Frequently Asked Questions

GENERAL

Q: Is there any charge for Reporting System v2?

A: No. Thomson Reuters is pleased to be able to provide advanced reporting functionality to aid you in effectively managing your business.

Q: What are the benefits of using Reporting System v2?

A: Reporting System v2 enables you to:

- **Flexible reporting options –** generating reports is flexible and easy. Choose from numerous standard report formats or create your own custom report format.
- **Customized client pricing –** apply a discount or a monthly fixed amount, which is used with standard or custom report formats.
- **Customized account groups –** create customized account groups by combining all or some location accounts
- **Automatic reports –** eliminate the need to remember to run usage reports. Your "auto reports" automatically arrive in a specified e-mail inbox.
- **TimeKeeper ID –** identify each Westlaw Canada user with a unique identifier to meet your organization's specific reporting needs. For example, you can group locations, departments or cost centres into one report so you can simplify the reporting process or provide an overview of specific areas of your business
- **Create client invoices** if you wish
- **View pay-per-view usage –** You can check the details of the PPV usage down to the user level and database level

Q: Is the Reporting System v2 a secure website?

A: Yes. Reporting System v2 uses a Secure Socket Layer (SSL) protocol to ensure the confidentiality of the information.

ACCESSING THE REPORTING SYSTEM V2

Q: Who can access the Reporting System v2?

A: Your organization determines who will have administrative access to the Reporting System v2. The Reporting System v2 supports multiple Administrators for the same set of accounts, but is not intended for “end user” use. If you do not have access, please contact your local Administrator(s).

Q: How can I look up who has access to the Reporting System v2?

A: A list of Administrators who can access the system is found on the Review Reporting System v2 Access page.

Q: How can I request my users to have access to Reporting System v2?

A: Contact techsupport.legaltaxcanada@tr.com

Q: How do I log in to the Reporting System v2?

A: You are required to sign on using OnePass starting Oct. 20, 2011 to sign on to Reporting System v2.

If you have not been identified as an Administrator for Reporting System v2, please see your internal Administrator(s).

Q: Why can’t I log in to the Reporting System v2?

A: If you are a Reporting System v2 user, you are required to sign on using OnePass starting Oct. 20, 2011.

If you forget your OnePass username or password, you can click on “Forgot Username? ” or “Forgot Password?” link at the signon page to retrieve the username or reset your password.

You can also contact techsupport.legaltaxcanada@tr.com for assistance.

Q: Will I be able to get real-time usage information?

A: Usage information will register on the system within 48 hours of the transaction.

Q: What criteria can I use to customize pricing for my clients?

A: You have the option of applying a flat/fixed amount rate or a percentage discount.

Q: Can I customize and create my own report template?

A: Yes. Use Customize Report Format from the drop-down list.

Q: Can I import usage data to my own billing/finance system? Can I do this automatically?

A: Yes, you can export data in text, delimited, non-delimited and spreadsheet formats.The file formats from Reporting System v2 are compatible to PCLaw, Elite, ProLaw and other systems. Most of the time, the CSV file format (also called comma delimited text file format) is best to use for automatic importing.

Please note: if you customize your report format to include CONTACT ID as a user field, it is a different field from WL User#. When you load your report from Reporting System v2 to your billing system, please make sure to set up accordingly.

For assistance, also contact techsupport.legaltaxcanada@tr.com

Q: How long is usage information kept on Reporting System v2?

A: Two years.

Q: What is Customized Client Pricing?

A: Customized Client Pricing allows you to determine how Westlaw Canada charges are allocated to your clients. You may provide a discount for online charges, a monthly fixed billing rate or determine who should be excluded from your pricing calculations.

Q: What is Lines in my usage reports?

A: Lines are the measure of how many lines have been viewed or printed; it does not apply to Canadian databases, only applies to usage on some of the non-Canadian content.

Q: What is Services?

A: Services is a field to separate usage into different group, here is how you use the Services field: To get usage from all your services to a report, please click **"All Services"** in the Services dropdown list.
Westlaw Canada: If a user logs to Westlaw Canada.com to perform their research, all the usage except WestClip and KeyCite Alert is logged to Westlaw Canada.
Westlaw: If a user logs on to Westlaw.com to do their research, the usage is logged to Westlaw.
WestClip and KeyCite Alert: Usage from WestClip and KeyCite Alert is logged to Westlaw.

If you have more questions, please contact Reference Support at (416)609-3800 or 1-800-387-5164 (Canada and US only).

