

# LexisNexis

# Account Insights

## User Guide

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## Glossary of key terms

**Chargeback:** a chargeback is a process of recovering legal costs from a client after the legal services have been provided. In the context of LexisNexis products, chargebacks refer to the costs of usage of our products (like accessing documents and running searches) being passed onto the law firms' or organizations' clients.

**Contract Gross Amount:** represents the dollar amount to be applied as a chargeback within a LexisNexis platform, as determined by the pricing model that the subscribing organization uses.

**Contract Net Amount:** represents the pro rated dollar amount to be applied as a chargeback within a LexisNexis platform. The dollar amount is pro rated based on the organization's total subscription value and the total organizational usage over a specified time period.

**Custom Allocation:** a feature within LexisNexis Account Insights that allows a user to define the total subscription value for all the platforms that an organization subscribes to, for the purposes of calculating pro rated chargebacks.

**Default Allocation:** a feature within LexisNexis Account Insights that applies a pricing model that the subscribing organization uses to the Contract Gross Amount of a specific usage activity.

**Doc-Access Pricing Model, a.k.a. Default Pricing Model:** one of two standard pricing models that LexisNexis Canada offers to their clients. This model assigns a \$0 Contract Gross Amount for running a search, but assigns a \$10 or a \$15 Contract Gross Amount for accessing primary sources (cases, legislation, and case & legislation citators), depending on the action. The Contract Gross Amount values for secondary sources within this model are generally comparable to the Contract Gross Amount values within the Search and Document Access Pricing Model.

**Fixed Rate Allocation:** a feature within LexisNexis Account Insights that allows a user to create custom pricing for a specific usage activity.

**LNAI:** abbreviation of LexisNexis Account Insights

**Non Usage Products:** a list of all products for which LexisNexis Account Insights is unable to capture usage, like Law360 Canada.

**Report Layout:** a feature within LexisNexis Account Insights that allows users to customize how a chargeback report looks like. The customization is done by arranging the columns of the report in the user's preferred order.

**Search and Document Access Pricing Model, a.k.a. Hybrid Pricing Model:** one of two standard pricing models that LexisNexis Canada offers to their clients. This model assigns a \$0 Contract Gross Amount for accessing primary sources (cases, legislation, and case & legislation citators), but assigns a \$19 Contract Gross Amount for running a search. The Contract Gross Amount values for

secondary sources within this model are generally comparable to the Contract Gross Amount values within the Doc-Access Pricing Model.

**Scheduled Reports:** alerts that a user can create based on the report that they have run within LexisNexis Account Insights.

**Total Subscription Value:** the total value of all products that an organization subscribes to with LexisNexis Canada. By default, the total subscription value consists of Usage Products only; however, users can also opt to include Non Usage Products in the total subscription value.

**Usage Products:** a list of all products for which LexisNexis Account Insights is able to capture usage, e.g. Lexis Advance Quicklaw, Practical Guidance, Lexis+ Canada, and more.

## Comparison of key terms in LexisNexis Account Insights and PowerInvoice

LexisNexis Account Insights	PowerInvoice
Create Report	Partially equivalent to the <b>Search</b> tab, which is used to run regular, non-customized reports. Unlike the <b>Create Report</b> tab in LNAI, the <b>Search</b> tab did not have the ability to load customized pricing or customized report layouts. There are also some unique features within <b>Create Report</b> that are just not available in PowerInvoice, like the ability to amend the total subscription value that gets reported in the <b>CONTRACT NET AMOUNT</b> column.
Report Layouts	Equivalent to <b>User-Defined</b> tab as well as the <b>User-Defined Format</b> within the <b>Custom</b> tab, all of which allowed users to customize how a report looked like. Unlike <b>Report Layouts</b> in LNAI, the reports generated in PowerInvoice were not transferrable throughout different tabs. For example, a report customized under <b>User-Defined</b> tab was not visible in the <b>Custom</b> tab.
Custom Allocation	Equivalent to <b>Reallocation</b> tab. Unlike <b>Custom Allocation</b> in LNAI, the <b>Reallocation</b> tab was often not able to get a precise amount that the user needed for the total subscription value.
Fixed Rate Allocation	Equivalent to the <b>Custom</b> tab and creating a <b>Custom Pricing Profile</b> .
Scheduled Reports	Equivalent to <b>Alerts</b> .

## How do I log into LexisNexis Account Insights?

To log into LexisNexis Account Insights, please use the following link:

<https://signin.lexisnexis.com/lnaccess/app/signin?aci=lai&back=https%3a%2f%2faccountinsights.lexisnexis.com%2f>

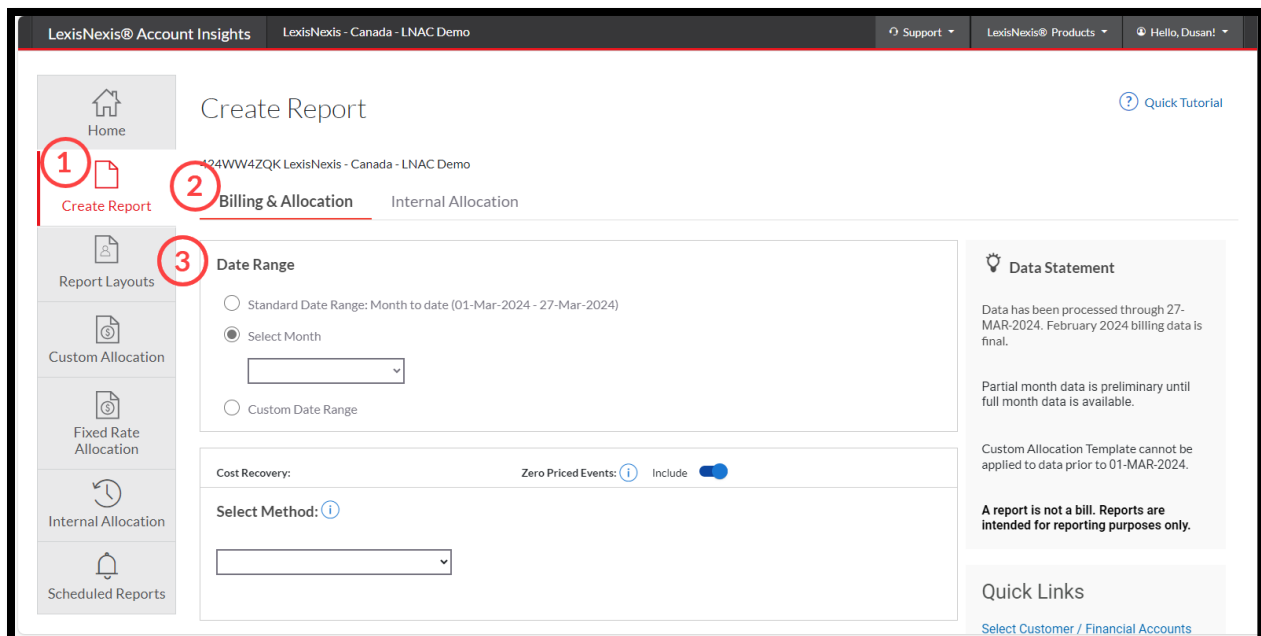
## How do I run a simple usage report?

Reporting is the main purpose of LexisNexis Account Insights. Our reports allow you to gauge usage of your subscriptions as well as to get chargeback information for billable activities.

There are several ways you can customize your reports. You can read more about them under [How do I customize the look of my report?](#), [How do I customize pricing for individual activities in my report?](#), and [How do I customize the total value for all platform subscriptions in my report?](#)

In this example, however, we will explain just one, simple way to do it.

1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure you are on the **Billing & Allocation** option.
3. Select the **Date Range** for which you want to run the report. There are 3 options:
  - a. **Standard Date Range:** runs a **Month-to-date** report, i.e. from the 1<sup>st</sup> of the month to the current day in the month;
  - b. **Select Month:** runs a report for the entire month you select, e.g. if you select **February 2024**, it will run a report from **February 1, 2024** to **February 29, 2024**;
  - c. **Custom Date Range:** run a report for the specified data range.



