QuickView+® User Guide

Thomson Reuters Customer Service

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AboutThisGuide

In this guide, the graphics and step-by-step instructions are based on accessing QuickView+ via the Internet. Because of the evolving nature of Internet technology, there may be recent changes to the interface and capabilities that are not reflected in this documentation.

NOTE: Contact ID within this guide refers to the Westlaw User number.

Information in this guide is current through September 2014.

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Table of Contents

Introduction to QuickView+

Overview

QuickView+ is a cost recovery and reporting service that allows designated personnel to track Westlaw usage and charges for a particular account, client/matter, contact ID, or usage date, all with the flexibility of Internet access.

Note that:

- Charges are estimates based on the applicable usage rates for your price plan, which may or may not reflect discounts and other charges, such as taxes or rates designated by subscribers.
- QuickView+ does not represent the subscriber's actual Thomson Reuters invoice charges.

QuickView+ Capabilities

QuickView+ includes these capabilities:

- Customize your reports by selecting only the fields you want displayed and sorting the usage information in the order you specify.
- Use flexible billing and pricing options to customize client/matter billing.
- Query multiple locations at one time by defining account groups.
- Automatically receive your reports daily, weekly, biweekly, or monthly by using the auto reports option.
- Download your information to a billing spreadsheet, or word-processing program for modification or analysis.
- Maintain confidentiality with a secure site.
- View your QuickView+ reports from any computer with internet access.
- Access QuickView+ at no charge.

Using QuickView+ Features

To access QuickView+ features, you select options from the drop-down list at the top of each application page. For example, you can choose to create reports, manage auto reports, create customized report formats, or manage TimeKeeper Information.

Figure 1-1 shows an example of using the QuickView+ drop-down list to select the Create Report option.

Figure 1-1: QuickView+ drop-down list

System Requirements

To get started using QuickView+, you need:

- QuickView+ Registration Key
- Your authorized OnePass log-in credentials
- A Web browser
- A screen resolution of at least 1024x768 is recommended.

Accessing QuickView+

Logging on to QuickView+

To access QuickView+, complete these steps:

1. From one of the required browsers, go to **www.quickview.com**. The QuickView+ home page is displayed, as shown in Figure 2-1.

Enter OnePass Username and Password, then click **Sign On**

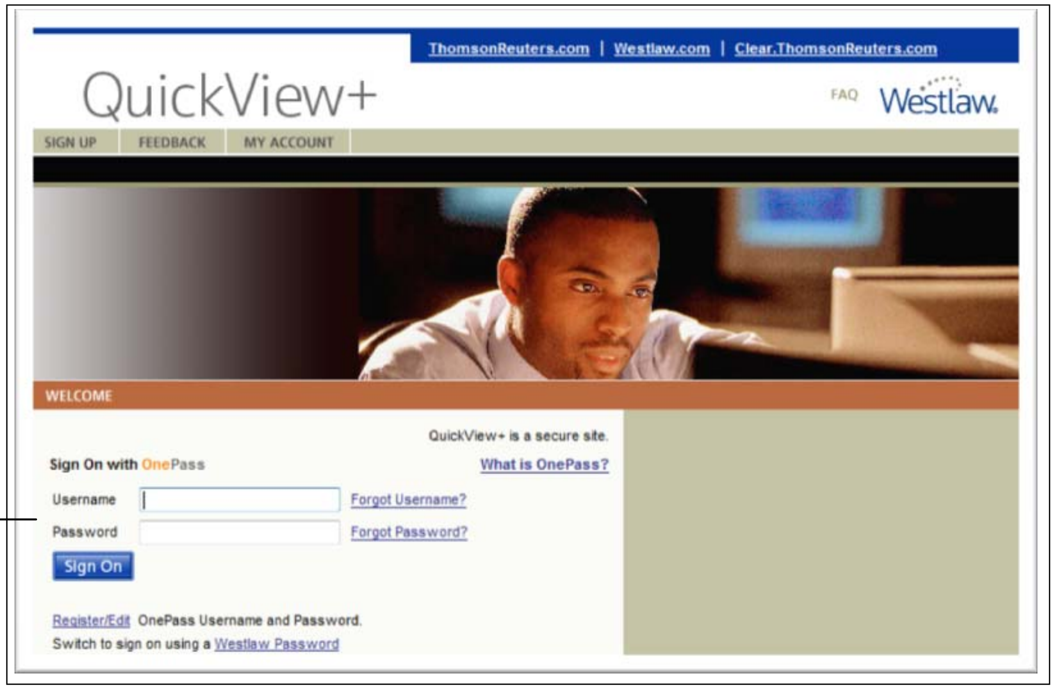
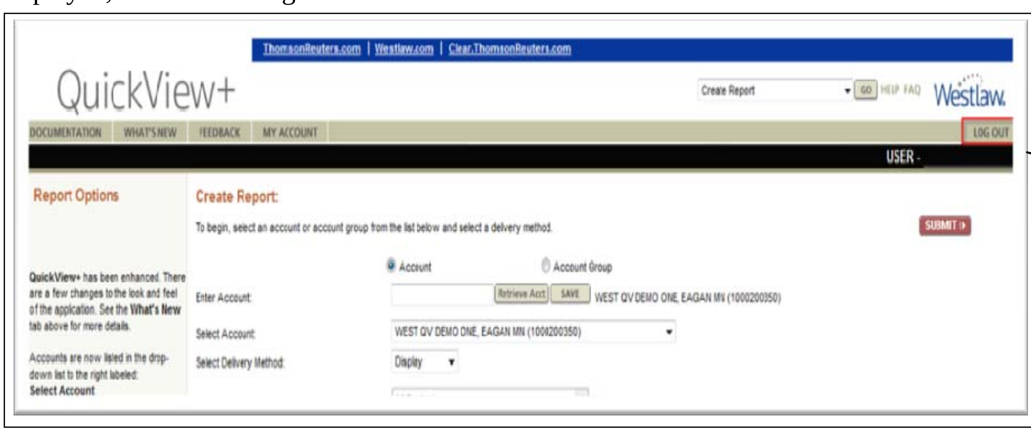


Figure 2-1: QuickView+ home page

2. Type your OnePass Username and Password, then click **Sign On**. The Create Report page is displayed, as shown in Figure 2-2.



Click **Log Out** to exit QuickView+

Figure 2-2: Create Report page

Logging off from QuickView+

To sign off from QuickView+, click **Log Out** in the upper-right corner of the page. Close your browser to completely exit QuickView+.

Creating Reports

Introducing Report Options

After you sign on to QuickView+, the Create Report page is displayed. Use the Create Report page to perform these tasks:

- Select the account or account group you want to use in the report.
- Choose the report delivery method. You can display the report online, send it to an e-mail address, download it to your computer, or create an auto report.
- Select a date range, report format, and other options that let you set up the report to meet the needs of your organization.

Figure 3-1 shows an example of the Create Report page.

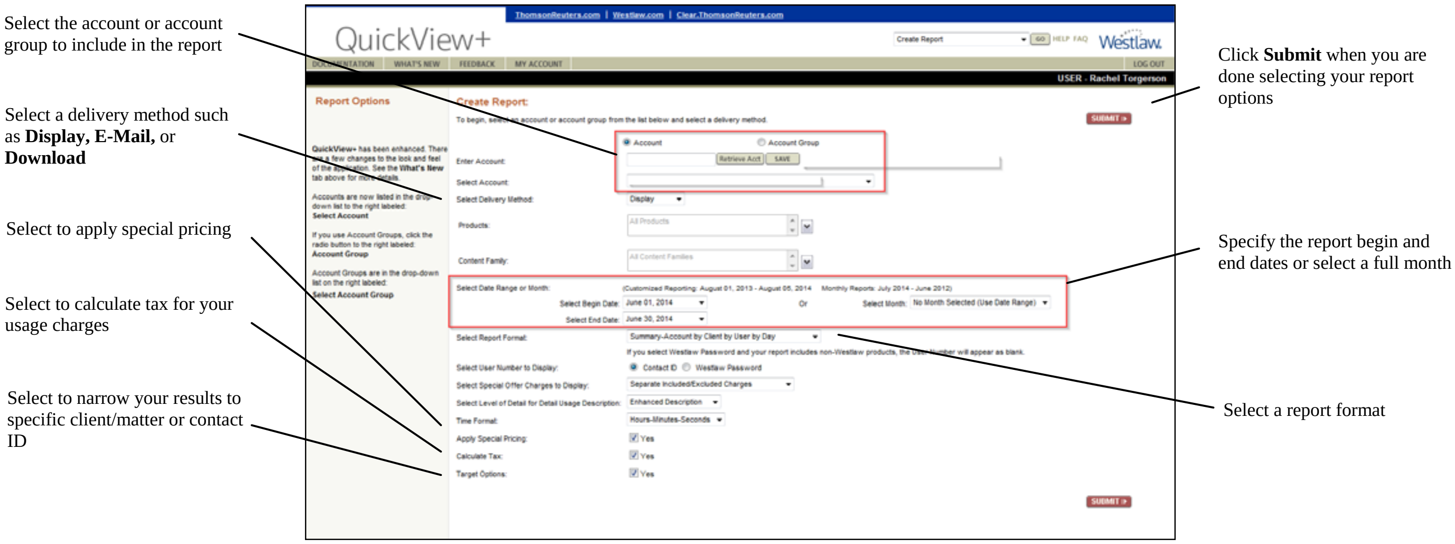


Figure 3-1: Create Report page

CreatingaReport

This section describes how to create your reports using standard QuickView+ report formats.

Process for Creating Reports

To create a report, complete these steps:

1. Make sure you are viewing the Create Report page. If you are not viewing the Create Report page, select **Create Report** from the drop-down list at the top of the page, as shown in Figure 3-2. Click **GO** if necessary.

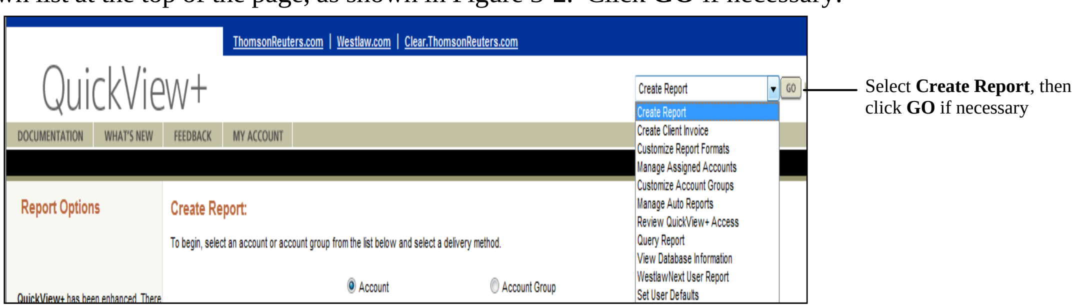


Figure 3-2: Create Report drop-down list option

2. Select which accounts you want to include in the report.
   - Select **Account** or **Account Group**.
   - Individual accounts or account groups are listed in the drop-down list. Select the account or account group you want to include in the report.

You can set up account groups to organize your accounts. For example, you might want to set up an account group for all of your office locations. For more information, see Customizing Account Groups on page 28.

3. Select the delivery method for your report, as shown in Figure 3-3.

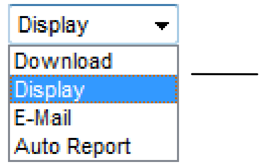


Figure 3-3: Select the delivery method for your report

You can choose one of these delivery methods. The Create Report page displays the fields you need to fill out for that delivery method.

Delivery Method	**Description**
Display	You can view the report online in QuickView+. For more information, see Viewing a Report Online on page 17.
Download	You can save the report to a file on your computer. For more information, see Downloading a Report on page 19.
E-Mail	You can send the report to an e-mail address. For more information, see Sending a Report via E-Mail on page 20.
Auto Report	You can have the report run automatically on a daily, weekly, biweekly, or monthly basis. You receive the report in an email. For more information, see Running a Report Automatically on page 21.

4. Choose the date range you want to use in the report. For more information, see Specifying a Date Range on page 12.
5. If you have a special price plan, you can choose how to display the charges. Select an option from the *Select Special Offer Charges to Display* drop-down list. For more information, see Selecting Special Offer Charges on page 13.
6. From the *Select Report Format* drop-down list, select the desired report format:
   - You can choose from 12 summary report formats and 12 detail report formats.
   - For more information, see Selecting a Report Format on page 12.
7. If you are creating a detail report, you need to select a description from the *Select Level of Detail for Detail Usage Description* drop-down list. You have these options:
   - **Enhanced Description**—The description includes the vendor, database group, price class, and the service type for usage excluded from your contract (such as BNA Allfiles).
   - **Price Class Description—**The description includes only the price class included in the description (such as Allfiles).
8. You can apply special pricing to your client/matter or contact ID charges:
   - Select the **Yes** check box next to *Apply Special Pricing* **(**if it's not already selected).
   - For more information, see Selecting Special Pricing Options on page 14.
9. You can have QuickView+ calculate the tax for your usage charges:
   - Select the **Yes** check box next to *Calculate Tax*, if it's not already selected.
   - If you choose to have tax calculated when you run a report for an account group, QuickView+ calculates the tax by account jurisdiction.
10. You can narrow your report results to specific client/matter or contact ID:
    - For example, you might want to only run the report for specific client/matter or contact ID.
    - Select the **Yes** check box next to *Target Options*, if it's not already selected.
    - For more information, see Selecting Target Options on page 17.
11. You can report usage time in **Seconds** or in **Hours-Minutes-Seconds**, depending on the type of calculations you perform. Select the desired time format from the *Time Format* drop-down list.
12. When you are done selecting the options on the Create Report page, click **Submit** to continue:
    - If you select certain options, such as special pricing, QuickView+ opens another page of report options. Complete the second page of options and then click **Submit** to create the report.
    - Otherwise, QuickView+ runs the report. For more information on report delivery options, see Delivering a Report on page 17.

Selecting Products

You can select all products or specific products that you would like to create a report for.

- Click the arrow next to the Products box to display available products to report on, as shown in Figure 3-4.

Figure 3-4: Select the Products for your report

Selecting Content Family

You can select All Content Families or specific Content Families that you would like to create a report for.

- Click the arrow next to the Content Family box to display available content families to report on, as shown in Figure 3-5.

Figure 3-5: Select the Content Family for your report

Specifying a Date Range

You can specify a date range or select a full month for which you want to display or download QuickView+ information.

Usage information is available for the current month and the previous two years.

You have these options, as shown in Figure 3-6.

- Select a begin date and an end date. You can report on the current month and the previous 12 months.
- Choose the desired month from the *Select Month* drop-down list. You can choose a month up to two years prior to the current month.

Note: For the current month, usage information is generally available within 48 hours of the actual usage.

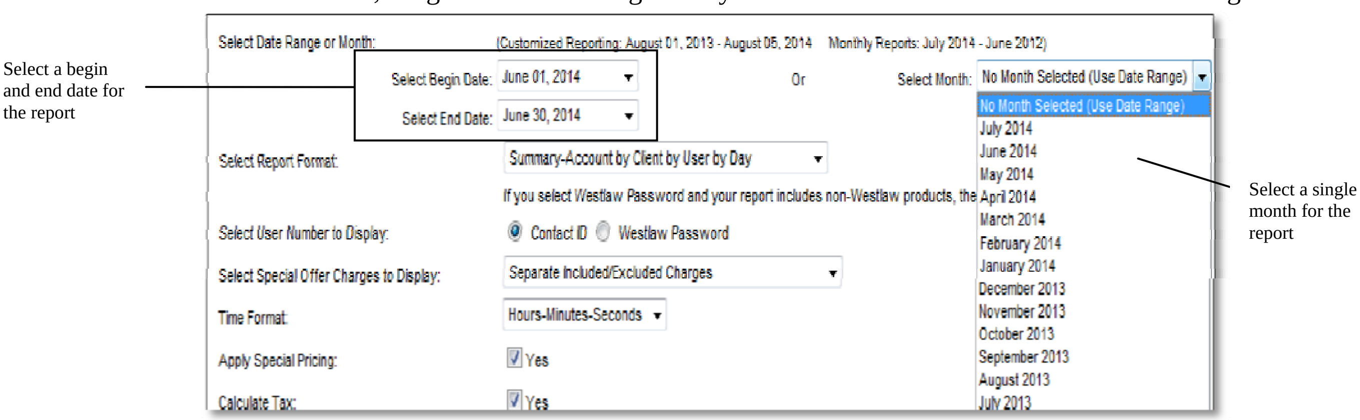


Figure 3-6: Select the dates for your report

Selecting a Report Format

You can select the format in which you want to display your usage information:

- The Summary format (such as Summary-Account by Client by Day) displays the total amount of database time and connect time, the number of transactions, total print documents/lines, and any unit charges associated with usage.
- The Detail format (such as Detail-Account by User by Client) provides additional detail on usage, based on the type of usage.

The report format determines how QuickView+ organizes and displays the usage information. There are 26 standard report formats to choose from: 13 summary formats and 13 detail formats.

From the *Select Report Format* drop-down list, select the desired report format. Figure 3-7 shows an example of the detail and summary report formats.

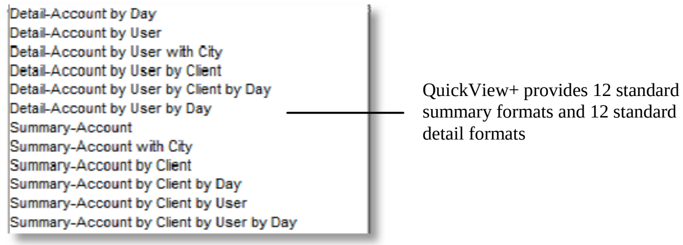


Figure 3-7: Example of Report Formats

Selecting Special Offer Charges

If your organization has a special price plan, you can choose how you want to display included and excluded charges in your report:

- Included charges reflect Westlaw usage that is inside your price plan.
- Excluded charges reflect Westlaw usage that is outside of your price plan.

On the Create Report page, you can select one of these options from the *Select Special Offer Charges to Display* drop-down list:

- Display Included Charges Only
- Display Excluded Charges Only
- Separate Included/Excluded Charges
- Do NOT Separate Included/Excluded Charges
- Separate Subscriptions (Display as Included/Excluded)
- Separate Subscriptions (Display by Subscription)

In the *Select Special Offer Charges to Display* drop-down list, your options vary based on your price plan. For example, Figure 3-8 shows the options available for a PRO pricing plan and Figure 3-9 shows the options that are available for a Special Offer pricing plan.

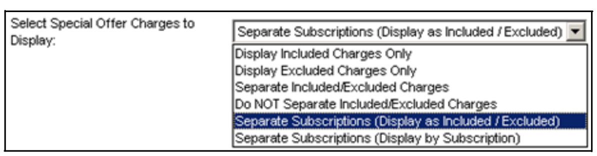


Figure 3-8: Special Offer Charge options for a PRO pricing plan

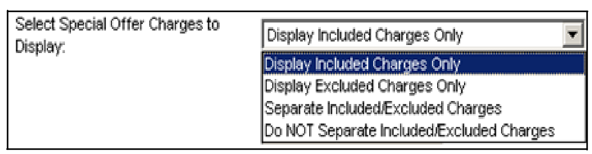


Figure 3-9: Special Offer Charge options for a Special Offer pricing plan

The following table provides additional information about each Special Offer Charge option.

Special Offer Option	Description
Display Included Charges Only	The report will only show usage charges for content that is inside your price plan.
Display Excluded Charges Only	The report will only show usage charges for content that is outside of your price plan.
Separate Included/Excluded Charges	The report will show all usage charges: ■ Use this option if you want to view separate amounts and subtotals for your included and excluded charges. ■ On the Special Pricing and Target Report Options page, you can enter a fixed dollar amount or discount percentage. This value is allocated to your clients for included charges only. ■ The report displays excluded charges separately. For each client, the report adds the total excluded charges to the total special pricing charges to calculate the total charge for that client.

