CounselLink®

Standard Reports

January 22, 2021

CounselLink Standard Reports

Contents

Overview

This document provides a list of all the standard reports found in CounselLink that includes:

- Report folder
- Report summary
- Objects contained in the report

From this document, users will learn the purpose of each standard report, the objects contained in that report and any prompts or filters associated with a report.

Changes in this Release

The following changes have been made to the standard reports and corresponding objects, which may impact custom reports you have created in previous CounselLink releases:

- Added new Matter report called **Closed Matters Report with Days Open** with new standard object **Matter Days Open Since Creation,** which signifies the count of days that have passed between a matter created date and recent closed date/deleted date (or the current date where a matter is not yet closed/deleted).

Standard Report Features

Standard Reports are included in the standard implementation of CounselLink. Reporting is the assembly of data into a readable format. In CounselLink, data exists as a series of objects called Metrics or Attributes. Metrics are pieces of information upon which mathematical operations are performed. An example of a metric is the Total Billed Amount of an Invoice which represents the sum of all charges (both expenses and fees) on a single invoice.

Attributes are objects that cannot have arithmetic applied to them. Law Firm Name, City, and File Handler are examples of Attributes. Knowing the difference between Metrics and Attributes will help when trying to identify objects on a report. It also helps you when adding, removing, or creating new objects. In CounselLink, Attributes are located on the left side of the report layout, while Metrics are on the right.

In addition to Metrics and Attributes, filter and prompt objects exist in the CounselLink environment. All objects within CounselLink are controlled by a master database that retrieves your data directly from the application.

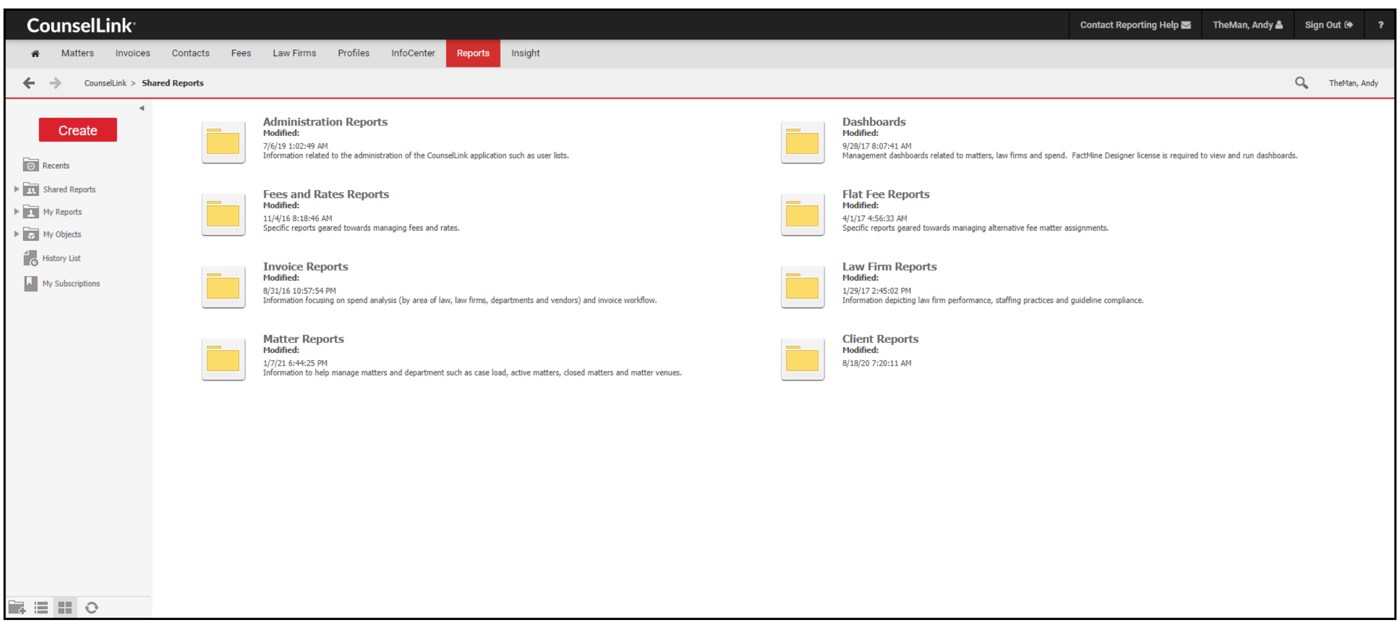
In order to most effectively gather information from CounselLink, data is refreshed continually throughout the business day. This means that the data in a report is always current.

The following options are available on most CounselLink reports:

- Subscriptions – Subscriptions allow recurring instance of a report to be scheduled.
- Export – Exporting a report allows the data in a report to be saved outside of CounselLink in the Excel, CSV, HTML, or Plain Text format.
- PDF – This is a quick export to PDF function. PDF export is helpful when emailing a copy of the report.

Custom reports can be created by LexisNexis. The fees for these reports are based on the Professional Services – Custom Development hourly rate. Should you require assistance with a report, or help creating a report, we invite you to contact your account team for assistance. Any member of this team can readily assist you with your reporting issues.

Shared Reports Screen



Administration Reports

Administration reports are listed in the following sections along with an explanation of their functionality.

Client Individual Roles Report

List of the individuals in all of the divisions and offices with their CounselLink roles and contact information. *Can be used to model new users on existing users, management of application task and feature roles.*

Column Header	Data Description
Customer Division Name	Customer division or business unit name at an intermediate (division) level.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Customer User Name	Customer user full name.
Client Individual Email	The email address for the client employee.
Customer User Role	CounselLink application roles associated with a customer user.

Customer Division Name	Customer Office Name	Customer User Name	Client Individual Email	Customer User Role
New Testing Division	Texas Legal Office #1	Gersema, Amy	brooke.manly@lexisnexis.com	Matter Assign Payment Administrator Payment Contact User Admin WF Task 1 WF Task 5
		Anderson, Andrea	maelynnp@examen.com	Invoice Contact Matter Contact Matter Setup User Admin
				Approve Fee Offer Budget Contact Budget Setup Budget Template Administrator Calendar Administrator Corporate

User List

List of CounselLink users including name, email, license type (Standard or Power User), verification of active status (T=true) and last access date.

Column Header	Data Description
User Name	CounselLink client user name.
Email	CounselLink client user name's email address.
License	The type of license the user has. Power User = Advanced User license. Standard User = Standard User license.
Client Individual is Active	Status of the user. "T" means the user is active.
Last Access Date	The date the user last accessed the CounselLink system.

User Name	Email	FactMine License	Client Individual is Active	Factmine Last Access Date
Liu, Arthur	qashared@examen.com	Power User	T	1/26/2011
Thatikonda, Madhu	mthatikonda@cybage.com	Power User	T	12/28/2012
Injam, Samatha	rohit.loya@lexisnexis.com	Power User and Power FactMine Designer User	T	9/5/2014

User Login Activity

List of CounselLink users, their last login dates, and total number of logins during the previous six month period.

Column Header	Data Description
User Name	CounselLink client user name.
Last Access Date	Date the CounselLink user last access the application.
Client Individual Login	The user ID for the client employee.
Client Individual Email	The email address for the client employee.
# of Logins (Within 6 Months)	The number of times the user has logged into the application in the last 6 months.

User Name	Last Access Date	Client Individual Login	Client Individual Email	# of Logins (Within 6 Months)
All Roles, EURO	6/6/2009	Euro_client	larisac2@hotmail.com	0
Anderson, Andrea	1/21/2010	86bqfnx5	maelynnp@examen.com	5
Anoop, Singh	11/17/2011	anoopsin	devnull@examen.com	9
Approve, Offer	5/12/2014	Off_APRVFeeOffer	amit.bhole@lexisnexis.com	5
Benton, Mark A	6/16/2014	Marktest123	mark.benton@lexisnexis.com	29
Bhole, amit	2/28/2014	amitbhole	amit.bhole@lexisnexis.com	11
bob, mini		minibob1	000@devnull.com	0
bodley, landon		Landonb1	devnull@examen.com	7
Boyko, Larisa	8/25/2014	larisa_client	qashared@examen.com	136
Boytano, Brian	11/20/2009	BrianB123		7
Casey, Mike	3/15/2010	mikecasey	devnull@examen.com	1
Checker, Tim	7/25/2008	Tim_Checker	devnull@examen.com	0
Cheung, George	11/17/2011	george_client	devnull@examen.com	0
Chilakala, Arjun	10/17/2013	arjun_client	nagarjuna.chilakala@lexisnexis.com	17
chris, mini		minichris1	lakjsdhf@123devnull.com	0
Ciminski, Eric		ericclient	eric.ciminski@lexisnexis.com	1

Dashboard Reports

Dashboard reports are listed in the following sections along with an explanation of their functionality.

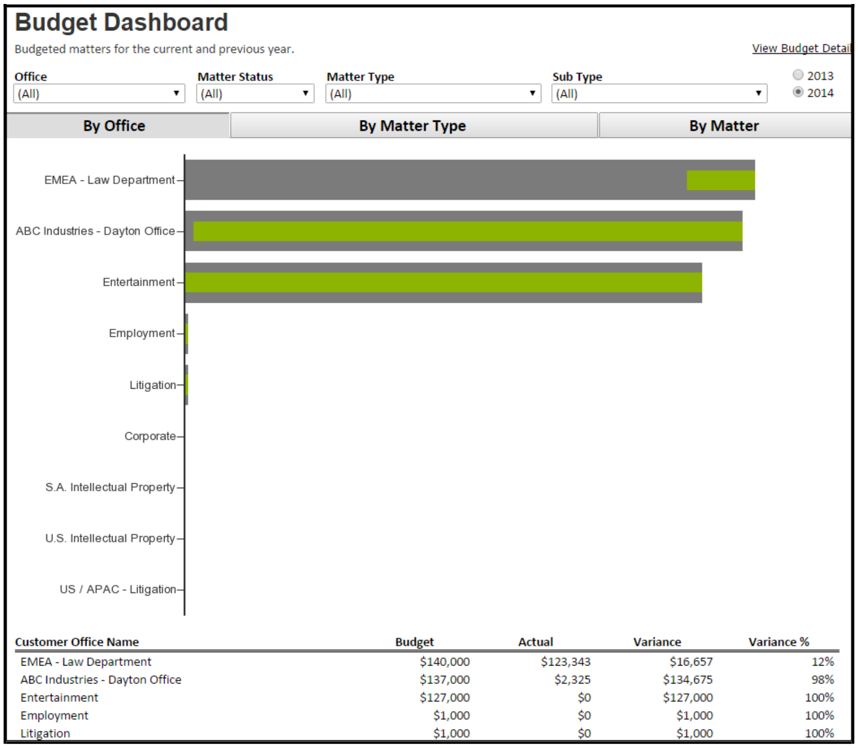
Budget Dashboard

A snapshot of budget to actual for the current and previous year. Budget amount is based on the budget period start date and actual amount is based on the date the work was performed (charge date). Break down by office, matter type, or matter tab. Dashboard only displays matters that have budgets for the current or the previous year.

Note*: If you are unable to view the dashboard, please contact your CounselLink Account Manager for assistance.*

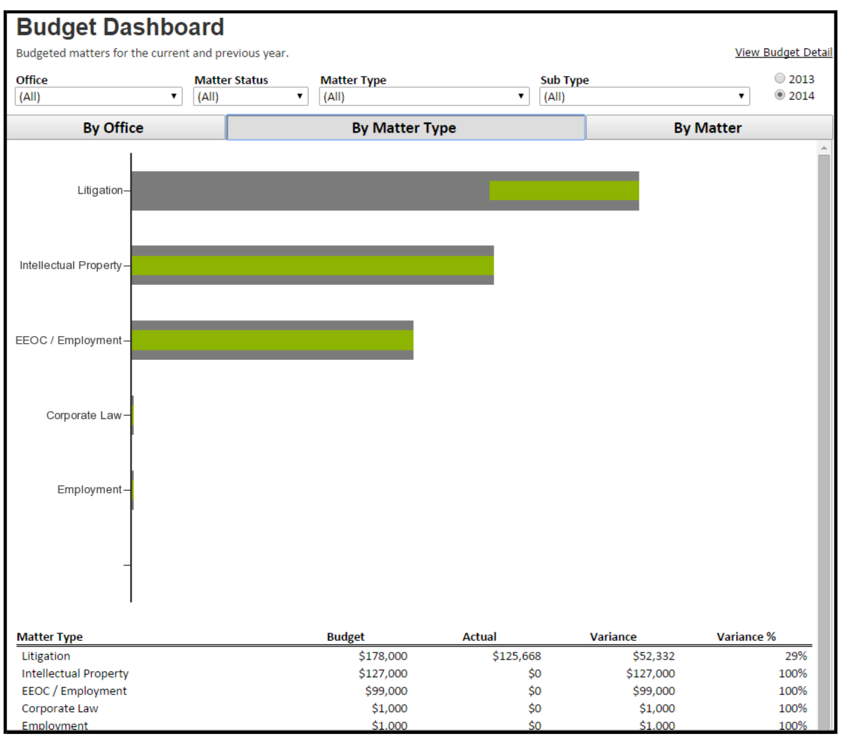
Dashboard Elements	Element Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Status	Detailed status associated with a matter.
Matter Type	Category of litigation associated with a matter.
Matter Sub Type	Sub-Category of litigation associated with a matter.
Budget Amount	The amount of budget allocated.
Budget Actual Amount	Actual legal amount spent against the budget.
Variance	Difference between the budget amount and the actual budget amount.
Variance %	This represents the percentage of difference between the budget amount and the actual budget amount.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.

By Office



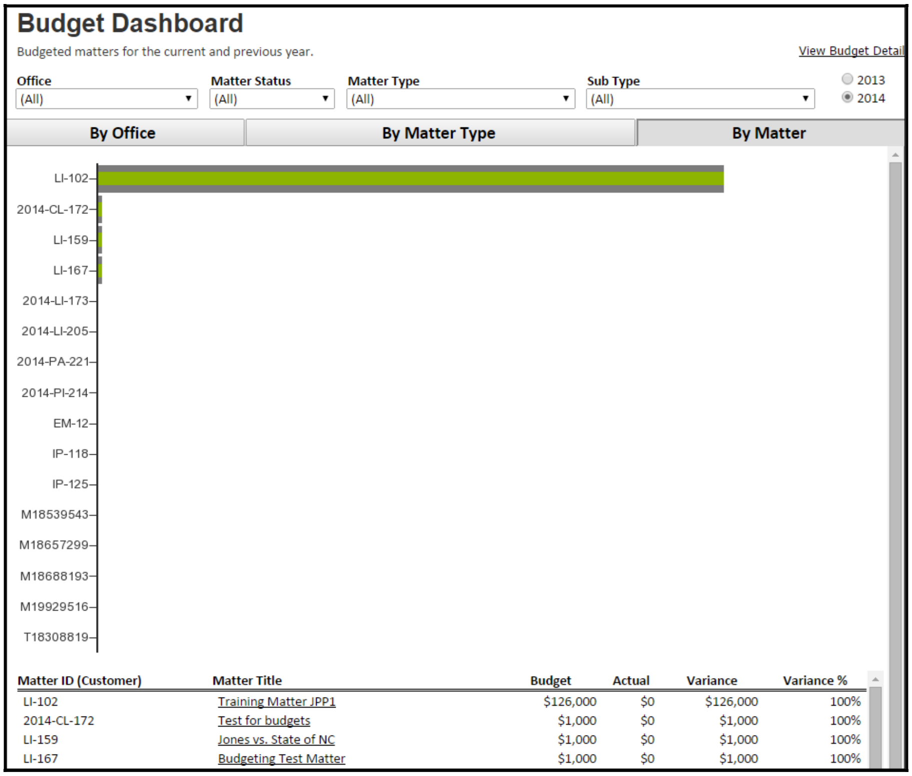
Customer Office Name	Budget	Actual	Variance	Variance %
EMEA - Law Department	$140,000	$123,343	$16,657	12%
ABC Industries - Dayton Office	$137,000	$2,325	$134,675	98%
Entertainment	$127,000	$0	$127,000	100%
Employment	$1,000	$0	$1,000	100%
Litigation	$1,000	$0	$1,000	100%

By Matter Type



Matter Type	Budget	Actual	Variance	Variance %
Litigation	$178,000	$125,668	$52,332	29%
Intellectual Property	$127,000	$0	$127,000	100%
EEOC / Employment	$99,000	$0	$99,000	100%
Corporate Law	$1,000	$0	$1,000	100%
Employment	$1,000	$0	$1,000	100%

By Matter


Budget Dashboard
Budgeted matters for the current and previous year.
View Budget Detail
Office
(All)
Matter Status
(All)
Matter Type
(All)
Sub Type
(All)
2013
2014
By Office
By Matter Type
By Matter
LI-102
2014-CL-172
LI-159
LI-167
2014-LI-173
2014-LI-205
2014-PA-221
2014-PI-214
EM-12
IP-118
IP-125
M18539543
M18657299
M18688193
M19929516
T18308819
Matter ID (Customer) Matter Title Budget Actual Variance Variance %
LI-102 Training Matter JPP1 $126,000 $0 $126,000 100%
2014-CL-172 Test for budgets $1,000 $0 $1,000 100%
LI-159 Jones vs. State of NC $1,000 $0 $1,000 100%
LI-167 Budgeting Test Matter $1,000 $0 $1,000 100%

CounselLink Activity Dashboard

Dashboard showing six months of CounselLink usage statistics including number of law firms, matter, invoice, and users.