The screenshot displays the LexisNexis Account Insights 'Create Report' page. The top navigation bar includes 'LexisNexis® Account Insights', 'LexisNexis - Canada - LNAC Demo', 'Support', 'LexisNexis® Products', and 'Hello, Dusan!'. The left sidebar contains navigation options: Home, Create Report (1), Report Layouts, Custom Allocation, Fixed Rate Allocation, Internal Allocation, and Scheduled Reports. The main content area is titled 'Create Report' and shows the 'Billing & Allocation' option selected (2). Under the 'Date Range' section (3), the 'Select Month' radio button is selected, with a dropdown menu below it. Other options include 'Standard Date Range: Month to date (01-Mar-2024 - 27-Mar-2024)' and 'Custom Date Range'. Below this, there are sections for 'Cost Recovery' (Zero Priced Events: Include) and 'Select Method:'. On the right side, there is a 'Data Statement' section with a warning: 'Data has been processed through 27-MAR-2024. February 2024 billing data is final. Partial month data is preliminary until full month data is available.' Below this is a note: 'Custom Allocation Template cannot be applied to data prior to 01-MAR-2024. A report is not a bill. Reports are intended for reporting purposes only.' At the bottom right, there is a 'Quick Links' section with a link to 'Select Customer / Financial Accounts'.

4. Next, within the **Cost Recovery** pod, select the desired cost recovery method.
  - a. Before you choose a method, we recommend to toggle on the **Include** option for **Zero Priced Events**, in order to ensure all usage is displayed.
  - b. Select **Default Allocation** and then select **Distribute use by Gross Amount**.
  - c. Leave as default the **Monthly Subscription Cost** charges.

Cost Recovery: Zero Priced Events: [i](#) Include  **4a**

Select Method: [i](#) Apply Default Allocation: [i](#)

Default Allocation **4b** Distribute use by Gross Amount **4c**

Match Report Tax Amount to Invoice Tax Amount

Monthly Subscription Cost	Assign Recovery:				
		%	OR	Amount	% of Monthly Cost
Usage Products	\$0.00	<input type="text" value="100.00 %"/>		<input type="text" value="\$ 0.00"/>	
<b>Total Monthly Cost:</b>	<b>\$0.00</b>	<b>Recovery Amount:</b>		<b>\$0.00</b>	

5. Ensure that **Default Allocation Filters** are selected as **ALL**.

Default Allocation Filters **5** [View All Filters](#)

Activity Description	ALL
Client IDs	ALL
Place of Business	ALL
Pricing Categories	ALL
Product Names	ALL
Types of Charges	ALL
User Names	ALL

- Under **Standard Report Selection**, select **Detail Report** and then leave **Detail by Client/User**.

**Standard Report Selection**

Detail Report 6

Detail by Client/User ▼

Summary by Client

Summary by User

Summary by Client/User

Summary by Client/User/Date

Summary by Activity Description

Summary by Place of Business

Summary by Products

- Ensure that **Report Filters** are selected as **ALL**.
- Under **User Display**, leave in **All Use** option.
- Under **Currency Settings**, leave in **Canadian dollar**.

**Report Filters** 7 [View All Filters](#)

Activity Description	ALL
Client IDs	ALL
Master Feature Name	ALL
Place of Business	ALL
Pricing Categories	ALL
Types of Charges	ALL
User Names	ALL

[Reset All Filters](#)

**User Display** 8

All Use

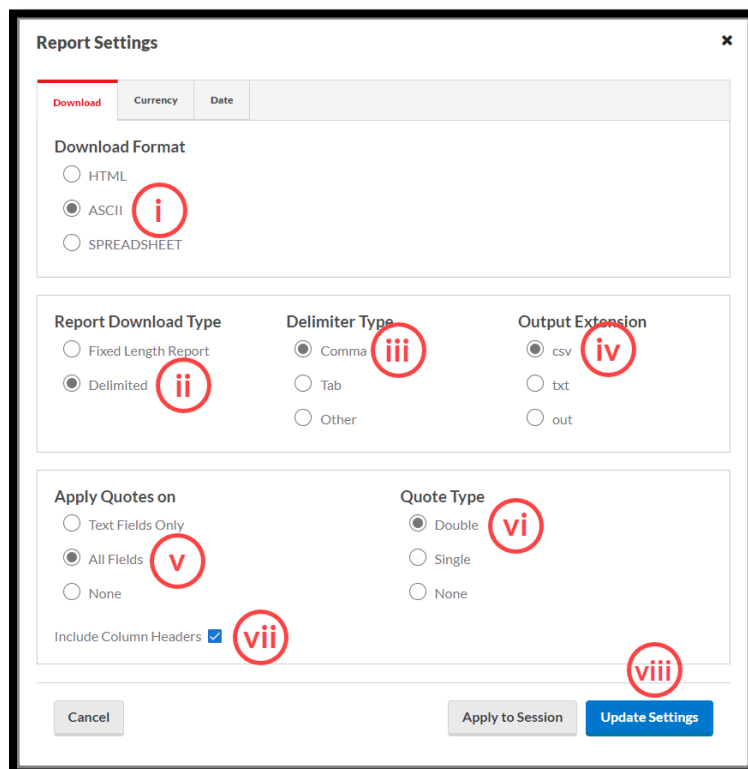
Exclude non-billable zone use

**Currency Settings:** 9

[Canadian dollar](#)



10. Before running the report, consider the following 2 options:
- If you are looking to download a report immediately, then select your preferred settings under **Download Settings** by clicking the format link.
  - Once chosen, click the **Download** button. For best reporting output, we recommend the following settings:
    - Download Format = ASCII
    - Report Download Type = Delimited
    - Delimiter Type = Comma
    - Output Extension = csv
    - Apply Quotes on = All Fields
    - Quote Type = Double
    - Include Column Headers = checked
    - Click **Update Settings** to ensure all these settings are set as default in the future.



- c. If you are looking to view the report, you can skip the **Download Settings** considerations and simply click the **View** button.

Download Settings:

ASCII

[Download](#) [View](#) **10c** [Reset All](#)

## How do I create an alert?

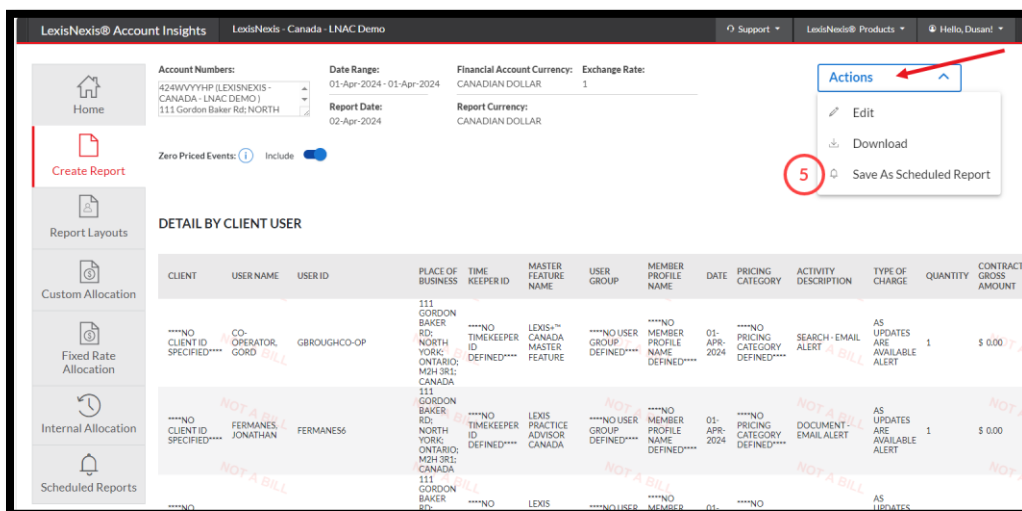
Creating alerts allows you to automate usage and chargeback reporting. In LexisNexis Account Insights, alerts are called **Scheduled Reports**, whereas in PowerInvoice, these features were called **Alerts**.

Follow the process below to set up an alert for your organization.

1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure to select appropriate **Cost Recovery Methods**, **Report Layouts / Standard Report Selections**, and apply desired filters, if any.
  - a. To see more details about choosing the right cost recovery method and report layout for your needs, please review the following step-by-step-instructions:
    - i. How do I run a simple usage report?
    - ii. How do I customize the look of my report?
    - iii. How do I customize pricing for individual activities in my report?
    - iv. How do I customize the total value for all platform subscriptions in my report?
3. **IMPORTANT:** The **Date Range** selection is irrelevant when creating an alert.
4. Once everything is selected, click the **View** button.