Do NOT Separate Included/ Excluded Charges	The report will show all usage charges: ■ Use this option if you want to view one amount for the total charges. ■ On the Special Pricing and Target Report Options page, you can enter a fixed dollar amount or discount percentage. The value you enter is allocated to the total of all the usage charges.
Separate Subscriptions (Display as Included/Excluded)	If your organization has a PRO price plan, this option lets you apply special pricing and allocate charges based on your subscriptions. The report will classify the usage as either Included or Excluded, as defined by the customer contract. The report only displays the subscriptions used during the specified time period. On the Special Pricing and Target Report Options page, you can enter a fixed dollar amount, enter a percentage of the standard charge, or choose to apply the standard charge for each subscription. If you do not specify a Special Pricing option for a subscription, the report will not assign charges to that subscription.
Separate Subscriptions (Display by Subscription)	If your organization has a PRO price plan, this option lets you apply special pricing and allocate charges based on your Westlaw subscriptions. The report will organize the usage by subscription, regardless of whether or not you apply special pricing. The report only displays the subscriptions used during the specified time period. On the Special Pricing and Target Report Options page, you can enter a fixed dollar amount, enter a percentage of the standard charge, or choose to apply the standard charge for each subscription. If you do not specify a Special Pricing option for a subscription, the report will not assign charges to that subscription.

For more information about special pricing options, see Selecting Special Pricing Options on page 14.

Selecting Special Pricing Options

You can use the Special Pricing features to determine how usage charges are allocated to your clients/matters:

- If you provide a discount to your clients for online charges, the special pricing discount feature allows you to apply the discount to the total charges in your report or to the charges included in a special price plan.
- You can specify a monthly fixed rate billing amount, which QuickView+ allocates to client/matter or contact ID charges.
- If you have clients who should be excluded from special pricing calculations, you can specify them.

If you selected *Apply Special Pricing* on the Create Report page, use the Select Special Pricing and Target Report Options page to set up your pricing options.

If you chose one of the following Special Offer settings, you need to enter a monthly fixed amount or discount percentage to be allocated over usage charges:

- Display Included Charges Only
- Display Excluded Charges Only
- Separate Included/Excluded Charges
- Do NOT Separate Included/Excluded Charges

Figure 3-10 shows an example of the options you can set on the Select Special Pricing and Target Report Options page.

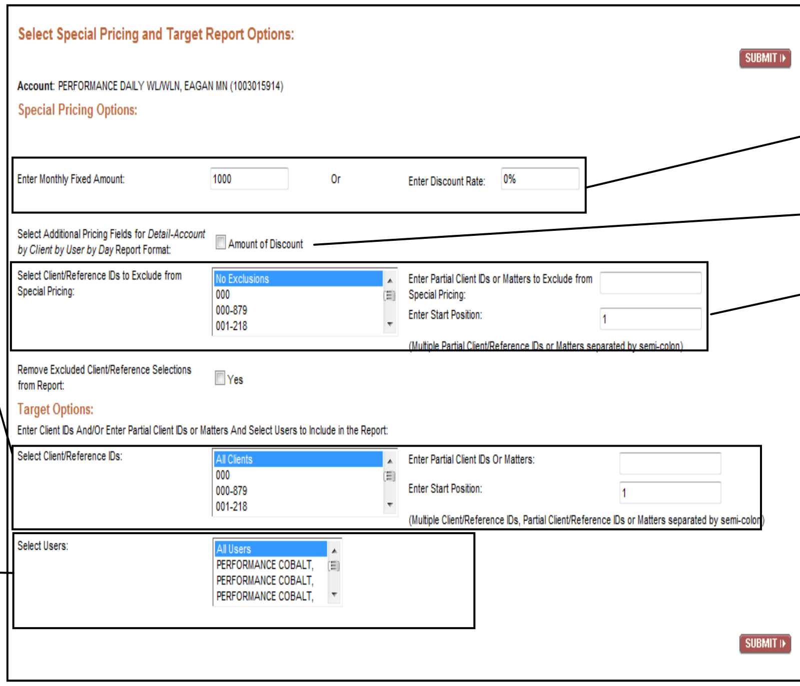
Target Options

Select the client/matter to include in the report. As an option, you can enter clients/matters to include those clients/matters.

For example, you could enter **999** to include all clients/matters that start with 999.

Enter a starting position for partial clients/matter. For example, enter **1** as the Start Position to include the client/matter, starting with the first digit in the IDs.

Select the contact IDs to include in the report and do display their portion of the allocation



Special Pricing Options

Enter a monthly fixed amount or a discount rate.

Select to display the dollar amount differences that result from the application of special pricing.

Select the clients/matters to exclude from special pricing. As an option, you can enter partial clients/matters to exclude those clients/matters.

For example, you could enter **28** to exclude all clients/matters that contain 28 in the seventh and eighth positions.

Enter a starting position for partial clients/matters.

Figure 3-10: Select Special Pricing and Target Report Options page

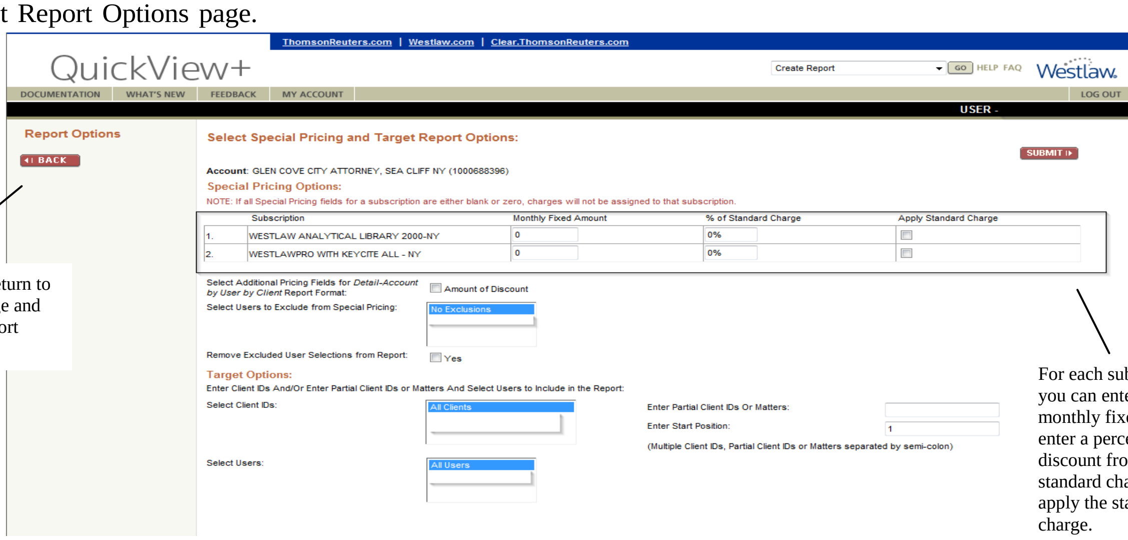
You can also choose to show an additional *Amount of Discount* field in the report or select or exclude certain clients/matters or contact IDs from the allocation.

If you chose one of the following Special Offer settings, you need to enter a monthly fixed amount or a percentage of the standard charge to be allocated over the particular subscriptions:

- Separate Subscriptions (Display as Included/Excluded)
- Separate Subscriptions (Display by Subscription)

You can also choose to apply the standard charge or select or exclude certain clients/matters or contact IDs from the allocation.

Figure 3-11 shows an example of the subscription options that WestlawPRO customers can set on the Select Special Pricing and Target Report Options page.



Click **Back** to return to the previous page and change your report settings

For each subscription, you can enter a monthly fixed amount, enter a percentage discount from the standard charge, or apply the standard charge.

Figure 3-11: Select Special Pricing and Target Report Options page, showing subscription options

To define your special pricing options, complete these steps:

1. If you elected to apply special pricing on the Create Report page, and chose **Display Included Charges Only**, **Display Excluded Charges Only**, **Separate Included/Excluded Charges**, or **Do NOT Separate Included/Excluded Charges**, complete these fields:
   - Type a monthly dollar amount in the *Enter Monthly Fixed Amount* text box if you want to allocate a fixed amount to client/matter or contact ID charges, or enter a percentage in the *Enter Discount Rate* text box to discount your client/matter or contact ID charges, as shown in Figure 3-10.
   - Select the *Amount of Discount* check box if you want this field displayed in the report, showing the dollar amount difference resulting from the application of special pricing.
2. If you elected to apply special pricing on the Create Report page, and chose **Separate Subscriptions (Display as Included/ Excluded)** or **Separate Subscriptions (Display by Subscription**), choose one of these options for each subscription:
   - Enter a monthly dollar amount in the *Monthly Fixed Amount* text box if you want to allocate a fixed amount to client/matter or contact ID charges across the particular subscription.
   - Enter a percentage (either surcharge or discount) in the *% of Standard Charge* text box to discount your client/matter or contact ID charges across the particular subscription.
   - Select the *Apply Standard Charge* check box if you want to apply the retail rate to this subscription.
3. You can exclude certain clients from special pricing calculations. For example, you might exclude administrative clients/matters from the billing allocation. To exclude these clients, you have these options:
   - Select the clients/matters from the *Select Client IDs to Exclude from Special Pricing* list box. Hold down the **Ctrl** key while you click to select multiple IDs.
   - Enter a partial client/matter in the *Enter Partial Client IDs or Matters to Exclude from Special Pricing* text box.
4. If you enter a partial client/matter, you can also enter a start position for the partial client/matter in the *Enter Start Position* text box. Figure 3-12 shows this portion of the Special Pricing and Target Report Options page.

You can use partial clients/ matters to exclude these clients/matters from special pricing.

Figure 3-12: Excluding client/matter from a report

   - For example, you have the following clients/matters:
     a. 100-1234
     b. 200-2312
     c. 300-1212
     d. 100-1899
   - In these clients/matters, “12” in the fifth and sixth positions indicates administrative clients/matters that you want to exclude from special pricing.
   - To exclude these clients/matters from special pricing, fill out these fields:
     a. *Enter Partial Client IDs or Matters to Exclude from Special Pricing* = 12
     b. *Enter Start Position* = 5.
   - QuickView+ excludes these clients/matters:
     a. 100-1234
     b. 300-1212
5. When you are done defining your special pricing options, do one of the following:
   - If you selected the *Target Options* check box on the Create Report page, fill out the fields at the bottom of the Special Pricing and Target Report Options page. For more information, see Selecting Target Options on page 17.
   - If you did not select the *Target Options* check box, click **Submit** to complete your report.

Note: Click the **Back** button at the top left side of the page if you want to return to the Create Report page and change your report options.

Selecting Target Options

You can use the target options to include only certain contact IDs or clients/matters in your report.

If you selected the *Target Options* check box on the Create Report page, you need to specify the clients/matters or partial clients/matters and contact IDs you want to include in the report.

To set your target options, complete these steps:

1. Select the clients/matters you want to include in the report. For example, you might want to only include clients/matters that have tax matters. To include these clients/matters in the report, you have these options:
   - Select the clients/matters from the *Select Client IDs* list box. Hold down the **Ctrl** key while you click to select multiple IDs.
   - Enter a partial client/matter in the *Enter Partial Client IDs or Matters* text box.
2. If you enter a partial client/matter, you can also enter a start position for the partial client/matter in the *Enter Start Position* text box. Figure 3-13 shows this portion of the Special Pricing and Target Report Options page.

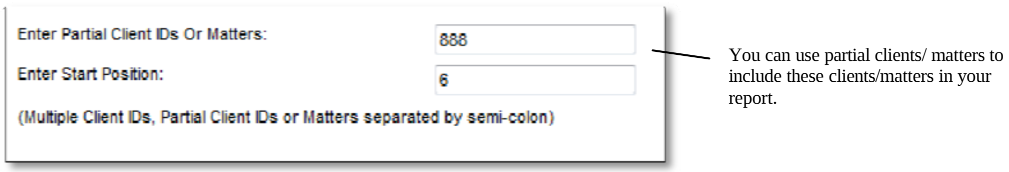


Figure 3-13: Selecting client IDs to include in report

   - For example, you have the following clients/matters
     a. 1000-888
     b. 1000-200
     c. 2000-888
     d. 2000-600
     e. 3000-888
   - In these client IDs, “888” in the sixth through eighth positions indicates tax matters.
   - To include these client IDs in the report, fill out these fields:
     a. *Enter Partial Client IDs or Matters* = 888
     b. *Enter Start Position* = 6.
   - QuickView+ includes these clients/matters IDs in the report:
     a. 1000-888
     b. 2000-888
     c. 3000-888

5. Select the contact IDs (those performing the research) you want to include in your report from the *Select Users* list box:
   - Each user’s portion of the allocation will be included in the report.
   - Hold down the **Ctrl** key while you click to select multiple contact IDs.
6. Click **Submit** to complete your report.
   Note: Click the **Back** button at the top left side of the page if you want to return to the Create Report page and change your report options.

Delivering a Report

The report options discussed in Process for Creating Reports (see page 10) are standard for each type of report you create in QuickView+. The report display options vary, depending on the report delivery method you chose.

The following sections describe the display options available for each delivery method.

Viewing a Report Online

You can view the report online if you selected *Display* as your delivery method.

To view a report online, complete these steps:

1. When you run the report, it is displayed in your browser window. Figure 3-14 shows a sample report.

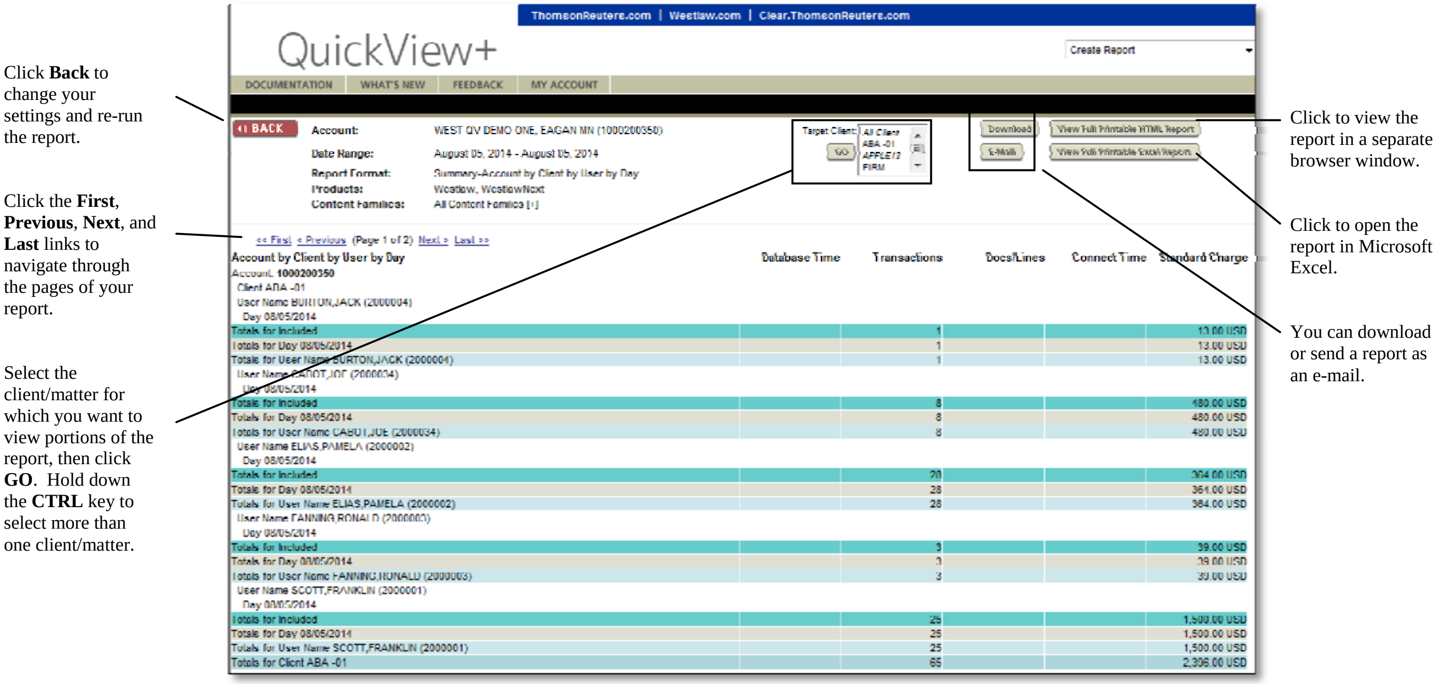


Figure 3-14: Sample report

2. Click the **First**, **Previous**, **Next**, and **Last** links to navigate to a specific page of your report.
3. You can filter the information that is displayed in the report, based on the primary sort criterion in the report format you selected. For example, if the report format is User by Client by Day, you can display the report for specific contact IDs.
   - Select a client/matter from the *Target Client IDs* list at the top of the report (see Figure 3-14).
   - To select multiple identifiers, hold down the **Shift** key or the **Control** key and click the desired identifiers, then click **GO**.
   - To cancel a filter, select **All Client IDs** in the *Target Client IDs* list.
4. If you want a copy of the report, select a delivery option at the top of the page.
   - Click **Download** to save the report as a file.
   - Click **E-Mail** to send the report to an e-mail address.
5. Click **View Full Printable HTML Report** to view the report in a separate browser window. You can use your browser's capabilities to print or save the report.
6. Click **View Full Printable Excel Report** to open the report in a Microsoft Excel document. In the File Download dialog box that is displayed, click **Open**. The report is displayed in an Excel spreadsheet.
7. Click the **Back** button at the top left side of the report if you want to return to the previous page and change your report options. You can then re-run the report.

Downloading a Report

If you chose **Download** as your delivery method, complete these steps on the Create Report page (see Figure 3-15).

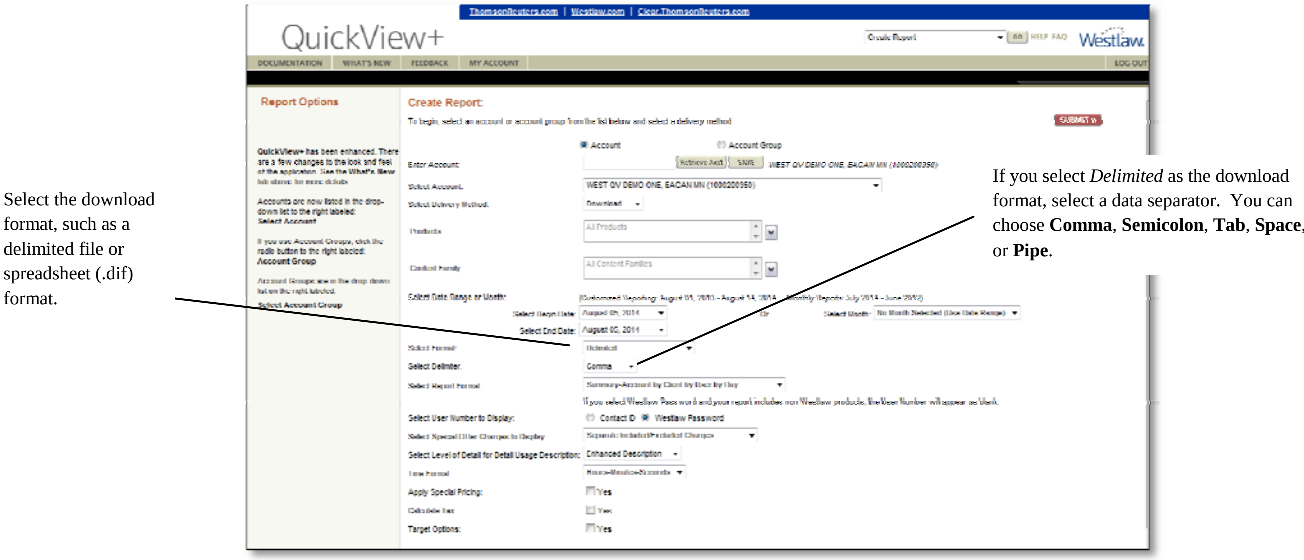


Figure 3-15: Create Report page, showing downloaded report options

1. From the *Select Format* drop-down list, select the desired format for the download file (see Figure 3-16).

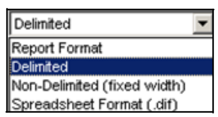


Figure 3-16: Select the format of the downloaded report

You can select one of these report formats:

- Select **Report Format** to download usage information in a text report format.
- Select **Delimited** to download usage information in a format that separates the fields by one of the five available delimiters (comma, semicolon, tab, space, or pipe). When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
- Select **Non-Delimited (fixed width)** to download usage information in a format that assigns each field a fixed position or fixed width. When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
- Select **Spreadsheet Format (.dif)** to download usage information in Data Interchange Format, which is recognized by most spreadsheet programs.

2. If you choose *Delimited* from the *Select Format* drop-down list, use the *Select Delimiter* drop-down list to choose how the data in the file will be separated: by **Comma**, **Semicolon**, **Tab**, **Space**, or **Pipe** (see Figure 3-17).

Figure 3-17: Select delimiter for downloaded report

3. Click **Submit** to continue:
   - If you elected to apply special pricing or target your report by narrowing your results, complete the steps in Selecting Special Pricing Options on page 14 and Selecting Target Options on page 17.

