

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/

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.

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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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The screenshot shows the LexisNexis Account Centre home page for 'Law-Firm-Australia'. The page is divided into several sections:

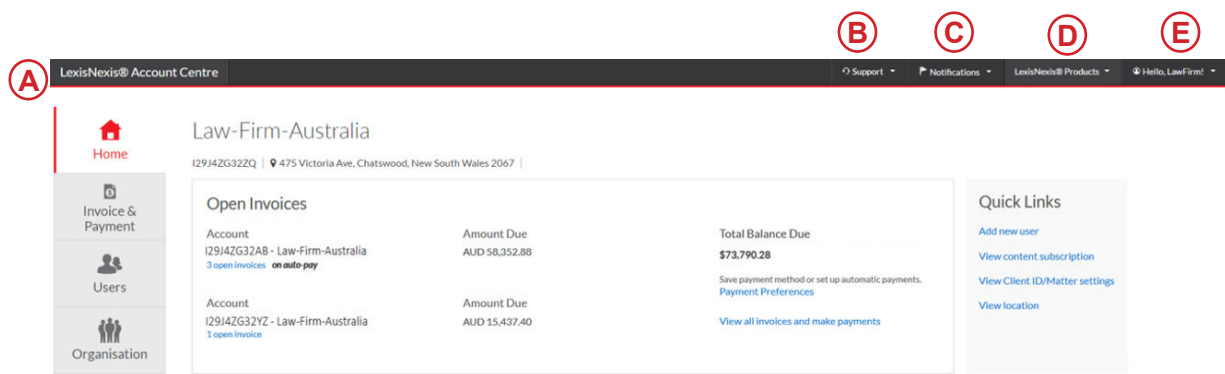
- (A) Global Navigation Bar:** Located at the top, it includes links for Support, Notifications, LexisNexis Products, and a user profile (Hello, LawFirm!).
- (B) Left Navigation Bar:** Contains icons and links for Home, Invoice & Payment, Users, and Organisation.
- (C) Open Invoices:** A table showing open invoices with columns for Account, Amount Due, and Total Balance Due. It includes links to view invoices, save payment methods, and view all invoices.
- (D) Quick Links:** A section on the right side providing quick access to tasks like adding a new user, viewing content subscription, and viewing client ID/Matter settings.
- (E) Notifications:** A section indicating that there are no notifications at the moment.
- (F) Support:** A section providing contact information for Customer Support, including a phone number and links to help topics and online tutorials.

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.

The screenshot shows the LexisNexis Account Centre dashboard for 'Law-Firm-Australia'. The left navigation bar has a red box around the 'Invoice & Payment' tab. The main content area features an 'Open Invoices' pod with a red border, displaying two accounts: 'I29J4ZG32AB - Law-Firm-Australia' with an amount due of AUD 58,352.88, and 'I29J4ZG32YZ - Law-Firm-Australia' with an amount due of AUD 15,437.40. A 'Total Balance Due' of \$73,790.28 is also shown. To the right, there are 'Quick Links' for adding a new user, viewing content subscription, client ID/matter settings, and location.

The screenshot shows the 'Invoice & Payment' page. The left navigation bar has a red box around the 'Invoice & Payment' tab. The main content area has a sub-navigation bar with tabs: 'Invoices' (labeled A), 'Preferences' (labeled B), 'Accounts Receivable' (labeled C), 'Dunning Letters' (labeled D), and 'Credits' (labeled E). Below this, there is a section for 'I29J4ZG334T-Law-Firm-Australia' (labeled F) showing a total balance of \$58,352.88(AUD) and a 'Pay Total Balance' button. Below this, there is a list of unpaid invoices with columns for date, invoice number, amount, and a 'Make Payment' button.

(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.

