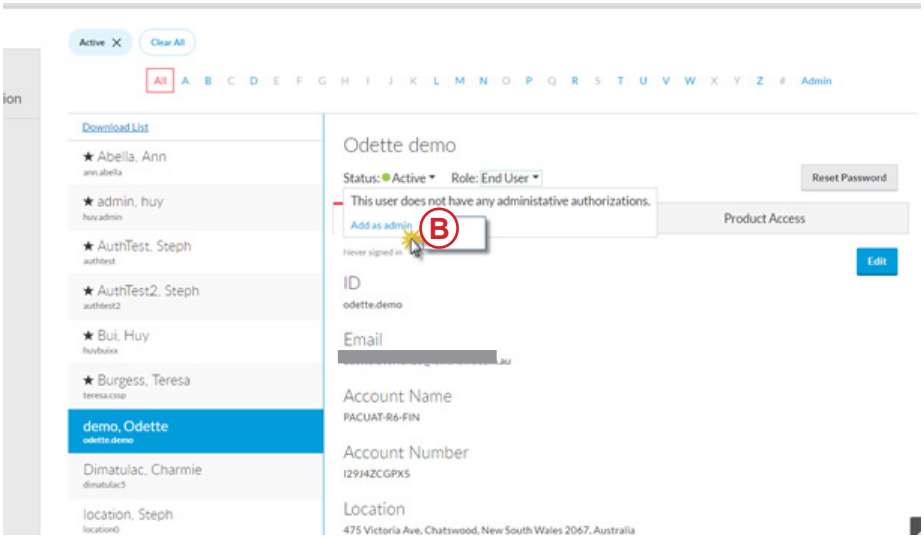
Users: Manage Roles

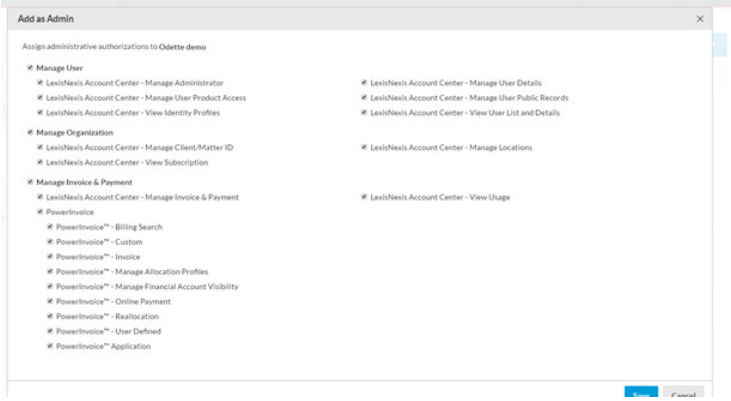
(A) Admin capabilities can be edited from the **Role** drop down option.





(B) **Add as Admin** link will take you to the admin authorisations screen.

This area is where authorisations can be edited around users, the organisation and managing invoices and payments.



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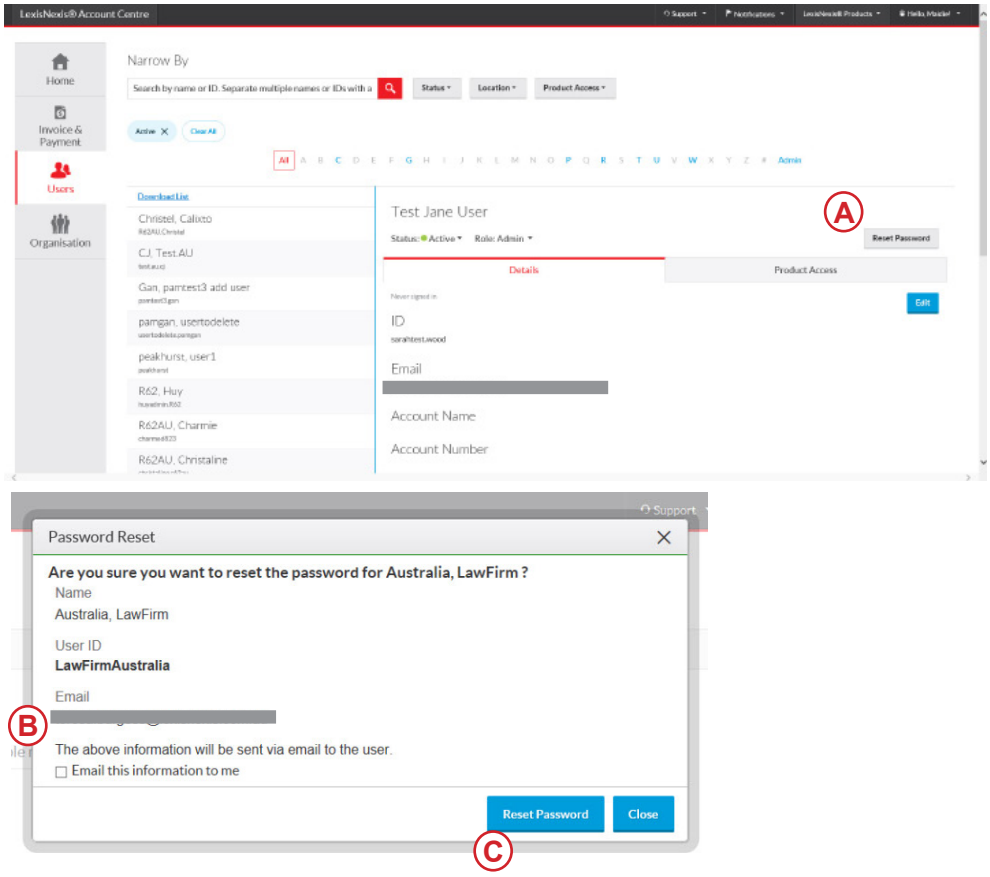
Users: Reset Password