Note: *If you are unable to view the dashboard, please contact your CounselLink Account Manager for assistance.*

Dashboard Elements	Element Description
Law Firms Submitting Invoices	Line chart showing by month the number of law firms submitting invoices.
Invoices Approved	Line chart showing by month the number of invoices approved.
Approved Spend	Stacked line chart showing by month the approved spend for fees and expenses.
Matters Assigned	Line chart showing by month the number of matters assigned.
Billed Matters by Division	Pie chart showing the number of billed matters by division.

The lower section of the dashboard displays various activity statistics for the previous month.

Departmental Trends

Dashboard displays a three year trend for spend by matter type, spend by office, and law firm consolidation. Trending is based on invoice approved dates.

***Note**: If you are unable to view the dashboard, please contact your CounselLink Account Manager for assistance.*

Dashboard Elements	Element Description
Spend by Matter Type	Amount spent by category of litigation associated with a matter.
Spend by Office	Amount spent by each Customer Office Name associated with a matter.
Law Firms for 80% of Spend	Law firms which make up 80% of total amount spent for a given year. This report excludes non-legal vendors.
Approved Amount	Total amount of invoices approved.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Law Firm Name	Name associated with a law firm that is used for reports associated with matter, invoice or charge information.

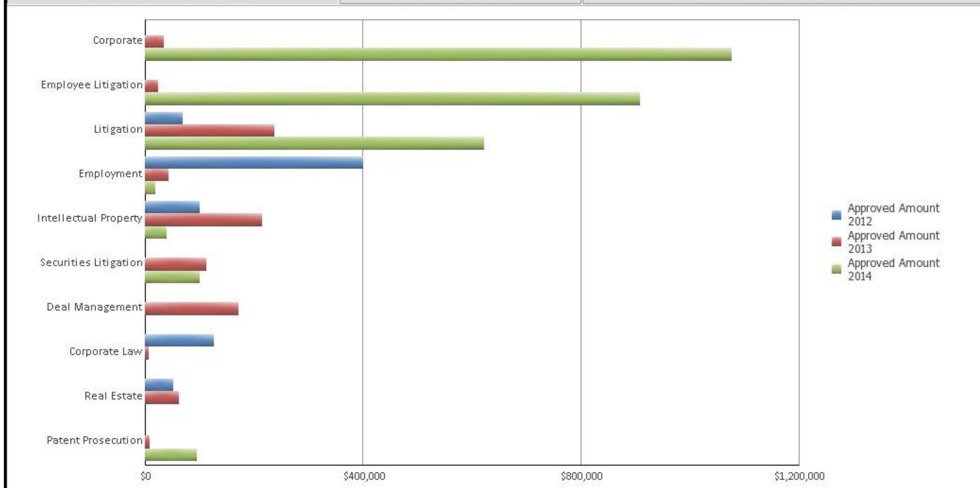
Spend by Matter Type

Departmental Trends

Three year trends in legal spend.

☑ 2012
☑ 2013
☑ 2014

Spend by Matter Type | **Spend by Office** | **Law Firms for 80% of Spend**



Top 10 shown, view detail

Matter Type	2012	2013	2014	Total
Corporate		$34,995	$1,078,239	**$1,113,234**
Employee Litigation		$23,840	$909,867	**$933,707**
Litigation	$69,168	$237,826	$622,436	**$929,430**
Employment	$400,786	$43,872	$18,582	**$463,240**
Intellectual Property	$100,065	$215,993	$39,820	**$355,878**
Securities Litigation		$113,752	$100,179	**$213,930**

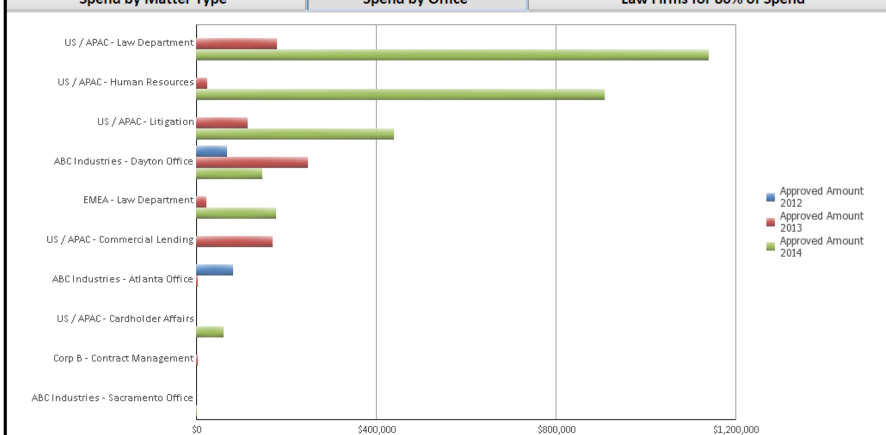
Spend by Office

Departmental Trends

Three year trends in legal spend.

☑ 2012
☑ 2013
☑ 2014

Spend by Matter Type | **Spend by Office** | **Law Firms for 80% of Spend**



Top 10 shown, view detail

Customer Office Name	2012	2013	2014	Total
US / APAC - Law Department		$180,352	$1,141,421	**$1,321,773**
US / APAC - Human Resources		$23,840	$909,867	**$933,707**
US / APAC - Litigation		$113,752	$439,882	**$553,634**
ABC Industries - Dayton Office	$69,168	$249,513	$146,498	**$465,179**
EMEA - Law Department		$23,431	$178,065	**$201,496**
US / APAC - Commercial Lending		$171,104		**$171,104**

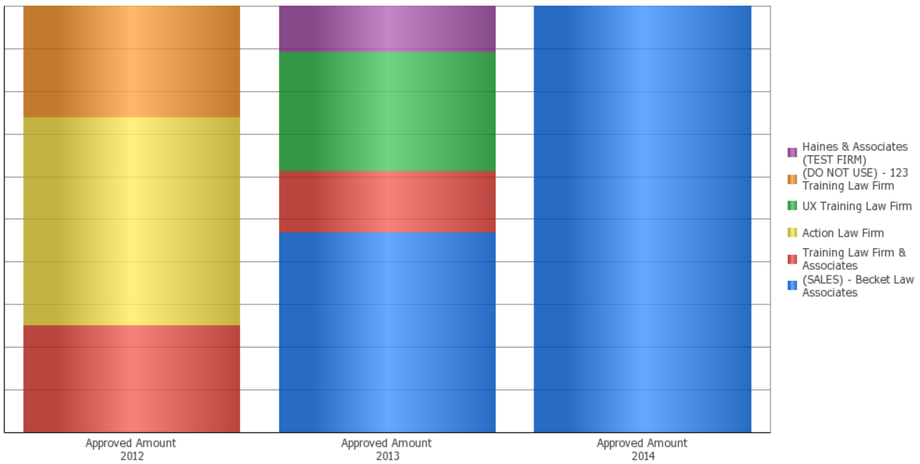
Law Firm for 80% of Spend

Departmental Trends

Three year trends in legal spend.

☑ 2012
☑ 2013
☑ 2014

Spend by Matter Type | **Spend by Office** | **Law Firms for 80% of Spend**



Firms that make up 80% of spend for each year, sorted by total spend.

View detail

Law Firm Name	2012	2013	2014	Total
(SALES) - Becket Law Associates		$557,028	$1,646,865	**$2,203,893**
Training Law Firm & Associates	$175,057	$172,932		**$347,989**
Action Law Firm	$341,658			**$341,658**
UX Training Law Firm		$330,780		**$330,780**
(DO NOT USE) - 123 Training Law Firm	$182,163			**$182,163**
Haines & Associates (TEST FIRM)		$129,830		**$129,830**

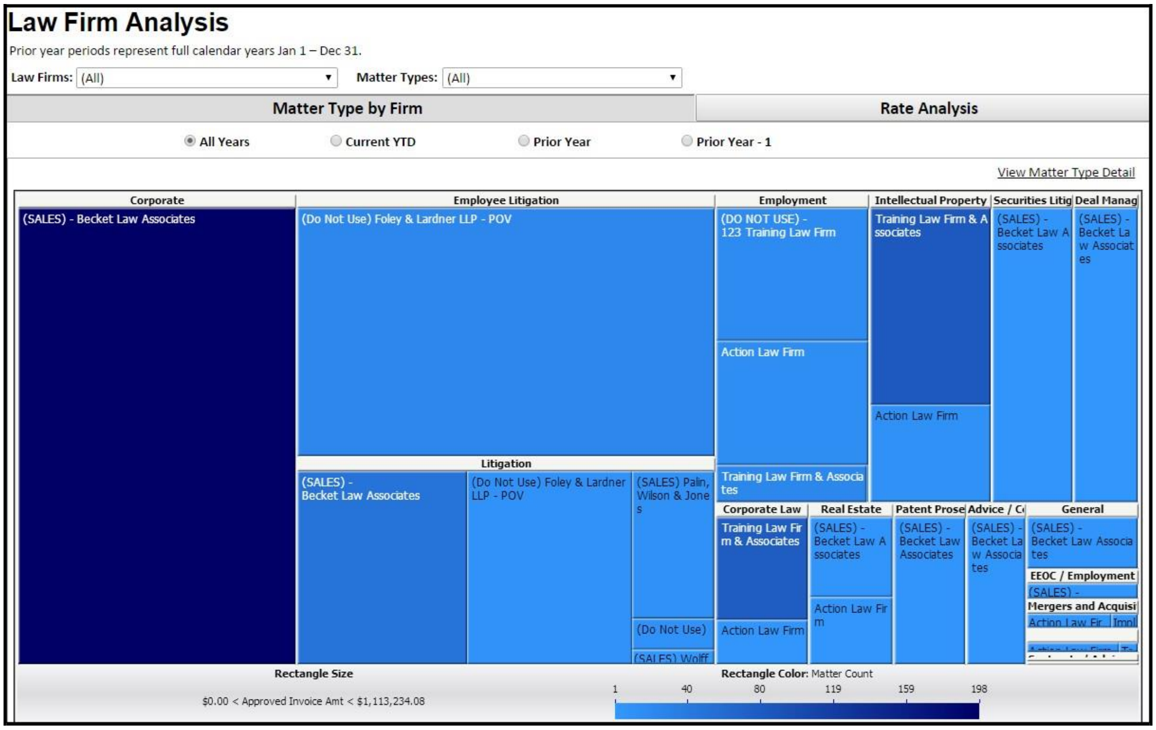
Law Firm Analysis

The Law Firm Analysis dashboard analyzes spend and rate data for invoices approved in the last three calendar years. The Law Firm Scorecard heat map shows approved spend by matter type and by law firm. The Rate Analysis tab shows average hourly billing rates year over year, broken out by timekeeper type (partner, associate, and paralegal trends). This report excludes non-legal vendors.

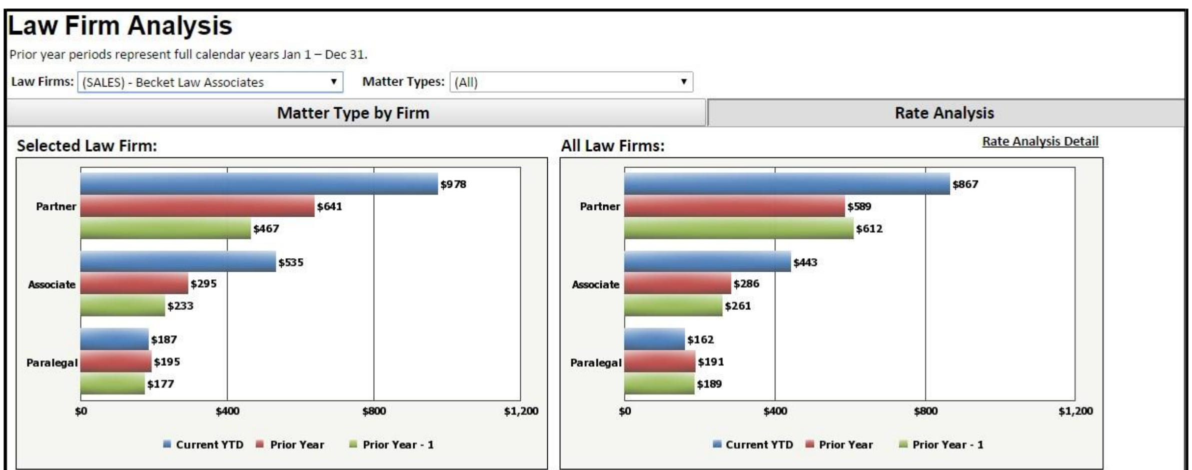
Note*: If you are unable to view the dashboard, please contact your CounselLink Account Manager for assistance.*

Dashboard Elements	Element Description
Matter Type	Category of litigation associated with a matter.
Matter Type by Firm	Category of matters associated with the law firm and matter type combination.
Rate Analysis	Average timekeeper rates from the last three years for Partners, Associates and Paralegals.
Timekeeper Level	Billing level of a timekeeper as provided on the invoice charge.
Year Over Year % Difference	This represents the percentage difference of timekeeper rates between the current year and the previous year and between the previous year and the year before that.

Matter Type by Firm



Rate Analysis



Year Over Year - % Difference

Timekeeper Level	Current YTD v. Prior Year	Prior Year v. Prior Year – 1
Partner	52.5%	37.4%
Associate	81.3%	26.8%
Paralegal	(4.1%)	10.2%

Year Over Year - % Difference

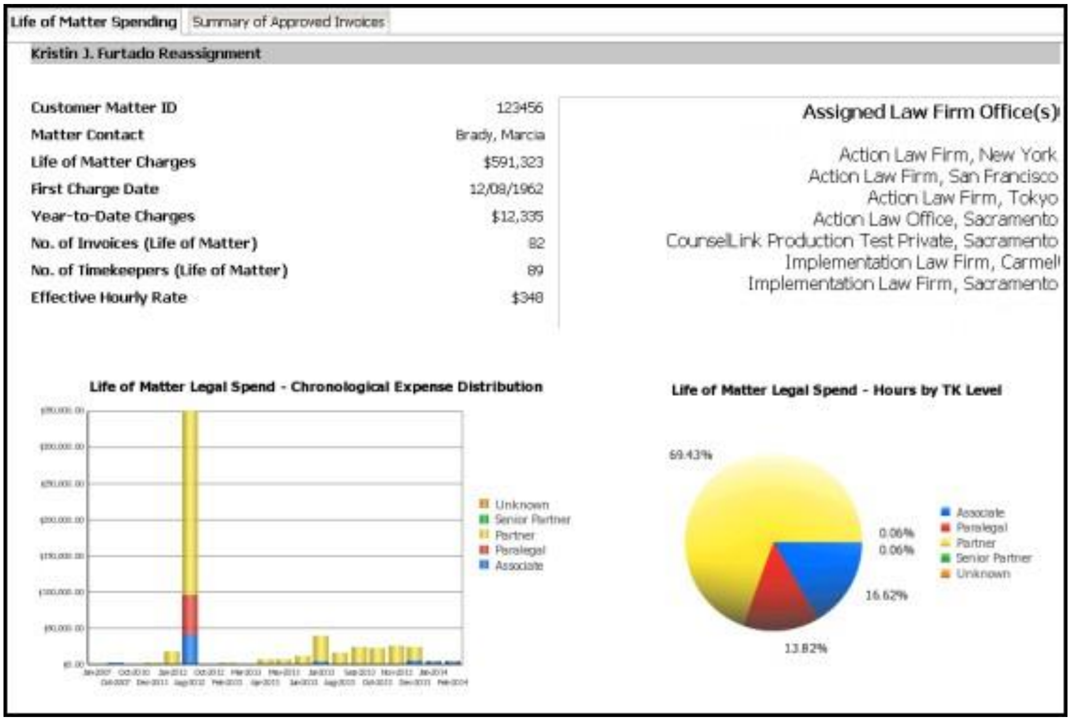
Timekeeper Level	Current YTD v. Prior Year	Prior Year v. Prior Year – 1
Partner	47.3%	(3.8%)
Associate	55.1%	9.6%
Paralegal	(15.1%)	1.0%

Life of Matter Spend

Dashboard showing life of matter spend information. Includes approved invoice detail on a second tab. Prompts for Customer Matter ID. Runs best when one matter is selected.

Note*: If you are unable to view the dashboard, please contact your CounselLink Account Manager for assistance.*

Dashboard Elements	Element Description
Customer Matter ID	The number applied to a matter by a customer for identification purposes.
Matter Contact	Principal customer user associated with a matter. Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Life of Matter Charges	Total of the Fee, Expenses, Taxes, Discounts and Adjustments (does not include cost sharing discounts) of invoices submitted on a matter.
First Charge Date	Date of the first charge chronologically on an invoice.
Year-To-Date Charges	Year to date amount after accounting for law firm, client adjustments, law firm discounts and taxes.
No. of Invoices (Life of Matter)	Count of invoices submitted on a matter.
No. of Timekeepers (Life of Matter)	Count of timekeepers associated with a law firm office that has submitted time on an invoice.
Effective Hourly Rate	Matter Recommended Amount (Fees) divided by Charge Units (Fees).
Assigned Law Firm Office	Names of all law firm offices assigned to this matter.
Life of Matter Legal Spend – Chronological Expense Distribution	Bar graph showing over time the amount of legal spend grouped by time keeper level.
Life of Matter Legal Spend – Hours by TK Level	Pie chart showing the percentage of hours billed by timekeeper level.
Summary of Approved Invoices	Located on the second tab of the dashboard. List details of invoices submitted on the matter. Invoices are grouped by month. Drill down available to view the details of invoices for the selected month.