Managing User Information

Q: How do I add new users?

A: Administrators, please send an email to customersupport.legaltaxcanada@TR.com to request new users.

Q: How can I delete users from the Reporting System v2?

A: Administrators, please send an email to customersupport.legaltaxcanada@TR.com to request the required changes.

Q: Can I organize my users into groups by practice area?

A: Yes, use the Timekeeper Management feature to organize groups.You can populate the TimeKeeper Group field as practice area of the user, then add TimeKeeper Group field into your report.

Q: What is an Account?

A: Accounts are defined by you, the Reporting System v2 Administrator, and created by ThomsonReuters Customer Relations. Accounts are typically physical office locations, such as Vancouver, Calgary, Winnipeg or practice areas such as Securities, Family and Insolvency.

Q: What is an Account Group?

A: An Account Group is a collection of individual accounts that are set up by you, the Reporting System v2 Administrator. For example, you may create an account group for Western Canada which includes accounts for Vancouver, Calgary and Winnipeg. You may set up as many Account Groups as you wish.

Q: What are TimeKeeper ID and TimeKeeper Group?

A: A TimeKeeper ID is an identification your organization chooses to assign to each Westlaw Canada user. The TimeKeeper Group is the group to which the TimeKeeper ID will be assigned.

Q: Can I add additional information to identify my users?

A: Manage TimeKeeper Information allows you to customize two fields with data specific to your organization.

Q: What are Target Options?

A: Target Options allow you to select Client IDs, Matter Numbers or Westlaw Canada users to be included in your report.

DELIVERY OPTIONS

Q: What are my delivery options for my usage report?

A: You may choose to Display, Email, Download, or Auto Report.

Q: I chose e-mail as my report delivery method. When I received the e-mail it contained a message stating that the attachment was removed because it may have had a virus. Why did this happen?

A: Some organizations have security policies that prevent users from receiving an executable file (.exe) as an e-mail attachment. If this applies to you, do not select **Create Self-Extracting File** as an e-mail option.

PASSWORDS

Q: What is OnePass?

A: A OnePass account is a username and password that can be used across multiple Thomson Reuters websites, Westlaw Canada, Reporting System v2, Taxnet Pro, Session Tracker - Rapport de session, Westlaw Business, West LegalEdcenter, lawschool.westlaw.com, and many more.
You are required to sign on to Reporting System v2 using OnePass starting Oct. 20, 2011. Until then, you can use your Westlaw Canada password (issued before Aug. 10, 2011) to sign on.
For more info about OnePass, please click here.

Q: If my end users forget their Westlaw Canada passwords and contact Thomson Reuters, will you provide them with their passwords?

A: The best way for end users to get their forgotten Westlaw Canada passwords is for them to contact their internal Administrator. In order to safeguard the security of your organization's Westlaw Canada passwords, we will not provide a reminder of Westlaw Canada passwords to end users over the phone. Upon request, we will email the passwords to the email address assigned to that end user in our system. If the email address is incorrect, the end user will need to contact their internal Administrator. The internal Administrator will need to send an email to techsupport.legaltaxcanada@tr.com to update the email address in our system.

TAXES

Q: Why do I only get one amount for taxes in the system? Can I run my report without tax showing up?

A: At this point in time, the underlying functionality does not let us break out provincial tax. You will not see separate tax amounts in Reporting System v2 reports. You will, however, see separate Retail Sales Tax (if applicable in your province) and GST/HST amounts on your invoice. You can run reports and exclude tax amounts by unchecking the Tax checkbox on the Create Report screen.

Q: Why doesn't Retail Sales Tax show up on the invoice I generated for my customers?

A: Retail Sales Tax is only applicable to online services in some provinces.

SUPPORT

Q: What training and support materials are available?

A: We have numerous learning support materials available for our Westlaw Canada Services. See https://store1.thomsonreuters.ca/learning/westlawcanada as well as the documents in the **Guides/Tutorials** tab, and **Help** links in the Reporting System v2.

Q: How can I book a Reporting System v2 training session?

A: To book a session, please contact the Customer Learning Coordinator at customerlearning.legaltaxcanada@tr.com or 1-800-387-5164 or 416-609-3800.

Q: Who do I contact if I have a question about my usage data?

A: Please contact ThomsonReuters's Reference Support Team at researchsupport.legaltaxcanada@tr.com.

Q: Who do I contact if I experience technical issues with Reporting System v2?

A: Thomsonreuters's Technical Support Team, techsupport.legaltaxcanada@tr.com.