(A) Select the **Reset Password** button.

(B) Select if you want this information emailed to the user and/ or to you. If the user has signed in to any LexisNexis research product, you will not have the option to supress the email to the user.

(C) Click **Reset Password**. The user's ID and temporary password will then display.

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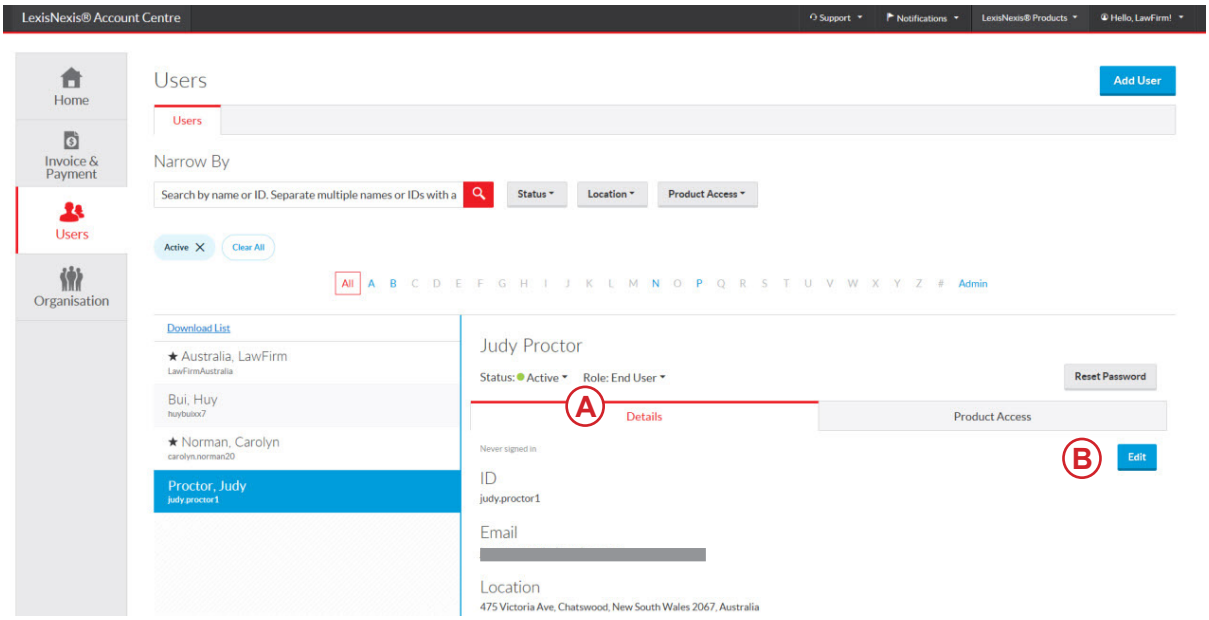
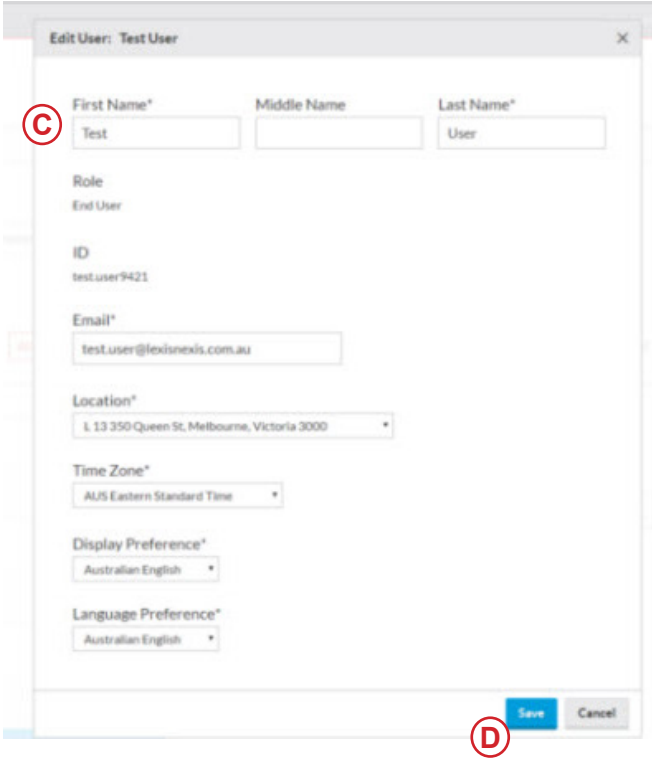
Users: Edit User Details