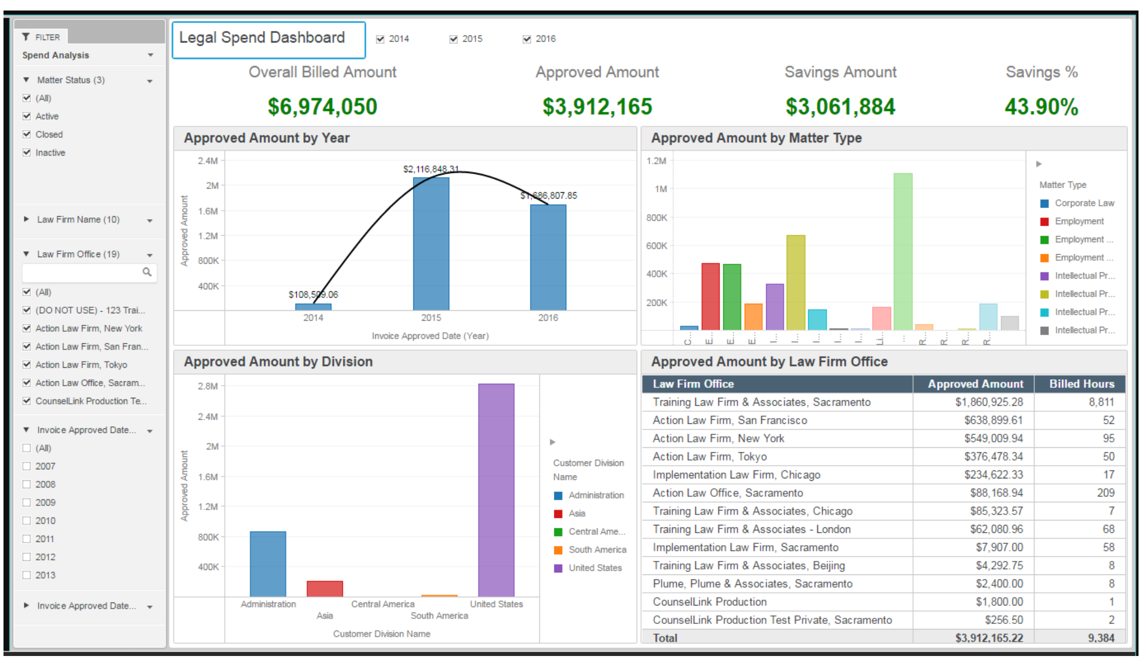

Life of Matter Spending
Summary of Approved Invoices
Kristin J. Furtado Reassignment
Customer Matter ID 123456
Matter Contact Brady, Marcia
Life of Matter Charges $591,323
First Charge Date 12/08/1962
Year-to-Date Charges $12,335
No. of Invoices (Life of Matter) 82
No. of Timekeepers (Life of Matter) 89
Effective Hourly Rate $348
Assigned Law Firm Office(s)
Action Law Firm, New York
Action Law Firm, San Francisco
Action Law Firm, Tokyo
Action Law Office, Sacramento
CounselLink Production Test Private, Sacramento
Implementation Law Firm, Carmel
Implementation Law Firm, Sacramento
Life of Matter Legal Spend - Chronological Expense Distribution
Unknown
Senior Partner
Partner
Paralegal
Associate
Life of Matter Legal Spend - Hours by TK Level
69.43%
0.06%
0.06%
16.62%
13.82%
Associate
Paralegal
Partner
Senior Partner
Unknown

Legal Spend Dashboard

The Legal Spend Dashboard displays various financial information for a specific time period. All information for each selected time period is displayed together.

The following information is displayed on this dashboard:

- **Snapshot amounts.** At the top of the dashboard, the following metrics are displayed (from left to right):
  - **Overall Billed Amount**. The overall amount charged for services for the selected time frame, after applying any discounts or taxes.
  - **Approved Amount**. The portion of the **Overall Billed Amount** that was approved.
  - **Savings Amount**. The total adjustment savings on approved invoices (i.e. realized savings from adjustments), but does not include discounts.
  - **Savings %**. The percentage difference between the **Overall Billed Amount** and the **Approved Amount**.
- **Panels.** The main visual part of the dashboard. These areas contain detailed, interactive information (via charts and tables) which can be further explored by clicking an item and seeing relationships, or by drilling-down into an item.
  - **Approved Amount by Year**. A graph and trend line showing the approved amounts on a year-to-year basis. By default, the three most recent years available are displayed.
  - **Approved Amount by Matter Type.** The approved amount broken down by individual matter types
  - **Approved Amount by Division.** The amount approved for each division (office).
  - **Approved Amount by Firm.** The amount approved for each law firm and the corresponding billed hours.



Fees and Rates Reports

Fees and Rates reports are listed in the following sections along with an explanation of their functionality.

Active and Pending Fee Offer Discount

Active and pending fee offers that contain a discount excluding discounts that are set to 0% and discounts that have expired. This report tracks compliance of agreed discount scenarios with firms.

Column Header	Data Description
Fee Offer ID	System assigned number to the fee offer.
Law Firm Name	Name associated with a law firm; used for reports that are associated with matter, invoice or charge information.
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Fee Structure Name/ID	Unique system ID assigned to the fee structure.
Discount ID	Unique system ID assigned to the fee offer.
Discount Effective Date	Date the fee offer discount is effective.
Discount Expiration Date	Date the fee offer discount expired.
Discount Desc	Description of the fee offer discount.
Discount Type	Type of fee offer discount e.g. Prompt Pay Discount.
Discount Qualifier Value	Number of days the discount is offered.
Discount Rate	The discount rate.
Discount Status	Status of the fee discount (Current/Future or Historical).

Fee Offer ID	Law Firm Name..	Law Firm Office	Fee Structure Name / ID		Discount ID	Discount Effective Date	Discount Expiration Date
12133621	Implementation Law Firm	Implementation Law Firm, Sacramento	CBS detailed hr - no cc aprov	3500	97037	1/14/2008 1:11:43 PM	
12133623	Implementation Law Firm	Implementation Law Firm, Sacramento	CBS detailed hr - no cc aprov	3500	97044	1/14/2008 1:11:43 PM	
12133625	Implementation Law Firm	Implementation Law Firm, Sacramento	CBS detailed hr - no cc aprov	3500	97051	1/14/2008 1:31:38 PM	
13155541	CounselLink Production Test Private	CounselLink Production Test Private, Sacramento	Detailed Hourly	3202	128673	10/18/2009 7:55:54 AM	
13155541	CounselLink Production Test Private	CounselLink Production Test Private, Sacramento	Detailed Hourly	3202	128674	10/18/2009 7:55:54 AM	
13155541	CounselLink Production Test Private	CounselLink Production Test Private, Sacramento	Detailed Hourly	3202	128675	10/18/2009 7:55:54 AM	

		Charge T	BOTH	BOTH	LGLEXP	LGLEXP	LGLFEE	LGLFEE
Discount Desc	Discount Type	Discount Qualifier Value	Discount Rate	Discount Status	Discount Rate	Discount Status	Discount Rate	Discount Status
Pay super quick	Prompt Pay Discount	30					(15.00%)	Current/Future
Pay super quick	Prompt Pay Discount	30					(15.00%)	Current/Future
Pay super quick	Prompt Pay Discount	30					(20.00%)	Current/Future
Premium	Prompt Pay Discount	60	(5.00%)	Current/Future				
Gold	Prompt Pay Discount	20	(3.00%)	Current/Future				
Silver	Prompt Pay Discount	10	(1.00%)	Current/Future				

Note*: The second image is in continuation with the first image and represents a single active and pending fee offer discount report.*

Approved Flat Fee Rates

Approved flat free fee offer rates report, which pages by the fee structure and includes the law firm office, effective dates, and stage.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Offered Fee Effective Date	Date the fee offer is effective.
Offered Fee Expire Date	Date the fee offer time period ends.
Stage Number	The stage number associated with the rate.
Case Stage	The stage name associated with the rate.
Offered Fee Amount	The approved flat fee offer rate.

Law Firm Office	Offered Fee Effective Date	Offered Fee Expire Date	Stage Number	Case Stage	Metrics	Offered Fee Amount
Training Law Firm & Associates - London	7/14/2016 9:29:45 AM		2	Application Filing Fee		$2,500.00
Training Law Firm & Associates - Toronto	7/14/2016 9:31:07 AM		2	Application Filing Fee		$1,500.00
Training Law Firm & Associates, Chicago	7/14/2016 9:28:42 AM		2	Application Filing Fee		$2,000.00
Training Law Firm & Associates, Sacramento	7/2/2014 11:50:14 AM		2	Application Filing Fee		$1,500.00
Training Law Firm & Associates - London	7/14/2016 9:29:45 AM		3	Designation Fee		$2,500.00
Training Law Firm & Associates - Toronto	7/14/2016 9:31:07 AM		3	Designation Fee		$1,500.00
Training Law Firm & Associates, Chicago	7/14/2016 9:28:42 AM		3	Designation Fee		$2,000.00
Training Law Firm & Associates, Sacramento	7/2/2014 11:50:14 AM		3	Designation Fee		$1,500.00
Training Law Firm & Associates - London	7/14/2016 9:29:45 AM		4	Extension Fee		$2,000.00
Training Law Firm & Associates - Toronto	7/14/2016 9:31:07 AM		4	Extension Fee		$500.00
Training Law Firm & Associates, Chicago	7/14/2016 9:28:42 AM		4	Extension Fee		$1,000.00
Training Law Firm & Associates, Sacramento	7/2/2014 11:50:14 AM		4	Extension Fee		$250.00
Training Law Firm & Associates - London	7/14/2016 9:29:45 AM		5	Claims Fee		$2,000.00
Training Law Firm & Associates - Toronto	7/14/2016 9:31:07 AM		5	Claims Fee		$500.00
Training Law Firm & Associates, Chicago	7/14/2016 9:28:42 AM		5	Claims Fee		$1,000.00
Training Law Firm & Associates, Sacramento	7/2/2014 11:50:14 AM		5	Claims Fee		$250.00

Fee Offer Details

Prompted on Law Firm Office. The purpose of the report is to provide a listing of timekeeper's approved role and hourly rate. The report identifies both active and inactive rate structures.

Column Header	Data Description
Fee Offer ID	Unique system ID assigned to the fee offer.
Fee Structure ID	Unique system ID assigned to the fee structure.
Fee Offer Submitted Date	The date the fee offer was submitted.
Fee Offer Approved Date	The date the fee offer was approved.
Timekeeper Fees Effective Date	The effective date of the fees associated with the offer.
Offered Fee Status	The status of the fee offer.
Timekeeper Level	Billing level of a timekeeper as provided on an invoice charge.
Timekeeper Name (Last, First)	Name of a law firm office user, last name first; used for reports that are associated with Invoice or charge information.
Timekeeper ID	Primary timekeeper id of a timekeeper, used to identify a timekeeper on an invoice.
Timekeeper Fee Offer Status	The status of the individual timekeeper within the fee offer.
Timekeeper Fee Offer Approved Date	The date the timekeeper was approved within the fee offer.
Timekeeper Fee Offer Submitted Date	The last submission date for the timekeeper within the fee offer.
Rate	The offered fees for the timekeeper on the fee offer.

Fee Offer ID	Fee Structure ID	Fee Offer Submitted Date	Fee Offer Approved Date	Timekeeper Fees Effective Date	Offered Fee Status	Timekeeper Level	Timekeeper Name (Last, First)	Timekeeper ID	Timekeeper Fee Offer Status	Timekeeper Fee Offer Approved Date	Timekeeper Fee Offer Submitted Date	Rate
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Associate	[illegible]	CL9165	Timekeeper Approved	10/20/2016 8:23:23 AM	10/20/2016 8:19:07 AM	$44.13
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Associate	[illegible]	ABC3	Timekeeper Approved	10/20/2016 8:23:23 AM	10/20/2016 8:19:07 AM	$228.25
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Associate	[illegible]	madhurig	Timekeeper Approved	10/20/2016 8:07:32 AM	10/20/2016 6:23:37 AM	$0.66
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Associate	[illegible]	te	Timekeeper Approved	10/20/2016 8:07:32 AM	10/20/2016 6:23:37 AM	$1.80
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Legal Assistant	[illegible]	LEG	Timekeeper Approved	10/20/2016 8:07:32 AM	10/20/2016 6:23:37 AM	$1.61
5029543530	2225	10/20/2016	10/20/2016	09/01/2016	Offered Fee Active	Other	[illegible]	LIB	Timekeeper Approved	10/20/2016 8:07:32 AM	10/20/2016 6:23:37 AM	$2.37
					Offered Fee				Timekeeper	10/20/2016 8:07:32	10/20/2016 6:23:37	

Regional Rate Comparison

Displays approved rates for customer law firms by city and state. Filter by active fee offers for partners, associates, and paralegals. Page by fee structure ID.

Column Header	Data Description
Law Firm Office City	City of the law firm office.
Law Firm Office State	State/Province of the law firm office.
Timekeeper Level	Billing level of a timekeeper as provided on an invoice charge.
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Timekeeper Fees Effective Date	Effective date for the approved timekeepers' fees.
Timekeeper Name (Last, First)	Name of a law firm office user, last name first; used for reports that are associated with Invoice or charge information.
Rate	Timekeeper's approved fee.
Discount Term for Fees	The discount term for the timekeepers approved fee.

Law Firm Office City	Law Firm Office State	Timekeeper Level	Law Firm Office	Timekeeper Fees Effective Date	Timekeeper Name (Last, First)	Rate	Discount Term for Fees
Sacramento	California	Associate	CounselLink Production Test Private, Sacramento	08/27/2009	Unknown Timekeeper	$500.00	0.00%
Sacramento	California	Paralegal	CounselLink Production Test Private, Sacramento	08/27/2009	Unknown Timekeeper	$500.00	0.00%
Sacramento	California	Partner	CounselLink Production Test Private, Sacramento	08/27/2009	Unknown Timekeeper	$500.00	0.00%

Summary of Approved Timekeeper Offered Fees

Approved timekeepers by law firm, paged by fee structure. This report displays the timekeepers approved or partially approved offered fee, the billed rate, and the number of invoices on which the timekeeper has billed. Resubmitted or rejected timekeepers are **not shown**. *Provides the current active rate for each approved timekeeper of a firm. Also includes the number of invoices the timekeeper has billed on and billed rate prior to any discounts for the date range specified in the report.*

Column Header	Data Description
Law Firm Office	The name of the law firm office.
Timekeeper Name	The name of the timekeeper in the law firm office.
Timekeeper Level	Billing level of a timekeeper as provided on an invoice charge.
Approved Timekeeper Offered Fee	The rate for the timekeeper level that was approved by the client.
Billed Rate	The rate for the timekeeper at which the law firm billed for the timekeeper's services.
Number of Invoices	The count (number) of invoices in which there is a charge for the timekeeper's services.

Law Firm Office	Timekeeper Name	Timekeeper Level	Approved Timekeeper Offered Fee	Billed Rate	Number of Invoices
CounselLink Production Test Private, Sacramento	Unknown Timekeeper	Paralegal	$500.00		0
	Unknown Timekeeper	Associate	$500.00		0
	Unknown Timekeeper	Partner	$500.00		0

Timekeeper Rate History

Lists for each timekeeper the current and previous rate and the percent change between the two. This report compares percent rate increases across multiple entities. Pages by Fee Structure or Law Firm Office.

Column Header	Data Description
Timekeeper Name	Name of a law firm office user; used for reports that are associated with Invoice or charge information.
Timekeeper Level	Billing level of a timekeeper as provided on an invoice charge.
Fee Offer ID	System assigned number to the fee offer.
Fee Offer Status	Status of the submitted fee offer.
Fee Offer Effective Date	Date the fee offer is effective.
Fee Offer End Date	Date the fee offer time period ends.
Fee Offer Approver	Customer user that approved the fee offer.
Fee Offer Rejecter	Customer user that rejected the fee offer.
Timekeeper Fee Offer Status	Status of the individual timekeeper within the fee offer.
Timekeeper Approved for Fee Offer	User who approved the specific timekeeper in the fee offer.
Timekeeper Rejecter for Fee Offer	User who rejected the specific timekeeper in the fee offer.
Current Timekeeper Offered Fee Amount	Current offered fee amount for the timekeeper.
Previous Timekeeper Offered Fee Amount	Previous offered fee amount for the timekeeper.
Fee Difference	The numeric difference between Previous Timekeeper Offered Fee Amount and Current Timekeeper Offered Fee Amount.

Change Percentage	Percent change between Previous Timekeeper Offered Fee Amount and Current Timekeeper Offered Fee Amount.
New Rate?	Specifies whether or not the current rate is a new rate for the timekeeper.