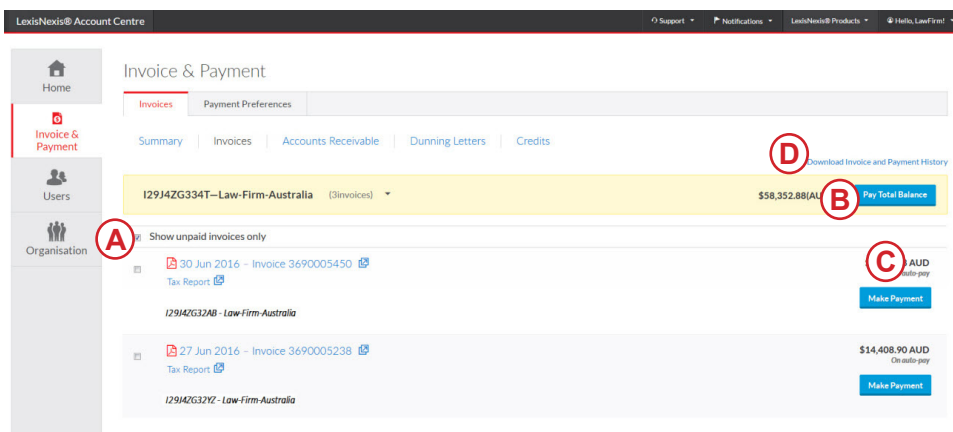
(D) **Dunning Letters.** Use this page to view or print notices to you for overdue payments on your account.

(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.

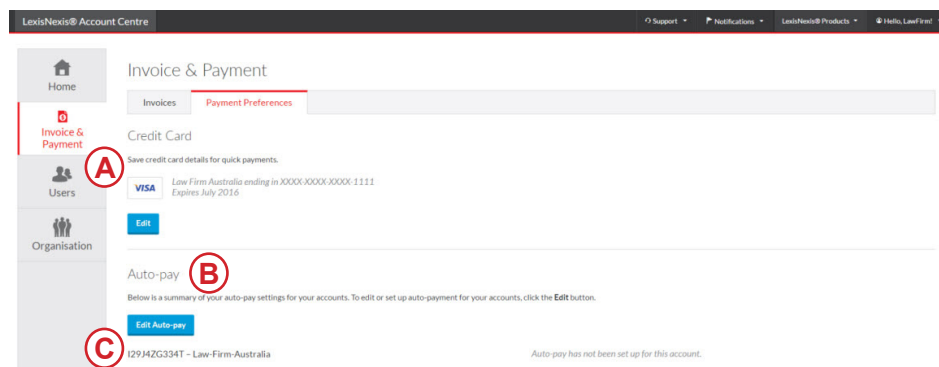
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Invoices and Payments : Invoices



- (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

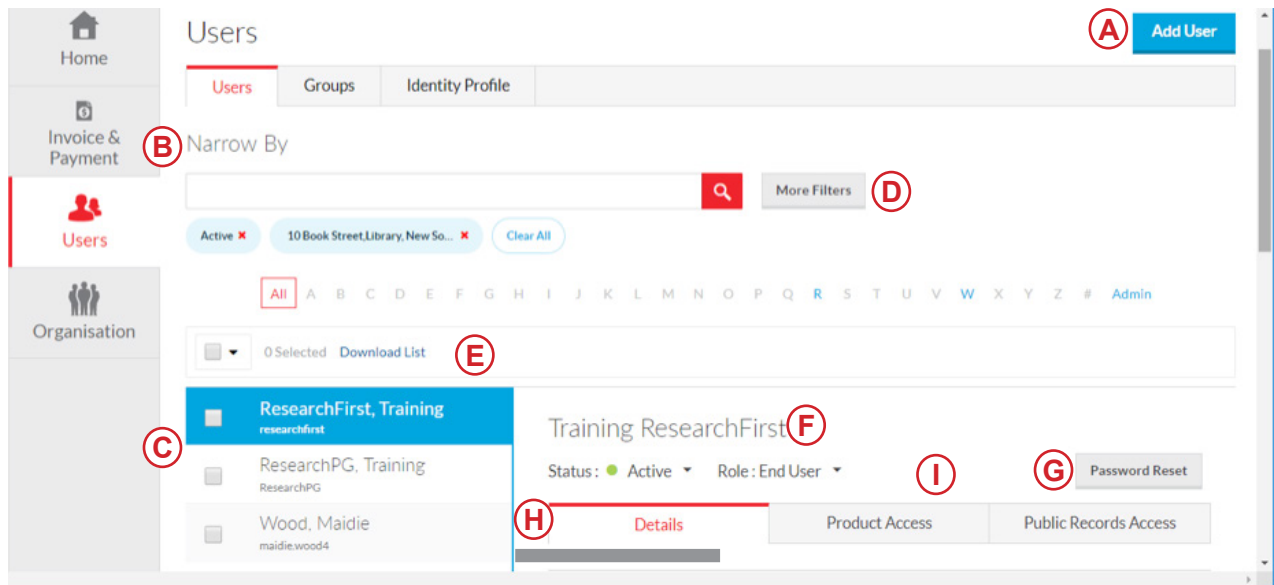


- (A) **Credit Card.** Select this to save or edit a credit card for making payments. For security reasons individual users can only view and edit their own payment preferences.
- (B) **Auto-pay.** Allows LexisNexis to automatically debit your registered credit card for the full open invoice total on 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 all 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