(A) Select the **Details** tab to see general information for the user whose name is displayed.

(B) Click the **Edit** button to edit the information for the user whose name is displayed.

(C) Make changes.

(D) Click **Save**.

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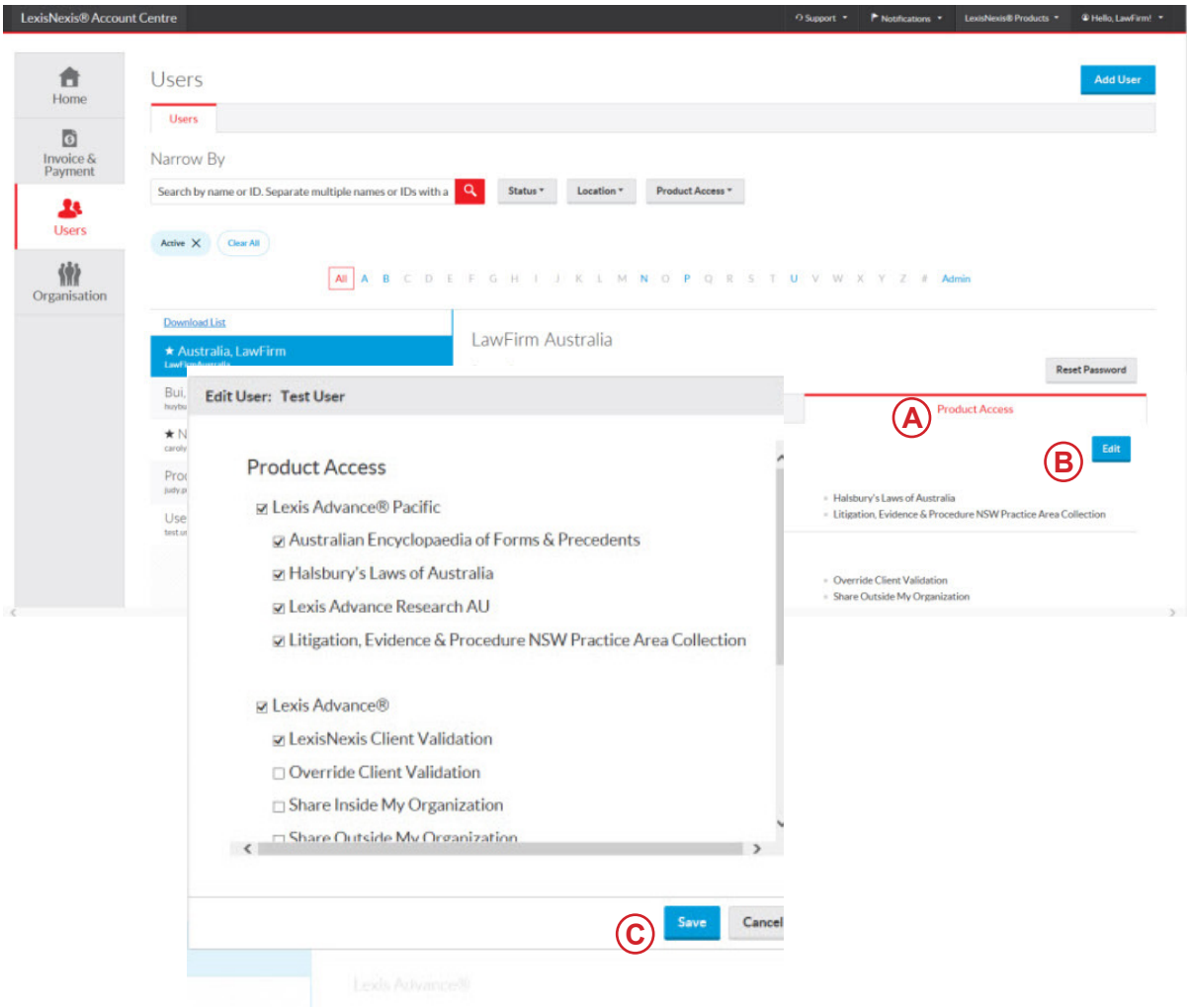
Users: Product Access