- Once the download file has been created, QuickView+ displays the page that is shown in Figure 3-18.

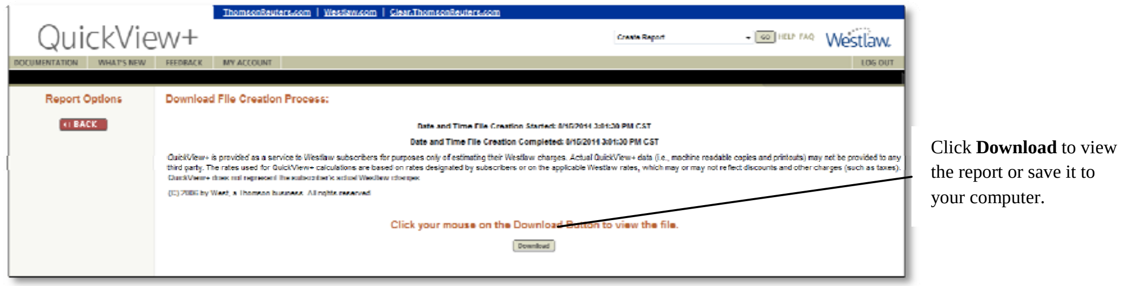


Figure 3-18: Page that is displayed when the downloaded file has been created

4. Click the **Download** button to open the report or save it to your computer.

Sending a Report via E-Mail

If you chose **E-Mail** as your delivery method, complete the following steps on the Create Report page (see Figure 3-19).

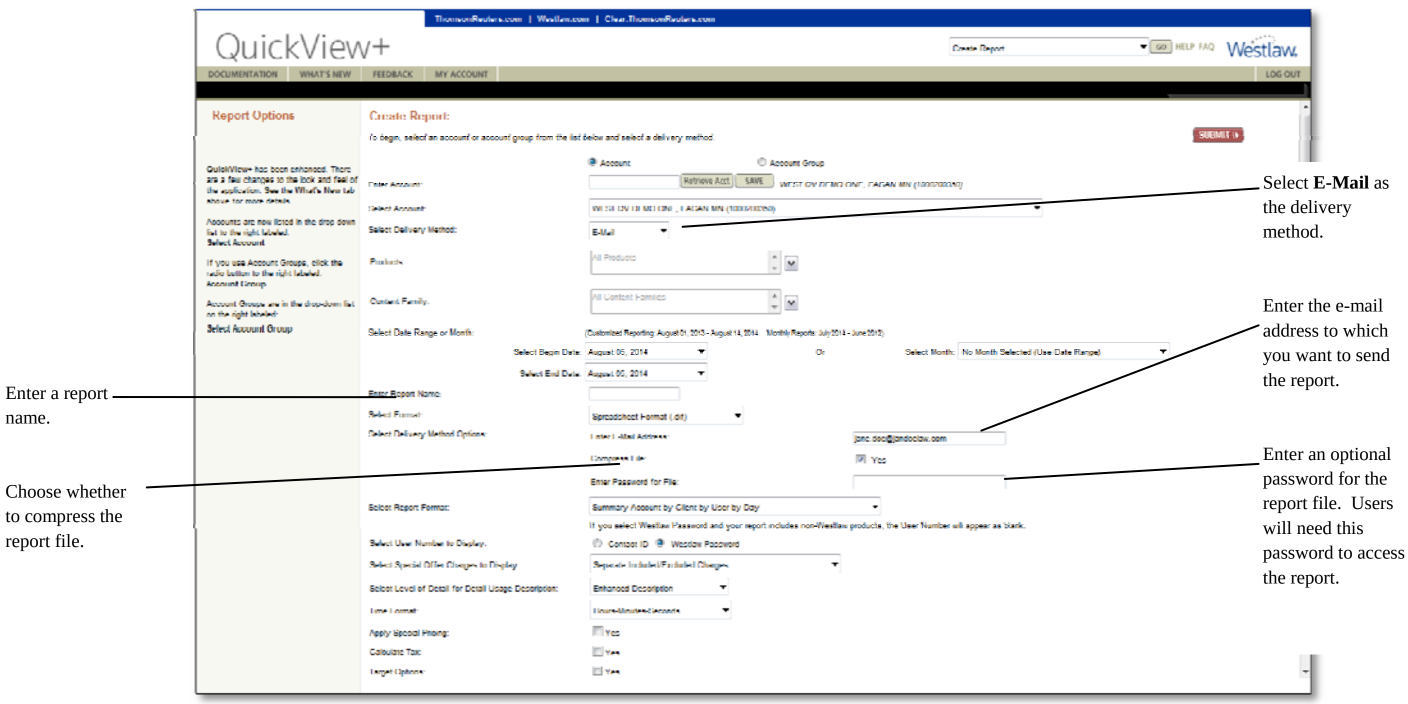


Figure 3-19: Create Report page, showing e-mail report options

1. Type a name for the report, if desired, in the *Enter Report Name* text box by selecting the existing name or typing a new name.
2. From the *Select Format* drop-down list, select the file format:
   - Select **Report Format** to download usage information in a text report format.
   - Select **Delimited** to download usage information in a format that separates the fields by one of the five available delimiters (comma, semicolon, tab, space, or pipe). When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
   - Select **Non-Delimited (fixed width)** to download usage information in a format that assigns each field a fixed position or fixed width. When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
   - Select **Spreadsheet Format (.dif)** to download usage information in Data Interchange Format, which is recognized by most spreadsheet programs.
3. If you choose **Delimited** from the *Select Format* drop-down list, use the *Select Delimiter* drop-down list to choose how the data in the file will be separated: by **Comma**, **Semicolon**, **Tab**, **Space**, or **Pipe**.
4. In the *Enter E-Mail Address* text box, type the e-mail address to which you want the report sent. To send the report

to more than one e-mail address, separate each address with a semicolon (;).

5. Select the **Yes** check box next to *Compress File* (if it's not already selected) to reduce the file size. QuickView+ uses WinZip to create a compressed file. Clear the check box if you do not want to create a compressed file.
6. Enter a password in the *Enter Password for File* text box if you want to require an e-mail recipient to enter a password before accessing the file.
7. Click **Submit** to continue:
   - If you elected to apply special pricing or target your report by narrowing your results, complete the steps in Selecting Special Pricing Options on page 14 and Selecting Target Options on page 17.
   - If you did not select special pricing or target options, a message is displayed to show that the report has been sent.
8. Click **Return** to display the Create Report page.

Running a Report Automatically

You can set up the report to run automatically if you selected *Auto Report* as your delivery method on the Create Report page (see Figure 3-20).

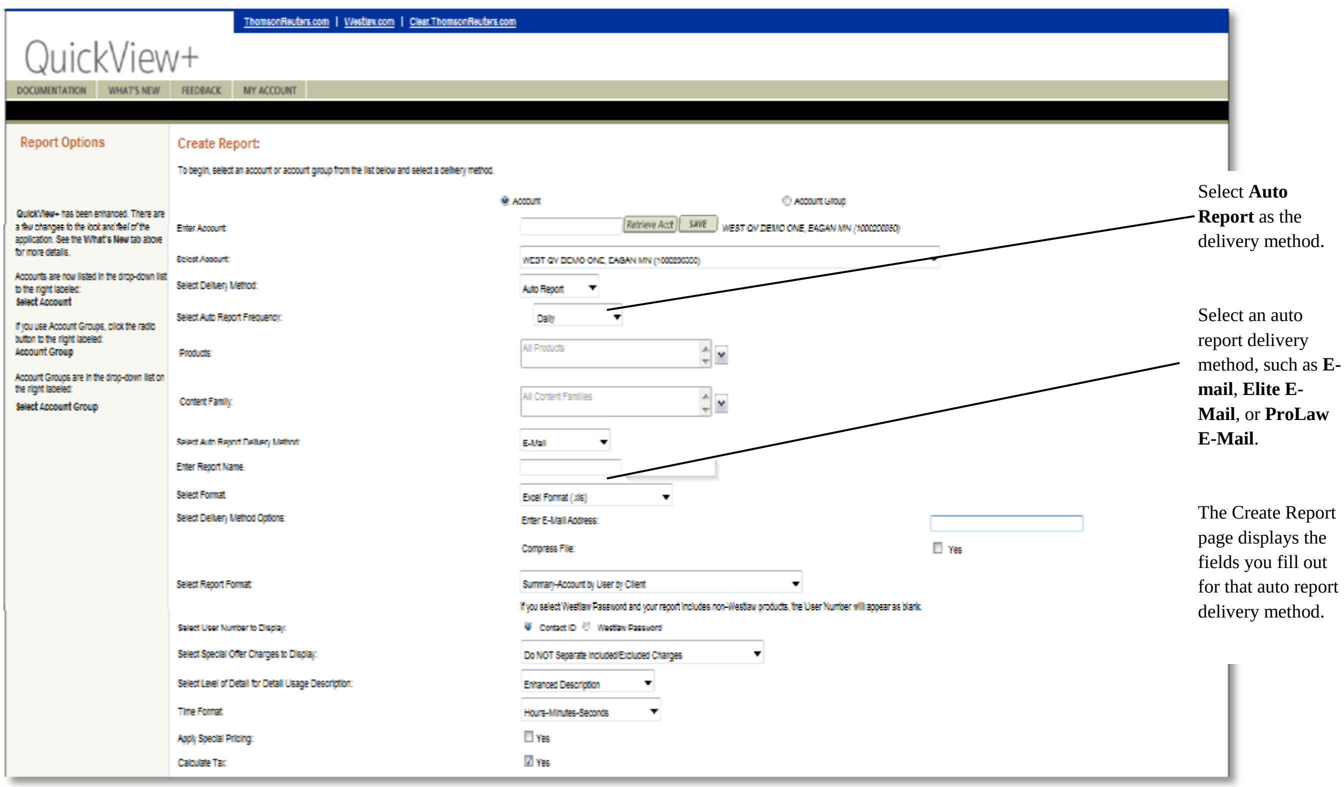


Figure 3-20: Create Report page, showing Auto Report options

When you create an auto report, you select:

- How often you want the report to be run, such as weekly, biweekly, or monthly.
- How you want the report delivered. You can choose these auto report delivery methods:

  E-mail

  ProLaw E-mail

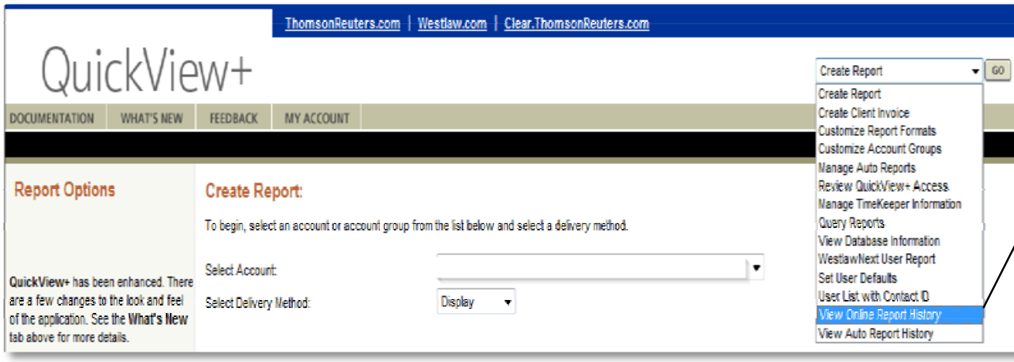
  Elite E-mail

For more information, see Managing Auto Reports on page 31.

Viewing Online Report History

To view the attributes of an online report, complete these steps:

1. Select **View Online Report History** from the drop-down list and click **GO** if necessary. Figure 3-21 shows how to select the View Online Report History option from the drop-down list.



Select **View Online Report History**, then click **GO** if necessary.

Figure 3-21: View Online Report History drop-down list option

The View Online Report History page is displayed (see Figure 3-22) with a list of online reports that have been completed or re-queued. This page lists the online report name, status, and date and time of execution.

Click a report name to view the attributes of the report.

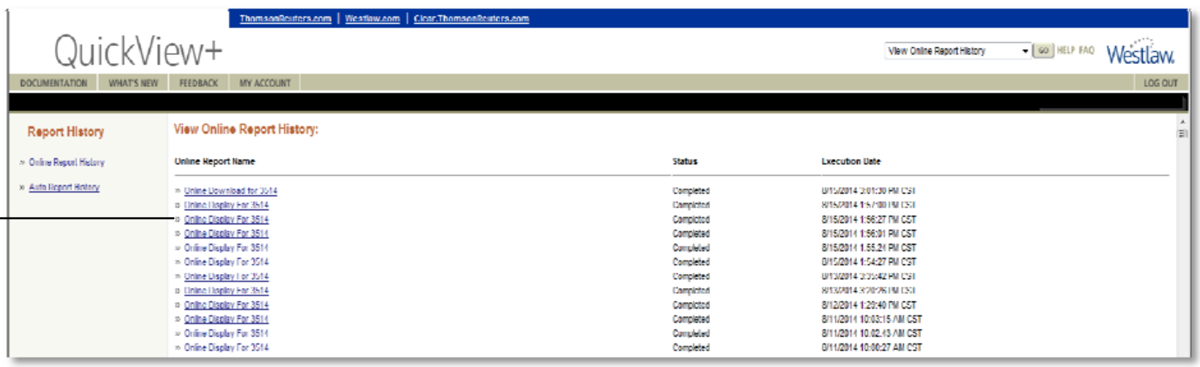
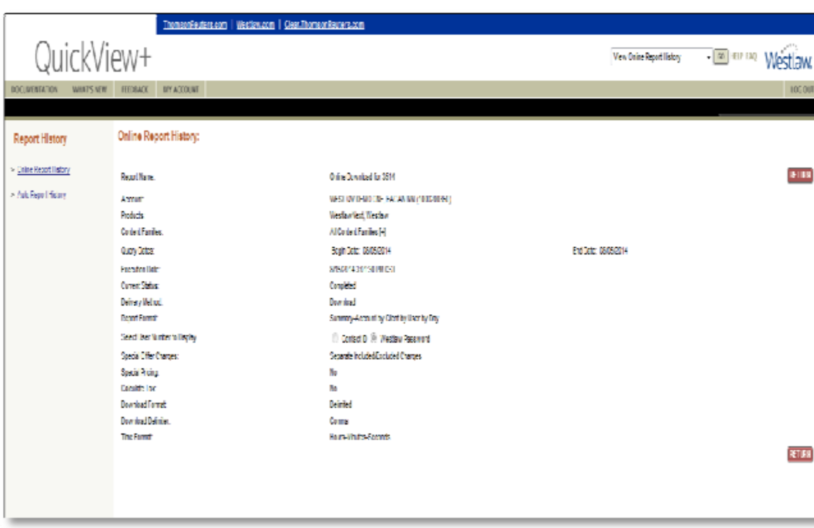


Figure 3-22: View Online Report History page

2. Click a report name to view information about that report. Figure 3-23 shows an example of a report's attributes.



Review the report information and then click **Return** to display the View Online Report History page.

Figure 3-23: Online Report History page

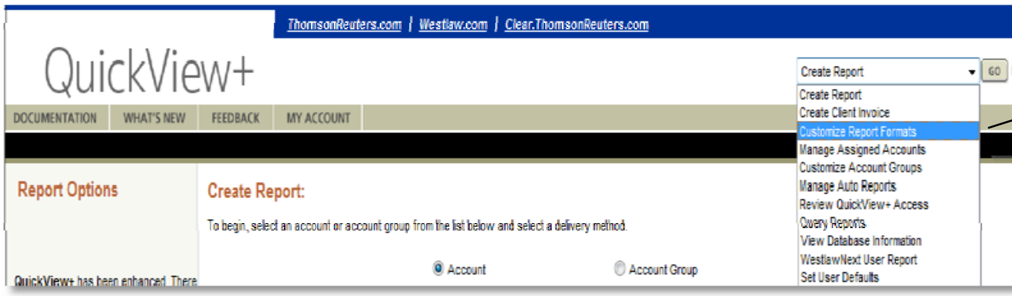
3. Click **Return** to return to the View Online Report History page.

Customizing QuickView+

Customizing Reports

In addition to the standard report formats that QuickView+ supplies, you can create customized reports to make your QuickView+ use more efficient. The report formats determine what information will be included in your report and the order in which the information will be displayed.

To set up a customized report, select **Customize Report Formats** from the drop-down list at the top of the page, as shown in Figure 4-1. Click **GO** if necessary.



Select **Customize Report Formats**, then click **GO** if necessary.

Figure 4-1: Customize Report Formats drop-down list option

The View Selected Report Format page is displayed (see Figure 4-2).
You can use these features to manage your customized reports:

- Copy a report format and use it to create another report format. See Copying a Report Format below.
- Create a new report format. See Creating a Report Format on page 25.
- Modify a report format. See Changing a Report Format on page 26.
- Delete a report format. See Deleting a Report Format on page 28.

Copying a Report Format

To copy some settings of a default report format and save it as a new format, complete these steps:

1. From the list of report formats, click the number in the left frame for the report format that you want to copy. The report format is displayed.
2. Click **Copy**, as shown in Figure 4-2.

Click the number next to a report format to display that format.

Click **Copy** to copy the settings of the displayed report format.

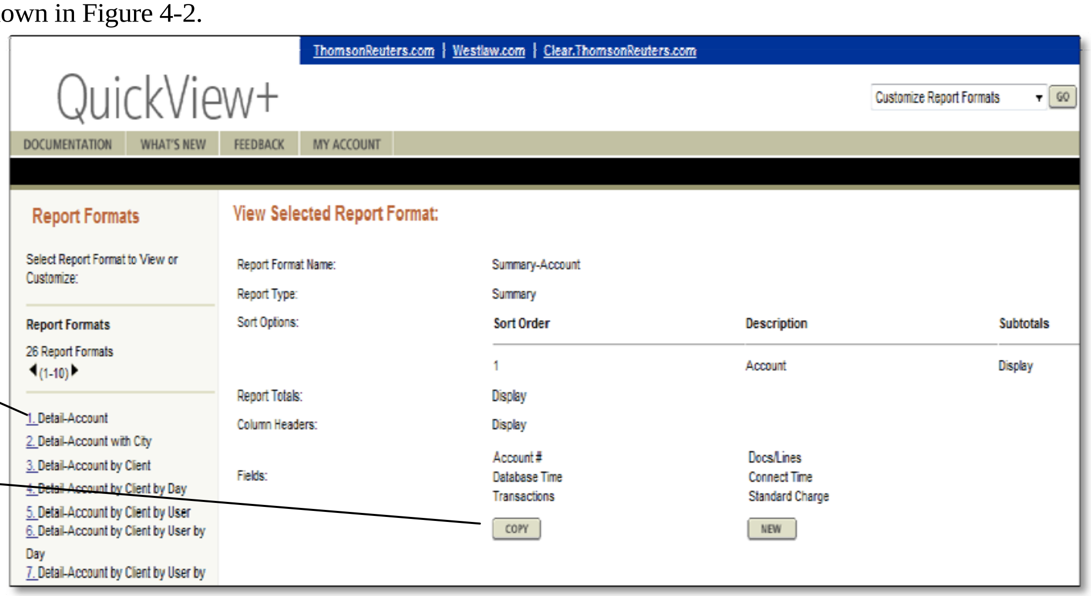


Figure 4-2: View Selected Report Format page showing Copy and New buttons

The report format you selected is displayed. For example, Figure 4-3 shows the settings for the Summary-Account by Client by User by Day report format.