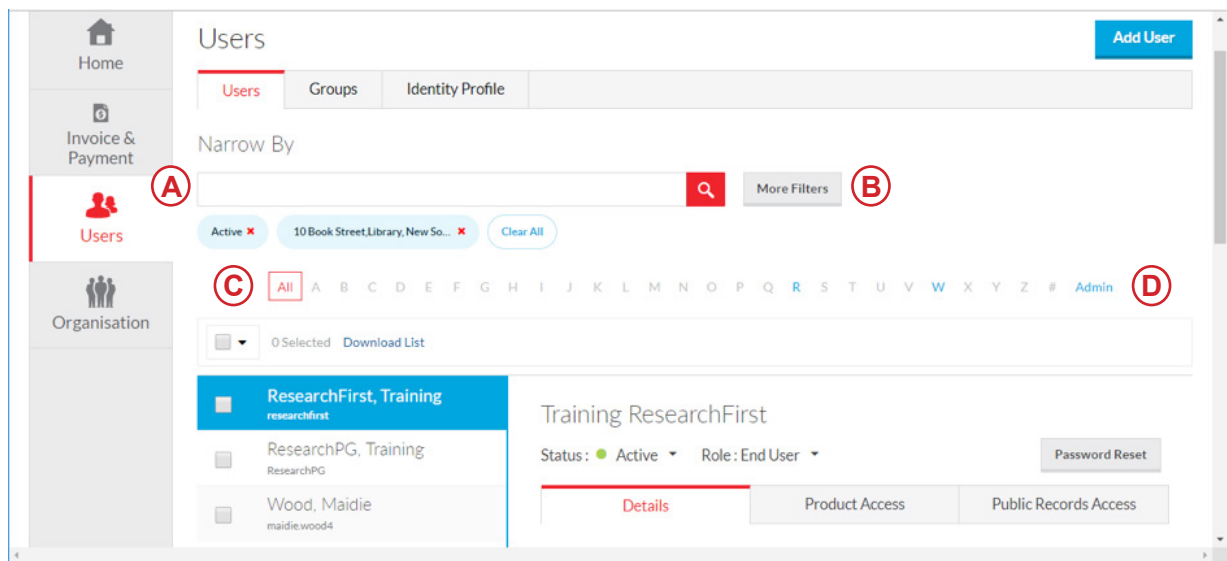
(E) To create additional users, click the **Create Additional Users** button. Note: All users will be created with the same product access.

(F) Click **Submit**.

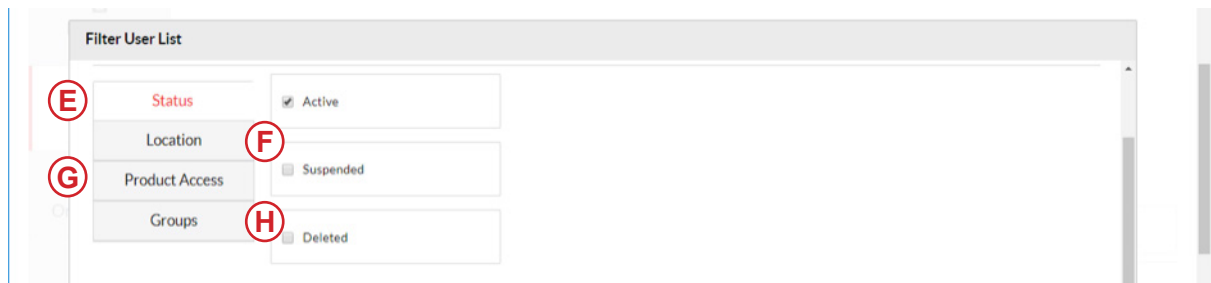
(G) Schedule user suspension/deletion (optional)
 Use this button to set an automatic deletion or suspension date when you set up the account.