(A) **Product Access.** Select this tab to see the products that the user whose name is displayed has access to.

(B) **Edit** button. Select this to edit product access.

(C) Make desired changes using the checkboxes and then click **Save**.

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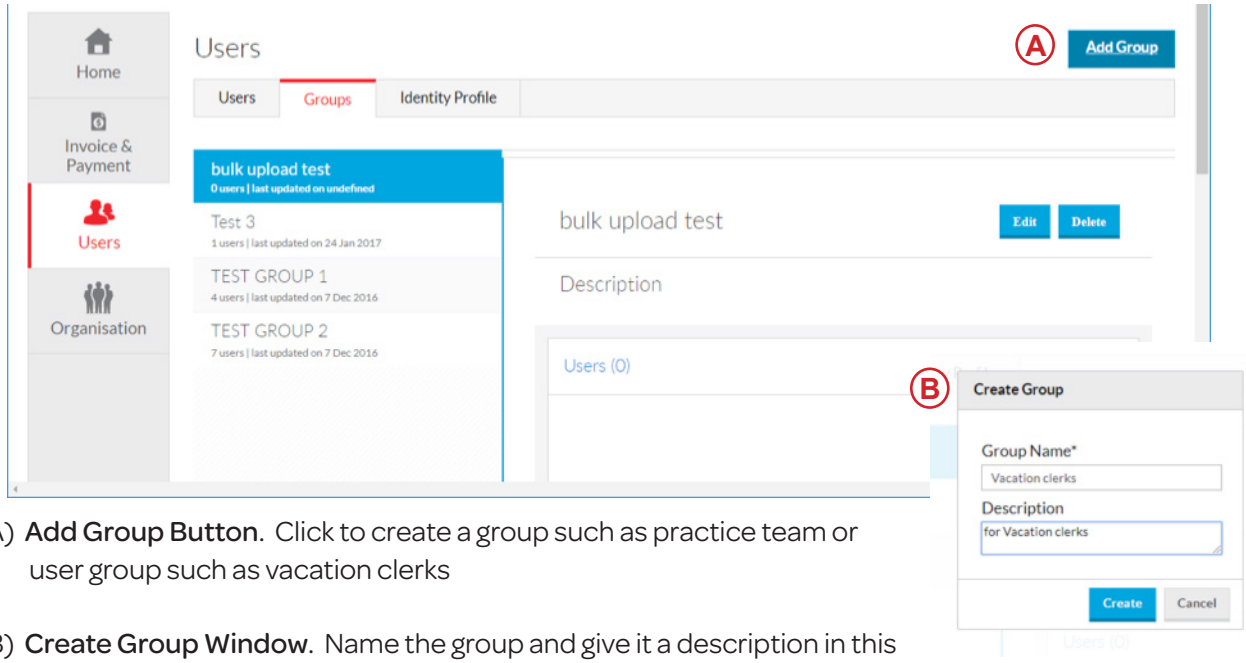
Users - Setting up Groups of Users