Timekeeper Name	Timekeeper Level	Fee Offer ID	Fee Offer Status	Fee Offer Effective Date	Fee Offer End Date	Fee Offer Approver	Fee Offer Rejecter	Timekeeper Fee Offer Status	Timekeeper Approver for Fee Offer	Timekeeper Rejector for Fee Offer	Current Timekeeper Offered Fee Amount	Previous Timekeeper Offered Fee Amount	Fee Difference	Change Percentage	New Rate?
Brown, Keith	Partner	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$575.00	$575.00	$0.00	0.00%	NO
Martinez, Maria	Associate	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$350.00	$350.00	$0.00	0.00%	NO
Smith, Jane	Partner	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$650.00	$650.00	$0.00	0.00%	NO
Smith, Sam F	Paralegal	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$125.00	$0.00	$125.00	0.00%	YES
St. Pierre, Mike	Partner	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$625.00	$625.00	$0.00	0.00%	NO
Sutherland, Felix	Associate	5029468842	Active	04/17/2016	-	James, Allison	NA	Timekeeper Approved	James, Allison	NA	$400.00	$400.00	$0.00	0.00%	NO

Flat Fee Reports

Flat fee reports are listed in the following sections along with an explanation of their functionality.

Spending by Venue and Status (Comprehensive Matter Summary by Status)

Summary of matters according to matter status. The State column can be drilled down to give law firm and matter detail. The report filter prompts for matter accept date range and matter status. The report can be drilled down from State to the Law Firm. *Provides a view of spend by geographical location.*

Column Header	Data Description
Matter Venue State	The state in which a matter is being litigated.
Matter Venue County	The county in which a matter is being litigated.
Number of Matters	This is the count of matters in the designated matter status.
Charge Recommended Amt (Fee)	Amount of the invoice for fee charges after accounting for law firm, client adjustments, law firm discounts and taxes.
Charge Recommended Amt (Expense)	Amount of the invoice for expense charges after accounting for law firm, client adjustments, law firm discounts and taxes.
Charge Recommended Amt	Amount of the invoice after accounting for law firm, client adjustments, law firm discounts and taxes. This is sum of #4 and #5.

Matter Venue State	Matter Venue County	Number of Matters	Charge Recommended Amt (Fee)	Charge Recommended Amt (Expense)	Charge Recommended Amt
Alabama	Barbour	1			
	Total	**1**	**$0.00**	**$0.00**	**$0.00**
California	Alameda	1			
	Total	**1**	**$0.00**	**$0.00**	**$0.00**
N/A	N/A	115	$21,424,242,770,548.50	$45,974.90	$21,424,242,816,523.40
	Total	**115**	**$21,424,242,770,548.50**	**$45,974.90**	**$21,424,242,816,523.40**
Outside USA	None	1	$0.00	$100.00	$100.00
	None	1	$0.00	$100.00	$100.00
	Total	**2**	**$0.00**	**$200.00**	**$200.00**
Total		**119**	**$21,424,242,770,548.50**	**$46,174.90**	**$21,424,242,816,723.40**

Invoice Reports

Invoice reports are listed in the following sections along with an explanation of their functionality.

Approved Invoices

Lists all invoices approved in a date range, including the approved amount. Prompts for invoice approved event date range.

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice Date	Date an invoice was generated by a law firm (Law firm controlled value).
Invoice Approved Date	Date an invoice is approved for payment.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.

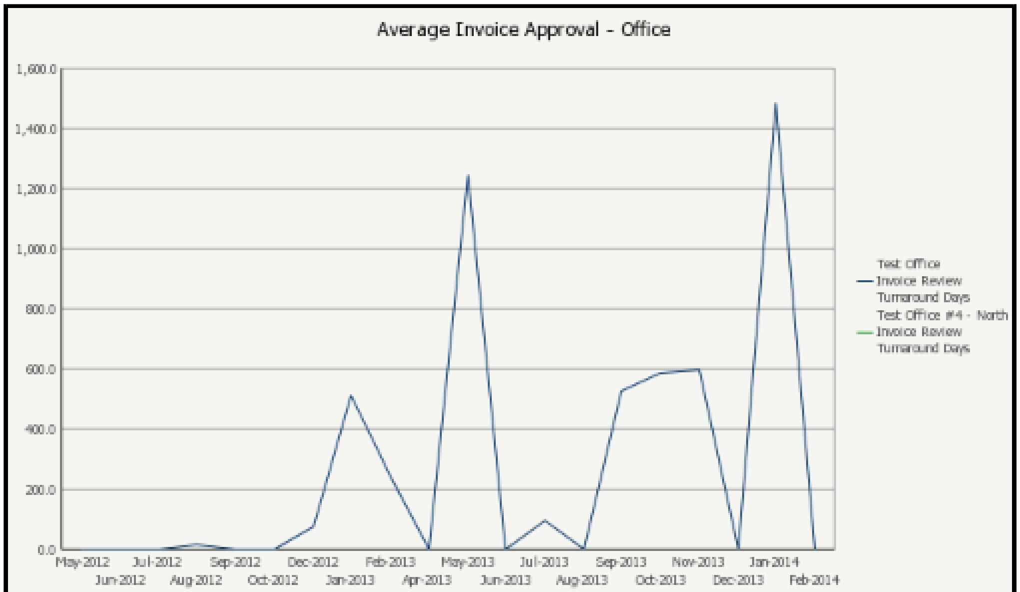
Invoice Allocation Contact	The name of the cost center or external party responsible for costs included on an invoice.
Approved Amount	The total amount for which the invoice is approved.

Customer Office Name	Law Firm Office	Invoice ID (CounselLink)	Invoice ID (Law Firm)	Invoice Date	Approve Date	Matter ID (Customer)	Matter ID (CounselLink)	Matter Title	Invoice Allocation Contact	Amount
Test Office	CounselLink Production Test Private, Sacramento	3336543	3336543	3/24/2011	6/8/2014 1:51:52 AM	M19560036	19560036	Matter For CIE 1	test 1	$1.26
		7519899	7519899	3/15/2014	5/12/2014 6:37:07 AM	M21045306	21045306	test matter	Larisa's test 2 C/S	$100.00
		7578255	7578255	4/3/2014	4/3/2014 3:32:20 AM	M18177193	18177193	Matter Close Test1	test 1	$0.11
		7595093	7595093	4/7/2014	4/9/2014 10:42:16 PM	M21111028	21111028	AT Test RFQ	yen contact	$0.02
		7610471	7610471	4/9/2014	4/9/2014 10:47:36 PM	M21111028	21111028	AT Test RFQ	yen contact	$112.50
		7662206	7662206	4/25/2014	4/25/2014 5:57:49 AM	M21155067	21155067	Approve invoice email	Larisa's test 2 C/S	$1,000.00

Average Invoice Approval - Office

Average invoice approval time (sent to approved date) by office and month. This report identifies by office how long invoices are in review. Prompts on Invoice Approved Date range. Includes a line graph showing the number of review days by office.

Column Header	Data Description
Invoice Approved Date (Month)	Month - Year a customer user approves an invoice for payment.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Invoice Review Turnaround Days	Number of days the invoice was in review in the customer office.



Customer Office Name / Invoice Approved Date (Month)	Test Office Invoice Review Turnaround Days	Test Office #4 - North Invoice Review Turnaround Days
May-2012	0.0	
Jun-2012	0.0	
Jul-2012	0.0	
Aug-2012	13.6	
Sep-2012	1.7	
Oct-2012	0.0	
Dec-2012	73.5	

Average Invoice Approval - Workflow

Average time it takes for an invoice to be approved from sent to approval. This report identifies how long individuals take to review invoices.

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Workflow Name	Name of workflow to which the invoice is assigned.
Matter Invoice Contact	Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Matter Contact	Principal customer user associated with a matter. Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Invoice Review Turnaround Days	Number of days, from the date an invoice was loaded into CounselLink, until the date the invoice review process was completed by LexisNexis.
Invoice Approved Date (Month)	Month - Year a customer user approves an invoice for payment.

Customer Office Name	Matter Law Firm Invoice Workflow Name	Matter Invoice Contact.	Invoice Approved Dat Matter Contact	Mar-2014 Invoice Review Turnaround Days	Apr-2014 Invoice Review Turnaround Days	May-2014 Invoice Review Turnaround Days	Jun-2014 Invoice Review Turnaround Days	Jul-2014 Invoice Review Turnaround Days	Aug-2014 Invoice Review Turnaround Days
Test Office	Auto Approval	Boyko, Larisa	Injam, Samatha				0.0		
Test Office	Multi-step Review & Approval	Boyko, Larisa	Boyko, Larisa				0.0		
Test Office	Multi-step Review & Approval	Boyko, Larisa	Hegland, Craig					0.0	
Test Office	Multi-step Review & Approval	Boyko, Larisa	Liang, Amy					0.0	
Test Office	Multi-step Review & Approval	Injam, Samatha	Injam, Samatha	0.0	0.0	58.0	0.0	0.0	0.0

Billing Conformity Report

Analysis of invoices grouped by invoice size, providing the number of invoices in each group, number of adjusted invoices per group, and total billed amount and adjustment summaries in the size range. The report prompts for invoice sent date range. *The report may be used to determine if auto-approval or other workflow adjustments are warranted for a particular invoice size.*

Column Header	Data Description
Invoice Size	The invoice amount range, based on the total invoice amount as billed by the law firm.
Number of Invoices	The count (number) of invoices submitted on a matter through CounselLink from the law firms.
Adjusted Invoices	The count of invoices for which adjustments to the amounts billed was made by the CounselLink product.
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Charge Current Adj Amt	Total current adjustment amount on a charge.
Invoices as Percentage of Total Invoices	This represents the percent of the total count of invoices that fell in the specified invoice amount range.
Billed Amount as Percentage of Total Billed	This represents the percent of the total billed dollar amount that fell in the specified invoice amount range.
Adjusted Percentage by Invoice Size	This represents the adjusted invoice amount sum as a percent of the total billed amount sum within the specified invoice amount range.
Adjusted Percentage of Total Billed	This represents the percentage amount of the invoice adjusted after discounts and taxes (Charge Current Adj Amt divided by Charge Amt less Discounts & Tax).

Adjusted as Percent of Total Adjusted	This represents the adjusted invoice amount sum for the designated invoice amount range as a percent of the total amount of adjustments made for all invoice amount ranges.
Average Adjusted Amount per Invoice	This is the average of the adjusted amounts across all invoices received within the specified invoice amount range.

Invoice Size	Number of Invoices	Adjusted Invoices	Charge Amt less Discounts & Tax	Charge Current Adj Amt	Invoices as Percentage of Total Invoices	Billed Amount as Percentage of Total Billed	Adjusted Percentage by Invoice Size	Adjusted Percentage of Total Billed	Adjusted as Percent of Total Adjusted	Average Adjusted Amount per Invoice
< $500	24	1	$2,861.53	($0.36)	54.5%	2.9%	0.0%	0.0%	0.0%	$0.01
> $500 and < $1000	5	1	$2,828.33	($105.10)	11.4%	2.9%	3.7%	0.1%	1.1%	$21.02
> $1000 and < $2500	3	1	$4,263.02	($102.00)	6.8%	4.3%	2.4%	0.1%	1.1%	$34.00
> $2500 and < $5000	2	0	$5,590.00	$0.00	4.5%	5.6%	0.0%	0.0%	0.0%	$0.00

Client Adjustment Analysis by Rule

Details of system and client adjustments made on invoices, broken down by adjustment codes. The report prompts for invoice approved date range. *The report may be used to determine if there are rules systematically overridden by users or if flags are consistently converted to adjustments. These scenarios would indicate a need to revise rule settings.*

Column Header	Data Description
Adjustment Rule Code	The adjustment rule code established based on client's billing agreement.
Adjustment Rule Desc	The description for the adjustment rule established based on client's billing agreement.
System Adjustment Amount	The total dollar amount of the adjustments that were made based on a system-stored adjustment rule (i.e. incorrect math on the law firm's invoice as billed) for the designated adjustment rule.
Client Adjustment Amount	The total dollar amount of the adjustments that were made by the client for the designated adjustment rule.
Deleted Adjustment Amount	The total dollar amount of the adjustments deleted by the client for the designated adjustment rule.
Deleted Adjustment Percent	The percentage of the adjustments deleted by the client for the designated adjustment rule.
Deleted Flagged Amount	The total dollar amount of the flags deleted by the client for the designated adjustment rule.
Deleted Flagged Percent	The percentage of the flagged amount deleted by the client for the designated adjustment rule.
Number of Current Adjustments	The count of adjustments made by system and clients based on the designated adjustment rule during the requested time period.
Current Adjustment Amount	The net total dollar amount of all adjustments made based on the designated adjustment rule, after the client user has made any adjustment deletions

Number of Deleted Flagged / Adjustments	The count of deleted flags and adjustments.
Current Flagged Amount	The total dollar amount of charges currently flagged on the invoice.

Adjustment Rule Code		Adjustment Rule Desc	System Adjustment Amount	Client Adjustment Amount	Deleted Adjustment Amount	Deleted Adjustment Percent	Deleted Flagged Amount	Deleted Flagged Percent	Number of Current Adjustment	Current Adjustment Amount	Number of Deleted Flagged / Adjustments	Current Flagged Amount
Z59	200101	Billed over approved rate with default rate option (59)	$0.00	($10.47)	$0.00	0.00%	($104.72)	0.40%	0	($10.47)	0	($26,157.13)
T37	300116	Billing Code	$0.00	($8,221.50)	$0.00	0.00%	($304.72)	0.67%	8	($8,221.50	2	($44,978.19)
Total			**$0.00**	**($8,231.97)**	**$0.00**	**0.00%**	**($409.44)**	**0.57%**	**8**	**($8,231.97)**	**2**	**($71,135.32)**

Client Savings Detail (by Office)

High level overview of the savings generated by each office. The report prompts for invoice approved date range. *Provides at a quick glance a view of summary invoice adjustment information grouped by office.*

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Invoice Approved Date (Month)	Date the invoice was sent by the law firm to the customer.
Number of Invoices	The count (number) of invoices submitted on a matter through CounselLink from the law firms.
Charge Amount less Discounts & Tax	The total dollar billed amount after discounts and taxes for all invoices received in the designated month.
Charge Current Adj Amt	The net dollar amount of all adjustments made for invoices in the designated invoice completion month, after any adjustment deletions have been made.
Savings Percentage	This represents the ratio of adjustments dollars to the total dollar amount sum of the invoices reviewed during the specified invoice completion month.

Customer Office Name	Invoice Approved Date (Month)	Number of Invoices	Charge Amt less Discounts & Tax	Charge Current Adjustment Amount	Savings Percentage
Asia Intellectual Property	Jul-2015	1	$4,292.75	$0.00	0.0%
	Apr-2016	1	$57,250.00	$0.00	0.0%
	May-2016	3	$17,400.00	$0.00	0.0%
Corporate	Jul-2015	1	$585.00	$0.00	0.0%
	Sep-2015	3	$445.00	$0.00	0.0%
	Nov-2015	5	$104,053.99	($16,307.37)	(15.7%)
	Apr-2016	4	$451,628.55	$0.00	0.0%
	May-2016	1	$33,000.00	$0.00	0.0%
Employment	Oct-2015	1	$1,000.00	$0.00	0.0%
	Nov-2015	1	$19,074.49	($1,853.00)	(9.7%)
	Mar-2016	1	$7,479.37	($1,022.90)	(13.7%)
	Apr-2016	5	$520,753.00	$0.00	0.0%
	May-2016	2	$88,000.00	$0.00	0.0%
Entertainment	Nov-2015	7	$44,098.10	($3,410.00)	(7.7%)
	Apr-2016	2	$36,893.55	$0.00	0.0%
Litigation	Jul-2015	1	$300.00	($12.50)	(4.2%)
	Sep-2015	3	$8,400.00	($100.00)	(1.2%)
	Oct-2015	1	$600.00	$0.00	0.0%
	Nov-2015	7	$99,568.25	($15,783.87)	(15.9%)
	Dec-2015	2	$3,350.00	($300.00)	(9.0%)
	Apr-2016	3	$285,998.77	($100.00)	(0.0%)

Collaborative Review Invoices

Lists all invoices currently assigned to a law firm in a collaborative review workflow step. Prompts for invoice sent date range.

Column Header	Data Description
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Associated Law Firm Office	Names of all law firm offices associated with this matter.
Invoice Workflow Task	Current invoice review status of an invoice.
Invoice Sent Date	Date the invoice was sent by the law firm to the customer.
Invoice Workflow Task Date	Date a workflow task was performed.
Invoice Owner Name	Customer individual responsible for the oversight of an invoice.
Invoice Billed Amount after Discounts and Taxes (LVL)	Amount charged for services after applying any discount or taxes (Invoice Level).
Charge Current Adj Amt (Expenses)	Total current adjustment amount on an expense charge.
Charge Current Adj Amt (Fees)	Total current adjustment amount on a fee charge.
Invoice Recommended Amt (LVL)	Amount recommended for payment to the law firm for services performed and expenses incurred by the law firm on the customer's behalf (Invoice Level).

Invoice ID (Law Firm)	Invoice ID (CounselLink)	Matter ID (Customer)	Matter Title	Associated Law Firm Office	Invoice Workflow Task	Invoice Sent Date	Invoice Workflow Task Date	Invoice Owner Name	Invoice Billed Amount after Discounts and Taxes (LVL)	Charge Current Adj Amt (Expenses)	Charge Current Adj Amt (Fees)	Invoice Recommended Amt (LVL)
87947	3336538	M19559961	PP Testing	CounselLink Production Test Private, Sacramento	Law Firm Review	03/24/201	7/18/201 1:50:31 PM	Private, Samatha	$288.47	$0.00	$0.00	$288.47

Deleted Invoices

Lists all deleted invoices deleted in a date range, including the billed amount. Page by Law Firm Office. Prompts for deleted invoice deleted date range.