5. In the top right-hand corner, under the **Actions** button, select **Save As Scheduled Report** option.



CLIENT	USERNAME	USER ID	PLACE OF BUSINESS	TIME KEEPER ID	MASTER FEATURE NAME	USER GROUP	MEMBER PROFILE NAME	DATE	PRICING CATEGORY	ACTIVITY DESCRIPTION	TYPE OF CHARGE	QUANTITY	CONTRACT GROSS AMOUNT
111 GORDON BAKER RD. NORTH YORK, ONTARIO, M2H 3R1, CANADA	CO-OPERATOR, GORD	GBROUGHCO-OP	111 GORDON BAKER RD. NORTH YORK, ONTARIO, M2H 3R1, CANADA	LEGIS-- CANADA MASTER FEATURE	LEGIS-- CANADA MASTER FEATURE	LEGIS-- CANADA MASTER FEATURE	LEGIS-- CANADA MASTER FEATURE	01-APR-2024	SEARCH-EMAIL ALERT	AS UPDATES ARE AVAILABLE ALERT	1	\$ 0.00	
111 GORDON BAKER RD. NORTH YORK, ONTARIO, M2H 3R1, CANADA	FERMANES, JONATHAN	FERMANES6	111 GORDON BAKER RD. NORTH YORK, ONTARIO, M2H 3R1, CANADA	LEGIS PRACTICE ADVISOR CANADA	LEGIS PRACTICE ADVISOR CANADA	LEGIS PRACTICE ADVISOR CANADA	LEGIS PRACTICE ADVISOR CANADA	01-APR-2024	DOCUMENT-EMAIL ALERT	AS UPDATES ARE AVAILABLE ALERT	1	\$ 0.00	

6. Enter the name of your report in **Scheduled Report Name** box. If you want, enter a description of the report.

### Save as Scheduled Report

**Scheduled Report Name**

ALERT TEST 6

**Description (Optional)**

Add more detail about this template, such as when it should be used

7. Leave the **Description** and **Cost Recovery** pods as they are.
8. Under **Shared Level** pod, select if you would like this alert to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
  - a. We recommend that you choose the **Shared > Edit** option, because if you are away for whatever reason and the alert needs to be amended, other users would be able to go in and make the necessary changes.
9. Under **Scheduled Reports** pod, select the cadence with which you would like to receive the report.

**Shared Level**

Shared

Edit 8

Private

---

**Scheduled Reports:**

Daily (Update data from first day of the month)

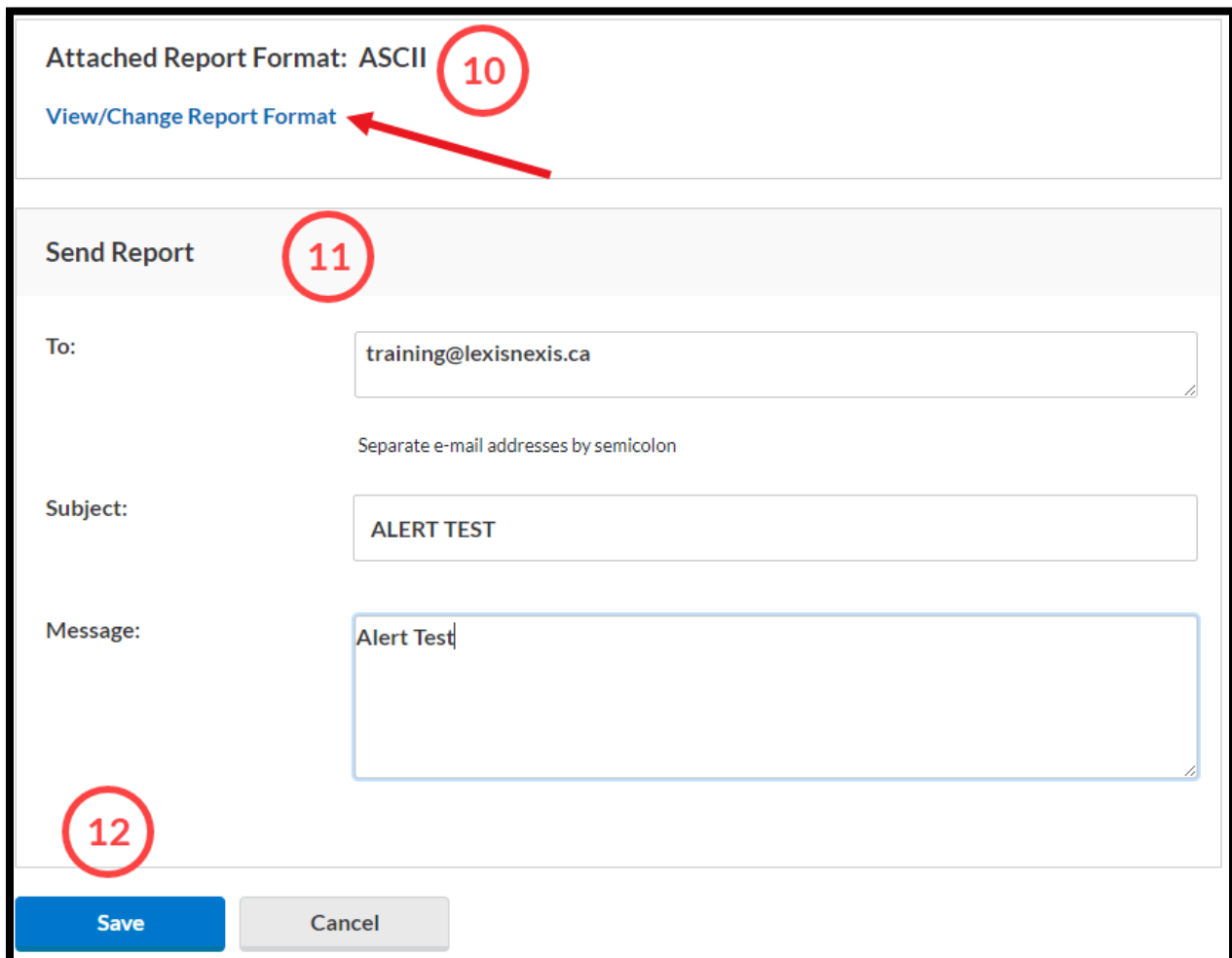
Business Day

Weekly

Bi-Monthly

Monthly 9

10. Under **Attached Report Format**, choose the report format that is right for you by clicking on the **View/Change Report Format** link.
  - a. If you are looking for a classic Excel spreadsheet look, we recommend the ASCII report in a **.CSV** format.
  - b. If you are looking to export the report as a **.TXT** file, you can now select that explicitly within the ASCII option.
11. Under **Send Report**, write in the following information:
  - a. All email addresses that should be included in the reception of the alert;
  - b. The **Subject** line that will appear in the alert email; and,
  - c. A message, if any, that will appear in the body of the alert email.
12. Once you are satisfied with your selections, click the **Save** button.



Attached Report Format: ASCII **10**

[View/Change Report Format](#)

**Send Report** **11**

To:

Separate e-mail addresses by semicolon

Subject:

Message:

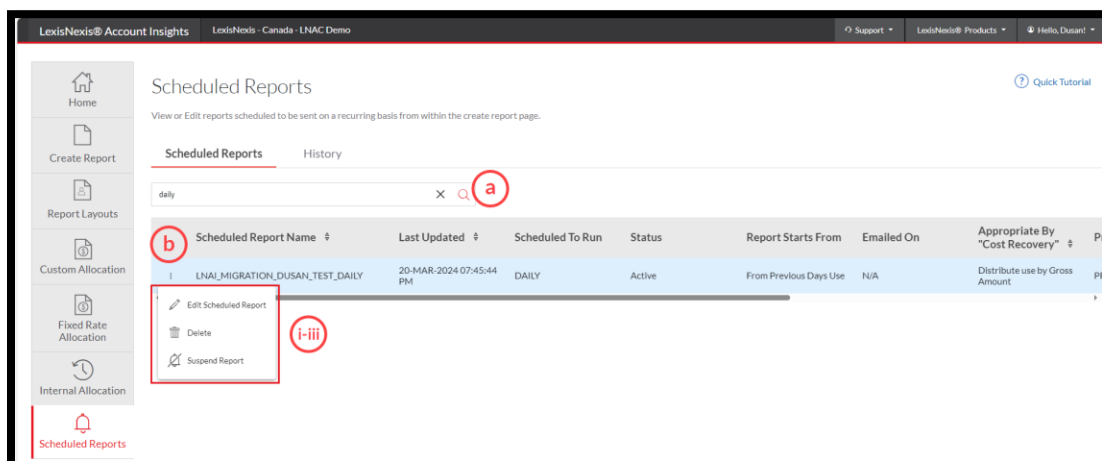
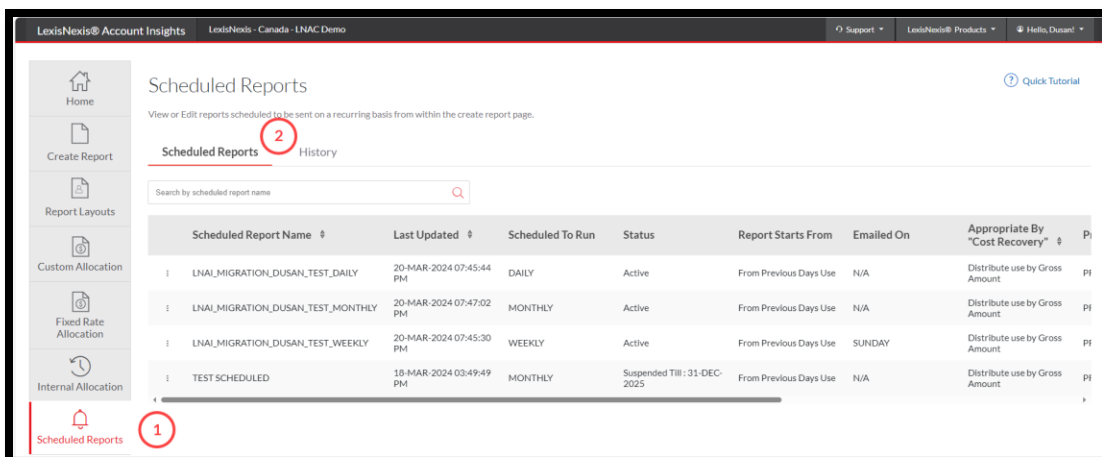
**12**