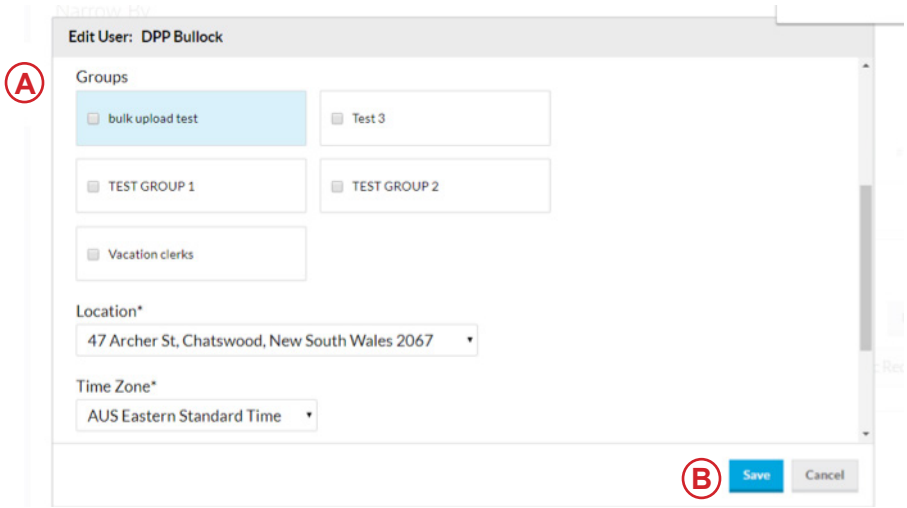


(A) **Add Group Button**. Click to create a group such as practice team or user group such as vacation clerks

(B) **Create Group Window**. Name the group and give it a description in this window.

Assigning Users to a Group

Click on users tab
Click on user
Click on edit user button
(A) Scroll to groups section and tick on relevant groups
(B) Click on Save button



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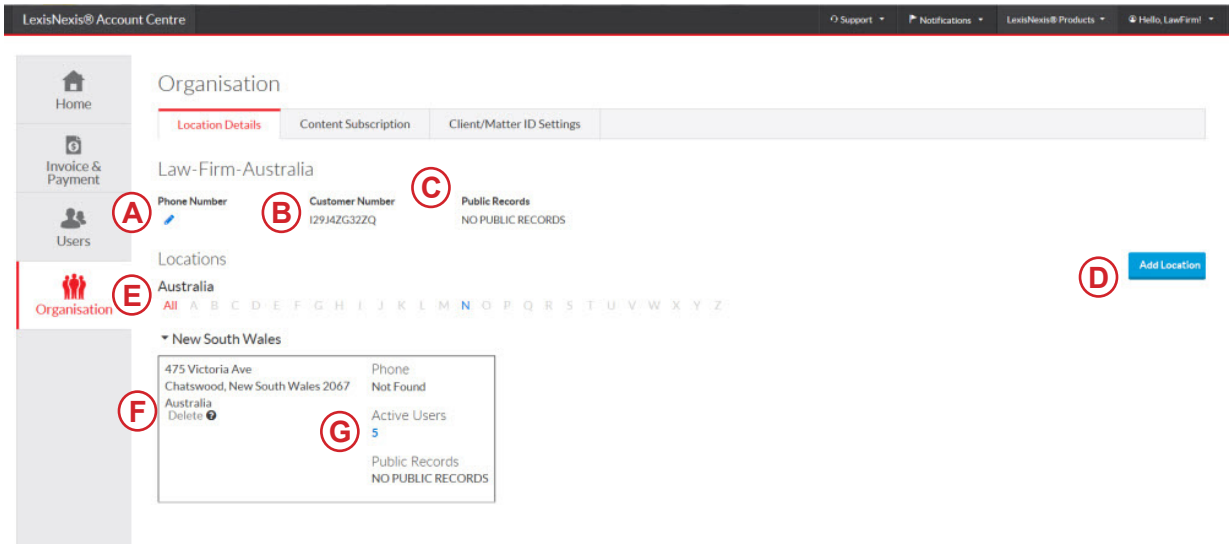
Organisation: Location Details

Organisation information is accessible via the organisation tab on the left navigation bar.



You may review and manage the locations (places of business) for your organisation.

(A) **Phone number**. Displays the phone number for your organisation. This may be edited by clicking on the pencil icon.

(B) **Customer Number.**

(C) **Public Records.** The public records access level for your organisation.

(D) **Add Location.** You can add a new location to an account.

(E) **Locations.** The address(es) for the place(s) of business for your organisation.

(F) **Delete.** You can delete a secondary location from your organisation.

(G) **Active Users.** Selecting this hyperlink takes you to the list of active users at this location.