Column Header	Data Description
Deleted Invoice Customer Office Name	Customer office or practice group name at the lowest (office) level.
Deleted Invoice ID (CounselLink)	Unique identification number assigned to an invoice by LexisNexis.
Deleted Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Deleted Invoice Last Sent Date	Date the invoice was sent by the law firm to the customer.
Deleted Invoice Deleted Date	Date an invoice was deleted.
Deleted Invoice Matter ID (Customer)	Number applied to a matter by a customer for identification purposes.
Deleted Invoice Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Deleted Invoice Billed Amt (Expenses) (LVL)	Amount charged for expenses on an invoice prior to any discounts and/or taxes (Invoice Level).
Deleted Invoice Billed Amt (Fees) (LVL)	Amount charged for services performed on an invoice prior to any discounts and/or taxes (Invoice Level).
Deleted Invoice Billed Amt (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).

Deleted Invoice Customer Office Name	Deleted Invoice ID (CounselLink)	Deleted Invoice ID (Law Firm)	Deleted Invoice Last Sent Date	Deleted Invoice Deleted Date	Deleted Invoice Matter ID (Customer)
Test Office	1248075	2perfgff001109	12/20/2007 9:48:48 PM	6/8/2014 1:53:13 AM	M18522075
	3336562	3336562		7/22/2014 1:37:54 AM	M19560036
	3336564	3336564		7/22/2014 1:37:55 AM	M19560036
	6247085	6247085		8/5/2014 3:57:44 PM	2012-TEST-27
	7595094	7595094		6/8/2014 2:43:30 AM	M21111032
	7829286	Inv1_101108_L98B		6/8/2014 2:23:45 AM	M21243490

Deleted Invoice Matter ID (CounselLink)		Deleted Invoice Billed Amt (Expenses) (LVL)	Deleted Invoice Billed Amt (Fees) (LVL)	Deleted Invoice Billed Amt (LVL)
QALB # 1	18522075	$60.00	$50.00	$110.00
Matter For CIE 1	19560036	$0.12	$0.00	$0.12
Matter For CIE 1	19560036	$0.00	$225.00	$225.00
Test matter 12 mar 2012	19986367	$0.00	$14.63	$14.63
AT Test RFQ 2	21111032	$48.43	$899.92	$948.35
Matter Invoice Test	21243490	$575.00	$1,800.00	$2,375.00

***Note**: The second image is in continuation with the first image and represents a single deleted invoices report.*

Discount Report

List all approved invoices and discounts associated with these invoices. Prompts for invoice approval date range.

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Associated Law Firm Office	Names of law firm offices associated with this matter.
Invoice Billed Amt (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).
Invoice Prompt Pay Discount Amount (LVL)	Total amount discounted on an invoice by the law firm when payment is made by the customer within a specified time (Invoice Level).
Invoice Law Firm Discounts (LVL)	Amount deducted from an invoice by the submitting law firm (Invoice Level).
Charge Current Adj Amt	Total current adjustment amount on a charge.
Invoice Approved to Date Amt	The amount of fee and expenses on an invoice that has been approved to date.
Savings	Total current adjustment amount on an expense charge + Amount deducted from an invoice by the submitting law firm (Invoice Level) + Total amount discounted on an invoice by the law firm when payment is made by the customer within a specified time (Invoice Level).
Savings %	Savings divided by the Billed amount after accounting for law firm adjustments, law firm discounts and taxes.

Customer Office Name	Associated Law Firm Office	Invoice Billed Amt (LVL)	Invoice Prompt Pay Discount Amount (LVL)	Invoice Law Firm Discounts (LVL)	Charge Current Adj Amt	Invoice Approved to Date Amt	Savings	Savings %
Test Office	CounselLink Production Test Private, Sacramento	$68,809.25	($1,677.55)	$0.00	($8,231.97)	$56,666.78	$9,909.52	14.40%

Invoice Aging

All invoices which are not approved. It shows the difference between the date the invoice reached the client and today's date as days open. *Provides a view of unapproved invoices and the aging status to highlight the state of the invoice queue.*

Column Header	Data Description
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Invoice Sent Date	Date the invoice was sent by the law firm to the customer.
Invoice Owner Name	Customer individual responsible for the oversight of an invoice.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Legal Bill Status	Invoice workflow status (approved, in review, etc.)
Invoice Billed Amount after Discounts & Taxes (LVL)	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Under 7 Days	Number of invoices where the difference between the date the invoice reached the client and today’s date is less than 7 days.
8 to 14 Days	Number of invoices where the difference between the date the invoice reached the client and today’s date is between 8 and 14 days inclusive.
15 to 21 Days	Number of invoices where the difference between the date the invoice reached the client and today’s date is between 15 and 21 days inclusive.
22 to 28 Days	Number of invoices where the difference between the date the invoice reached the client and today’s date is between 22 and 28 days inclusive.

Over 28 Days	Number of invoices where the difference between the date the invoice reached the client and today's date is over 28 days.
Invoice Recommended Amt	Amount after accounting for law firm, client adjustments, law firm discounts and taxes.

Invoice ID (CounselLink)	Customer Office Name	Matter ID (Customer)	Matter Title	Invoice Sent Date	Invoice Owner Name	Invoice ID (Law Firm)	Legal Bill Status	Invoice Billed Amount after Discounts & Taxes (LVL)	Under 7 Days	8 to 14 Days	15 to 21 Days	22 to 28 Days	Over 28 Days	Invoice Recommended Amount (LVL)
59330194	Litigation	M19929184	Transport New Routes CA	5/27/2015	Schmidt, Matthew	123	Invoice Review Step 1	$677.82	1					$153.00
59330657	Litigation	M19929184	Transport New Routes CA	5/27/2015	Schmidt, Matthew	123	Invoice Review Step 1	$345.92	1					$137.70
59330696	Litigation	M19929184	Transport New Routes CA	5/27/2015	Schmidt, Matthew	123	Invoice Review Step 1	$318.00	1					$61.20
59310437	Litigation	M18657299	TM Blaser v. Blaser TM	5/22/2015	Blaser, Cristina	45997	Invoice Review Step 1	$5,976.99		1				$0.00
59301436	Litigation	M19275205	International Law Firm Training	5/20/2015	Higgins, J	59301436	Invoice Review Step 1	$3,105.36		1				$1,552.68

Invoice Allocation

Lists all approved invoices and their associated allocation information. Prompts for invoice approved date.

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice Allocation Contact Name	The name of the cost center or external party responsible for costs included on an invoice.
Invoice Allocation Amt (Fees)	Amount of fees that have been allocated to the internal cost center or external party responsible for the costs.
Invoice Allocation % (Fees)	Percentage of fees on an invoice that have been allocated to the internal cost center or external party responsible for the costs.
Invoice Allocation Amt (Expenses)	Amount of expense costs on an invoice that has been allocated to the internal cost center or external party responsible for the costs.

Invoice Allocation % (Expenses)	Percentage of expense costs on an invoice that has been allocated to the internal cost center or external party responsible for the costs.
Invoice Allocation Amt	Sum of fees and expense costs on an invoice that have been allocated to the internal cost center or external party responsible for the costs or fees.

Customer Office Name	Matter ID (CounselLink)	Matter ID (Customer)	Invoice ID (CounselLink)	Invoice ID (Law Firm)	Invoice Allocation Contact Name
Test Office	18015667	M18015667	8005573	8005573	NONE
Test Office	18347616	M18347616	8001294	8001294	Allocation Contact 1
Test Office	18347616	M18347616	8001294	8001294	test 1
Test Office	18347616	M18347616	8001294	8001294	test 2
Test Office	18347616	M18347616	8001294	8001294	test 3
Test Office	21292462	M21292462	8005359	8005359	HJ 5.9.4 QA contact 1
Test Office	21292462	M21292462	8005359	8005359	HJ 5.9.4 QA contact 2
Test Office	21292470	M21292470	8005376	8005376	QA grop office
Test Office	21292470	M21292470	8005434	8005434	QA grop office

Invoice Allocation Amt (Fees)	Invoice Allocation % (Fees)	Invoice Allocation Amt (Expenses)	Invoice Allocation % (Expenses)	Invoice Allocation Amt
$0.00	100.000%	$194.00	100.000%	$194.00
$0.00	0.000%	$0.00	0.000%	$0.00
$32.40	90.000%	$0.00	85.000%	$32.40
$0.00	10.000%	$0.00	15.000%	$0.00
$0.00	0.000%	$0.00	0.000%	$0.00
$2,517.45	50.000%	$250.00	50.000%	$2,767.45
$2,517.45	50.000%	$250.00	50.000%	$2,767.45
$3.20	100.000%	$0.00	100.000%	$3.20
$1,620.16	100.000%	$0.00	100.000%	$1,620.16

***Note**: The second image is in continuation with the first image and represents a single invoice allocation report.*

Invoice by Submission Method

Lists the manner used to submit invoices to CounselLink. This report tracks the value added by non-electronic invoices submission methods (E-mail and Scanned). Prompts for Invoice Sent Date.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Invoice Submitted File Type	Method of invoice transmittal from the law firm to LexisNexis.
Number of Invoices	The number of invoices submitted to CounselLink by the law firm per method.
Invoice Billed Amount (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).

Law Firm Office	Invoice Submitted File Type	Number of Invoices	Invoice Billed Amt (LVL)
CounselLink Production Test Private, Sacramento	ONLINE	108	$21,424,242,802,960.20
Test, Test	ONLINE	1	$2,576.49
Total		**109**	**$21,424,242,805,536.70**

Override Adjustment Details

Details on adjustments and overrides. The report can be drilled down from Invoice Sent Month, to the CounselLink Bill # to the Charge Number showing the adjustment rule code and description. The report filter prompts for invoice sent date range. *A good report to track adjustment information by law firm including system adjustment, reviewer adjustments and adjustment overrides. This report can help identify problems with law firm billing.*

Column Header	Data Description
Invoice Sent Month	The calendar month and year of the invoices.
Law Firm Office	The name of the law firm office that sent the invoices.
Charge Billed Amt	Amount charged for services performed or expenses at a line item level prior to the application of any discounts and/or taxes (includes law firm entered charge level adjustments).
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Charge Adj Amt (System LVL)	Amount adjusted by LexisNexis on an invoice charge (i.e. incorrect math on the law firm's invoice as billed).
Charge Adj Amt (Customer LVL)	Amount adjusted by the customer on an invoice charge (charge level).
Charge Deleted Adj Amount	Amount deleted by the customer after LexisNexis makes an adjustment.
Flagged to Adjusted Amt	The total dollar amount of all currently existing adjustments after deletions.
Charge Current Adj Amt	Total current adjustment amount on a charge.
Charge Recommended Amt	Amount after accounting for law firm, client adjustments, law firm discounts and taxes.

Invoice Sent Month	Law Firm Office	Charge Billed Amt	Charge Amt less Discounts & Tax	Charge Adj Amt (System) (LVL)	Charge Adj Amt (Customer) (LVL)	Charge Deleted Adj Amt	Flagged to Adjusted Amount	Charge Current Adj Amt	Charge Recommended Amt
Jun-2014	CounselLink Production Test Private, Sacramento	$21,424,242,701,161.70	$21,424,242,725,596.70	$0.00	($39.47)	$0.00	($54.00)	($93.47)	$21,424,242,725,503.20
Jul-2014	CounselLink Production Test Private, Sacramento	$66,333.56	$68,228.52	$0.00	($8,599.95)	$0.00	($700.00)	($9,299.95)	$58,928.56
Aug-2014	CounselLink Production Test Private, Sacramento	$29,064.44	$30,967.55	$0.00	$0.00	$0.00	$0.00	$0.00	$30,967.55
Total		**$21,424,242,796,559.70**	**$21,424,242,824,792.80**	**$0.00**	**($8,639.43)**	**$0.00**	**($754.00)**	**($9,393.43)**	**$21,424,242,815,399.30**

Pending Invoice

All pending invoices in the law firm's created queue. You can see all the invoice information, billed amount and the reason for rejection. If the rule is blank that means it was returned by the client, see the event comments to view the notes. *This report provides visibility to invoices pending in the law firm 'Created' queue. Once corrected and activated, these invoices will transfer to the client invoice review queue for approval and payment. This report allows the client to prepare for review/payment of these invoices as well as manage law firm relationships.*

Column Header	Data Description
Law Firm Office Name	The name of the law firm office.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (Law Firm)	Number applied to a matter by an associated law firm for identification purposes.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Invoice Contact	Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice Date	Date an invoice was generated by a law firm (Law firm controlled value).
Invoice Status Date	Date the invoice status was applied.
Invoice Event Description	System generated invoice event description.
Invoice Event Entered By	The CounselLink user name who triggered the event.
Invoice Event Comment	Event comments entered by the user.
Adjustment Comment	Adjustment comments entered by the user.
Adjustment Rule Code	The adjustment rule code established based on client's billing agreement.
Adjustment Rule Code Desc	The description for the adjustment rule established based on client's billing agreement.

Column Header	Data Description
Invoice Currency	Type of currency in which an invoice was submitted for payment.
Invoice Billed Amt (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).

Law Firm Office Name	Matter ID (CounselLink)	Matter ID (Customer)	Matter ID (Law Firm)	Customer Office Name	Matter Title	Matter Invoice Contact	Invoice ID (Law Firm)	Invoice ID (CounselLink)
123 Law Firm	20182869	EM-32		S.A. Intellectual Property	Employment Dummy 28	Plume, John	4898459	4898459
123 Law Firm	20182869	EM-32		S.A. Intellectual Property	Employment Dummy 28	Plume, John	4898459	4898459
123 Law Firm	20182869	EM-32		S.A. Intellectual Property	Employment Dummy 28	Plume, John	4898459	4898459

Invoice Date	Invoice Status Date	Invoice Event Description	Invoice Event Entered By	Invoice Event Comment	Adjustment Comment	Adjustment Rule Code	Adjustment Rule Desc	Invoice Currency	Invoice Billed Amt (LVL)
3/11/2012	9/20/2012	Invoice created on	Plume, John	Created by client	Charge is dated more than 90 days from the invoice submission date.	S16/S17	Charge Date	US Dollar	$1,710.00
3/11/2012	9/20/2012	Invoice rules completed	System	Rules completed for 4898459	Charge is dated more than 90 days from the invoice submission date.	S16/S17	Charge Date	US Dollar	$1,710.00
3/11/2012	9/20/2012	Invoice rules started	System	Rules started for 4898459	Charge is dated more than 90 days from the invoice submission date.	S16/S17	Charge Date	US Dollar	$1,710.00

Note*: The second image is in continuation with the first image and represents a single pending invoice report.*

Rejected Invoice Report

This report provides details regarding rejected invoices. The report includes invoice information, the reason for rejection, and relevant rejection comments.

Column Header	Data Description
Law Firm Office Name	The name of the law firm office.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (Law Firm)	Number applied to a matter by an associated law firm for identification purposes.
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Invoice Contact	Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice Date	Date an invoice was generated by a law firm (Law firm controlled value).
Invoice Status Date	Date the invoice status was applied.
Invoice Event Description	System generated invoice event description.
Invoice Event Entered By	The CounselLink user name who triggered the event.
Invoice Event Comment	Event comments entered by the user.
Adjustment Comment	Adjustment comments entered by the user.
Adjustment Rule Code	The adjustment rule code established based on client's billing agreement.
Adjustment Rule Desc	The description for the adjustment rule established based on client's billing agreement.
Submission Method	Distinguishes between electronic invoices (ONLINE) versus non-electronic invoices (EMAIL, SCAN).
Invoice Currency	Type of currency in which an invoice was submitted for payment.

Column Header	Data Description
First Charge Date	Date of the first charge chronologically on an invoice.
Last Chart Date	Date of the last charge chronologically on an invoice.
Invoice Billed Amt (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).

Law Firm Office Name	Matter ID (CounselLink)	Matter ID (Customer)	Matter ID (Law Firm)	Customer Office Name	Matter Title	Matter Invoice Contact	Invoice ID (Law Firm)	Invoice ID (CounselLink)	Invoice Date	Invoice Status Date	Invoice Event Description
Action Law Firm, New York	18657299	M18657299		Litigation	TM Blaser v. Blaser TM	Plume, John	7655830	7655830	####	#####	Invoice note to lawfirm
Action Law Firm, New York	18657299	M18657299		Litigation	TM Blaser v. Blaser TM	Plume, John	7655830	7655830	####	#####	Invoice rejected
Action Law Firm, New York	18657299	M18657299		Litigation	TM Blaser v. Blaser TM	Plume, John	7656134	7656134	####	#####	Invoice note to lawfirm

Invoice Event Description	Invoice Event Entered By	Invoice Event Comment	Adjustment Comment	Adjustment Rule Code	Adjustment Rule Desc	Submission Method	Invoice Currency	First Charge Date	Last Charge Date	Invoice Billed Amount
Invoice note to lawfirm	Blaser, Cristina	Resubmit to rerun the rules	Billed rate is above the approved timekeeper rate.	L21	Unapproved Rate	ONLINE	US Dollar	03/15/2014	3/17/2014	$950.00
Invoice rejected	Blaser, Cristina		Billed rate is above the approved timekeeper rate.	L21	Unapproved Rate	ONLINE	US Dollar	03/15/2014	3/17/2014	$950.00
Invoice note to lawfirm	Plume, John	Rates updated. Resubmit to re run the rules	Billed rate is above the approved timekeeper rate.	L21	Unapproved Rate	ONLINE	US Dollar	03/29/2014	3/30/2014	$1,400.00

Note: *The second image is in continuation with the first image and represents a single rejected invoice.*

Summary of Approved Invoices

Information pertaining to approved invoices by office. Information includes the number of invoices, adjustments, discounts, taxes, savings and other relevant values. The report filter prompts for invoice approved date range. *Provides a high-level view of approved invioce information grouped by office.*

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level for which the data is provided.
Number of Invoices	The count (number) of invoices approved by the client office.
Number of Charges	The total count of charges across all approved invoices.
Charge Billed Amt	The total dollar amount for all invoices submitted by the law firms to this client office before any law firm discounts and/or taxes have been applied.
Charge Law Firm Discounts and Premiums	The total dollar amount of all law firm invoice adjustments, such as law firm discounts in the submitted invoices.
Charge Taxes	The total dollar amount of all law firm invoice taxes.
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
System Adjustment Amount	The total dollar amount of the adjustments made by system (i.e. incorrect math on the law firm's invoice as billed) to invoices.
Client Adjustment Amount	The total dollar amount of the adjustments made by client.
Deleted Adjustment Amount	The total dollar amount of the adjustments made by the system or client, but deleted by client.
Charge Current Adj Amt	The total dollar amount of all currently existing adjustments after deletions.