**Save** **Cancel**

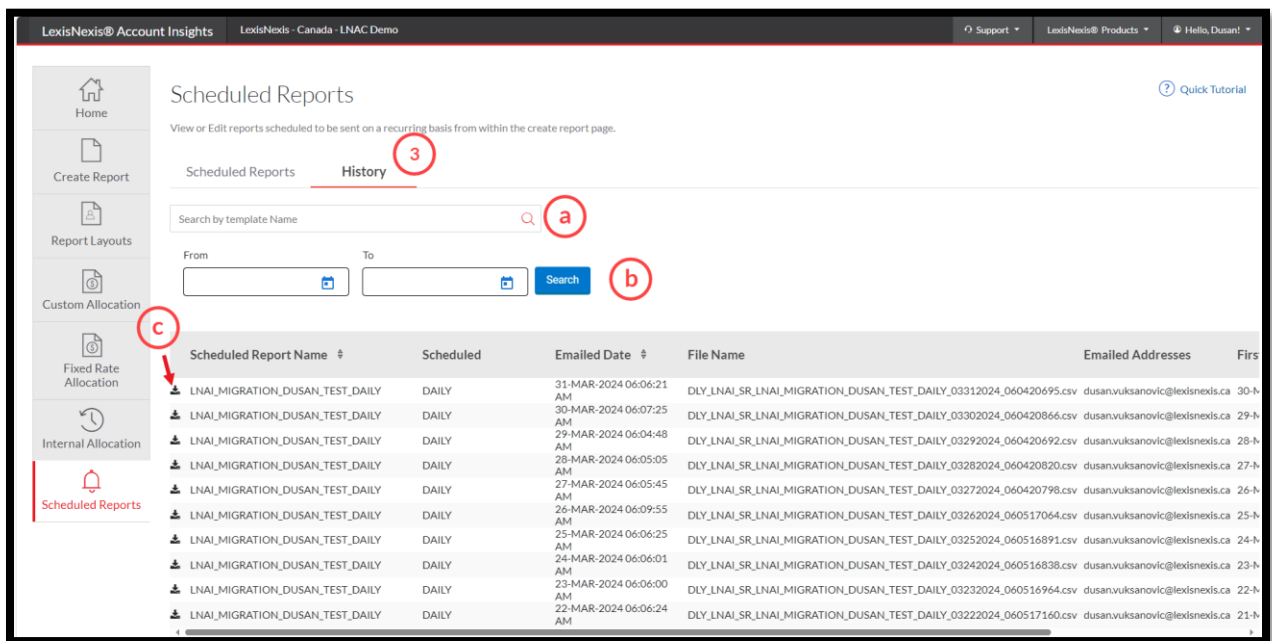
## Where can I see all the alerts that have been created for my organization?

Having an overview of all your alerts can help you manage your organization's reporting and ensure the right information is obtained at the right time.

1. From anywhere within LexisNexis Account Insights, click the **Scheduled Reports** tab.
2. Under the **Scheduled Reports** option, you can see all the alerts for the organization that either you have created or have been shared with you by others.
  - a. To find an alert, type a part of its name and click **Enter** or the **Magnifying Glass** icon.
  - b. To make amendments to an alert, click on the **vertical three-dots icon** and then:
    - i. Click **Edit Scheduled Report** to edit the alert's parameters;
    - ii. Click **Delete** to remove the alert; or,
    - iii. Click **Suspend Report** to stop the alert from being sent without having it deleted.



3. Under the **History** option, you can see the history of when each alert has been generated and sent. This is especially useful if you were unable to receive an alert to your email, for whatever reason.
  - a. To find an alert, start typing the name of the alert in **Search by template name** box.
  - b. To narrow down the alert by date, select the dates within the **From** and **To** boxes and then click the **Search** button.
  - c. To download the alert, click the **Download** icon on the left-hand side of the list.



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Home

Create Report

Report Layouts

Custom Allocation

Fixed Rate Allocation

Internal Allocation

Scheduled Reports

### Scheduled Reports

View or Edit reports scheduled to be sent on a recurring basis from within the create report page.

Scheduled Reports **History** 3

Search by template Name a

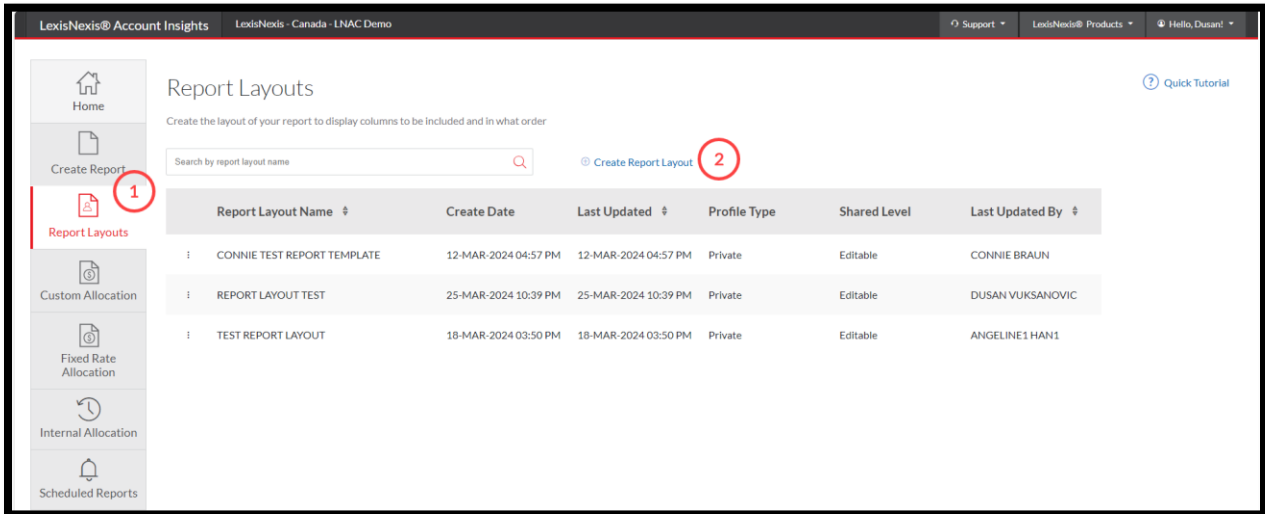
From To Search b

Scheduled Report Name	Scheduled	Emailed Date	File Name	Emailed Addresses	Firs
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	31-MAR-2024 06:06:21 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03312024_060420695.csv	dusan.vuksanovic@lexisnexis.ca	30-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	30-MAR-2024 06:07:25 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03302024_060420866.csv	dusan.vuksanovic@lexisnexis.ca	29-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	29-MAR-2024 06:04:48 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03292024_060420692.csv	dusan.vuksanovic@lexisnexis.ca	28-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	28-MAR-2024 06:05:05 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03282024_060420820.csv	dusan.vuksanovic@lexisnexis.ca	27-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	27-MAR-2024 06:05:45 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03272024_060420798.csv	dusan.vuksanovic@lexisnexis.ca	26-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	26-MAR-2024 06:09:55 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03262024_060517064.csv	dusan.vuksanovic@lexisnexis.ca	25-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	25-MAR-2024 06:06:25 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03252024_060516891.csv	dusan.vuksanovic@lexisnexis.ca	24-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	24-MAR-2024 06:06:01 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03242024_060516838.csv	dusan.vuksanovic@lexisnexis.ca	23-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	23-MAR-2024 06:06:00 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03232024_060516964.csv	dusan.vuksanovic@lexisnexis.ca	22-h
LNAI_MIGRATION_DUSAN_TEST_DAILY	DAILY	22-MAR-2024 06:06:24 AM	DLY_LNAI_SR_LNAI_MIGRATION_DUSAN_TEST_DAILY_03222024_060517160.csv	dusan.vuksanovic@lexisnexis.ca	21-h

## How do I customize the look of my report?

Customizing your usage and chargeback reports gives you the freedom to only see the usage and chargeback data relevant to you and your organization. In LexisNexis Account Insights, this feature is called **Report Layouts**, whereas in PowerInvoice, it was called **User-Defined Reports**.