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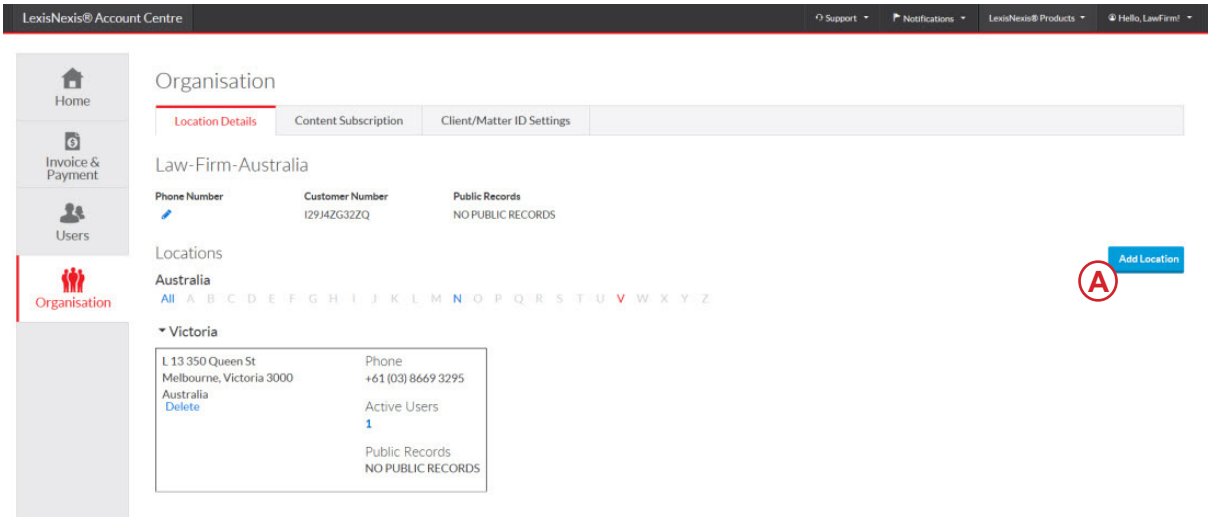
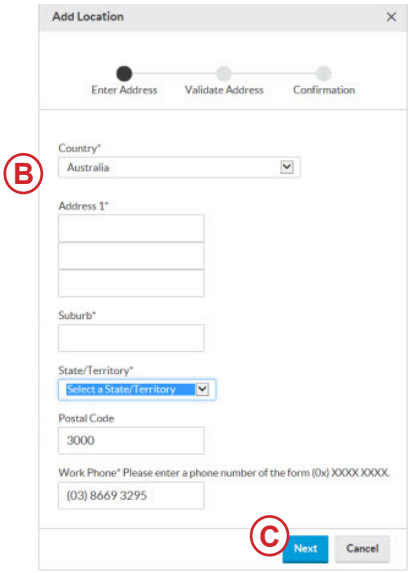
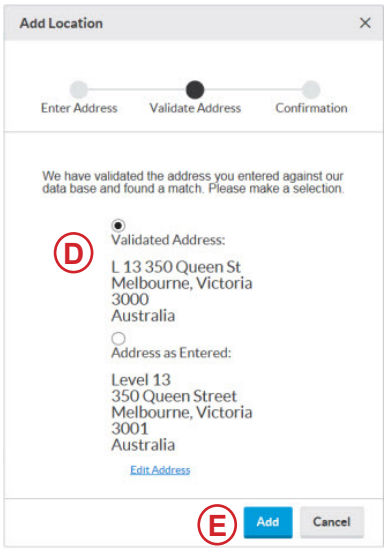
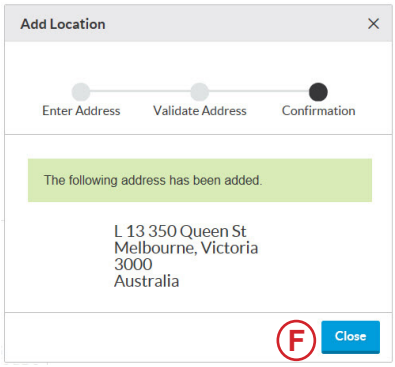
Organisation: Add Location









(A) Select the **Add Location** button.

(B) **Complete the required fields**, indicated by an asterisk.

(C) Select **Next.**

(D) **Validate** address.