Customer Office Name	Number of Invoices	Number of Charges	Charge Billed Amt	Charge Law Firm Discounts and Premiums	Charge Taxes	Charge Amt less Discounts & Tax	System Adjustment Amount	Client Adjustment Amount	Deleted Adjustment Amount	Charge Current Adj Amt
Test Office	34	78	$68,809.25	$0.00	$1,751.62	$70,560.87	$0.00	($8,177.97)	$0.00	($8,231.97)
Total	**34**	**78**	**$68,809.25**	**$0.00**	**$1,751.62**	**$70,560.87**	**$0.00**	**($8,177.97)**	**$0.00**	**($8,231.97)**

Top X Invoices Awaiting Approval

Lists X oldest invoices current in the CounselLink workflow. This report tracks and highlights stagnant invoices. Prompts on the number of records to return.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Invoice ID (Law Firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice Owner Name	Customer individual responsible for the oversight of an invoice.
Days Since Received	Number of days since the invoice was received by the client in CounselLink.
Invoice Recommended Amt (LVL)	Amount recommended for payment to the law firm for services performed and expenses incurred by the law firm on the customer's behalf (Invoice Level).

Law Firm Office	Invoice ID (Law Firm)	Invoice ID (CounselLink)	Invoice Owner Name	Days Since Received	Invoice Recommended Amt (LVL)
Test Law Firm, Sacramento	515370	515370	NA	3,662	$110.00
Test Law Firm, Sacramento	523143	523143	NA	3,606	$100.00
Test LF Office #2	03	554721	NA	3,461	$987.00
Test LF Office #2	554718	554718	NA	3,461	$2.00
CounselLink Production Test Private, Sacramento	18046409LB004	599166	Individual, Test 2	3,196	$1,520.20

Unapproved Invoice Amounts by Invoice Owner

List of total dollar amounts for unapproved invoices by current invoice owner. This report will highlight bottlenecks in the invoice workflow.

Column Header	Data Description
Invoice Owner	Customer individual responsible for the oversight of an invoice.
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Charge Recommended Amt	Amount after accounting for law firm, client adjustments, law firm discounts and taxes.

Invoice Owner	Charge Amt less Discounts & Tax	Charge Recommended Amt
All Roles, EURO	$9,434.41	$9,434.41
Anderson, Andrea	$6,842.00	$6,392.00
Anoop, Singh	$302.69	$302.69
Benton, Mark A	$2,651.03	$616.70
Boyko, Larisa	$911,742.40	$368,073.05
Boytano, Brian	$16,832.27	$16,732.27
Cheung, George	$133,808.93	$110,372.43
Client Malhotra, Tanu	$778.65	$773.65
Client, Shalini	$13,076.78	$7,967.78
Client, Test 1	$500.00	$500.00
Earnshaw, Ernest	$5,640.70	$5,640.70
Hegland, Craig	$9,123.03	$5,173.03

Unapproved Invoices by Owner (Pre Approval Invoices by Owner)

Overview of unapproved invoices. It shows basic invoice and matter information, who the current legal bill owner is and how many days it's been assigned to them as well as the total billed and recommended amount. *Helps identify when invoices have been with a reviewer for an unreasonable amount of time.*

Column Header	Data Description
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Customer Office Name	Customer office or practice group name at the lowest (office) level for which the data is provided.
Legal Bill Owner	This is the invoice/billing contact (paralegal or legal assistant).
Days Since Receipt of Invoice	The total number of days elapsed since the invoice was received from the law firm.
Days Assigned to Current Owner	The total number of days that the invoice has been available for review by the client employee based on the current status in the workflow.
Charge Billed Amt	The amount billed by the law firm before discounts and taxes.
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Charge Recommended Amt	This is the amount of the invoice after all adjustments have been made, which is the amount that CounselLink recommends the client pay for the invoice.

Matter Title	Invoice ID (CounselLink)	Customer Office Name	Legal Bill Owner	Days Since Receipt of Invoice	Days Assigned to Current Owner	Charge Billed Amt	Charge Amt less Discounts & Tax	Charge Recommended Amt
QA test	599166	Test Office		3,196	3,196	$5,037.00	$5,175.20	$1,520.20
	599168	Test Office		3,196	3,196	$5,037.00	$5,175.20	$1,520.20
QA test 121305	600244	Test Office	Boyko, Larisa	3,191	3,191	$10.00	$10.50	$10.50
QALB Test 01122006-2	605957	Test Office		3,161	3,161	$2,760.00	$2,911.22	$2,911.22
ATest_01	611446	Test Office		3,140	3,140	$10,832.00	$10,844.43	$260.93
	611449	Test Office		3,140	3,140	$6,406.80	$6,450.88	$1,513.28
QAMP2206_1	611441	Test Office	Hegland, Craig	3,140	3,140	$114.27	$119.98	$119.98
QALB 020206-3	611451	Test Office	Hegland, Craig	3,140	3,133	$2,500.00	$2,515.00	$215.00
	611452	Test Office	Hegland, Craig	3,140	3,133	$150.00	$161.25	$161.25
QALB 020206-3	611456	Test Office	Hegland, Craig	3,140	3,133	$1,000.00	$1,015.00	$215.00

Law Firm Reports

Law firm reports are listed in the following sections along with an explanation of their functionality.

Active Law Firm Directory

Contact information for your law firms including mailing and email addresses and fax and phone numbers. This report can be used as an email distribution list or can be used as a starting point for advanced reports on law firms. *Provides a mailing list to send general mails to firms. For example, rate freezes or new billing policies.*

Column Header	Data Description
Law Firm Name	Name associated with a law firm; used for reports that are associated with matter, invoice or charge information.
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Law Firm Office Address 1	First address line of the law firm office.
Law Firm Office Address 2	Second address line of the law firm office.
Law Firm Office City	City of the law firm office.
Law Firm Office County	County of the law firm office.
Law Firm Office State	State/Province of the law firm office.
Law Firm Office Zip Code	Zip or Postal code of the law firm office.
Law Firm Office Default Email	Default email address of the law firm office.
Law Firm Office Fax	Fax number of the law firm office.
Law Firm Office Phone	Phone number of the law firm office.
Recent Invoice Sent Date	Most Recent Invoice Sent Date on a LFO
Number of Active Matters	Total count of Active Matters on the LFO
Recent Matter Assignment Date	Most Recent Matter Assignment Date on a LFO
Number of Invoices	Total count of Invoices on the LFO

Law Firm Name..	Law Firm Office	Law Firm Office Address 1	Law Firm Office Address 2	Law Firm Office City	Law Firm Office County	Law Firm Office State	Law Firm Office Zip Code	Law Firm Office Default Email	Law Firm Office Fax	Law Firm Office Phone	# Active Matters	Number of Invoices	Invoice Recent Sent Date	Recent Matter Assign Date
Becket Law Associates	Becket Law Associates - Atlanta	103 Peach Street Avenue	Office 14Rm 6.	Atlanta	Fulton	Georgia	30303		770-999-9998	404-999-9999	14	9	11/16/2023	10/25/2023
	Becket Law Associates - Chicago	1234 Michigan Avenue	Suite 1493	Chicago	Cook	Illinois	60610		312-999-9998	312-999-9999	18	29	07/15/2022	05/23/2023
	Becket Lydell Smith & Shulman - New York	One Liberty Plaza	55th Floor	New York	New York	New York	10004		212-999-9998	212-999-9999				
Palin, Wilson & Jones	Palin, Wilson & Jones - Newark	784 Broad Street	Suite 2342	Newark	Essex	New Jersey	07102		973-999-9998	973-999-9999	13	39	05/25/2023	05/16/2022
Test Law Firm	Test Law Firm, Sacramento	555 Main St		Sacramento	Sacramento	California	95834	devnull@examen.com		999-9999 x-				

Active Law Firm User Email List

Email addresses for your law firm users including name, level, role, and last login date. This report prompts on timekeeper role, defaulting to Admin users. *A great report to use when creating distribution lists for sending emails to law firms users.*

Column Header	Data Description
Law Firm Name	Name associated with a law firm; used for reports that are associated with matter, invoice or charge information.
Timekeeper Name (Last, First)	Name of a law firm office user, last name first; used for reports that are associated with Invoice or charge information.
Timekeeper Level	Billing level of a timekeeper as provided on an invoice charge.
Timekeeper Email	Email address of a law firm user.
Timekeeper Last Login Date	Date and time the timekeeper last logged in to CounselLink.
Timekeeper Role	Role of a timekeeper from the timekeeper profile.

Law Firm Name..	Timekeeper Name (Last, First)	Timekeeper Level	Timekeeper Email	Timekeeper Last Login Date	Timekeeper Role
CounselLink Test Law Firm	Test, Admin	Clerk	devnull@examen.com	11/2/2009 3:44:23 PM	Admin
	Test, elaine	Associate	elaine.brooks@lexisnexis.com	10/24/2007 5:21:38 PM	Practicing Attorney
	test, test	Partner	csp@devnull.com	12/8/2010 12:06:40 PM	Practicing Attorney Admin
	Timothy, *QA*	Partner	timluong@gmail.com	2/22/2008 4:02:21 PM	Practicing Attorney Admin
1234 Test	Bogdan, Corina	Partner	corina.bogdan@gmail.com	6/28/2009 6:36:05 PM	Practicing Attorney Admin
	email, test	Clerk	000@devnull.com		Admin
	p, chris	Partner	christl1000s@hotmail.com	6/21/2011 10:56:38 AM	Practicing Attorney Admin

Billing Guideline Acknowledgement

Lists status of billing guideline acknowledgement for law firms including acceptance date and who accepted.

Column Header	Data Description
Law Firm Name	Name associated with a law firm.
Billing Guidelines Uploaded Date	Date which the Billing Guidelines were uploaded.
Billing Guidelines Start Date	Date which the Billing Guidelines become effective.
Billing Guidelines Acknowledgement Status	Shows the status of the Billing Guideline request for the law firm e.g. Billing Guidelines Pending or Billing Guidelines Accepted.
Billing Guidelines Last Acknowledge Date	Date the law firm last accepted the Billing Guidelines.
Billing Guidelines Accepted User	Logged in CounselLink Law Firm user who accepted the billing guidelines.
Billing Guidelines Accepted Date	Date the law firm accepted the Billing Guidelines.
Billing Guidelines Accepted User Email Address	Email address of the logged in CounselLink Law Firm user who accepted the billing guidelines.
Billing Guidelines Acceptance (By, Company, Title)	User, Company and title for the person who entered information when accepting the Billing Guidelines.
Billing Guidelines Due Date	Due date by which the law firm must accept the Billing Guidelines.

Law Firm Name..	Billing Guidelines Uploaded Date	Billing Guidelines Start Date	Billing Guidelines Acknowledgement Status	Billing Guidelines Last Acknowledge Date	Billing Guidelines Accepted User	Billing Guidelines Accepted Date	Billing Guidelines Accepted User Email Address	Billing Guidelines Acceptance (By, Company, Title)			Billing Guidelines Due Date
QA CounselLink Test Law Firm	10/04/2012	06/09/2014	Billing Guidelines Pending	10/04/2012	Test, Admin	10/4/2012 4:14:49 PM	devnull@examen.com	Test	Admin	Admin	07/09/2014
1234 Test	03/27/2013	06/09/2014	Billing Guidelines Pending	03/25/2014	Bogdan, Corina	3/25/2014 1:16:04 PM	corina.bogdan@gmail.com	Test	support	landon	07/09/2014
3.1 release testing firm (no email)		06/09/2014	Billing Guidelines Pending								07/09/2014
Aardema Whitelaw, PLLC		06/09/2014	Billing Guidelines Pending								07/09/2014

Law Firm Compliance (Law Firm Comparison Report)

Law firm level information of billed amount, adjustments, flags, deleted adjustments. The report filter prompts for invoice charge date range. *Provides information to monitor law firm compliance with billing guidelines.*

Column Header	Data Description
Law Firm Office	The name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Charge Billed Amount	The total dollar amount sum for all invoices provided by each law firm office, based on the invoice amount as billed by the law firm.
Charge Amt less Discounts & Tax	Amount charged for services performed or expenses incurred at a line item level after the application of any discounts and/or taxes.
Charge Current Adj Amount	The total dollar amount of the adjustments that were made based on system-stored adjustment rules (i.e. incorrect math on the law firm's invoice as billed) for invoices billed by the law firm.
Charge Flagged Amt	The sum of line-item charge amounts that have been flagged by the system for further review for the client based on client-specific rules.
Deleted Adjustments (Adjustment Level)	The total dollar amount of the adjustments made by the system that were overridden by the client user for the invoices billed by the law firm.
Charge Recommended Amt	The total dollar amount of the invoices for the designated time period, based on what was recommended by the product that the client pay. In other words, this would be the sum of the total "net" amount of the invoices after the product made adjustments to the billed amounts. The adjustments would be based on the client's rules.
Adjusted as Percent of Billed	This represents the ratio of current dollar adjustments to the total dollar amount sum of the invoices billed by the law firm.
Flagged as Percent of Billed	This represents the ratio of "Current Flagged" to the total dollar amount sum of the invoices billed by the law firm.

Law Firm Office	Charge Billed Amt	Charge Amt less Discounts & Tax	Charge Current Adj Amt	Charge Flagged Amt	Deleted Adjustments (Adjustment Level)	Charge Recommended Amt	Adjusted as Percent of Billed	Flagged as Percent of Billed
CounselLink Production Test Private, Sacramento	$95,398.00	$99,196.07	($9,299.95)	($54,196.12)	$0.00	$89,896.11	9.38%	54.64%

Law Firm Diversity Report

Column Header	Data Description
Timekeeper Name	
Timekeeper Gender	
Timekeeper Race	
Timekeeper Disabled Veteran	
Timekeeper Practice Start Date	
Timekeeper Graduation Date	
Timekeeper Year of Service	

Litigation Analysis by Law Firm

Overview of spending based on Law Firm and charge code. Examples of the categories are attend deposition, response to motion, trial prep for fees and copies and printing for disbursements. The report filter prompts for invoice charge date range. *Identifies SmartReview categories for invoice charges to track what is being billed by category. Pages by law firm office.*

Column Header	Data Description
Charge SmartReview Category	This is the specific system-based billing rule applied to the invoices received for the client from the law firms across all matters.
Total Matters per Category	This is the count of matters for which the system-based billing rules found that an adjustment should be made on a specific charge or expense for invoices received during the designated time period.
Total Hours per Category	This is the count of hours that were billed by the law firm for the designated charge category.
Average Hours per Category Matter	This is the average number of hours that were billed by the law firm for the designated charge category.
Corporate Average Hours per Category Matters	This is the average number of corporate hours that were billed by the law firm for the designated charge category.
Variation Hours per Category Matter	This is the variation of number of hours that were billed by the law firm for the designated charge category.

Charge SmartReview Category	Total Matters per Category	Total Hours per Category	Average Hours per Category Matter	Corporate Average Hours per Category Matters	Variation Hours per Category Matter
file opening	2	4.00	2.00	2	0.00
photocopying	22	827.00	37.59	38	15.59
Total	**24**	**831.00**	**34.63**	**35**	**10.63**

Summary of Timekeeper Hours Worked per Day

Hours worked by active timekeepers for each law firm, with total hours worked, and columns with the number of days with over 4, 6, 8, 12, 14, 16, 18, 20, or 24 hours worked and weekend hours billed. The report filter prompts for a charge date range. *Allows to see if timekeepers are billing for an unreasonable number of hours.*

Column Header	Data Description
Law Firm Office	Name of the law firm office.
Timekeeper Name	Name of the timekeeper from the law firm office.
Total Billed	Total dollar amount billed by the law firm timekeeper.
Timekeeper Hours	Total number of hours billed by the law firm timekeeper.
Days > 4hrs	The number (count) of days the timekeeper billed for more than 4 hours a day.
Days > 6hrs	The number (count) of days the timekeeper billed for more than 6 hours a day.
Days > 8hrs	The number (count) of days the timekeeper billed for more than 8 hours a day.
Days > 12hrs	The number (count) of days the timekeeper billed for more than 12 hours a day.
Days > 14hrs	The number (count) of days the timekeeper billed for more than 14 hours a day.
Days > 16hrs	The number (count) of days the timekeeper billed for more than 16 hours a day.
Days > 20hrs	The number (count) of days the timekeeper billed for more than 20 hours a day.
Days > 24hrs	The number (count) of days the timekeeper billed for more than 24 hours a day.