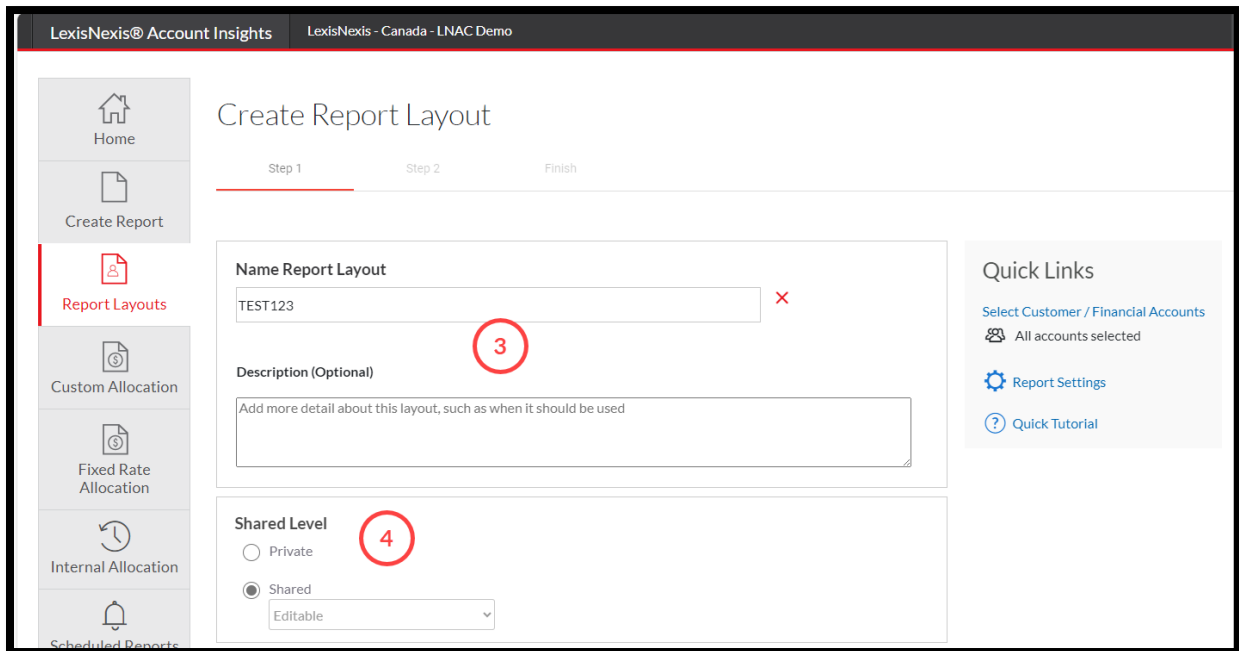
1. From anywhere within LexisNexis Account Insights, click on the **Report Layouts** tab.
2. Click the **Create Report Layout** link.



Report Layout Name	Create Date	Last Updated	Profile Type	Shared Level	Last Updated By
CONNIE TEST REPORT TEMPLATE	12-MAR-2024 04:57 PM	12-MAR-2024 04:57 PM	Private	Editable	CONNIE BRAUN
REPORT LAYOUT TEST	25-MAR-2024 10:39 PM	25-MAR-2024 10:39 PM	Private	Editable	DUSAN VUKSANOVIC
TEST REPORT LAYOUT	18-MAR-2024 03:50 PM	18-MAR-2024 03:50 PM	Private	Editable	ANGELINE1 HAN1



3. Give a name to your custom report layout under **Name Report Layout** box. If you want, enter the description of the report layout in the next box.
4. Under **Shared Level**, select if you would like this report to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
  - a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.



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## Create Report Layout

Step 1 Step 2 Finish

**Name Report Layout**

TEST123

**3**

**Description (Optional)**

Add more detail about this layout, such as when it should be used

**Shared Level**

Private

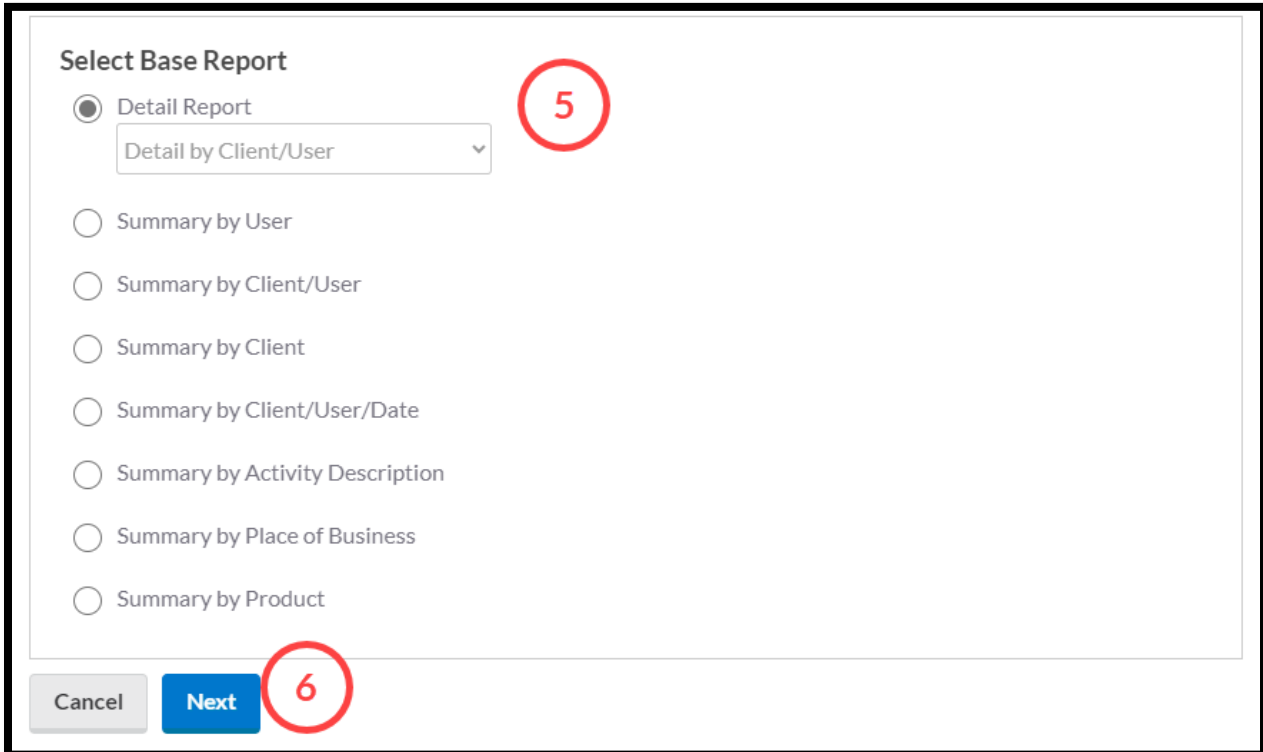
**4** Shared

Editable

**Quick Links**

- Select Customer / Financial Accounts
- All accounts selected
- Report Settings
- Quick Tutorial

5. Under **Select Base Report**, choose **Detail Report > Detail by Client/User** or **Detail by User/Client**. These two reports will give you the most options from which you can customize your report layout.
6. Click the **Next** button.