(E) Select **Add.**

(F) **Confirm** address by selecting **Close.**

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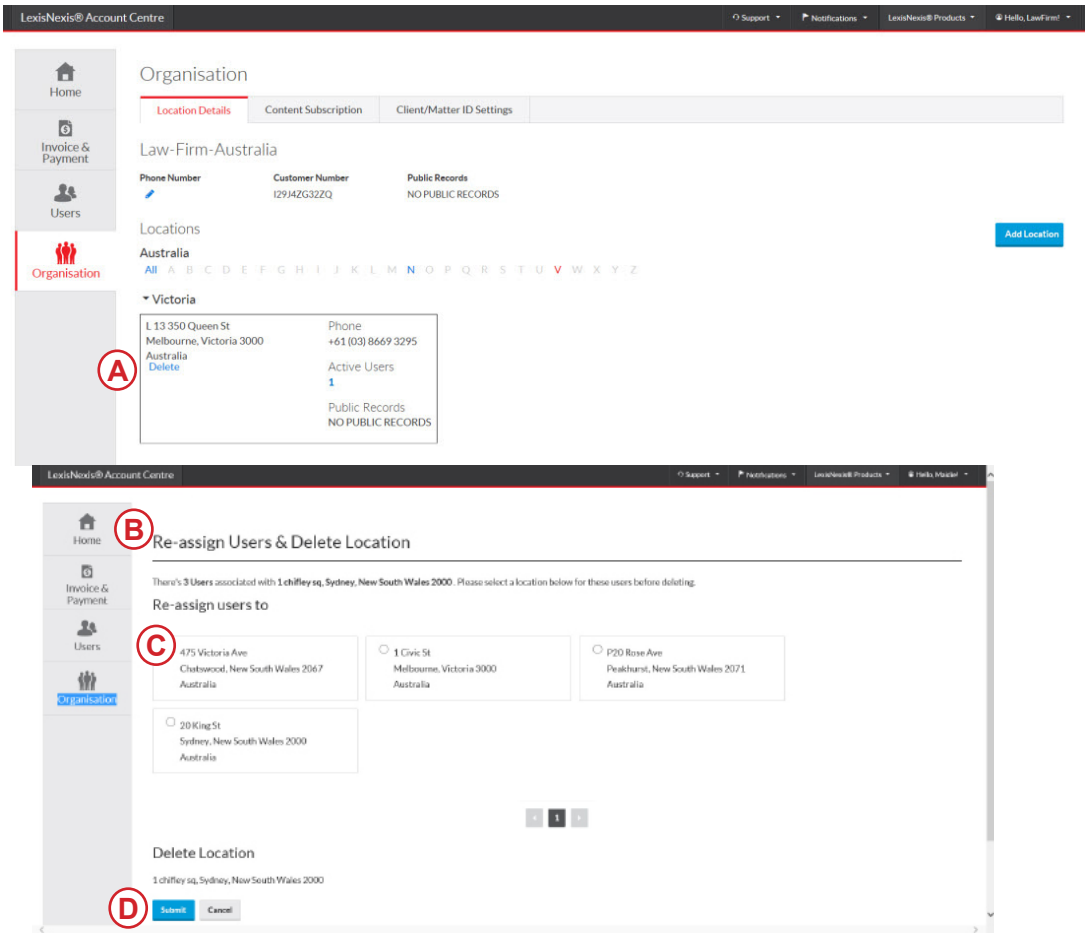
Organisation: Delete Location



You can delete a location from your organisation through LexisNexis Account Center.

(A) Identify the location you want to delete and click the **Delete** link.
Note: Primary location cannot be deleted.

(B) The **re-assign users and delete location** page will pop up, indicating the number of users that must be assigned to a new location.

(C) Select the new location you want to assign the users to.

(D) Select **Submit** under delete location.