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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.

The screenshot displays the LexisNexis Account Centre user management interface. The top section shows a list of users on the left and a detailed view of 'Judy Proctor' on the right. Judy Proctor's status is 'Active' and her role is 'End User'. A red circle labeled 'A' highlights the 'Role' dropdown menu. Below the user details, there are tabs for 'Details' and 'Product Access'. The bottom section shows a list of users on the left and a detailed view of 'Odette demo' on the right. Odette demo's status is 'Active' and her role is 'End User'. A red circle labeled 'B' highlights the 'Add as admin' link. Below the user details, there are tabs for 'Details' and 'Product Access'.

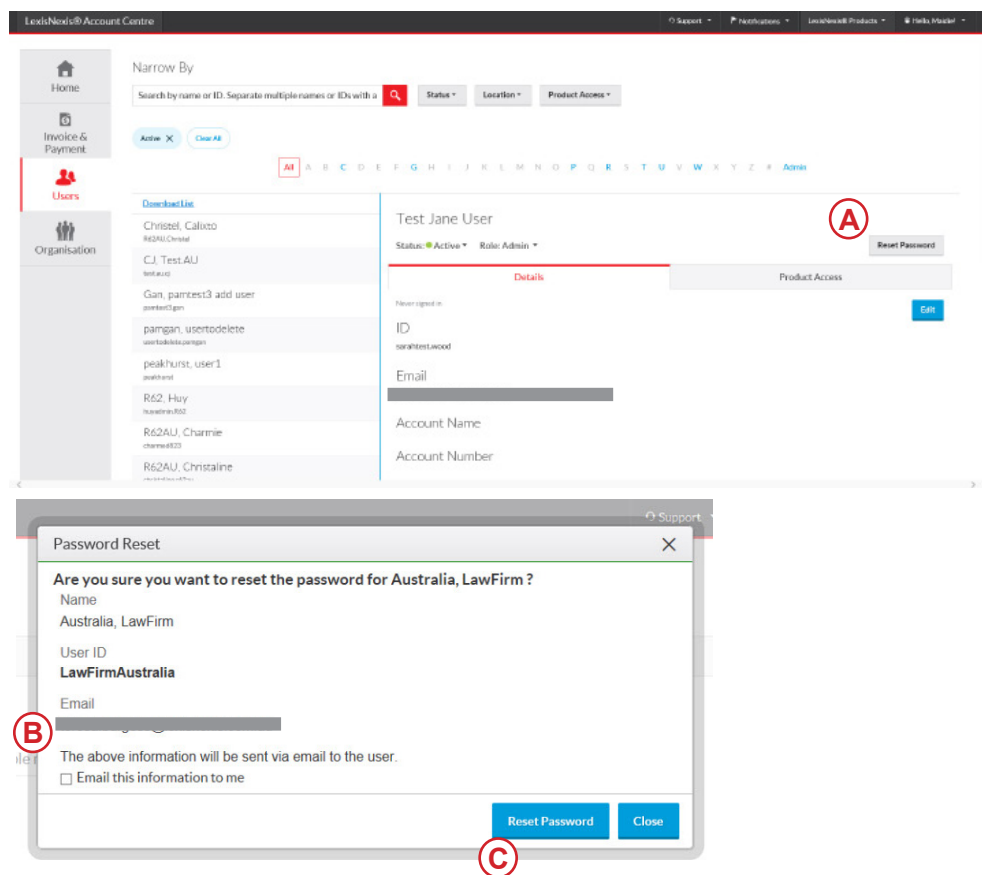
(B) **Add as Admin** link will take you to the admin authorisations screen.