**Select Base Report**

Detail Report 5

Detail by Client/User v

Summary by User

Summary by Client/User

Summary by Client

Summary by Client/User/Date

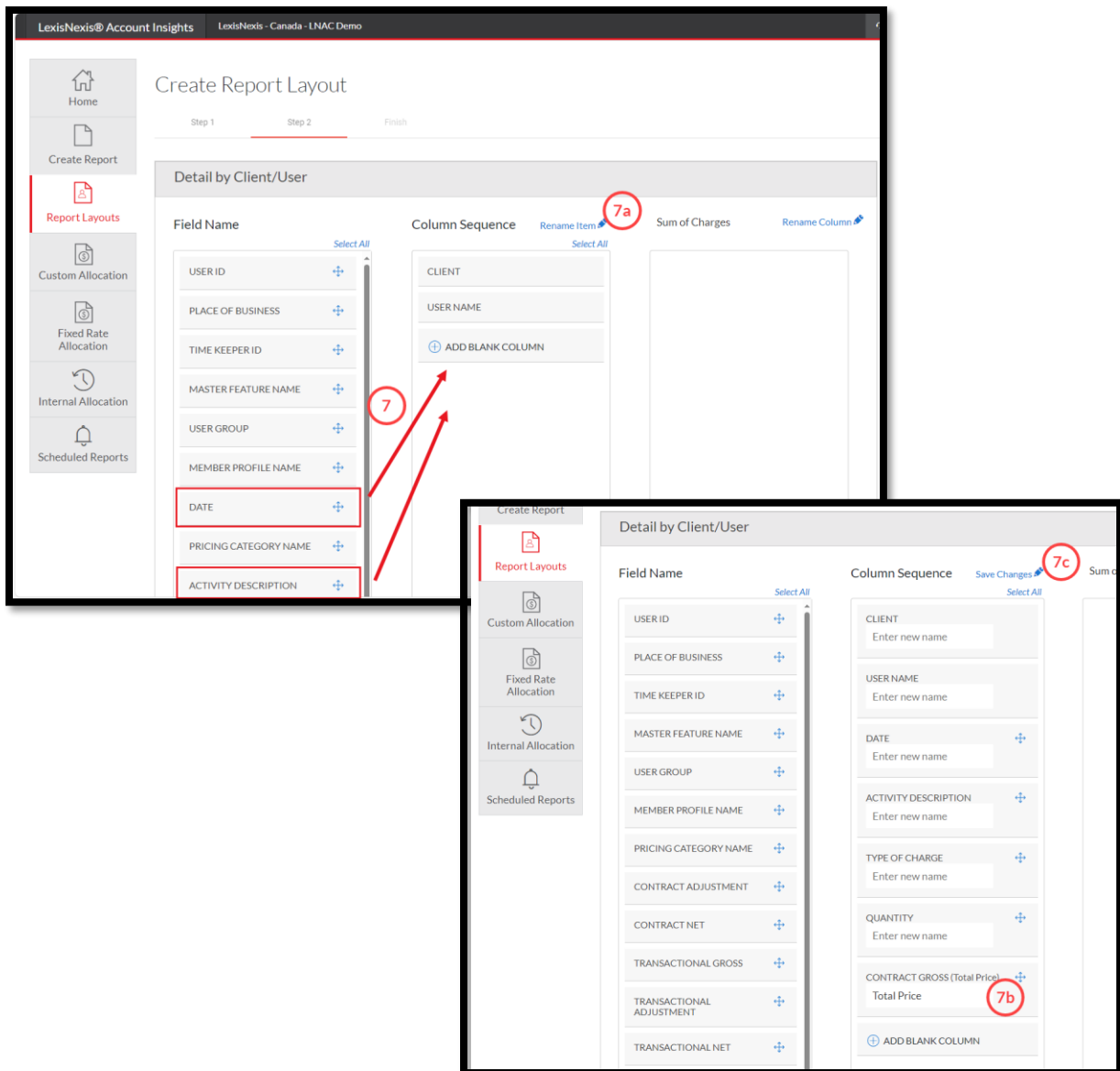
Summary by Activity Description

Summary by Place of Business

Summary by Product

6

7. Drag-and-drop the columns that you want to include in the report layout within the **Column Sequence** option. Note that, in our example, the order of the first 2 columns cannot be altered.
  - a. If needed, you can customize the names of your columns by clicking the **Rename Item** link.
  - b. Once clicked, type in the new column name in the relevant field.
  - c. Finally, click **Save Changes**. (NOTE: Even though the old name is still being displayed in the report layout creation steps, only the newly edited name will display once you actually run the report.)

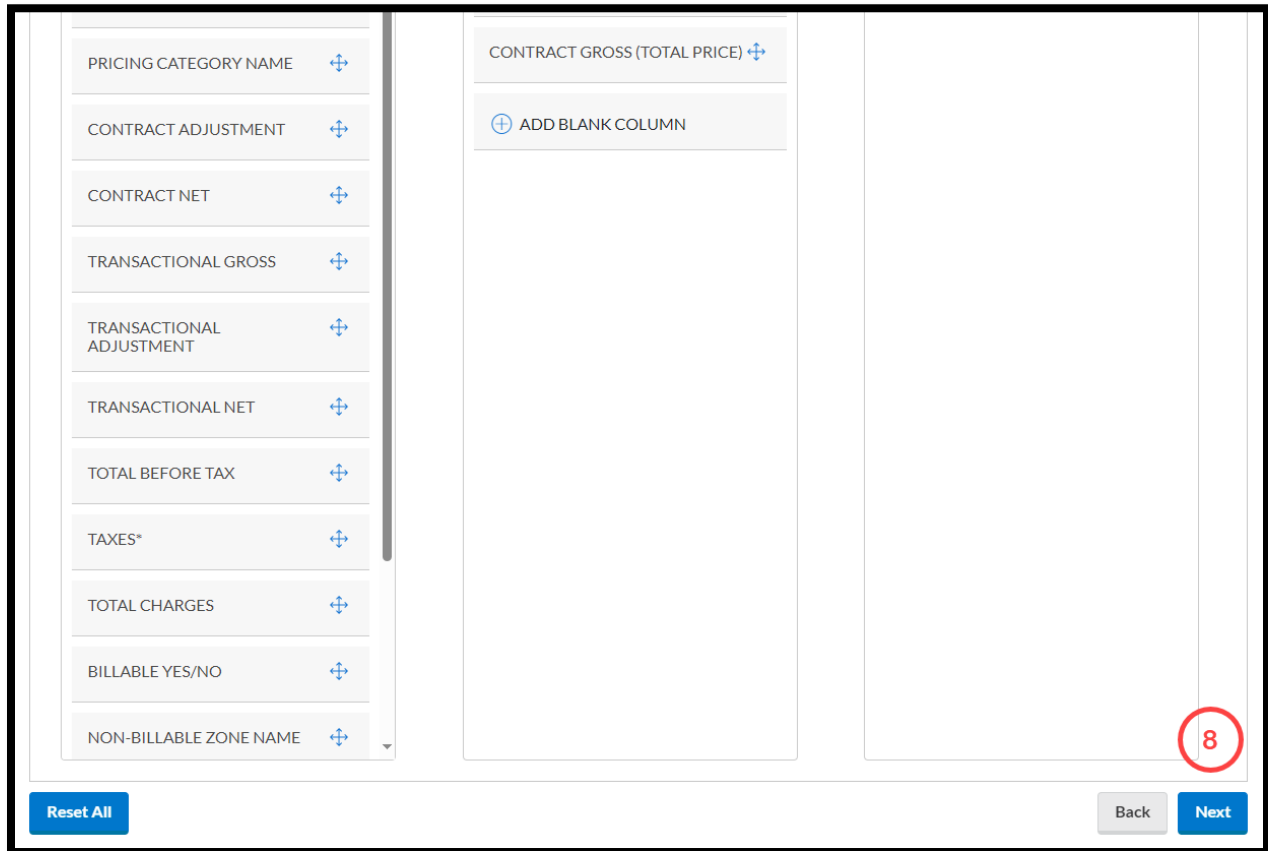


The image displays two screenshots of the LexisNexis Account Insights 'Create Report Layout' interface, illustrating the steps to customize a report layout.

**Top Screenshot:** Shows the 'Create Report Layout' screen at Step 2. The 'Detail by Client/User' section is active. The 'Field Name' column lists various fields, with 'DATE' and 'ACTIVITY DESCRIPTION' highlighted in red boxes. A red circle labeled '7' is next to the 'Field Name' column header. Red arrows point from these boxes to the 'Column Sequence' column. The 'Column Sequence' column shows 'CLIENT' and 'USER NAME' in its sequence, with a 'Rename Item' link circled in red and labeled '7a'. The 'Sum of Charges' column is currently empty.