Law Firm Office	Timekeeper Name	Total Billed	Timekeeper Hours	Days > 4hrs	Days > 6hrs	Days > 8hrs	Days > 12hrs	Days > 14hrs	Days > 16hrs	Days > 20hrs	Days > 24hrs
CounselLink Production Test Private, Sacramento	Pate, Angie	$1,129.21	72	1	1	1	1	1	1	1	1
	Park, Maelynn	$1.05	1	0	0	0	0	0	0	0	0
	Boyko, Larisa	$358.88	3	0	0	0	0	0	0	0	0
	Private, Tim	$301.78	2	0	0	0	0	0	0	0	0
	Lawfirm, Dan	$1,297.10	150	1	1	1	1	1	1	1	1
	Private, Samatha	$7,449.98	62	2	1	1	1	1	1	1	1

Timekeeper Hours > X Per Day

This report lists timekeepers who have billed X or more hours in a given day with related invoice and matter information. The report prompts for Charge Date range and X, the number of hours billed in a day.

Column Header	Data Description
Law Firm Name	Name associated with a law firm; used for reports that are associated with matter, invoice or charge information.
Charge Timekeeper Level	Billing level applied to a charge by a timekeeper.
Charge Timekeeper Name	Name of the timekeeper billing for services performed on a charge.
Charge Date	Date of service performed by the law firm at a line item level.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Invoice ID (CounselLink)	The invoice number that CounselLink has assigned to the invoice received from a law firm.
Invoice ID (Law firm)	Number or other identifier applied to an invoice by the submitting law firm for identification purposes.
Charge Units (Fees)	Number of hours or units charged for services performed by the law firm.

Law Firm Name..	Charge Timekeeper Level	Charge Timekeeper Name	Charge Date	Matter ID (CounselLink)	Matter ID (Customer)	Invoice ID (CounselLink)	Invoice ID (Law Firm)	Charge Units (Fees)
CounselLink Production Test Private	Associate	Pate, Angie	7/22/2014	21294292	M21294292	8010239	8010239	60.0
CounselLink Production Test Private	Associate	Pate, Angie	7/22/2014	21294344	M21294344	8010133	8010133	5.0
CounselLink Production Test Private	Associate	Pate, Angie	7/22/2014	**Total**				**65.0**

Timekeeper Roles

All active law firm office individuals and their role(s) in CounselLink. Timekeepers are displayed by law firm office, including email contact information. *This can be used as starting point to create a mailing list for certain types of timekeepers.*

Column Header	**Data Description**
Timekeeper Name	The name of the timekeeper within the law firm.
Timekeeper Email	The email address of the timekeeper within the law firm.
Timekeeper Roles Type	The role that the law firm timekeeper holds within CounselLink.
Timekeeper Status	The status of the law firm timekeeper within CounselLink.

Timekeeper Name		Timekeeper Email	Timekeeper Role	Timekeeper Status
Best, Ted	906129	devnull-906129@lexisnexis.com	Anchor	Active
			Practicing Attorney	Active
			Budget Contact	Active
			Document Administrator	Active
			Admin	Active
			Accts Payable Contact	Active
			Accts Receivable Contact	Active
			Contact Office Individual	Active
			Partner	Active
			Matter Change Approval Contact	Active
Jones, Paul	906161	teb@examen.com	Anchor	Active
			Accts Payable Contact	Active
			Accts Receivable Contact	Active
			Contact Office Individual	Active
			Partner	Active
			Matter Change Approval Contact	Active
Jones, Paulette	906173	ted@devnullexamen.com	Practicing Attorney	Active
			Admin	Active
			Contact Office Individual	Active
			Matter Change Approval Contact	Active

Top X Firms Average Hourly Rate

Top X Law Firm average hourly rate by Timekeeper level. Filters by Invoice Approve Date range and number of records to return.

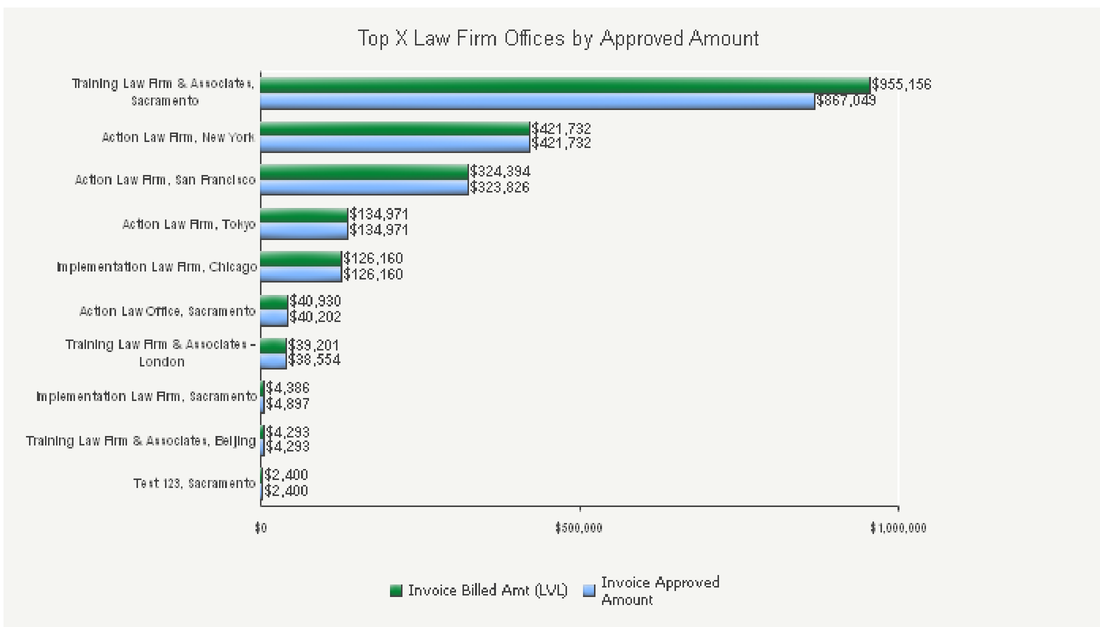
Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Charge Timekeeper Level	Billing level applied to a charge by a timekeeper.

Charge Timekeeper Level	Associate	Paralegal	Partner	Unknown
Law Firm Office	Charge Unit Rate	Charge Unit Rate	Charge Unit Rate	Charge Unit Rate
CounselLink Production Test Private, Sacramento	$440.90	$1.07	$21.18	$100.97

Top X Law Firm Offices by Approved Amount

Displays a specified number of law offices based on the offices' Approved Amounts. Displays both a grid and bar graph. Prompts on Approved Date range and number of records to return.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Invoice Billed Amount (LVL)	Amount charged for services performed or expenses on an invoice prior to any discounts and/or taxes (Invoice Level).
Invoice Approved Amount	The amount of fee and expenses on an invoice that has been approved.



CATEGORIES

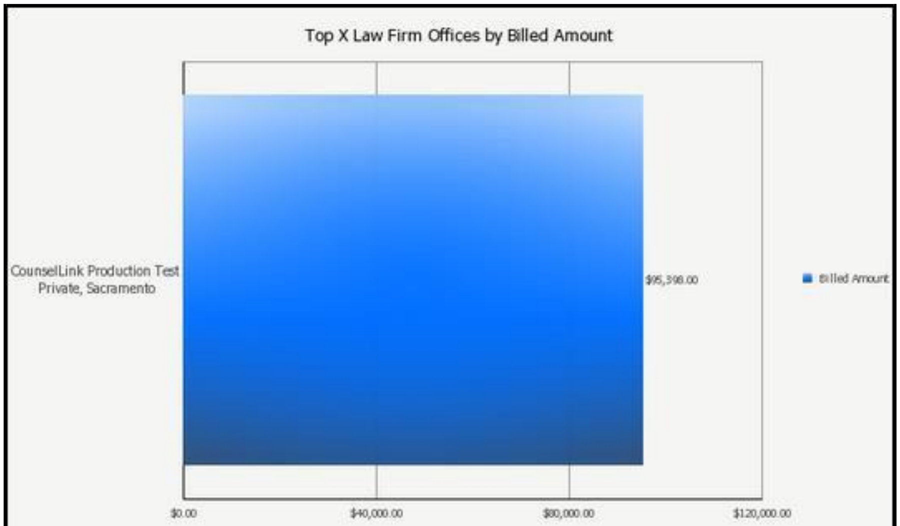
Law Firm Office

Law Firm Office	Invoice Billed Amt (LVL)	Invoice Approved Amount
Training Law Firm & Associates, Sacramento	$955,156.16	$867,048.90
Action Law Firm, New York	$421,732.00	$421,732.00
Action Law Firm, San Francisco	$324,393.55	$323,826.05
Action Law Firm, Tokyo	$134,971.00	$134,971.00
Implementation Law Firm, Chicago	$126,160.00	$126,160.00
Action Law Office, Sacramento	$40,930.00	$40,202.00
Training Law Firm & Associates - London	$39,201.39	$38,554.41
Implementation Law Firm, Sacramento	$4,386.00	$4,896.50
Training Law Firm & Associates, Beijing	$4,292.75	$4,292.75
Test 123, Sacramento	$2,400.00	$2,400.00

Top X Law Firm Offices by Billed Amount

Top X Law Firm Offices by Billed Amount. Prompts for Invoice Sent Date range and number of records to return. Displays both a grid and bar graph.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Billed Amount	Amount billed to the law firm for the given date range.



Law Firm Office	Billed Amount
CounselLink Production Test Private, Sacramento	$95,398.00
Total	**$95,398.00**

Top X Law Firms Percent of Billed Hours by Level

Top X Law Firm Offices Percent of Billed Hours by Level based on Legal Spend. Includes Billed Level and percent of Billed Units. Prompts on Approved Date range and number of records to return.

Column Header	Data Description
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Charge Timekeeper Level	Billing level applied to a charge by a timekeeper.
% of Billed Units	Percentage of billed units for each billing level by Law Firm Office.

Charge Timekeeper Level	Associate
Law Firm Office	% of Billed Units
CounselLink Production Test Private, Sacramento	100.00%

Matter Reports

Matter reports are listed in the following sections along with an explanation of their functionality.

Accrual Report

Contains accrual information as submitted by law firms. Prior to report generation, you need to supply the name of a specific accrual. Once generated, the report displays the law firm name, matter information, accrual amounts, and accrual period information for the specified accrual.

Column Header	Data Description
Accrual Name	Name of the accrual.
Accrual Contact	Corporate Client CounselLink user identified as the contact for the accrual.
Accrual Period Cycle Date (End)	Ending date for the accrual period.
Accrual Period Status	Status of the accrual period.
Accrual Law Firm Office	Law firm office submitting accrual numbers.
Accrual Matter Number	Matter number for which accrual numbers are being submitted.
Accrual Law Firm Matter ID	The law firm's ID of the matter entered by the law firm on the accrual record.
Accrual Matter Title	Matter title for which accrual numbers are being submitted.
Accrual Entry Comment	Comment related to the accrual (entered by the law firm).
Accrual Law Firm Amount (LVL)	The accrued amount entered by the law firm.

Accrual Name	Accrual Contact	Accrual Period Cycle Date (End)	Accrual Period Status	Accrual Law Firm Office	Accrual Matter Number	Accrual Law Firm Matter ID	Accrual Matter Title	Accrual Entry Comment	Accrual Law Firm Amount (LVL)
Acme Matters Accrual	Plume, John	6/30/2012	CLOSED	Action Law Office, Sacramento	A19922317		Acme Trucking Claim 5014		$10,000.00
					M19670608	LF-M19670608	Elk Grove and Smith Construction Transport		$5,000.00
					M20051987		Title Company Acquisition		$2,000.00
					T18308819	M18308819	Acme Trucking v Expresso Inc.		$4,000.00
				Training Law Firm & Associates, Sacramento	M19313254		Spahr v. Widget Corp		$2,000.00
					M19318960		Mcabee Licensee, 5.3		$0.00
					M19319802		Iraheta		$0.00
					M19856883		BCH Earnings Amendment		$5,000.00
					M19869067		Pike's Patent		$8,000.00
Elk Grove Calendar Project	Schmidt, Matthew C	7/31/2012	CLOSED	Action Law Office, Sacramento	General Issues		General issues		
					M19905964	0528	Elk Grove Trasport Calendar Project		
Elk Grove Tranport	Schmidt, Matthew C	7/6/2017	OPENED	Action Law Office, Sacramento	2015-PA-238		Elk Grove - Trailer Design - SA		
					2015-PA-239		Elk Grove - Trailer Design - CA		
					2015-PA-240		Elk Grove - Trailer Design - US		

Active Matters (by Firm)

Billed amounts by law firm for active matters. Report displays matter ID, matter name, number of invoices received to date and total recommended amount. Defaults to page by Law Firm Office. *Provides a quick overview of active matters. Can be subscribed since there is no prompt.*

Column Header	Data Description
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Start Date	The start of the date range for which the client report user has requested report data.
End Date	The end of the date range for which the client report user has requested report data.
Number of Invoices	The count (number) of invoices submitted on a matter through CounselLink from the law firms.
Total Recommended Amount to Date	This data represents the total dollar amount of the invoices for the designated time period based on what was recommended by the product that the client pay. In other words, this would be the sum of the total "net" amount of the invoices after the CounselLink adjustments to the billed amounts. The adjustments are based on the client's rules.
Last Charge Date	The most recent charge date for the designated matter.
Months Open	This represents the number of months that the matter has been active.

Matter ID (Customer)	Matter ID (CounselLink)	Matter Title	Start Date	End Date	Number of Invoices	Total Recommended Amount to Date	Last Charge Date	Months Open
M185176746	18517674	Jan vs. Marcia	03/01/2014	08/31/2014	21	$17,753.32	07/16/2014	89
M19929211	19929211	Elk Grove Transport New Routes OH	03/01/2014	08/31/2014	3	$40,251.00	07/16/2014	3

Allocation of Matters by Internal Staff

Number of active matters assigned to internal staff within each office. *Provides a list of matters to which staff are assigned for management purposes.*

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Client Contact	Name of the client employee within the client office designated as the matter contact for the matter.
Number of Matters	The total number (count) of active matters assigned to the client employee within the client office.

Customer Office Name	Matter Contact	Number of Matters
Asia Intellectual Property	Blaser, Cristina	1
	Bliss, Mary Kay	8
	Brady, Marcia	5
	James, Allison	7
	Lease, Stephanie	1
	Plume, Jayne P	5
	Smith, Pilar B	3
C.A. Intellectual Property	Espinosa, Mateo	1
	Schmidt, Matthew	1

Budget Report

Budget information by matter. Prompts for budget period start date range. Includes Budget Amount, Budget Actual Amount and Percent of Budget spent. Page by Customer Office Name.

Column Header	Data Description
Matter ID (Customer)	Number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Law Firm Office	Name of the law firm office. A law firm may have more than one office. This report provides data at the law firm office level.
Budget Period Status	Current status for the budget period.
Budget Period Start Date	The first date of the budget period.
Budget Period End Date	The last date of the budget period.
Budget Amount	Amount of the budget.
Budget Actual Amount	Actual legal spend amount spent against the budget.
% of Budgeted	Percent of Budget Actual Amount against Budget Amount.Budget Actual Amount divided by the Budget Amount.

Matter ID (Customer)	Matter Title	Law Firm Office	Budget Period Status	Budget Period Start Date	Budget Period End Date	Budget Amount	Budget Actual Amount	% of Budgeted
LI-102	Training Matter JPP1	Training Law Firm & Associates, Chicago	Pending Budget	06/01/2014	06/30/2014	$0.00	$0.00	
				07/01/2014	07/31/2014	$0.00	$0.00	
				08/01/2014	08/31/2014	$0.00	$0.00	
				09/01/2014	09/30/2014	$0.00	$0.00	
		Training Law Firm & Associates, Sacramento	Approved	08/01/2014	08/31/2014	$10,500.00	$0.00	0%
				09/01/2014	09/30/2014	$10,500.00	$0.00	0%
			Budget declined	06/01/2014	06/30/2014	$10,500.00	$0.00	0%
			Pending Approval	07/01/2014	07/31/2014	$10,500.00	$0.00	0%
Total						**$42,000.00**	**$0.00**	**0%**

Closed Matters

Matter detail on all closed matters grouped by office. The report filter prompts for matter closed date range. *Provides a summary review of matters closed during the entered date range.*

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Type	Category of litigation associated with a matter (optional).
Matter Contact	Principal customer user associated with a matter.
Matter Event Create Date	Date that a matter was created.
Matter Event Close Date	Date a matter was designated closed.
Associated Law Firm Office	Names of all law firm offices associated with this matter.
Matter Days Open	Count of days that have passed between the last matter assignment date and recent close date/deleted date (or the current date where a matter is not yet closed/deleted)
Invoice Approved to Date Amt (Fees)	The amount of fees on an invoice that has been approved to date.
Invoice Approved to Date Amt (Expenses)	The amount of expenses on an invoice that has been approved to date.
Invoice Approved to Date Amt	The amount of fee and expenses on an invoice that has been approved to date.