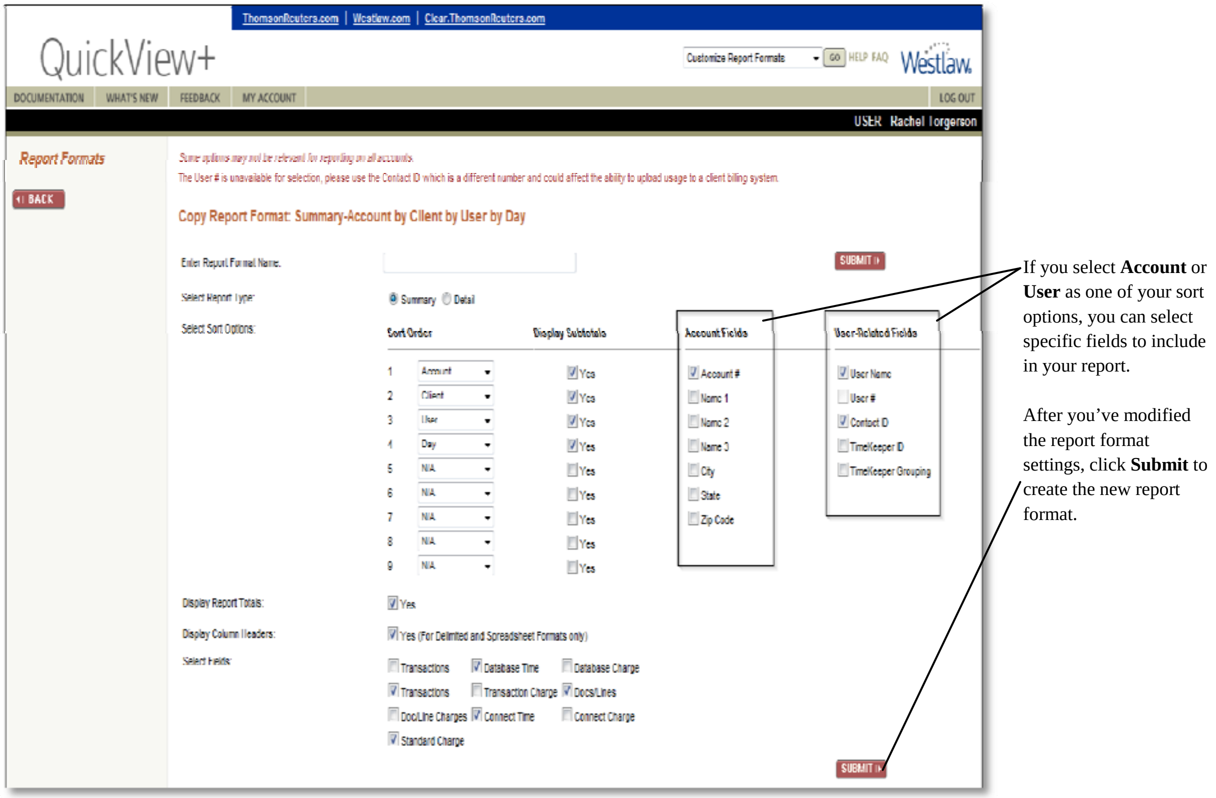


Figure 4-3: Copy Report Format page

3. Type a name or description for the report in the *Enter Report Format Name* text box.
4. Select the desired report type:
   - **Summary** format displays the total amount of database time and connect time, the number of transactions, total print documents/lines, and any unit charges associated with usage.
   - **Detail** format provides additional detail on usage, based on the type of usage.
5. From the *Select Sort Options* drop-down lists, select the order in which you want the data sorted.
   - Data can be sorted by Account, Products, Content Family, Client, User, and Day. Clear accounts can select additional sort options for Time, Service Type, and Query.
   - You can select up to nine options.
   - Select the **Yes** check box next to a sort option if you want the report to display subtotal amounts for that sort option.
6. If you select **Account** or **User** as one of your sort options, you can select additional related fields for your report: Figure 4-3 shows this portion of the Copy Report Format page.
   - For **Account**, additional fields include: **Account #**, **Name 1**, **Name 2**, **Name 3**, **City**, **State**, and **Zip Code**.
   - For **User**, additional fields include: **User Name**, **Contact ID**, **TimeKeeper ID**, or **TimeKeeper Grouping**. **User #** is unavailable is selection.
7. Select the **Yes** check box next to *Display Report Totals* (if it's not already selected) if you want the report to calculate the total amount. Clear the check box to disable the option.
8. Select the **Yes** check box next to *Display Column Headers* (if it's not already selected) if you want the report to include column headings in downloaded reports that use the delimited or spreadsheet formats. Clear the check box to disable the option.
9. In the *Select Fields* section, select the check boxes for the type of information you want included in the report.
10. Click **Submit** to save your new report format.

Creating a Report Format

To create a custom report format, complete these steps:

1. Click **New** on the View Selected Report Format page (see Figure 4-2 on page 24). The New Report Format page is displayed, as shown in Figure 4-4.

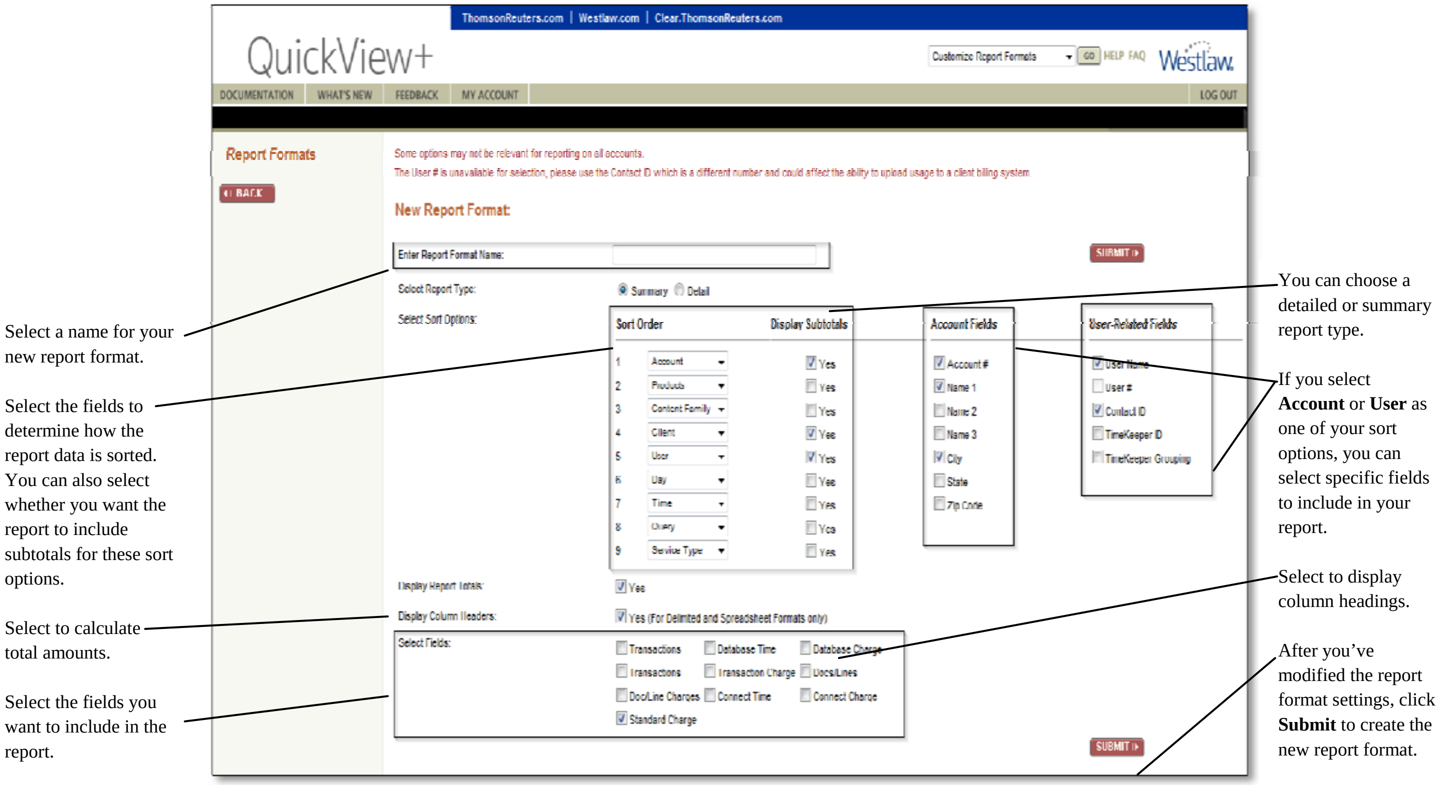


Figure 4-4: New Report Format page

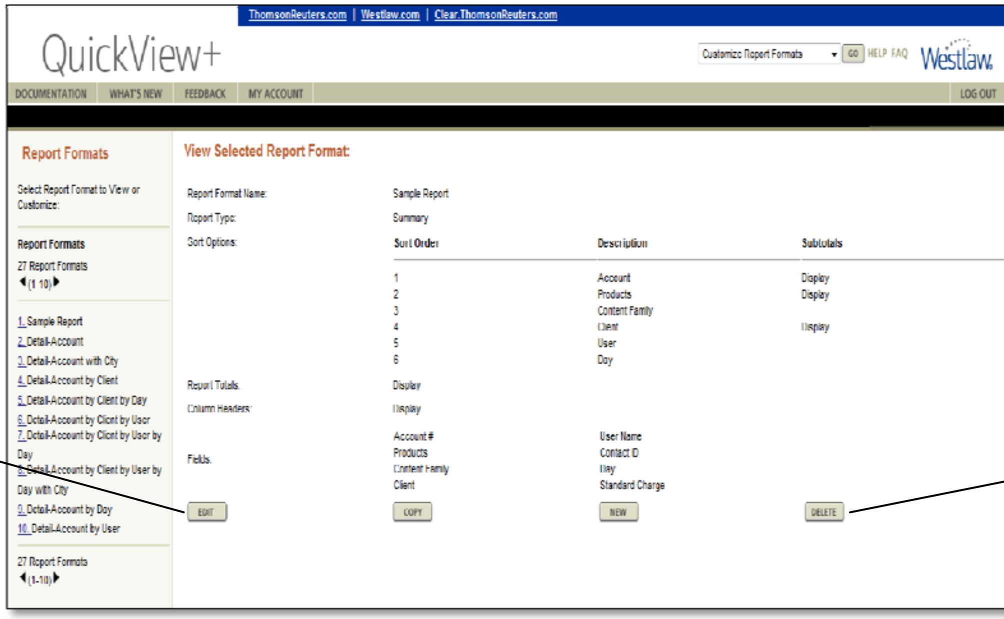
2. Type a name or description for the report in the *Enter Report Format Name* text box.
3. Select the desired report type:
   - **Summary** format displays the total amount of database time and connect time, the number of transactions, total print documents/lines, and any unit charges associated with usage.
   - **Detail** format provides additional detail on usage, based on the type of usage.
4. From the *Select Sort Options* drop-down lists, select the order in which you want the data sorted.
   - Data can be sorted by Account, Products, Content Family, Client, User, and Day. Clear accounts can select additional sort options for Time, Service Type, and Query.
   - You can select up to nine options.
   - Select the **Yes** check box next to a sort option if you want the report to display subtotal amounts for that sort option.
5. If you select **Account** or **User** as one of your sort options, you can select additional related fields for your report: Figure 4-4 shows this portion of the New Report Format page.
   - For **Account**, additional fields include: **Account #**, **Name 1**, **Name 2**, **Name 3**, **City**, **State**, and **Zip Code**.
   - For **User**, additional fields include: **User Name**, **Contact ID**, **TimeKeeper ID**, or **TimeKeeper Grouping**. **User #** is unavailable is selection.
6. Select the **Yes** check box next to *Display Report Totals* (if it's not already selected) if you want the report to calculate the total amount for the report. Clear the check box to disable the option.
7. Select the **Yes** check box next to *Display Column Headers* (if it's not already selected) if you want the report to include column headings in downloaded reports that use the delimited or spreadsheet formats. Clear the check box to disable the option.
8. In the *Select Fields* section, select the check boxes for the type of information you want included in the report.
9. Click **Submit** to save your settings.

Changing a Report Format

To edit a custom report format, complete these steps:

1. Click the number in the left frame for the report format you want to edit.

The View Selected Report Format page for the selected report format is displayed, as shown in Figure 4-5.

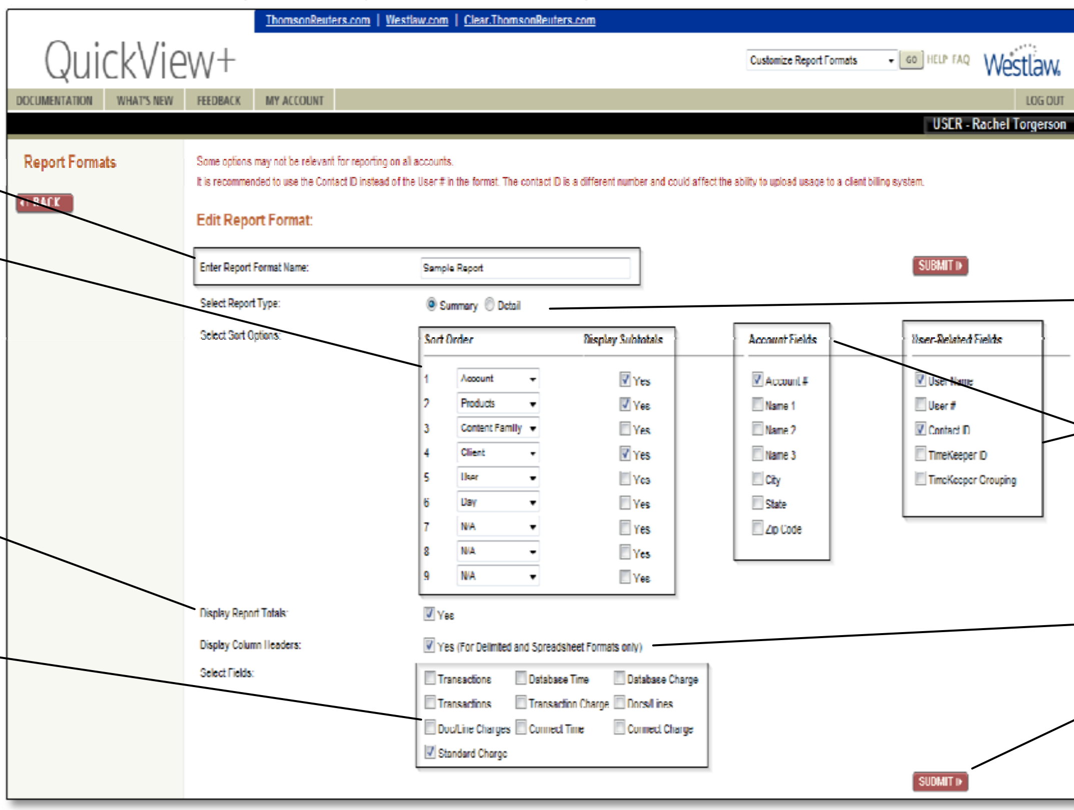


Click **Edit** to change the displayed report format.

Click **Edit** to change the displayed report format.

Figure 4-5: View Selected Report Format page showing Edit and Delete options

2. Click **Edit**.
   The Edit Report Format page is displayed, as shown in Figure 4-6.



Type a new report name, if desired.

Select the fields to determine how the report data is sorted. You can also select whether you want the report to include subtotals for these sort options.

Select to calculate total amounts.

Select the fields you want to include in the report.

You can choose a detailed or summary report type.

If you select **Account** or **User** as one of your sort options, you can select specific fields to include in your report.

Select to display column headings.

Click **Submit** to create the new report format

Figure 4-6: Edit Report Format page

3. Enter a new report name, if desired, by selecting the existing text in the *Enter Report Format Name* text box and typing a new name.
4. Select the desired report type:
   - **Summary** format displays the total amount of database time and connect time, the number of transactions, total print documents/lines, and any unit charges associated with usage.

- **Detail** format provides additional detail on usage, based on the type of usage.

5. From the *Select Sort Options* drop-down lists, select the order in which you want the data sorted.
   - Data can be sorted by Account, Products, Content Family, Client, User, and Day. Clear accounts can select additional sort options for Time, Service Type, and Query.
   - You can select up to nine options.
   - Select the **Yes** check box next to a sort option if you want the report to display subtotal amounts for that sort option.
6. If you select **Account** or **User** as one of your sort options, you can select additional related fields for your report: Figure 4-6 shows this portion of the Edit Report Format page.
   - For **Account**, additional fields include: **Account #**, **Name 1**, **Name 2**, **Name 3**, **City**, **State**, and **Zip Code**.
   - For **User**, additional fields include: **User Name**, **Contact ID**, **TimeKeeper ID**, or **TimeKeeper Grouping**. **User #** is unavailable is selection.
7. Select the **Yes** check box next to *Display Report Totals* (if it's not already selected) if you want the report to calculate the total amount for the report. Clear the check box to disable the option.
8. Select the **Yes** check box next to *Display Column Headers* (if it's not already selected) if you want the report to include column headings in downloaded reports that use the delimited or spreadsheet formats. Clear the check box to disable the option.
9. Select the *Select Fields* check boxes for the type of data you want included in the report.
10. Click **Submit** to save the edited report format. A message is displayed to show that the report format has been saved.
11. Click **OK** to return to the View Selected Report Format page.
    Note: You cannot edit standard report formats.

Deleting a Report Format

To delete a custom report format, complete these steps:

1. Click the number in the left frame for the report format that you want to delete. The View Selected Report Format page is displayed (see Figure 4-6 on page 27).
2. Click **Delete** to remove the report format. A message is displayed to show that the report has been deleted.
3. Click **OK** to return to the View Selected Report Format page.
   Note: You cannot delete standard report formats.

Customizing Account Groups

You can create groups to report usage information for multiple accounts. For example, you might want to set up an account group for all of your office locations.

To manage your account groups, complete these steps:

1. Select **Customize Account Groups** from the drop-down list at the top of the page, as shown in Figure 4-7. Click **GO** if necessary.

Select **Customize Account Groups**, then click **GO** if necessary.

Figure 4-7: Customize Account Groups drop-down list option

2. If your organization has not set up any accounts yet, the New Account Group page is displayed. See Creating an Account Group on page 29.

3. If you have set up at least one account group, the View Account Group page is displayed, as shown in Figure 4-8.

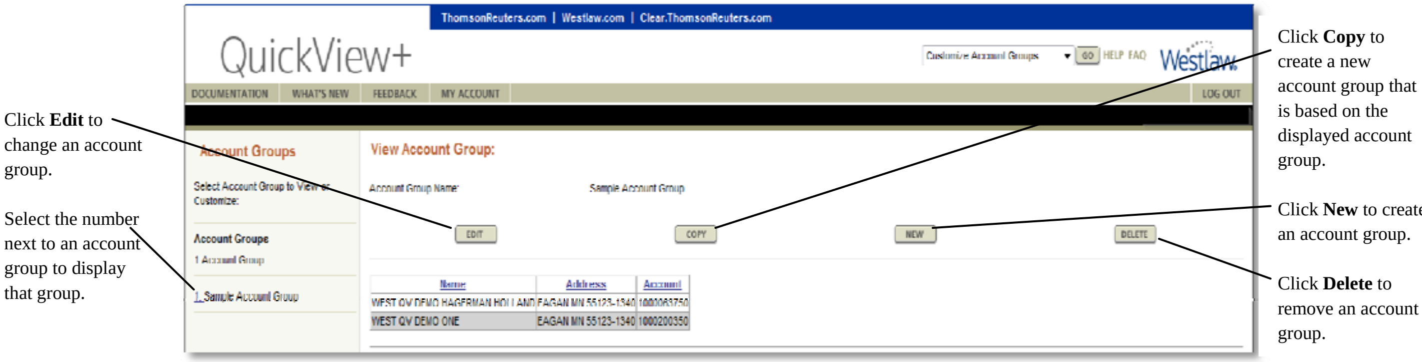


Figure 4-8: View Account Group page

You can use these features to manage your account groups:

- Copy an account group and use it to create another report format. See Copying an Account Group on page 29.
- Create an account group. See Creating an Account Group on page 29.
- Modify an account group. See Changing an Account Group on page 30.
- Delete an account group. See Deleting an Account Group on page 31.

Creating an Account Group

To create an account group, complete these steps:

1. Click **New** on the View Account Group page (see Figure 4-8).
   The New Account Group page is displayed, as shown in Figure 4-9. This page lists your organization's accounts.