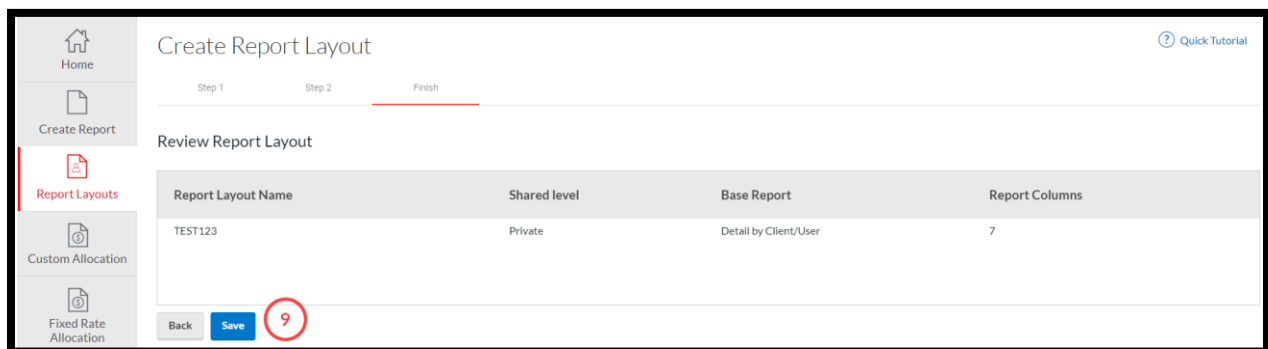
**Bottom Screenshot:** Shows the 'Rename Item' process. The 'Column Sequence' column now displays 'CLIENT' and 'USER NAME' with input fields for 'Enter new name'. The 'DATE' and 'ACTIVITY DESCRIPTION' fields are also present in the sequence with input fields. The 'Save Changes' link is circled in red and labeled '7c'. The 'CONTRACT GROSS (Total Price)' field is circled in red and labeled '7b'.

8. Once you are happy with your selections, click **Next** at the bottom of the page.



The screenshot shows a configuration interface for a report layout. On the left, there is a vertical list of pricing categories, each with a plus-minus icon: PRICING CATEGORY NAME, CONTRACT ADJUSTMENT, CONTRACT NET, TRANSACTIONAL GROSS, TRANSACTIONAL ADJUSTMENT, TRANSACTIONAL NET, TOTAL BEFORE TAX, TAXES\*, TOTAL CHARGES, BILLABLE YES/NO, and NON-BILLABLE ZONE NAME. The main area contains a table with the header 'CONTRACT GROSS (TOTAL PRICE)' and a button 'ADD BLANK COLUMN'. At the bottom, there are three buttons: 'Reset All', 'Back', and 'Next'. A red circle highlights the 'Next' button.

9. If everything is in order, click the **Save** button to create the new report layout.

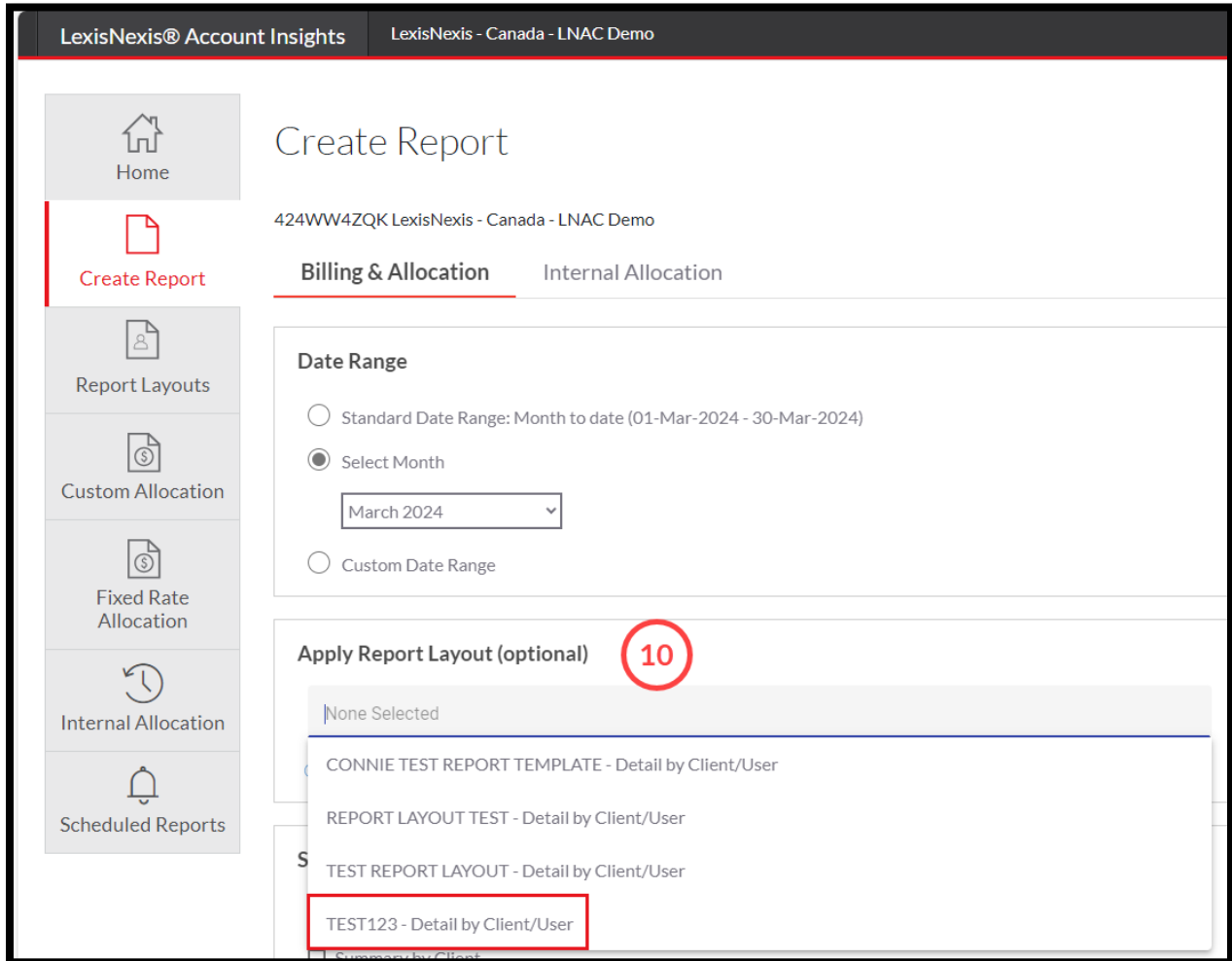


The screenshot shows the 'Review Report Layout' screen. It features a sidebar with navigation options: Home, Create Report, Report Layouts (highlighted in red), Custom Allocation, and Fixed Rate Allocation. The main content area has a progress indicator with 'Step 1', 'Step 2', and 'Finish' (underlined). Below the progress indicator is a table with the following data:

Report Layout Name	Shared level	Base Report	Report Columns
TEST123	Private	Detail by Client/User	7

At the bottom left, there are 'Back' and 'Save' buttons. A red circle highlights the 'Save' button.

10. You can select this newly created layout to your reports when you click **Create Report** tab > **Apply Report Layout (optional)** > click the **None selected** box for a dropdown display



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## Create Report

424WW4ZQK LexisNexis - Canada - LNAC Demo

**Billing & Allocation** Internal Allocation

**Date Range**

- Standard Date Range: Month to date (01-Mar-2024 - 30-Mar-2024)
- Select Month  
March 2024
- Custom Date Range

**Apply Report Layout (optional)** 10

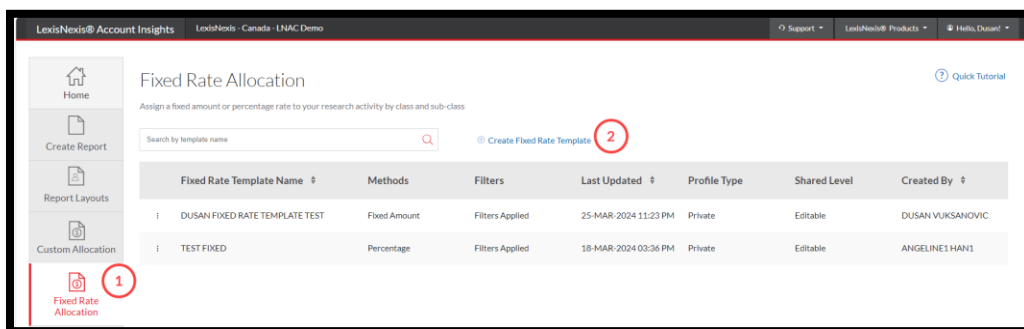
None Selected

- CONNIE TEST REPORT TEMPLATE - Detail by Client/User
- REPORT LAYOUT TEST - Detail by Client/User
- TEST REPORT LAYOUT - Detail by Client/User
- TEST123 - Detail by Client/User