Customer Office Name	Matter ID (Customer)	Matter ID (CounselLink)	Matter Title	Matter Type	Matter Contact	Matter Event Create Date	Matter Event Close Date	Associated Law Firm Office	Matter Days Open	Invoice Approved to Date Amt (Fees)	Invoice Approved to Date Amt (Expenses)	Invoice Approved to Date Amt
Test Office	M21292470	21292470	Invoice matter 1		Injam, Samatha	07/20/2014	07/20/2014	CounselLink Production Test Private, Sacramento	0	$1,623.36	$0.00	$1,623.36
	M21348349	21348349	Inv test		Injam, Samatha	08/24/2014	08/24/2014	CounselLink Production Test Private, Sacramento	0			
Total									**0**	**$1,623.36**	**$0.00**	**$1,623.36**

Closed Matters Report with Days Open

Matter detail on all closed matters grouped by office. The report filter prompts for matter closed date range. *Provides a summary review of matters closed during the entered date range. It now includes days that have passed between a matter's created date and its most recent closed date/deleted date.*

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Type	Category of litigation associated with a matter (optional).
Matter Contact	Principal customer user associated with a matter.
Matter Event Create Date	Date that a matter was created.
Matter Event Close Date	Date a matter was designated closed.
Associated Law Firm Office	Names of all law firm offices associated with this matter.
Matter Days Open Since Creation	Count of days that have passed between a matter created date and recent closed date/deleted date (or the current date where a matter is not yet closed/deleted).
Invoice Approved to Date Amt (Fees)	The amount of fees on an invoice that has been approved to date.
Invoice Approved to Date Amt (Expenses)	The amount of expenses on an invoice that has been approved to date.
Invoice Approved to Date Amt	The amount of fee and expenses on an invoice that has been approved to date.

Matter Contact	Matter Event Create Date	Matter Event Close Date	Associated Law Firm Office	Matter Days Open Since Creation	Invoice Approved Amount (Fees)	Invoice Approved Amount (Expenses)	Invoice Approved Amount
User, Test	07/01/2019	11/03/2019	Law Firm Office not Assigned	125			
User, Test	08/10/2017	11/23/2020	Implementation Law Firm, LLP Sacramento	1,201	$0.00	$0.00	$0.00
User, Test	05/15/2018	01/13/2019	Law Firm Office not Assigned	243			
				1,569	**$0.00**	**$0.00**	**$0.00**

Expenditures by Corporate Office

Summary of all the YTD expenditures by office. *Provides a summary of all recommended expenditures of invoices grouped by office.*

Column Header	**Data Description**
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Number of Invoices	The count (number) of invoices submitted on a matter through CounselLink from the law firms from year start to the current date for the designated client office.
Billed Amount (YTD)	The total dollar amount sum for all invoices processed from year start to current date for the designated client office. This figure is based on the invoice amount as billed by the law firm.
Recommended Amount (YTD)	The sum of the adjusted invoice amounts, year to date, for the designated client office. In this case, the adjusted invoice is the amount of the invoice after all adjustments have been made based on the system and client billing rules.

Customer Office Name	Number of Invoices	Billed Amount(YTD)	Recommended Amount(YTD)
Corporate	5	$34,720.00	$28,910.00
Employment	4	$35,276.70	$32,876.70
Entertainment	28	$248,975.00	$209,072.50
Litigation	10	$89,301.00	$84,776.00
S.A. Intellectual Property	1	$300.00	$300.00
U.S. Intellectual Property	3	$16,461.50	$13,527.50

Litigation Analysis by Category

Overview of spending based on charge code category. Examples of the categories are attend deposition, response to motion, trial prep for fees and photocopies and printing for disbursements. The report filter prompts for invoice charge date range. *Identifies SmartReview categories for invoice charges to track what is being billed by category.*

Column Header	Data Description
Charge SmartReview Category	This is the specific system-based billing rule applied to the invoices received for the client from the law firms across all matters.
Total Matters per Category	This is the count of matters for which the system-based billing rules found that an adjustment should be made on a specific charge or expense for invoices received during the designated time period.
Total Hours per Category	This is the count of hours that were billed by the law firms for the designated charge category.
Corporate Average Hours per Category Matters	This is the average number of corporate hours that were billed by the law firm for the designated charge category.

Charge SmartReview Category	Total Matters per Category	Total Hours per Category	Corporate Average Hours per Category Matters
photocopying	1	302.00	8.00

Matter Inventory

A comprehensive listing of matters, law firms, and spend. This report prompts on Client Office and Matte Status. The report filter prompts for Customer Office Name and Matter Status.

Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Description	Description of the matter.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Status	Detailed status associated with a matter.
Matter Contact	Principal customer user associated with a matter.
Matter Invoice Contact	Customer user responsible for the oversight of the invoice review process throughout the life cycle of a matter.
Associated Law Firm Office	This is the name of the law firm office that is handling the matter on behalf of the client.
Matter Event Law Firm Accept Date	Date a matter is accepted by a law firm.
Matter Law Firm Office Status	Status associated with the law firm on the matter.
Invoice Approved to Date Amt (Fees)	The amount of fees on an invoice that has been approved to date.

Invoice Approved to Date Amt (Expenses)	The amount of expenses on an invoice that has been approved to date.
Invoice Approved to Date Amt	The amount of fee and expenses on an invoice that has been approved to date.

Customer Office Name	Matter ID (Customer)	Matter ID (CounselLink)	Matter Description	Matter Title	Matter Status	Matter Contact	Matter Invoice Contact	Associated Law Firm Office	Matter Law Firm Office Status	Matter Event Law Firm Accept Date	Invoice Approved to Date Amt (Fees)	Invoice Approved to Date Amt (Expenses)	Invoice Approved to Date Amt
Paris office EURO	M18905895	18905895		Legacy matter	Active	All Roles, EURO	All Roles, EURO	CounselLink Production Test Private, Sacramento	Active	6/5/2009			
	M18906017	18906017		TestForMC4	Active	All Roles, EURO	All Roles, EURO	CounselLink Production Test Private, Fairfield	Active	6/6/2009	$10,307.75	$0.00	$10,307.75
	M18906030	18906030		US Dollar Matter	Active	robinson, John	robinson, John	CounselLink Production Test Private, Fairfield	Active	6/6/2009			
	M18906040	18906040		Test	Active	All Roles, EURO	All Roles, EURO	Law Firm Office not Assigned	Active				
	M18906043	18906043		test	Deleted	All Roles, EURO	All Roles, EURO	Law Firm Office not Assigned	Active				

Matter Journal

Matter Journal information including matter journal entries, comments, user who entered the entry and category. Prompts on Matter ID (Customer).

Column Header	Data Description
Matter ID (Customer)	Number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Journal Subject	Title for the journal entry entered by the user.
Matter Journal Entered Date	Date the journal entry was created.
Matter Journal Details	Journal entry text entered by the user.
Matter Journal Type	Indicator that the note is visible by corporate users (CLIENT) or visible to corporate and law firm users.
Matter Journal Entry Name	User who entered the matter journal entry.
Matter Journal Category	Category selected for the journal entry.
Matter Journal Comment	Comment entered on the journal entry.

Matter ID (Customer)	Matter Title	Matter Journal Subject	Matter Journal Entered Date	Matter Journal Details	Matter Journal Type	Matter Journal Entry Name	Matter Journal Category	Matter Journal Comment
18561173	M18561173	dfgdfg	4/29/2012 12:40:59 AM	dgdgdfg	CLIENT	Hunter, Chris	Meeting Notes	
		dfgsd	4/29/2012 1:47:37 AM	fgsdfgdfg	CLIENT	Hunter, Chris	Note	
		journal	5/22/2012 2:58:40 AM	cxcvv	CLIENT	Yallavula, Raju	Note	
		LBQA	4/29/2012 12:42:00 AM		CLIENT	Boyko, Larisa	Note	
		sdfgdfg	4/29/2012 12:40:19 AM	dfgdfgdfg	CLIENT	Hunter, Chris	Note	
		sdfgsdfg	4/29/2012 12:21:10 AM	fgsdfgdfg	CLIENT	Hunter, Chris	Note	
		test	4/29/2012 12:42:18 AM		CLIENT	Boyko, Larisa	Note	
			12/25/2012 9:55:15 PM	df	CLIENT	Yallavula, Raju	Note	tes test
		zxczxc	4/29/2012 12:14:51 AM	zxc	CLIENT	Hunter, Chris	Note	

Matter Participants

Matter participants including name, role, email and address. Prompts on Client Matter ID.

Column Header	Data Description
Matter ID (CounselLink)	Matter ID for the matter. Used to relate Matter Participant objects to other matter objects.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter Participant Name	Name for matter participant. Includes first and last name.
Matter Participant Role	Role for the matter participant e.g. plaintiff, defendant, expert witness.
Matter Participant Email Address	Email address for the matter participant.
Matter Participant Address	Address for the matter participant.
Matter Participant City	City for the matter participant.
Matter Participant State	State for the matter participant.
Matter Participant Zip Code	Zip code for the matter participant.

Matter ID (CounselLink)	Matter Title	Matter Participant Name	Matter Participant Role	Matter Participant Email Address	Matter Participant Address	Matter Participant City	Matter Participant State	Matter Participant Zip Code
18561173	M18561173	1	Defendant		aaa			
18561173	M18561173	1	Plaintiff		aaa			
18561173	M18561173	CounselLink Production Test Private, Sacramento	Billing Vendor		3831 North Freeway Blv, Suite 200	Sacramento	CA	95834

Matter Spend by UTBMS Code

Displays matter spend (recommended amount) by UTBMS code. Prompts for Invoice Approved date range. Can filter by one or more matters.

Column Header	Data Description
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Charge Task Code	The task code associated with each charge.
Charge Task Code Description	Description for the type of task associated with each charge.
Charge Recommended Amt	Amount after accounting for law firm, client adjustments, law firm discounts and taxes.

Matter ID (CounselLink)	Matter ID (Customer)	Matter Title	Charge Task Code	Charge Task Code Description	Charge Recommended Amt
21348351	M21348351	Matter - Allocation	NONE	None	$10.56
21348367	TO-68890	aaaaa	NONE	None	$209.00

Matters with No Assigned Law Firm

List of matters which are not closed or deleted and do not have a law firm assigned.

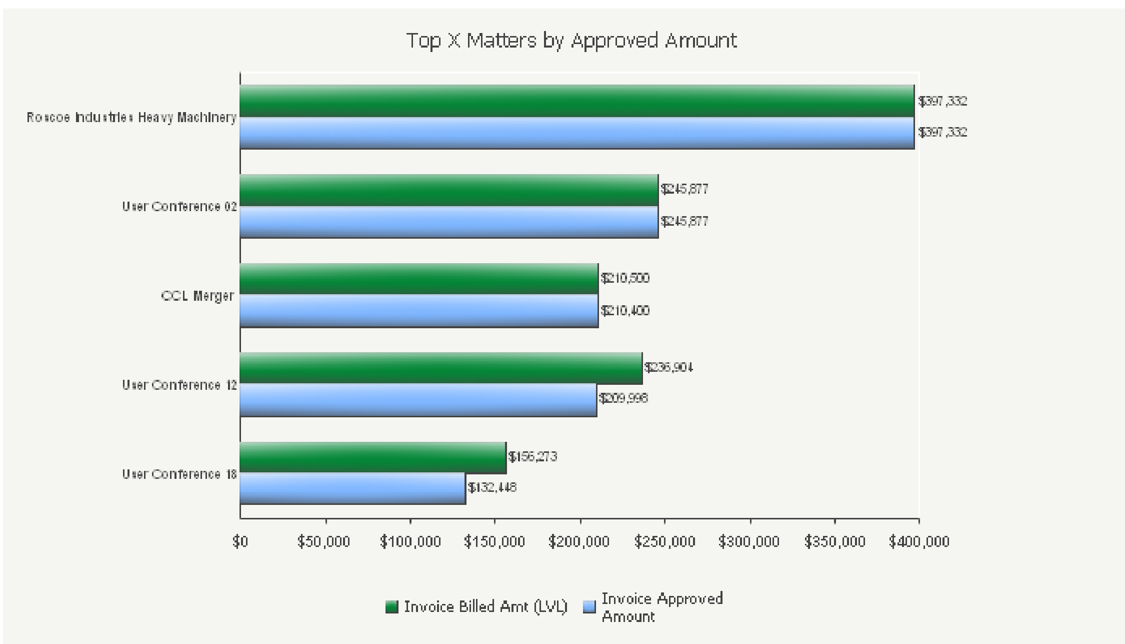
Column Header	Data Description
Customer Office Name	Customer office or practice group name at the lowest (office) level.
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Matter ID (Customer)	The number applied to a matter by a customer for identification purposes.
Matter ID (CounselLink)	Unique identification number assigned to a matter by LexisNexis.
Matter Status	This is the current status of the matter in CounselLink.

Customer Office Name	Matter Title	Matter ID (Customer)	Matter ID (CounselLink)	Matter Status
Paris office EURO	dfasdfadsfsd	POE-68874	21243576	Incomplete
Paris office EURO	test	M18906045	18906045	Active
Paris office EURO	Test	M18906040	18906040	Active
Paris office EURO	Test Matter	M18997616	18997616	Active
Test Office	_	M20853200	20853200	Matter Abandonment

Top X Matters by Approved Amount

Displays a specified number of matters based on the matters' Billed Amount and Approved Amount. Displays both a grid and bar graph. Report prompts on Approved Date range and number of records to return.

Column Header	Data Description
Matter Title	The name or title that the client has assigned to the matter within CounselLink.
Invoice Billed Amount (LVL)	Amount charged for expenses or services performed on an invoice prior to any discounts and/or taxes (Invoice Level).
Invoice Approved Amount	The amount of fee and expenses on an invoice that has been approved.



CATEGORIES

Matter Title

Matter Title	Invoice Billed Amt (LVL)	Invoice Approved Amount
Roscoe Industries Heavy Machinery	$397,332.00	$397,332.00
User Conference 02	$245,877.33	$245,877.33
CCL Merger	$210,500.00	$210,400.00
User Conference 12	$236,904.49	$209,997.83
User Conference 18	$156,272.62	$132,448.38

Top X Matter Types by Spend for Current Year

List of Top X matter types with the highest Invoice Approved Amount for the current year. Includes the Invoice Approved to Date Amount for the previous year. Prompts on the number of records to return.

Column Header	Data Description
Matter Type	Category of litigation associated with a matter.
Invoiced Approved to Date Amt – Current Year	Total amount for invoices for the matter type approved to date for the current year.
Invoiced Approved to Date Amt – Previous Year	Total amount for invoices for the matter type approved to date for the previous year.

Matter Type	Invoice Approved to Date Amt - Current Year	Invoice Approved to Date Amt - Previous Year
Corp 1 - changed	$0.11	$75.60

Glossary of Terms

- Ad Hoc Reporting: The process of creating and/or generating a report as needed, or "on the fly".
- Ad Hoc Client Created Reports: Reports created by client Advanced/Enterprise Reports users. The ability to create these reports is included in the license fee.
- Advanced User: A user of CounselLink who has the ability to edit existing reports in design view, modify report filters, and create reports from scratch. The advanced user is able to pull in custom data when creating reports.
- Advanced/Enterprise Reports User License: This license allows the user to create custom reports for users to view. This user level includes the functionality of the Standard Reports User License. Advanced / Enterprise users may, in most cases, edit reports, or add Report Filters to reports.
- Attribute: An element of data within CounselLink upon that cannot be part of an arithmetic equation. An example of an attribute would be the Matter Name or Matter Number.
- Business Intelligence Team: The LexisNexis team that is responsible for the creation, maintenance, and upgrade of reports in the CounselLink environment.
- Comma Separated Values (CSV): This is an option for the export of reports from CounselLink. Many spreadsheet and data programs can easily import ".CSV" files.
- Content Guided Templates: Pre-formed reporting tools that allow you to build a custom report without having to use the design interface. Guided content templates simplify the report development process by ensuring that all elements of data work well together.
- Custom Reports: Reports created specifically for a client or individual, designed to meet their unique needs such as performing complicated, multi-step calculations and presenting the data in a special form.
- Delimited Export: Describes the process of exporting plain text using commas, tabs, or semi-colons.
- Derived Metric: A metric that is created using elements that already exist on a specific report.
- Design View: A feature of CounselLink that provides Advanced Users with the ability to edit existing reports or create new reports from scratch.
- Executing Reports: The process of generating a report.
- Export: The process of taking a specific report from CounselLink and making it compatible for use with Microsoft Excel, or other third-party data evaluation tools.
- History List: A feature of CounselLink that provides a convenient location for the user to access completed reports, as opposed to waiting for them to execute. All reports to which the user has subscribed will display in the history list as the execution of the report is completed.

- Merged Row Headers: A feature of CounselLink that combines common row headers to simplify the viewing of a specific report. Row headers should be unmerged prior to export.
- Metric: An element of data within CounselLink that can be part of an arithmetic calculation.
- Object Browser: A panel within the Design View that allows advanced users to select various objects and add them to their report.
- Power User: See Advanced User.
- Report Filter: Pre-defined criteria that limit how many results or the scope of results that will be presented in the report.
- Reports: The collection of information in a readable format used to support business decisions.
- Standard Report: A report that is visible to all clients, and appears in the initial CounselLink reports listing.
- Standard User: Any user of CounselLink that does not have the ability to edit reports or create new reports from scratch.
- Subscriptions: A feature of CounselLink that allows users to schedule recurring instances of specific reports for later access.
- View Filters: A feature of CounselLink that allows users to limit the number of visible report records without affecting the underlying report structure, or re-executing the report.