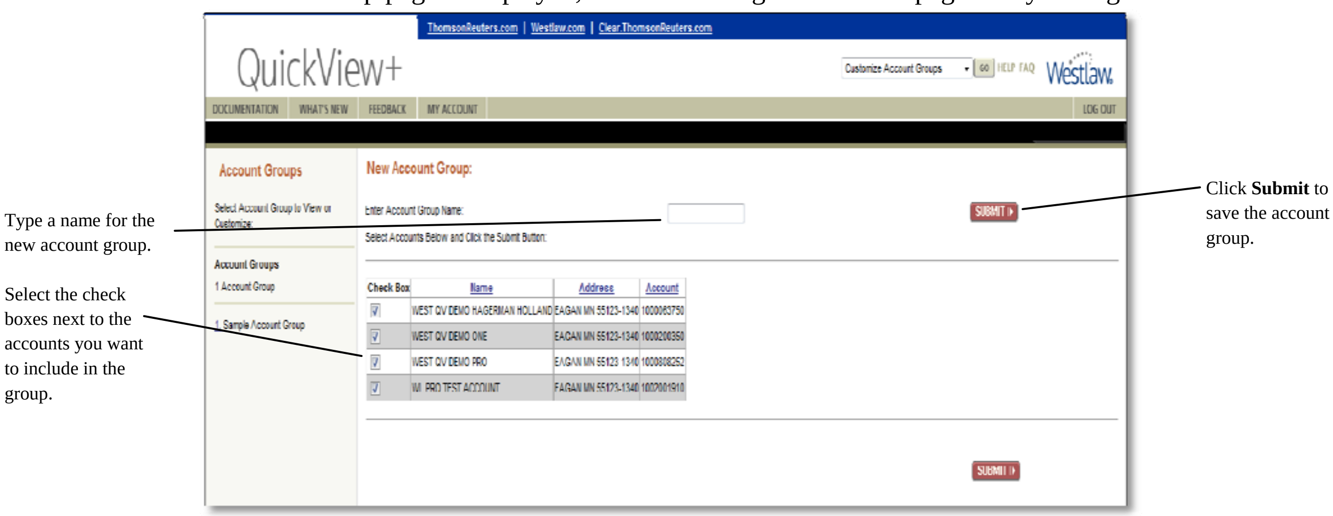


Figure 4-9: New Account Group page

2. Type a name for the new account group in the *Enter Account Group Name* text box.
3. Select the check box next to each account you want to include in the account group.
   Note: If you choose to have tax calculated when you run a report for an account group, QuickView+ calculates the tax by account jurisdiction.
4. Click **Submit**. A message is displayed to show that the new account group has been created.
5. Click **OK** to return to the View Account Group page.

Copying an Account Group

To copy an account group, complete these steps:

1. On the View Account Group page, click the number in the left frame for the account group that you want to copy. The account group is displayed.
2. Click **Copy** (see Figure 4-8).

The Copy Account Group page is displayed, as shown in Figure 4-10.

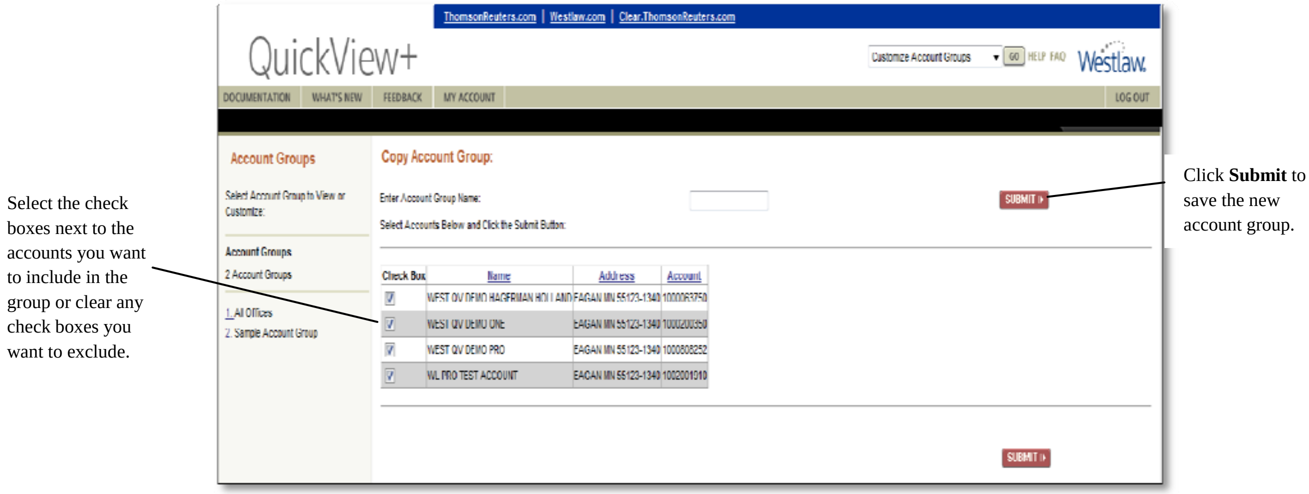


Figure 4-10: Copy Account Group page

3. Type a name for the new account group in the *Enter Account Group Name* text box.
4. The accounts included in the existing account group are selected. Select the check box for each additional account you want to include in the new group. Clear the check box next to each account you want to remove.
   Note: If you choose to have tax calculated when you run a report for an account group, QuickView+ calculates the tax by account jurisdiction.
5. Click **Submit**. A message is displayed to show that the account group has been created.
6. Click **OK** to return to the View Account Group page.

Changing an Account Group

To change an account group, complete these steps:

1. On the View Account Group page, click the number in the left frame for the account group that you want to edit. The account group is displayed.
2. Click **Edit** (see Figure 4-8 on page 29).
   The Edit Account Group page is displayed, as shown in Figure 4-11.

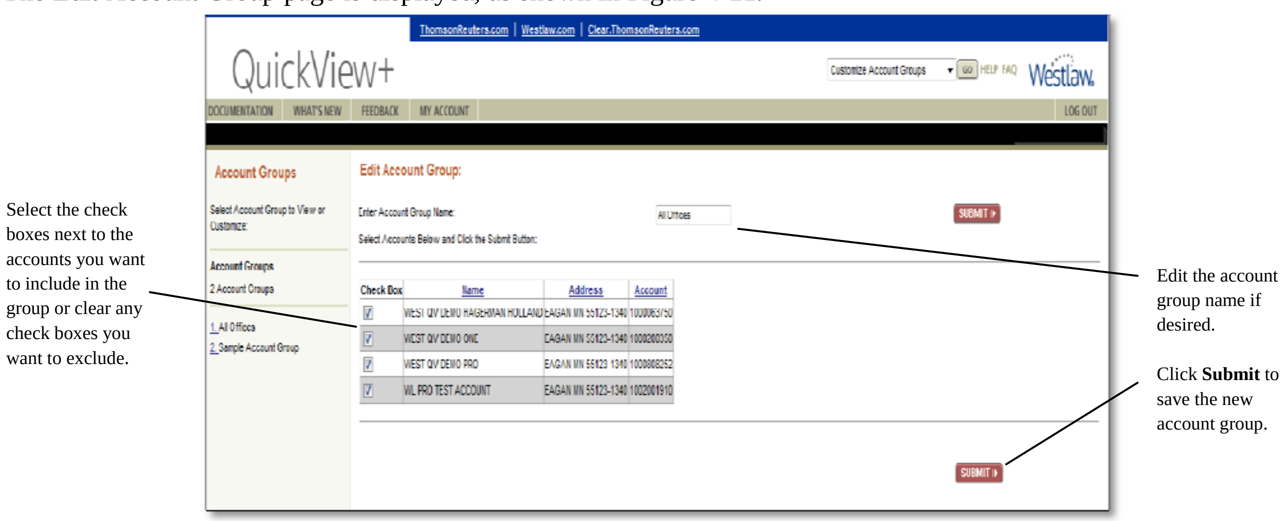


Figure 4-11: Edit Account Group page

3. Edit the account name in the *Enter Account Group Name* text box, if desired.
4. Select the check box next to each additional account you want to include in the group. Clear the check box next to each account you want to remove from the group.
5. Click **Submit**. A message is displayed to show that the account group has been updated.
   Note: If you choose to have tax calculated when you run a report for an account group, QuickView+ calculates the tax by account jurisdiction.

6. Click **OK** to return to the View Account Group page.
   Note: If your business adds an account (for example, a new office location), you can edit your account groups to include the new account.

Deleting an Account Group

To delete an account group, complete these steps:

1. On the View Account Groups page, click the number in the left frame for the account group you want to delete. The account group is displayed.
2. Click **Delete** (see Figure 4-8 on page 29). A message is displayed to show that the account group has been deleted.
3. Click **OK** to return to the View Account Group page.

Managing Auto Reports

You can schedule a report to run automatically, using the Auto Reports feature.

To view and manage your auto reports, complete these steps:

1. Select **Manage Auto Reports** from the drop-down list at the top of the page, as shown in Figure 4-12. Click **GO** if necessary.

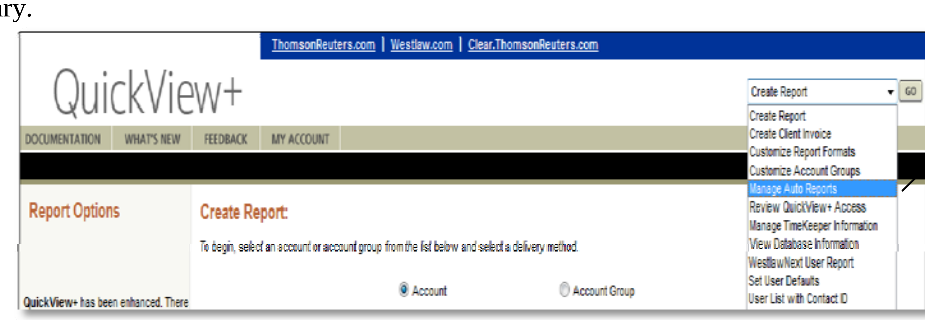


Figure 4-12: Manage Auto Reports drop-down list option

The View Auto Report page is displayed, as shown in Figure 4-13.

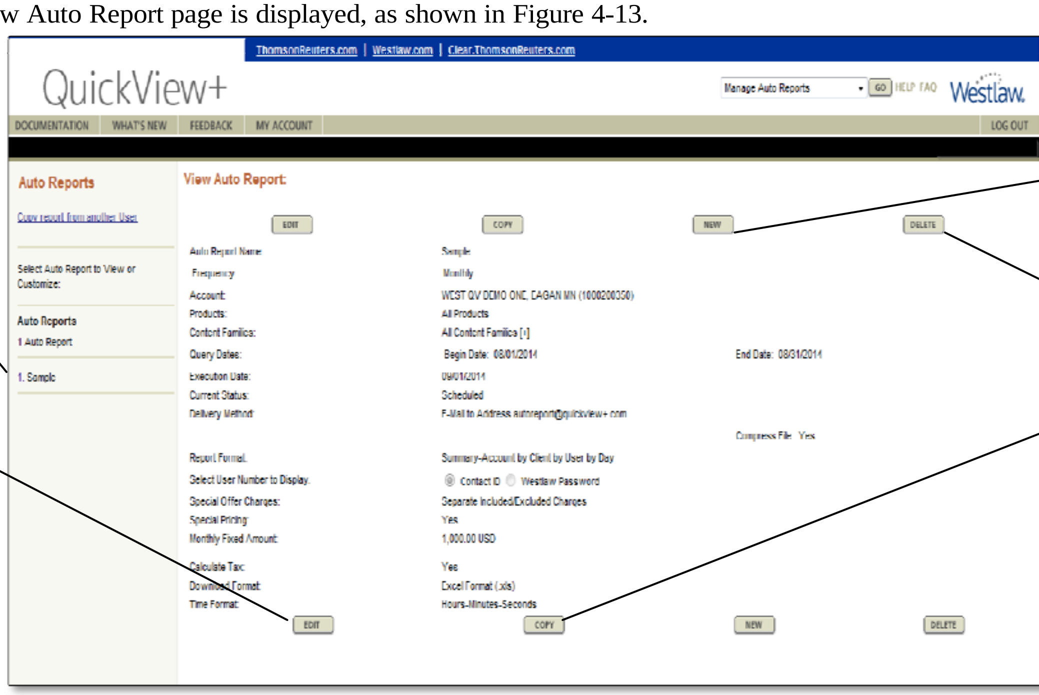


Figure 4-13: View Auto Report page

2. To view information about a scheduled auto report:
   - Click the number in the left frame for the auto report.
   - If there are more than 10 reports, click the arrows to display the next 10 or previous 10 reports.

You can use these features to manage your auto reports:

- Create an auto report. See Creating an Auto Report on page 32.
- Copy an auto report and use it to create another auto report. See Copying an Auto Report Format on page 34.
- Modify an auto report. See Changing an Auto Report on page 36.
- Delete an auto report. See Deleting an Auto Report on page 36.
- View the history of the auto reports you have scheduled. See Viewing Auto Report History on page 36.

Creating an Auto Report

To create an auto report, complete these steps on the Create Report page:

1. Select the account or account group you want to include in the report.
2. Select **Auto Report** as the delivery method.
3. Choose how often you want the report to be run. From the *Select Auto Report Frequency* drop-down list, select one of these options:
   - Select **Daily** to run a report each day.
   - Select **Weekly** to run a report for the previous week. You can specify the week start day. The default start day is Sunday.
   - Select **Biweekly** to run a report for the previous two weeks. You can specify the week start day. The default start day is Sunday.
   - Select **Monthly** to run a report for the previous calendar month.
   - Select **One-Time Run** to run a report for specified dates.
   - Select **Month to Date** to run a report for current month to date.

   Note: Report information will be delivered as soon as usage is available.

4. Select one of these auto report delivery methods:
   - Select **E-Mail** to deliver the report to the e-mail address specified in the *Enter E-Mail Address* text box.
   - Select **ProLaw E-Mail** to deliver the report in ProLaw software format.
   - Select **Elite E-Mail** to deliver the report in Elite software format.
5. Type a name for the report in the *Enter Report Name* text box.
6. When you selected an auto report delivery method in Step 4, the Create Report page displays additional fields that you need to fill out for that delivery method.

   For more information, see:
   - Creating an Auto Report for E-mail Delivery on page 33
   - Creating an Auto Report for ProLaw or Elite E-mail Delivery on page 34
7. Select additional report settings and then click **Submit**.
8. When you are done selecting the options on the Create Report page, click **Submit** to continue:
   - If you select special pricing or target options, QuickView+ opens another page of report options. Complete the second page of options and then click **Submit** to create the report.
   - If you do not select special pricing or target options, QuickView+ saves your auto report.

   Notes:
   - The performance and delivery of QuickView+ auto reports may vary, depending on your equipment and the level of Internet activity.
   - The following issue applies to organizations that do special pricing by subscription. If, after scheduling an auto report, a new subscription is added, or an existing subscription is deleted, QuickView+ displays an error message instead of the report. To resolve this issue, edit the auto report and make any necessary changes to the setup. Then save it again. Make sure you save the report even if you did not need to make changes to the setup.

Creating an Auto Report for E-mail Delivery

When you create an auto report, you can choose to deliver the report via e-mail. Figure 4-14 shows the auto report options that appear on the Create Report page.

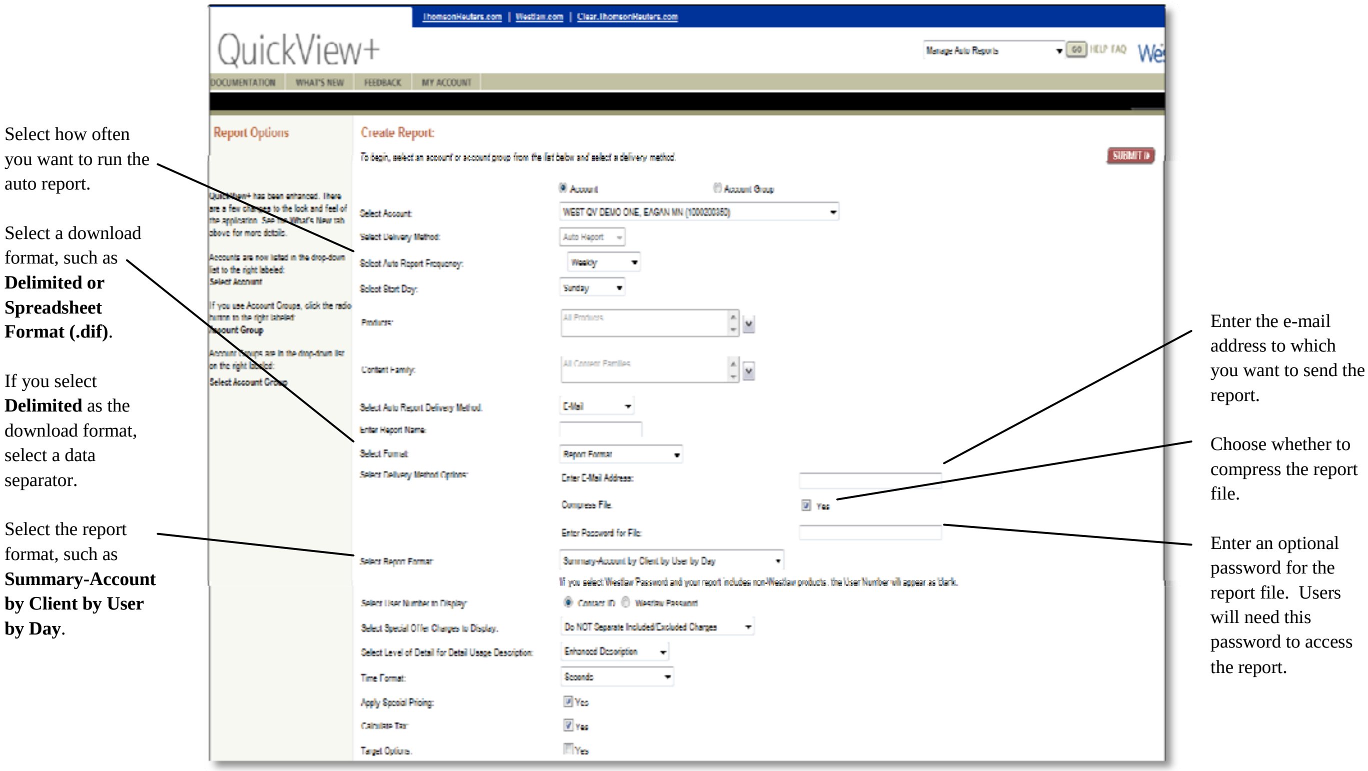


Figure 4-14: Create Report options for the e-mail auto report delivery method

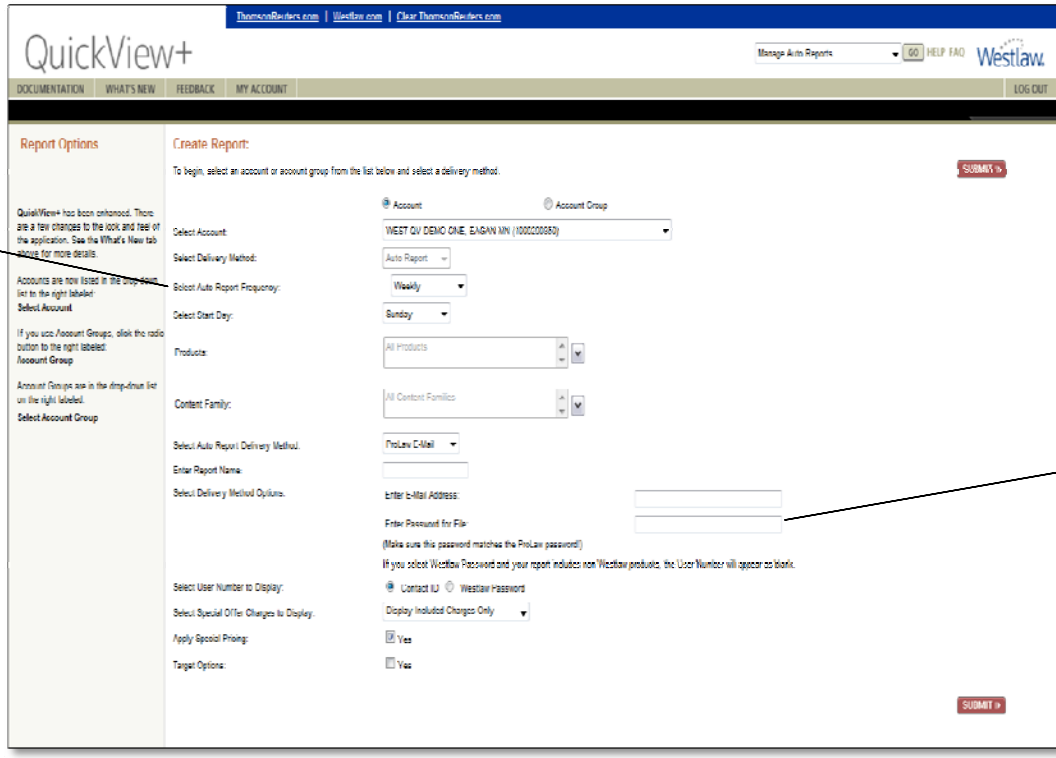
If you selected **E-mail** as the auto report delivery method, complete these steps on the Create Report page:

1. From the *Select Format* drop-down list, select the format for the download file:
   - Select **Report Format** to download usage information in a text report format.
   - Select **Delimited** to download usage information in a format that separates the fields by one of the five available delimiters (comma, semicolon, tab, space, or pipe). When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
   - Select **Non-Delimited (fixed width)** to download usage information in a format that assigns each field a fixed position or fixed width. When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
   - Select **Spreadsheet Format** (**.dif**) to download usage information in Data Interchange Format, which is recognized by most spreadsheet programs.
2. If you choose *Delimited* from the *Select Download Format* drop-down list, use the *Select Download Delimiter* drop- down list to select how the data in the file will be separated: **Comma**, **Semicolon**, **Tab**, **Space**, or **Pipe**.
3. Enter the e-mail address to which you want the report delivered.
4. Select the **Yes** check box next to *Compress File* (if it's not already selected) to reduce the file size. QuickView+ uses WinZip to create a compressed file. Clear the check box if you do not want to create a compressed file.
   Note: Some organizations have security policies that prevent users from receiving an executable file as an e-mail attachment.
5. Enter a password in the *Enter Password for File* text box if you want to require an e-mail recipient to enter a password before accessing the file.
6. Select the report format, such as Summary - Account by Client by User by Day.
7. Select other report options, as described in Creating an Auto Report on page 32.