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

The screenshot shows the 'Add as Admin' dialog box. The dialog box is titled 'Add as Admin' and contains a list of administrative authorizations to be assigned to 'Odette demo'. The list is organized into three columns: 'Manage User', 'Manage Organization', and 'Manage Invoice & Payment'. Each column contains a list of checkboxes and corresponding authorization names. The 'Manage User' column includes 'LexisNexis Account Center - Manage Administrator', 'LexisNexis Account Center - Manage User Product Access', and 'LexisNexis Account Center - View Identity Profiles'. The 'Manage Organization' column includes 'LexisNexis Account Center - Manage Client/Matter ID' and 'LexisNexis Account Center - View Subscription'. The 'Manage Invoice & Payment' column includes 'LexisNexis Account Center - Manage Invoice & Payment', 'LexisNexis Account Center - View Usage', 'PowerInvoice™ - Billing Search', 'PowerInvoice™ - Custom', 'PowerInvoice™ - Invoice', 'PowerInvoice™ - Manage Allocation Profiles', 'PowerInvoice™ - Manage Financial Account Visibility', 'PowerInvoice™ - Online Payment', 'PowerInvoice™ - Reallocation', 'PowerInvoice™ - User Defined', and 'PowerInvoice™ Application'.

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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 suppress 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

LexisNexis® Account Centre

Support Notifications LexisNexis® Products Hello, LawFirm!

Home Invoice & Payment Users Organisation

Users

Add User

Narrow By

Search by name or ID. Separate multiple names or IDs with a

Status Location Product Access

Active Clear All

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Admin

Download List

- Australia, LawFirm LawFirmAustralia
- Bui, Huy huybui07
- Norman, Carolyn carolyn.norman20
- Proctor, Judy judy.proctor1**

Judy Proctor

Status: Active Role: End User Reset Password

Details Product Access

Never signed in

ID judy.proctor1

Email

Location 475 Victoria Ave, Chatswood, New South Wales 2067, Australia

Edit User: Test User

First Name* Middle Name Last Name*

Test

Role End User

ID test.user9421

Email* test.user@lexisnexis.com.au

Location* 1, 13 350 Queen St, Melbourne, Victoria 3000

Time Zone* AUS Eastern Standard Time

Display Preference* Australian English

Language Preference* Australian English

Save Cancel

- (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

The screenshot displays the LexisNexis Account Centre interface. On the left is a sidebar with navigation links: Home, Invoice & Payment, Users (highlighted), and Organisation. The main content area is titled 'Users' and includes a search bar and filters for 'Narrow By' (Status, Location, Product Access). A modal window titled 'Edit User: Test User' is open, showing the 'Product Access' section. This section contains a list of products with checkboxes, including Lexis Advance® Pacific, Australian Encyclopaedia of Forms & Precedents, Halsbury's Laws of Australia, Lexis Advance Research AU, and Litigation, Evidence & Procedure NSW Practice Area Collection. A 'Product Access' tab is highlighted with a red circle (A), and an 'Edit' button is highlighted with a red circle (B). The 'Save' button at the bottom of the modal is highlighted with a red circle (C).

(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

The screenshot shows the 'Users' management interface. On the left is a sidebar with navigation options: Home, Invoice & Payment, Users (highlighted), and Organisation. The main area has three tabs: Users, Groups (selected), and Identity Profile. Under the 'Groups' tab, there is a list of groups: 'bulk upload test' (0 users), 'TEST GROUP 1' (4 users), and 'TEST GROUP 2' (7 users). To the right of this list is a form for editing a group, with fields for 'bulk upload test' and 'Description'. A blue 'Add Group' button is in the top right corner, labeled with a red circle 'A'. A 'Create Group' modal window is open on the right, labeled with a red circle 'B'. It contains fields for 'Group Name*' (with 'Vacation clerks' entered) and 'Description' (with 'for Vacation clerks' entered), and 'Create' and 'Cancel' buttons at the bottom.