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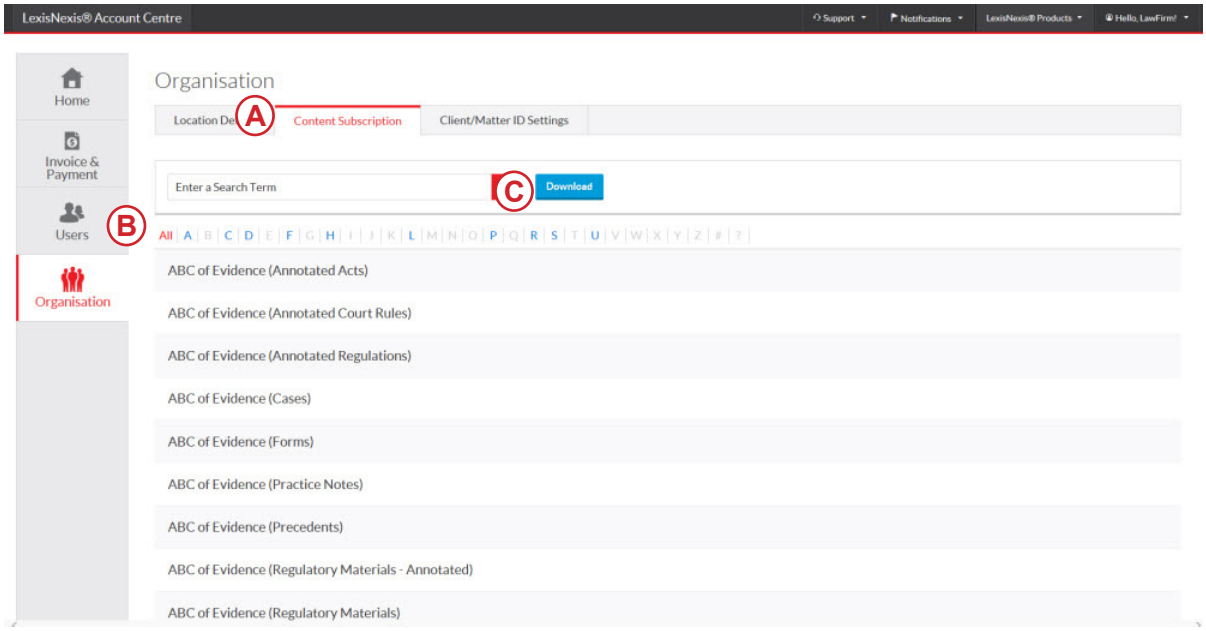
Organisation: Content Subscription



You can view and download the list of publications your organisation is subscribed to or search for a specific publication through LexisNexis Account Centre.

(A) Select the **Content Subscription** tab.

(B) **To find a specific publication,** do one of the following:
- Enter the name (or part of a name) in the **search box** and select the Search button to find a publication.
- Use the **alphabetical list** to search for a publication alphabetically.
- Select a **page number at the bottom of the page** to display the next group of publications or use the **right and left arrows** to page through the list of publications.

(C) Click **Download** to download the list of all publications the organisation is subscribed to so you can save or print it.

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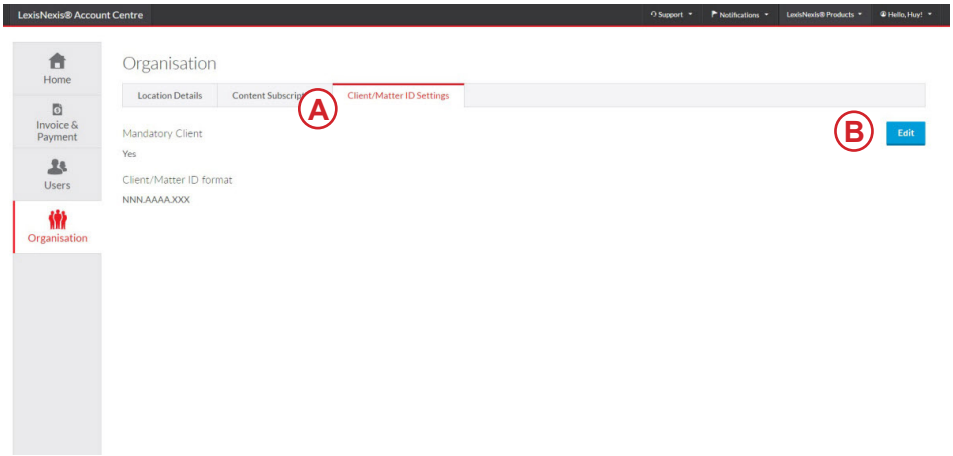
Organisation: Client Matter



(A) Select the **Client/ID Matter Settings** tab.

(B) Select the **Edit** button.

Value	Description
Client ID mandatory	Select this to require users for this organization to set a Client ID when signing in to LexisNexis® Account Centre.
Client/Matter ID format	Enter the format the client/matter ID must conform to. • N - means 0-9 is required • X - means 0-9 and A-Z are acceptable • A - means A-Z is required • B - means a blank is required The identifier you enter must match the displayed format character for character. For example, if the displayed format were XXXB##-##, you would have to enter a 9-character identifier consisting of 3 alphanumeric characters, followed by a blank, 2 numeric characters, a hyphen, and 2 more numeric characters.
Use third-party validation	Select this if you are using a software-based client validation application such as LexisNexis® Cost Recovery Manager, Lookup Precision, Research Monitor, or OneLog.
Client Validation URL	If you are using a URL-based client validation application, enter the URL here.
Test URL to enable client validation (optional)	If you are using a URL-based client validation application, enter the URL here.

Ifyou have any questions, please contact Technical Support at
1800 999 906 or techsupport@lexisnexis.com.au.

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