Creating an Auto Report for ProLaw or Elite E-mail Delivery

When you create an auto report, you can choose to deliver the report in ProLaw or Elite application format. For example, Figure 4-15 shows the auto report options that appear on the Create Report page for a ProLaw report.

Choose how often you want to run the auto report, such as weekly or monthly.



Enter an optional password for the report file. Users will need this password to access the report.

Figure 4-15: Create Report options for the ProLaw auto report delivery method

If you selected **ProLaw E-Mail** or **Elite E-Mail** as the auto report delivery method, complete these steps on the Create Report page:

1. Enter the e-mail address to which you want the report delivered.
2. Enter a password in the *Enter Password for File* text box if you want to require an e-mail recipient to enter a password before accessing the file:
   - When the recipient receives the report in the form of a self-extracting file (.exe), he or she will be prompted to enter this password. You need to provide the password to the recipient separately.
   - If you are sending a ProLaw report, you must use your ProLaw password.
   - If you are sending an Elite report, QuickView+ displays the password that users enter to access the report.
3. Select other report options, as described in Creating an Auto Report on page 32.

Copying an Auto Report Format

You can copy an auto report and use the settings to create another auto report.

To copy an auto report, complete these steps:

1. On the View Auto Report page, click the number in the left frame for the auto report that you want to copy. The auto report is displayed, as shown in Figure 4-13 on page 31.

2. Click **Copy**. The Create Report page is displayed, which shows the report options from the report you are copying. Figure 4-16 shows an example of a copied auto-report that uses the E-mail delivery method.

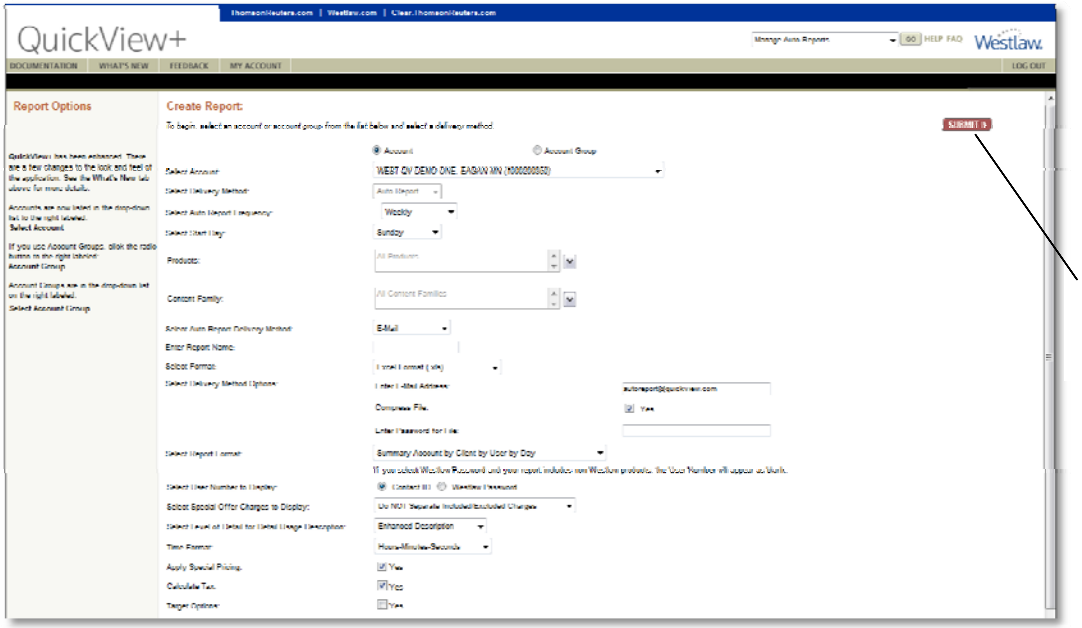


Figure 4-16: Create Report page, which you can use to copy an auto report format

3. Type a name for the new auto report format in the *Enter Report Name* text box.
4. Select other auto report options, as described in these sections:
   - Creating an Auto Report for E-mail Delivery on page 33
   - Creating an Auto Report for ProLaw or Elite E-mail Delivery on page 34
5. Click **Submit**. A message is displayed to show that the auto report has been created.
6. Click **OK** to return to the View Auto Report page.

Copying a Report From Another User

You can copy an auto report from another QuickView+ user within your organization. Figure 4-17 shows an example of selecting a report to copy from another user.

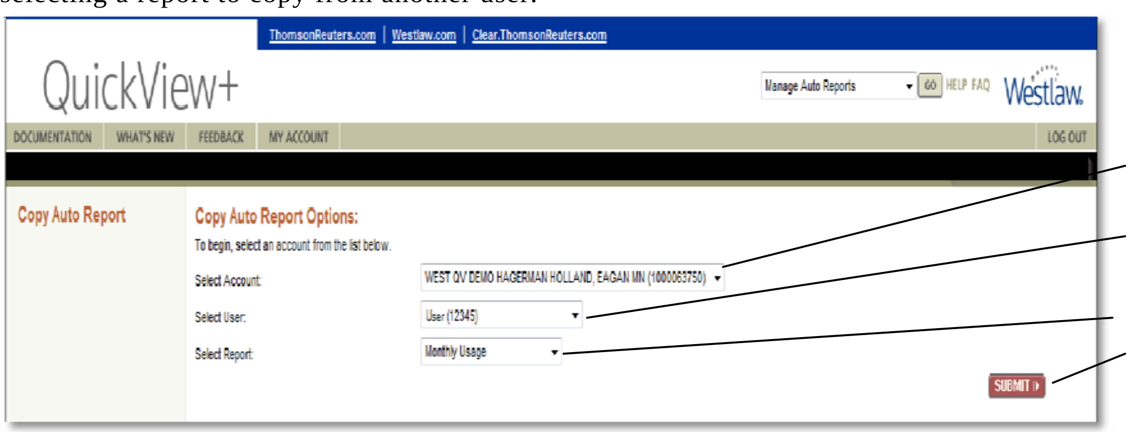


Figure 4-17: Copy Auto Report from Another User page

To copy an auto report from another user, complete these steps:

1. On the View Auto Report page, click the link in the left frame for *Copy report from another User*.
2. Select an account that you want to copy an auto report for.
3. Select the name of the user whose report you want to copy.
4. Select the name of the report you would like to copy.
5. Click **Submit**.
   - If an Account Group is used and you do not have access to one or many locations within the Account Group, then you are notified of this and asked if you would still like to copy the auto report. You are provided a list of the

account(s) that you do not have access to. Click **YES** or **NO**.

- If you clicked **YES** but do not have access to all the accounts within the Account Group, then you can proceed with copying the other parameters of the auto report, but would need to select either a different Account Group or account.
- If you clicked **YES** and have access to all the accounts within the Account Group, then that Account Group is copied to your profile.
- If you clicked **NO**, then you will need to select an Account Group or account for this auto report.

- If a customized report format is used for this auto report, then you are asked if you would like to copy the customized report format. Click **YES** or **NO** or **CANCEL**.
  - If you clicked **YES**, then the report format is copied to your profile.
  - If you clicked **NO**, then you would select the report format that you would like to use for this auto report.
  - If you clicked **CANCEL**, then the copying of the auto report is cancelled.

6. Enter an email address in the email field
7. Click **Submit**.

Changing an Auto Report

You can change the settings of an auto report. For example, you might want to change an auto report to run weekly instead of monthly. QuickView+ uses the updated settings the next time the report is run.

To change an auto report, complete these steps:

1. On the View Auto Report page, click the number in the left frame for the auto report that you want to change. The auto report is displayed, as shown in Figure 4-13 on page 31.
2. Click **Edit**. The Create Report page is displayed, which shows the report options for this auto report.
3. Update the auto report options, as described in these sections:
   - Creating an Auto Report for E-mail Delivery on page 33
   - Creating an Auto Report for ProLaw or Elite E-mail Delivery on page 34
4. Click **Submit**. A message is displayed to show that the auto report has been updated.
5. Click **OK** to return to the View Auto Report page.

Deleting an Auto Report

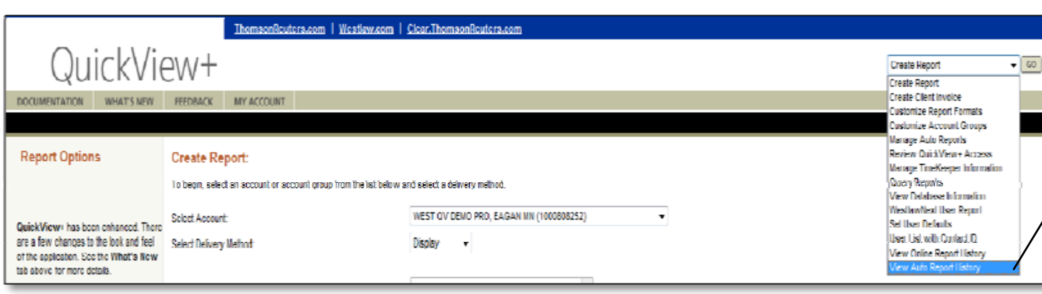
To delete an auto report, complete these steps:

1. On the View Auto Report page, click the number in the left frame for the auto report that you want to delete. The auto report is displayed.
2. Click **Delete**. A message is displayed to show that the auto report has been deleted.
3. Click **OK** to return to the View Auto Report page.

Viewing Auto Report History

To view the history for an auto report, complete these steps:

1. Select View Auto Report History from the drop-down list, as shown in Figure 4-18. Click **GO** if necessary.



Select **View Auto Report History**, then click **GO** if necessary.

Figure 4-18: View Auto Report History drop-down list option

The View Auto Report History page is displayed, which lists the auto reports that have been completed or requeued. The list shows the auto report name, status, and date and time of execution.

2. Click a report name to view additional information for the report, as shown in Figure 4-19.
3. Click **Return** to return to the View Auto Report History page.

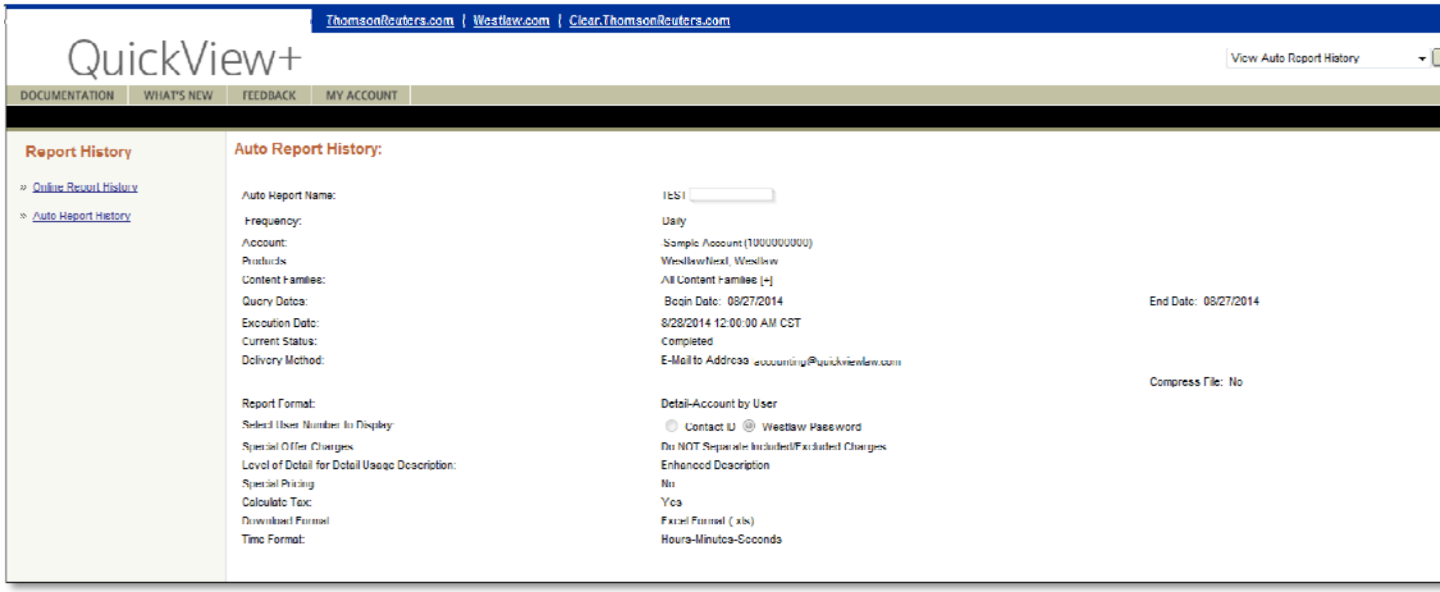


Figure 4-19: View Auto Report History page

Additional QuickView+ Features

Creating a Client Invoice

QuickView+ users can create an invoice that summarizes Westlaw charges for clients/matters who had online research done on their behalf. You can present the invoice to the client/matter or retain it in the client/matter file for record-keeping.

To create an invoice, complete these steps:

1. Select **Create Client Invoice** from the drop-down list at the top of the page, as shown in Figure 5-1. Click **GO** if necessary.

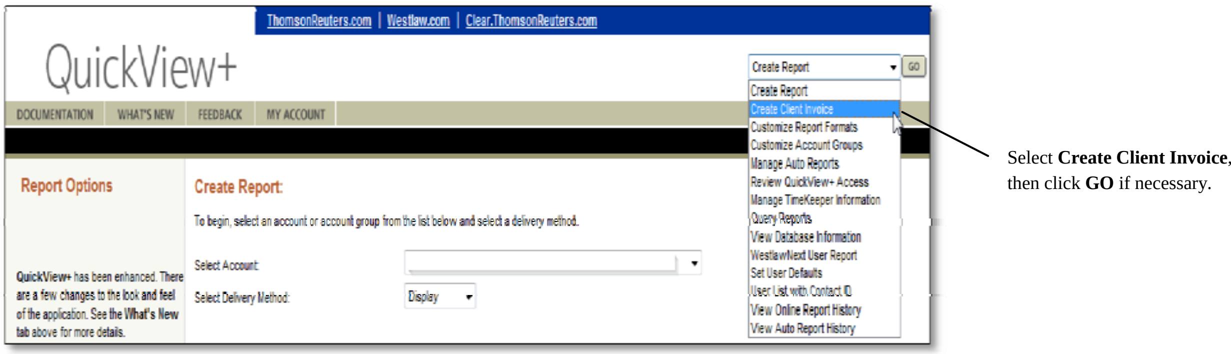


Figure 5-1: Create Client Invoice drop-down list option

The Create Client Invoice page is displayed, as shown in Figure 5-2.

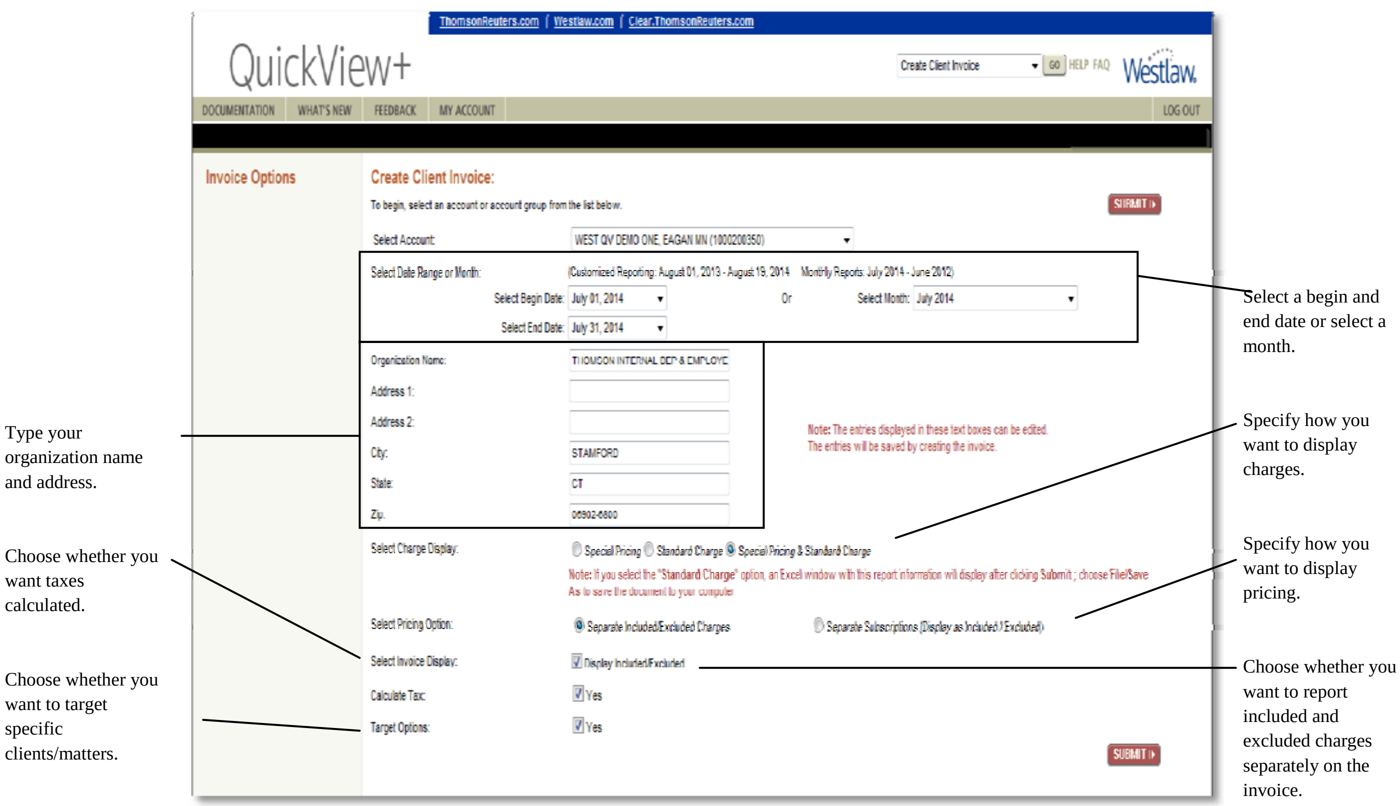


Figure 5-2: Create Client Invoice page

2. Select the account or account group for which you want to view invoice information.
3. Select a start date from the *Select Begin Date* drop-down list and an end date from the *Select End Date* drop-down list. Or, if you want to view information for one month, select the desired month from the *Select Month* drop-down list.
4. Type your organization name and address in the appropriate text boxes. To change an existing entry, select the text and then type the new text. QuickView+ saves these entries when you create the invoice.
5. Specify how you want charges displayed on the invoice. In the *Select Charge Display* section, you can choose one of these options:
   - **Special Pricing** (displays an allocated amount)

- **Standard Charge** (displays retail charges)
- **Special Pricing & Standard Charge** (displays both the retail charges and the allocated amounts)

Note: If you select *Standard Charge*, and do not set up target options for the invoice, you will be prompted to save or open the file in Microsoft Excel format. Click **Save** and then specify where you want to save the file. Go to where you saved the file, and then double-click the file to open it in Microsoft Excel.