(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

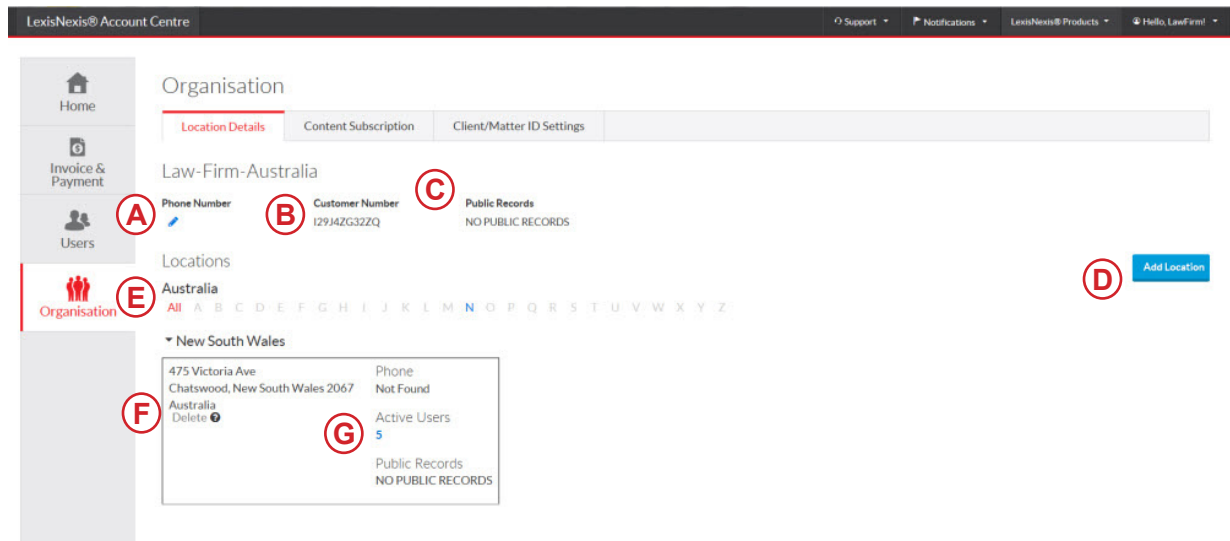
(B) Click on Save button

The screenshot shows the 'Edit User' modal window for 'DPP Bullock'. It has a 'Groups' section with a list of groups: 'bulk upload test', 'TEST GROUP 1', 'Vacation clerks', 'Test 3', and 'TEST GROUP 2'. Each group has a checkbox next to it. Below the groups list are fields for 'Location*' (47 Archer St, Chatswood, New South Wales 2067) and 'Time Zone*' (AUS Eastern Standard Time). At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button labeled with a red circle 'B'. A red circle 'A' is placed next to the 'Groups' section header.

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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

LexisNexis® Account Centre

Support Notifications LexisNexis® Products Hello, LawFirm!

Home Invoice & Payment Users Organisation

Organisation

Location Details Content Subscription Client/Matter ID Settings

Law-Firm-Australia

Phone Number Customer Number Public Records
I29J4ZG32ZQ NO PUBLIC RECORDS

Locations

Australia
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

▼ Victoria

| | |
|--|---|
| L 13 350 Queen St Melbourne, Victoria 3000 Australia Delete | Phone +61 (03) 8669 3295 Active Users 1 Public Records NO PUBLIC RECORDS |
|--|---|

A Add Location

B Add Location

Enter Address Validate Address Confirmation

Country*
Australia

Address 1*
Suburb*
State/Territory*
Select a State/Territory
Postal Code
3000
Work Phone* Please enter a phone number of the form (0x) XXXX XXXX.
(03) 8669 3295

C Next Cancel

D Add Location

Enter Address Validate Address Confirmation

We have validated the address you entered against our data base and found a match. Please make a selection.

D Validated Address:
L 13 350 Queen St
Melbourne, Victoria
3000
Australia
Address as Entered:
Level 13
350 Queen Street
Melbourne, Victoria
3001
Australia
[Edit Address](#)

E Add Cancel

F Add Location

Enter Address Validate Address Confirmation

The following address has been added.

L 13 350 Queen St
Melbourne, Victoria
3000
Australia

F Close

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

(D) **Validate** address.

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

(E) Select **Add**.

(C) Select **Next**.

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

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Organisation: Delete Location

The first screenshot shows the LexisNexis Account Centre interface. The left sidebar has a red circle (A) around the 'Delete' link under the 'Locations' section. The main content area shows the 'Organisation' page with tabs for 'Location Details', 'Content Subscription', and 'Client/Matter ID Settings'. The 'Location Details' tab is active, showing 'Law-Firm-Australia' with details like Phone Number, Customer Number, and Public Records. Below this, the 'Locations' section lists 'Australia' and 'Victoria'. Under 'Victoria', there is a location entry with a 'Delete' link circled in red (A).

The second screenshot shows the 'Re-assign Users & Delete Location' page. The left sidebar has a red circle (B) around the 'Organisation' link. The main content area has a red circle (C) around the 'Re-assign users to' section, which lists several locations. Below this, the 'Delete Location' section has a red circle (D) around the 'Submit' button. The page also includes a 'Cancel' button and a '1' indicator.