6. Specify how you want pricing displayed on the invoice. In the *Select Pricing Option* section, you can choose one of these options:
   - **Separate Included/Excluded Charges** (allocate charges for usage included within their contract)
   - **Separate Subscriptions (Display as Included/Excluded)** (delineate charges by subscription)
7. Select the *Invoice Display* check box if you want to list Included and Excluded charges separately on the invoice. Clear the check box if you want the charges combined.
8. Select the *Calculate Tax* check box if you want applicable taxes calculated.
9. Select the *Target Options* check box to create the invoice for specific clients.
10. Click **Submit**.

The Select Special Pricing Invoice Options page is displayed, as shown in Figure 5-3.

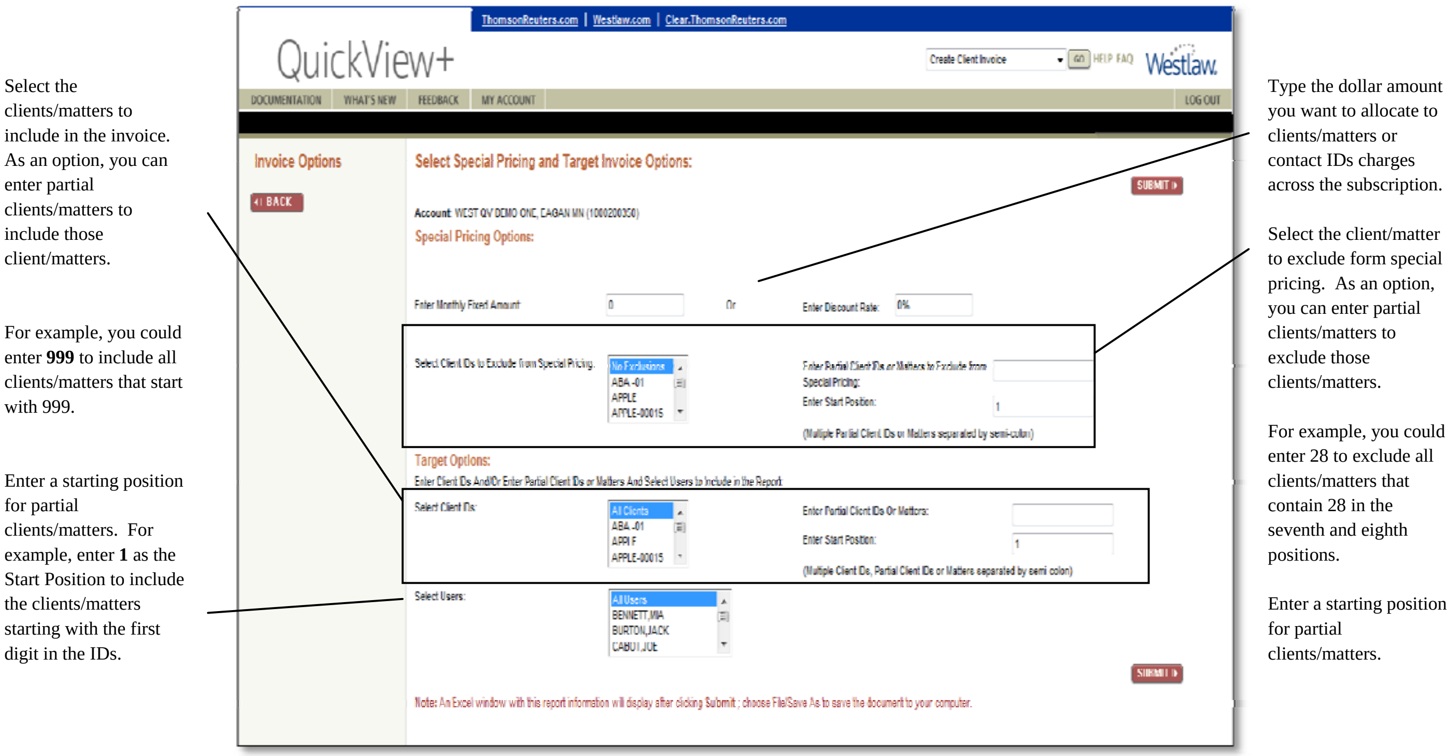


Figure 5-3: Select Special Pricing and Target Invoice Options page

11. Type a monthly dollar amount in the *Enter Monthly Fixed Amount* text box if you want to allocate a fixed amount to client/matter or contact ID charges across the subscription. The dollar amount entered will be allocated toward Included usage only.

    Note: You will not see this option if you chose the *Standard Charge* option on the previous page.
12. You can exclude certain clients/matters from special pricing calculations. For example, you might exclude an administrative client/matter from the billing allocation. To exclude clients/matters, perform these steps:
    - Select the clients/matters from the *Select Client IDs to Exclude from Special Pricing* list box or enter a partial client/matter to exclude from special pricing in the *Enter Partial Client IDs or Matters to Exclude from Special Pricing* text box.
    - Hold down the **Ctrl** key while you click to select multiple clients/matters.
    - If you enter a partial client/matter, you can also enter a start position for the partial client or matter ID in the *Enter Start Position* text box.
    - For example, if you wanted to exclude from special pricing all clients/matters in the 88888-10 range, beginning with the first entry, you would enter **88888-10** in the *Enter Partial Client IDs or Matters to Exclude from Special*

Pricing text box and enter **1** in the *Enter Start Position* text box.

13. If you elected to target options to narrow your invoice results on the Create Invoice page, you need to specify the clients/matters or partial clients/matters and contact IDs you want to include in the invoice. Figure 5-4 shows this portion of the Special Pricing and Target Invoice Options page.
    - Select the clients/matters you want to include in the report from the *Select Client IDs* list box or enter a partial client/matter to include in the report in the *Enter Partial Client IDs or Matters* text box.
    - Hold down the Ctrl key while you click to select multiple clients/matters.
    - If you enter a partial client/matter ID, you can also enter a start position for the partial client/matter in the *Enter Start Position* text box.

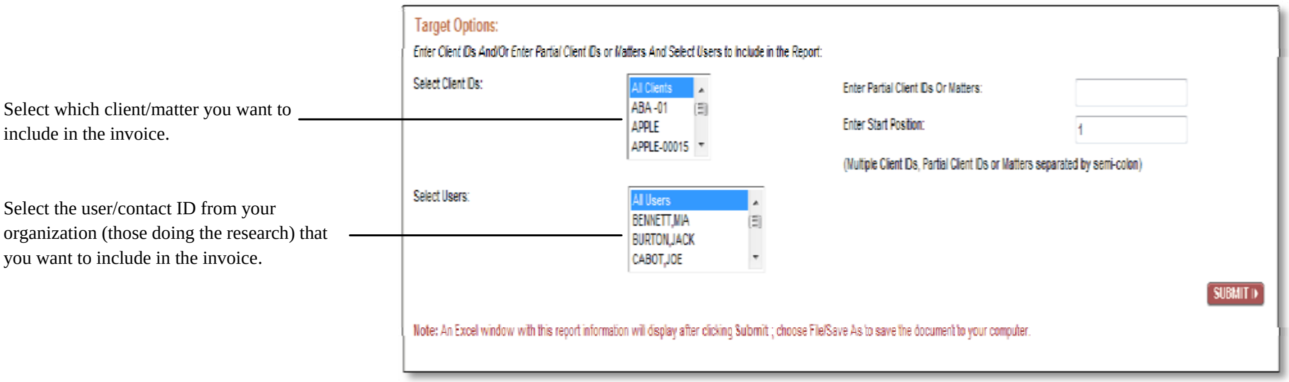


Figure 5-4: Target options for an invoice

14. Select the users (members of your organization performing the research) that you want to include in your report from the *Select Users* list box.
    - The report will include each user's portion of the total account allocation.
    - Hold down the **Ctrl** key while you click to select multiple users.
15. Click **Submit** to continue with the invoice. The File Download dialog box is displayed.
    Note: Click the **Back** button at the top left side of the page if you want to return to the Create Client invoice page and change your options.
16. Click **Save**.
17. Specify where you want to save the invoice, then click **Save**.
18. Go to where you saved the invoice, and then double-click it to open the file in Microsoft Excel.

Creating Query Reports (CLEAR Only)

The Query Reports feature allows you to verify search details for research conducted by your users. This feature is only available to those QuickView+ users with CLEAR account access.

To access the Query Reports feature, choose Query Reports from the drop-down list at the top of the page, as shown in Figure 5-5.

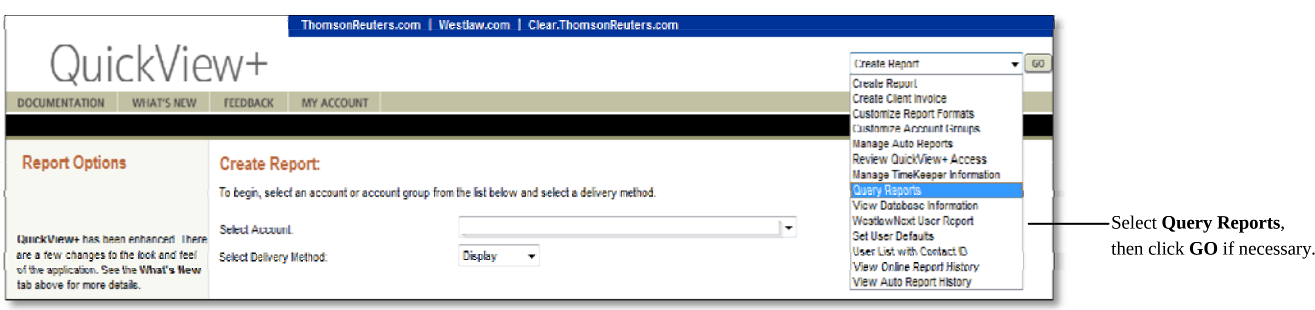


Figure 5-5: Query Reports drop-down list option

The Query Reports page is displayed, as shown in Figure 5-6.

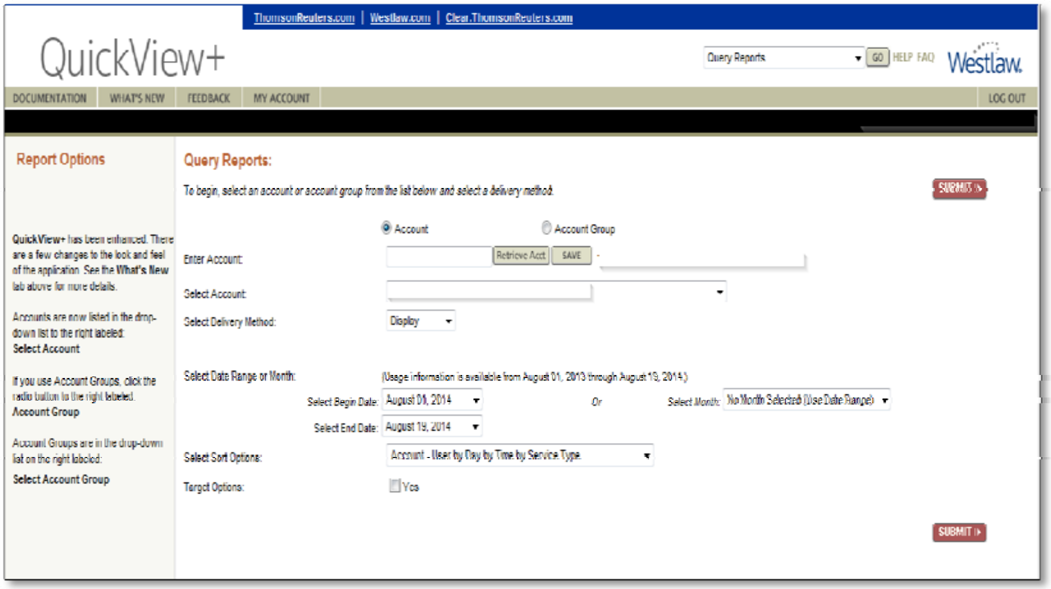


Figure 5-6: Query Report page

1. Select which accounts you want to include in the report.
   - Select **Account** or **Account Group**.
   - Individual accounts or account groups are listed in the drop-down list. Select the account or account group you want to include in the report.

You can set up account groups to organize your accounts. For example, you might want to set up an account group for all of your office locations. For more information, see Customizing Account Groups on page 28.

2. Select the delivery method for your report, as shown in Figure 5-7.

Figure 5-7: Select the delivery method for your report

You can choose one of these delivery methods. The Create Report page displays the fields you need to fill out for that delivery method.

Delivery Method	Description
Display	You can view the report online in QuickView+. For more information, see Viewing a Report Online on page 17.
Download	You can save the report to a file on your computer. For more information, see Downloading a Report on page 19.
E-Mail	You can send the report to an e-mail address. For more information, see Sending a Report via E-Mail on page 20.
Auto Report	You can have the report run automatically on a daily, weekly, biweekly, or monthly basis. You receive the report in an email. For more information, see Running a Report Automatically on page 21.

3. Choose the date range you want to use in the report. For more information, see Specifying a Date Range on page 12.
4. From the *Select Sort Options* drop-down list, select the desired report format:
   - You can choose from four report formats.
5. You can narrow your report results to specific client/matter or contact ID:
   - For example, you might want to only run the report for specific client/matter or contact ID.

- Select the **Yes** check box next to *Target Options*, if it's not already selected.
- For more information, see Selecting Target Options on page 17.

6. When you are done selecting the options on the Create Report page, click **Submit** to continue:
   - If you select certain options, such as Target Options, QuickView+ opens another page of report options. Complete the second page of options and then click **Submit** to create the report.
   - Otherwise, QuickView+ runs the report. For more information on report delivery options, see Delivering a Report on page 17.

Viewing Database Information

You can run a report to validate included or excluded charges:

- You can view the charges for a single day, month-to-date, or month.
- You can report the charges by single client/matter or contact ID within an account or account group.

To do this, you use the View Database Information feature to review database-level information.

To use this feature, complete these steps.

1. Select **View Database Information** from the drop-down list at the top of the page. Click **GO** if necessary (see Figure 5-8).

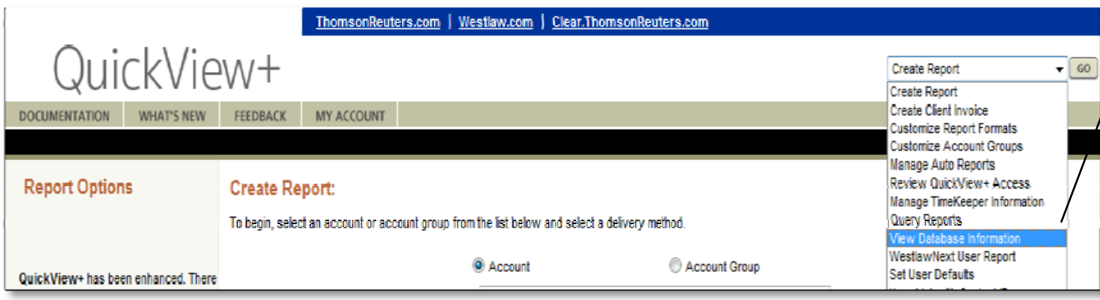


Figure 5-8: View Database Information drop-down list option

The Select Database Information Options page is displayed, as shown in Figure 5-9.

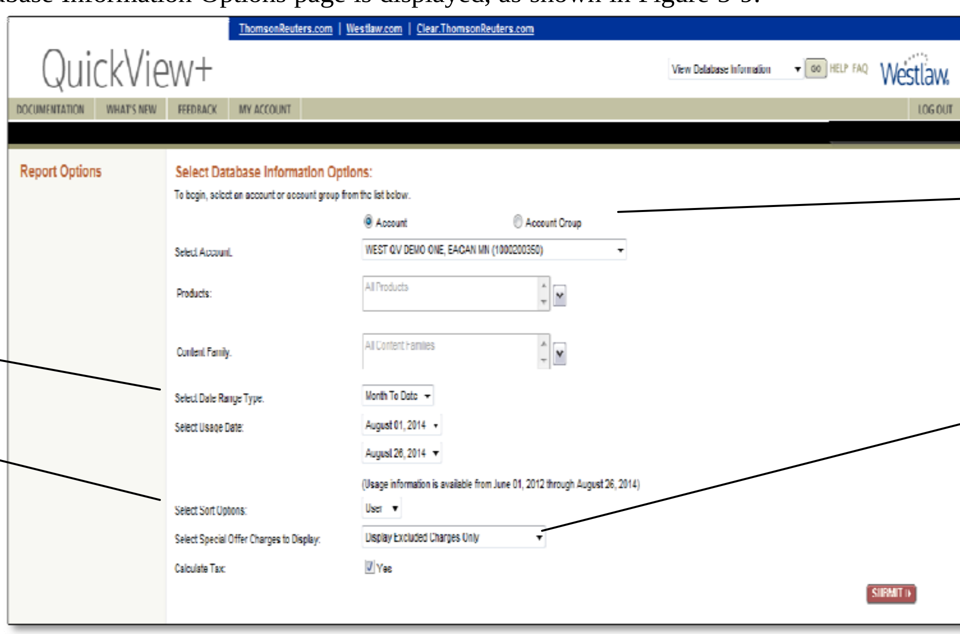


Figure 5-9: Select Database Information Options page

2. Select an account or account group.
3. From the *Select Usage Date* drop-down list, select the date for which you want to view usage.
4. From the *Select Sort Options* drop-down list, select whether to report the usage by **Client** or **User**.
5. Depending on your Westlaw pricing plan, you may see the *Select Special Offer Charges to Display* drop-down list. You can choose how to display included or excluded charges in your report.
6. Click **Submit**.

If usage was found for the criteria you entered, the Select Database Information Options page is displayed again with new options (see Figure 5-10).

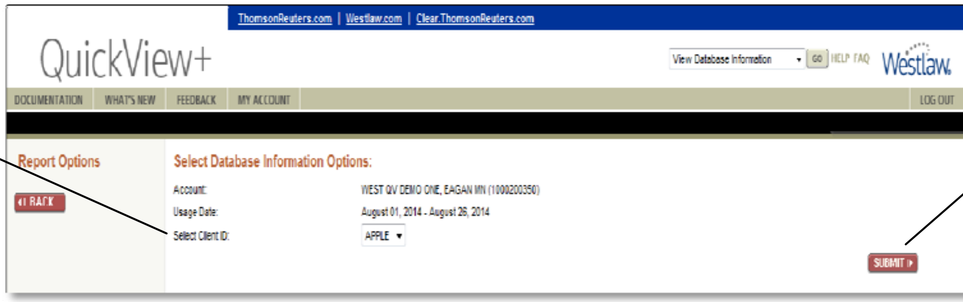


Figure 5-10: Select Excluded Database Information Options page, showing Client ID option

7. Select a client/matter from the *Select Client ID* drop-down list or select a contact ID from the *Select User* drop-down list. The *Select Client ID* or *Select User* option is displayed based on the sort option you selected in step 4.
8. Click **Submit** to display the report.
   Figure 5-11 shows an example of this report.

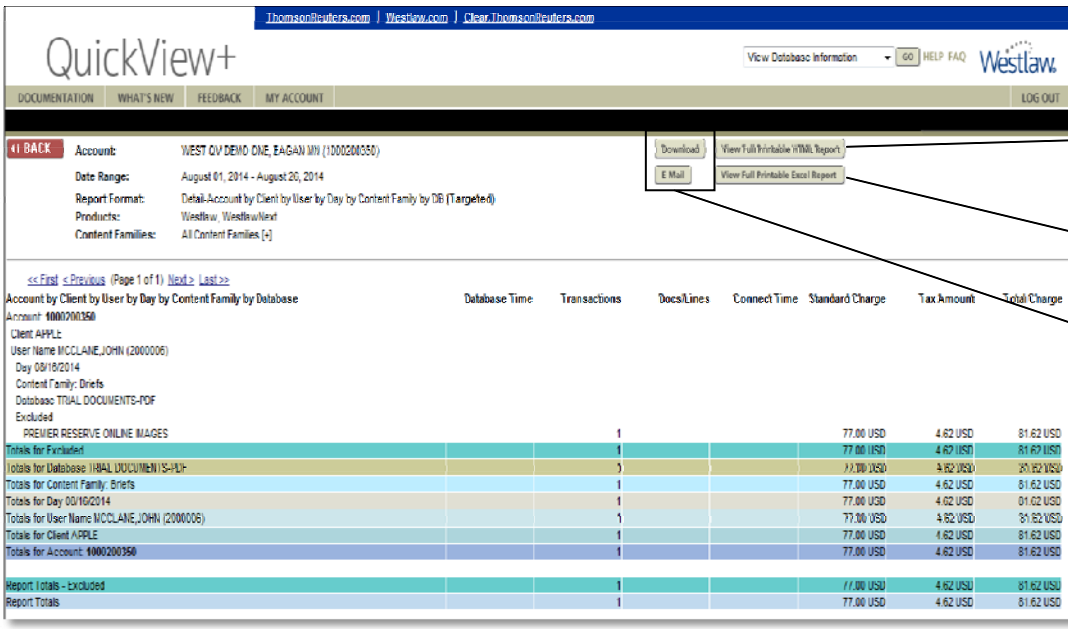


Figure 5-11: Example of Database Information report

Managing TimeKeeper Information

TimeKeeper information includes:

- TimeKeeper IDs—the identification number your organization has assigned to each contact ID at your organization
- TimeKeeper Groupings—the group to which TimeKeeper IDs have been assigned

You can change the TimeKeeper IDs to match identification numbers used in your system. By entering or uploading TimeKeeper IDs, you can create a custom report that automatically includes these IDs in your usage reports.