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.

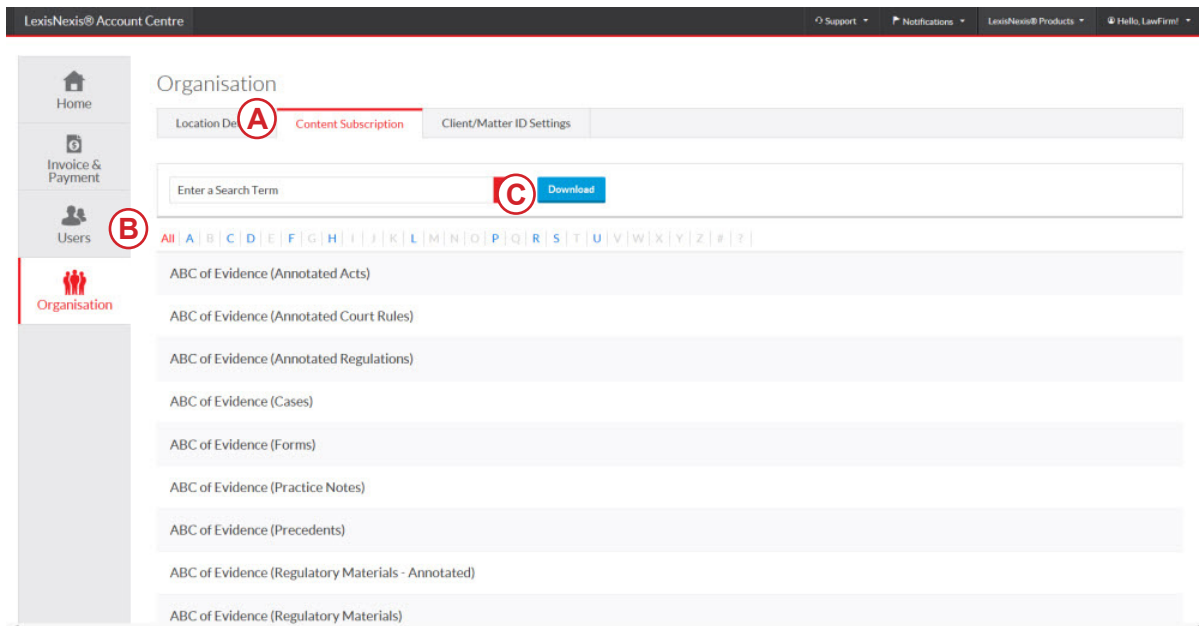
(B) The **re-assign users and delete location** page will pop up, indicating the number of users that must be assigned to a new location.

(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.

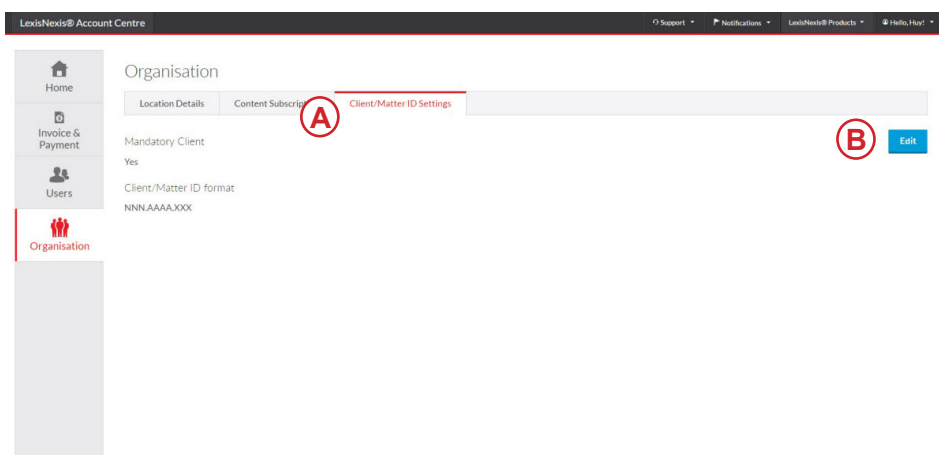
(B) To find a specific publication, do one of the following:

- 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 | <p>Enter the format the client/matter ID must conform to.</p> <ul style="list-style-type: none"> • 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 <p>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.</p> |
| 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. |

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

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