Viewing TimeKeeper Information

To view TimeKeeper IDs, complete these steps:

1. Select **Manage TimeKeeper Information** from the drop-down list at the top of the page, as shown in Figure 5-12. Click **GO** if necessary.

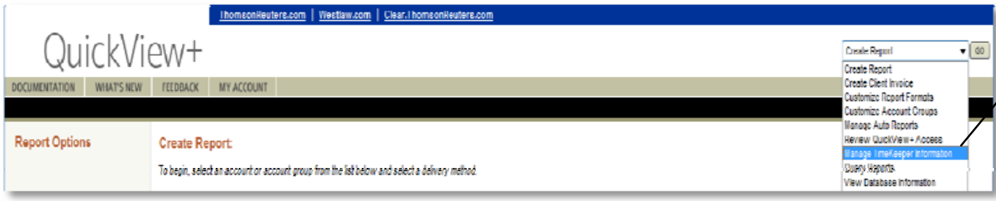


Figure 5-12: Manage TimeKeeper Information drop-down list option

The Manage TimeKeeper Information page is displayed, as shown in Figure 5-13.

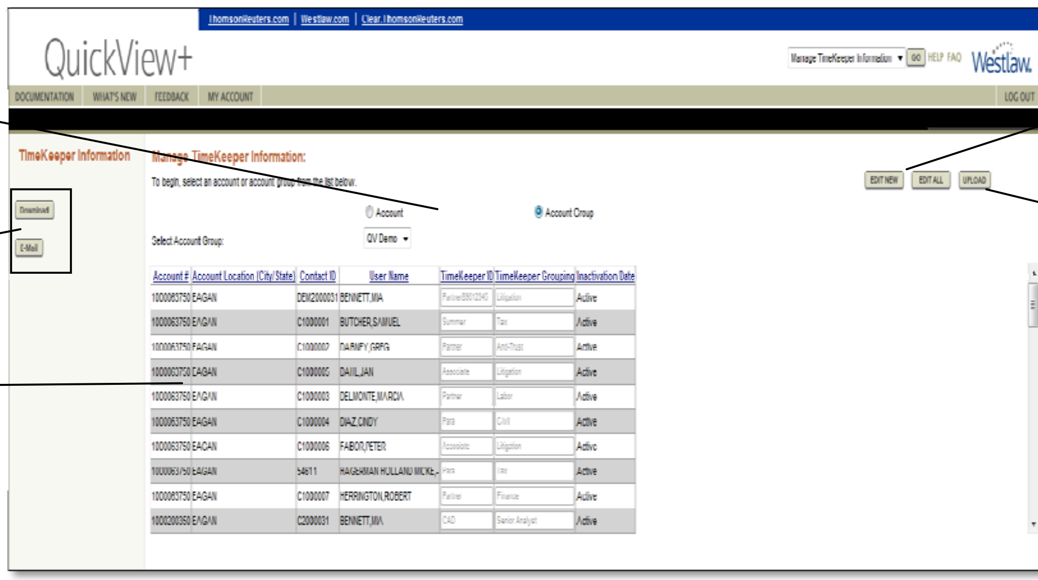


Figure 5-13: Manage TimeKeeper Information page

2. Select the account or account group for which you want to view TimeKeeper information.
   The TimeKeeper IDs and groups for the account or account group are displayed. The information includes:
   - The contact ID and user name for each user in your organization.
   - The TimeKeeper ID assigned to each user.
   - The TimeKeeper group for that user if one has been assigned. For example, your organization may organize users by practice area.

Editing TimeKeeper Information

To update TimeKeeper information, complete these steps:

1. Select **Manage TimeKeeper Information** from the drop-down list at the top of the page, as shown in Figure 5-12. Click **GO** if necessary.
   The Manage TimeKeeper Information page is displayed (see Figure 5-13).
2. Click **Edit**.

The Manage TimeKeeper Information page is displayed again, where you can change the TimeKeeper information (see Figure 5-14).

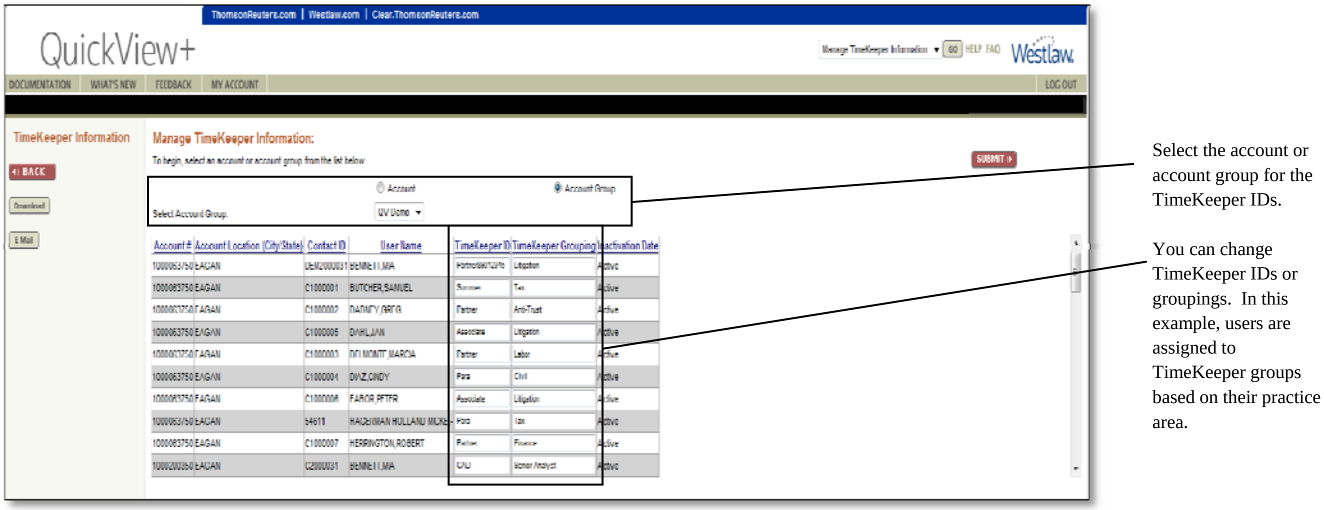


Figure 5-14: Manage TimeKeeper Information page, showing editing options.

3. To change the IDs, type the identification numbers currently used by your organization in the *TimeKeeper ID* text boxes.
   - TimeKeeper IDs can be any combination of up to 15 letters or numbers.
4. To assign a user to a TimeKeeper group, type the name of the group in the *TimeKeeper Grouping* text box.
   - TimeKeeper groups can be any combination of up to 20 letters or numbers.
5. Click **Submit** to save the changes. A message is displayed to show that the TimeKeeper information has been saved.
6. Click **OK** to return to the Manage TimeKeeper Information page.

Uploading TimeKeeper Information From Your Computer

You can upload TimeKeeper information from your computer and use it in QuickView+. You can upload a file that contains the TimeKeeper IDs and groupings for some or all of your organization's users.

Here is an example of how you might upload a partial list of TimeKeeper IDs.

1. Your organization has 50 users.
2. You want to change the TimeKeeper IDs for 40 users to match the identification numbers from your organization's billing system.
3. You upload a file that contains the TimeKeeper IDs for these 40 users:
   - QuickView+ changes the TimeKeeper IDs for these users.
   - The TimeKeeper IDs for the other 10 users do not change. These users will continue to use their default TimeKeeper ID.

To upload TimeKeeper information, complete these steps:

1. Select **Manage TimeKeeper Information** from the drop-down list at the top of the page, as shown in Figure 5-12 on page 45. Click **GO** if necessary.
   The Manage TimeKeeper Information page is displayed (see Figure 5-13 on page 45).
2. Click **Upload**.

The Upload TimeKeeper Information page is displayed, as shown in Figure 5-15.

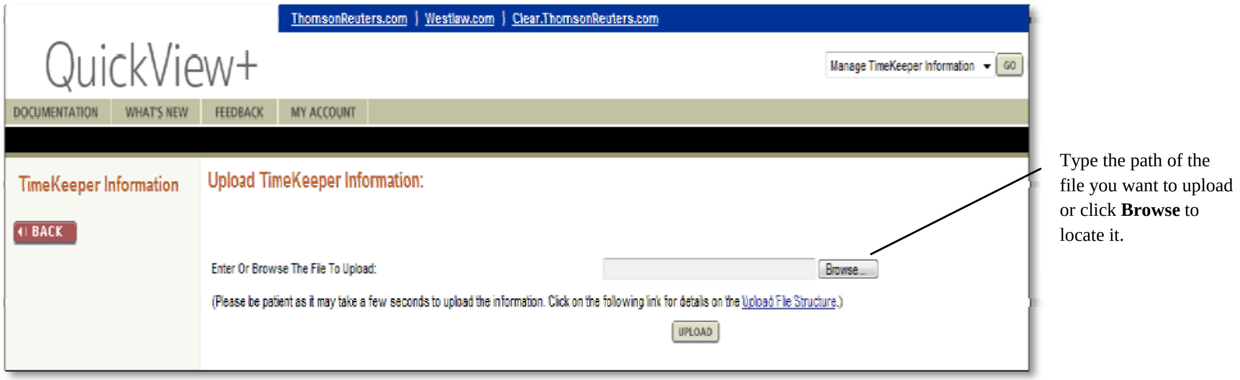


Figure 5-15: Upload TimeKeeper Information page

Note: The file you upload must be a comma-delimited text file. Click the **Upload File Structure** link to view the required field sequence, character lengths, and a sample text file.

3. If you know the location of the file you want to upload, type the path in the *Enter Or Browse The File To Upload* text box or select the Browse button to locate the file.
4. Click **Upload**.

Delivering TimeKeeper Information

By default, you view TimeKeeper information online. This information includes a list of contact IDs, the corresponding TimeKeeper IDs, and the TimeKeeper groupings. You can also download or use e-mail to distribute TimeKeeper information.

To deliver TimeKeeper information, complete these steps:

1. Select **Manage TimeKeeper Information** from the drop-down list at the top of the page, as shown in Figure 5-12 on page 45. Click **GO** if necessary.
   The Manage TimeKeeper Information page is displayed (see Figure 5-13 on page 45).
2. Click one of these buttons:
   - Click **Download** to save the TimeKeeper information to a file.
   - Click **E-Mail** to send the TimeKeeper information to an e-mail address.

   The Manage TimeKeeper Information page displays new settings, based on the delivery option you selected.
3. Enter the required information and click **Submit**. A message is displayed to show that the TimeKeeper information has been sent to the specified destination.
4. Click **Return** to display the Manage TimeKeeper Information page.

Setting User Defaults

The User Defaults feature allows you to customize commonly used report settings. The default settings you choose will be displayed on the Create Report page and the Auto Reports page.

To set up your user defaults, complete these steps:

1. Select **Set User Defaults** from the drop-down list at the top of the page, as shown in Figure 5-16. Click **GO** if necessary.

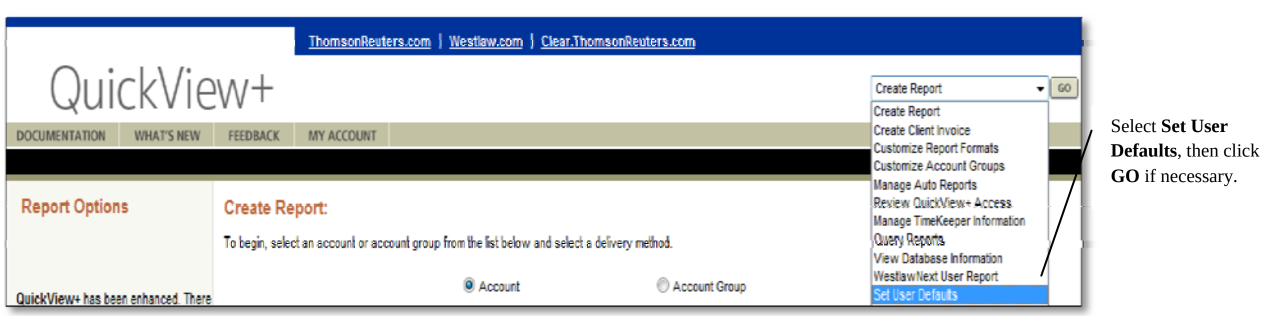


Figure 5-16: Set User Defaults drop-down list option

The Set User Defaults page is displayed, as shown in Figure 5-17.

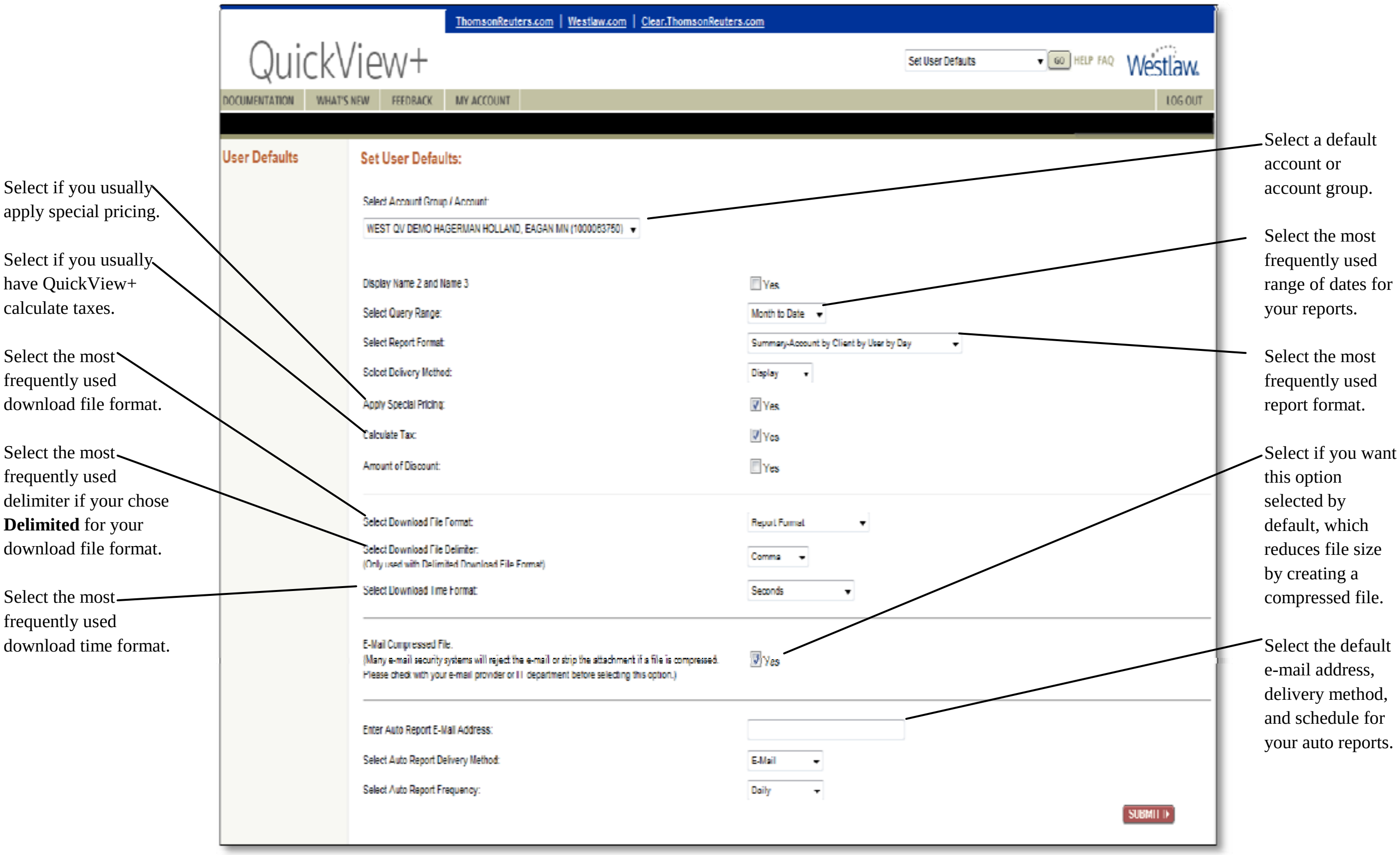


Figure 5-17: Set User Defaults page

2. From the *Select Account Group/Account* drop-down list, select a default account or account group to use in reports.
3. From the *Select Query Range* drop-down list, select the range of dates for which you normally prepare reports. You can select one of these options:
   - Previous Month
   - Month to Date
   - Last 7 Days

   The date range you select will be displayed by default in the *Select Begin Date* and *Select End Date* drop-down lists on the Create Report page.
4. Select the report format that you use most often from the *Select Report Format* drop-down list. This format will be displayed by default on the Create Report page. You can choose from the standard report formats, as well as from any customized formats you have created.
5. Select the report delivery method you use most often from the *Select Delivery Method* drop-down list. This method will be displayed by default on the Create Report page.
   - Select **E-Mail** to send the report to an e-mail address.
   - Select **Auto Report** to have the report run automatically on a daily, weekly, biweekly, or monthly basis or for a specific date range (including a future date), then delivered to an e-mail address.
   - Select **Display** to view the report online.
   - Select **Download** to save the report to a file.
6. Select the **Yes** check box next to *Apply Special Pricing* if you usually apply special pricing to charges and want this option selected by default.
7. Select the **Yes** check box next to *Calculate Tax* if you want this option selected by default. This option calculates the tax for usage and communications charges.
8. Select the **Yes** check box next to *Amount of Discount* if you want this option selected by default. This option shows the dollar amount difference resulting from the application of special pricing.
9. Select the file format for downloading that you use most often from the *Select Download File Format* drop-down

list. This format will be displayed by default in the *Select Format* drop-down list on the Create Report page.

- Select **Report Format** to download usage information in a text report format.
- Select **Delimited** to download usage information in a format that separates fields by one of the five available delimiters (comma, semicolon, tab, space, or pipe). When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
- Select **Non-Delimited (fixed width)** to download usage information in a format that assigns each field a fixed position or fixed width. When you open the file in a spreadsheet program, a wizard will identify the data and help you display it.
- Select **Spreadsheet Format (.dif)** to download usage information in Data Interchange Format, which is recognized by most spreadsheet programs.

10. From the *Select Download File Delimiter* drop-down list, select a default data separator to use when you select **Delimited** from the *Select Download File Format* drop-down list: **Comma**, **Semicolon**, **Tab**, **Space**, or **Pipe**.
11. From the *Select Download Time Format* drop-down list, select a default usage time format based on the type of calculations you perform: **Seconds** or **Hours-Minutes-Seconds**.
12. Select the **E-Mail Compressed File** check box if you want this option selected by default. This option allows QuickView+ to reduce the file size by using WinZip to create a compressed file.
    Note: Some organizations have security policies that prevent users from receiving an executable file as an e-mail attachment.
13. You can set up QuickView+ to automatically display a password in the *Enter Password for File* text box when creating a report.
    - Type the password in the **Enter Password for E-Mailed File** text box.
    - E-mail recipients need to enter this password before accessing an e-mailed, self-extracting file.
14. In the *Enter Auto Report E-Mail Address* text box, type the default e-mail address to which QuickView+ will send auto reports.
15. From the *Select Auto Report Delivery Method* drop-down list, choose the default delivery destination for auto reports:
    - E-Mail
    - ProLaw E-Mail
    - Elite E-Mail
16. From the *Select Auto Report Frequency* drop-down list, choose the default frequency for auto reports:
    - **Daily** runs a report each day.
    - **Weekly** runs a report for the previous week.
    - **Biweekly** runs a report for the previous two weeks.
    - **Monthly** runs a report for the previous month.
    - **One-Time Run** runs a report only for the dates you choose.
17. Click **Submit** to save the default settings. A message is displayed to show that the settings have been saved.
18. Click **OK** to return to the Create Report page.

Index