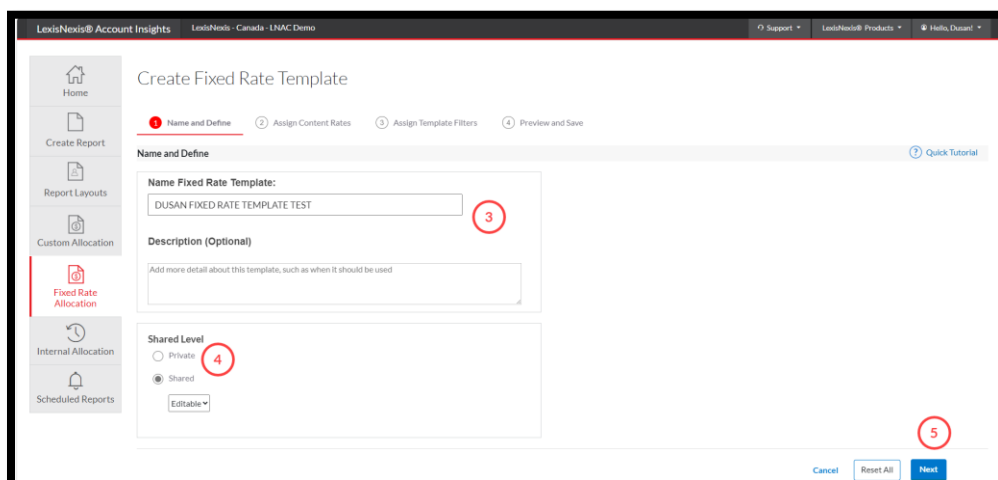
## How do I customize pricing for individual activities in my report?

Customizing pricing allows you to create your own price list for the purposes of client chargeback, rather than relying on LexisNexis pricing models. In LexisNexis Account Insights, custom pricing is called **Fixed Rate Allocation**, whereas in PowerInvoice, it was called **Custom Pricing**.

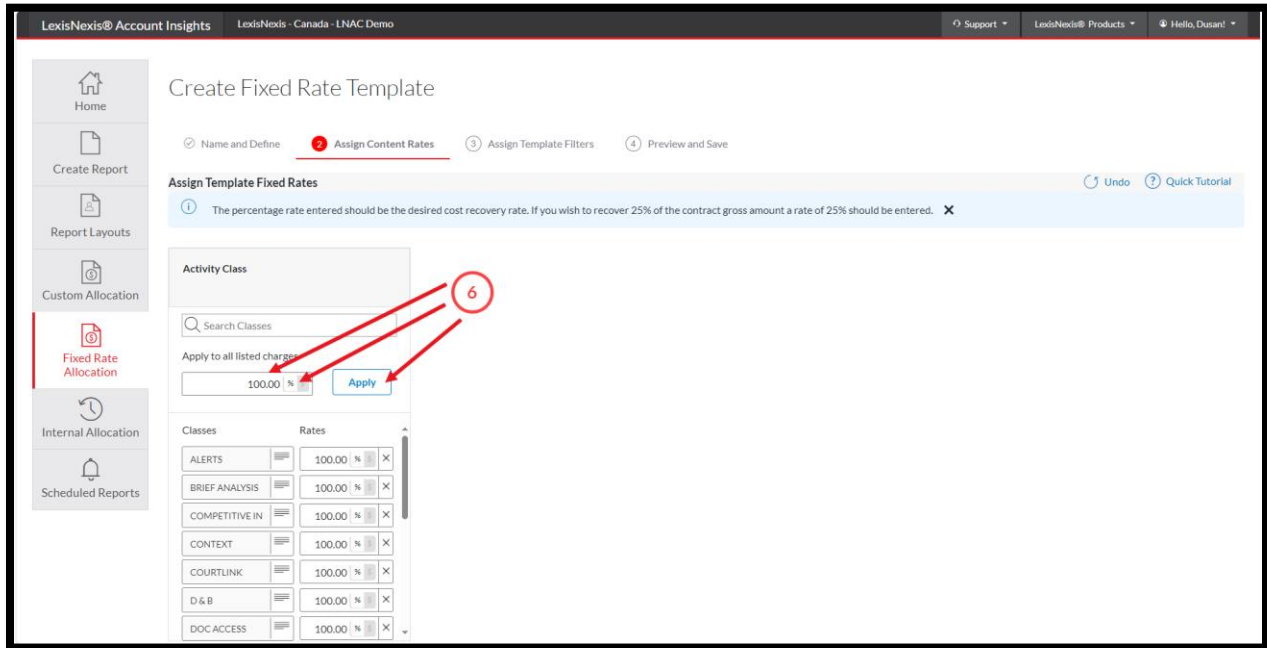
1. From anywhere within LexisNexis Account Insights, click the **Fixed Rate Allocation** tab.
2. Click the **Fixed Rate Template** link.



3. Give a name to your **Fixed Rate Template** under the **Name Fixed Rate Template** box. If you want, enter the description of the Fixed Rate Template in the next box.
4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
  - a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.
5. Click **Next**.



6. Because all fields **must have** some value, we recommend that you first enter the value of **100.00%** in the **Apply to all listed charges** box and click the **Apply** button.



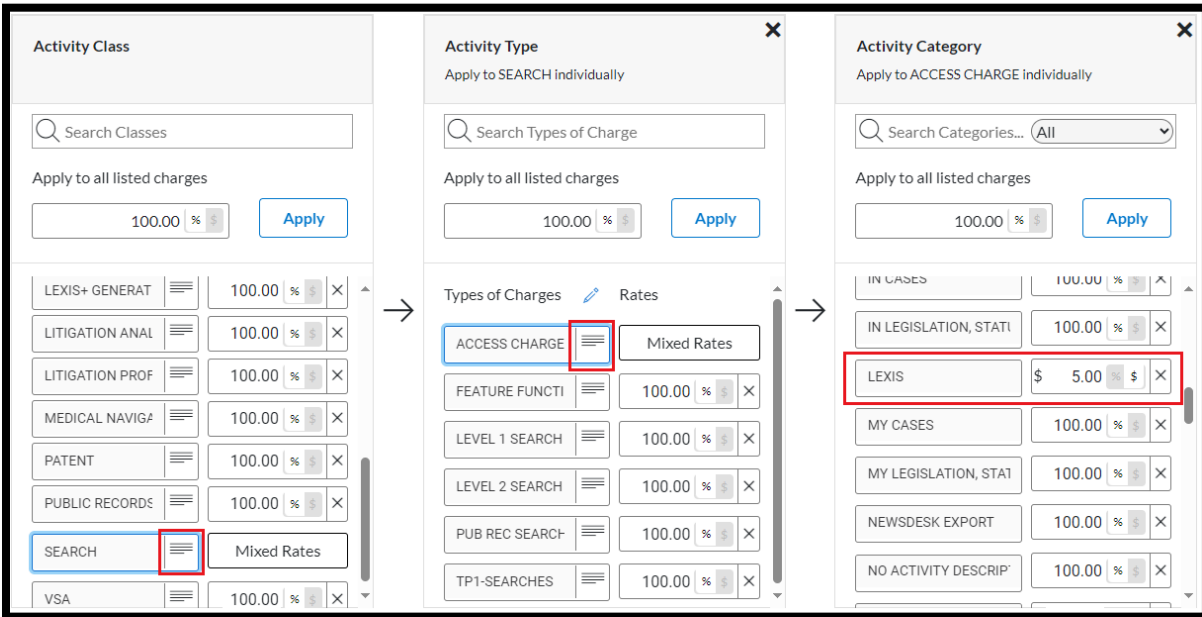
The screenshot shows the 'Create Fixed Rate Template' interface in LexisNexis Account Insights. The 'Assign Content Rates' step is active. A red circle with the number '6' is placed over the 'Apply to all listed charges' input field, which contains '100.00 %', and the 'Apply' button. A red arrow points from the '6' to the input field, and another red arrow points from the '6' to the 'Apply' button. A table of classes and rates is visible below.

Classes	Rates
ALERTS	100.00 % X
BRIEF ANALYSIS	100.00 % X
COMPETITIVE IN	100.00 % X
CONTEXT	100.00 % X
COURTLINK	100.00 % X
D & B	100.00 % X
DOC ACCESS	100.00 % X

7. Now, you can go in and customize not just each class, but specific activity types and activity categories. Below, you can find a pathway how to amend the pricing for some of the most common activities in our platforms. We will imagine that we want to change the activity to be charged back at \$5.

**a. Running a search:**

CLASS = SEARCH → TYPES OF CHARGES = ACCESS CHARGE → ACTIVITY CATEGORY = LEXIS, switch to dollar sign and enter the value 5.00

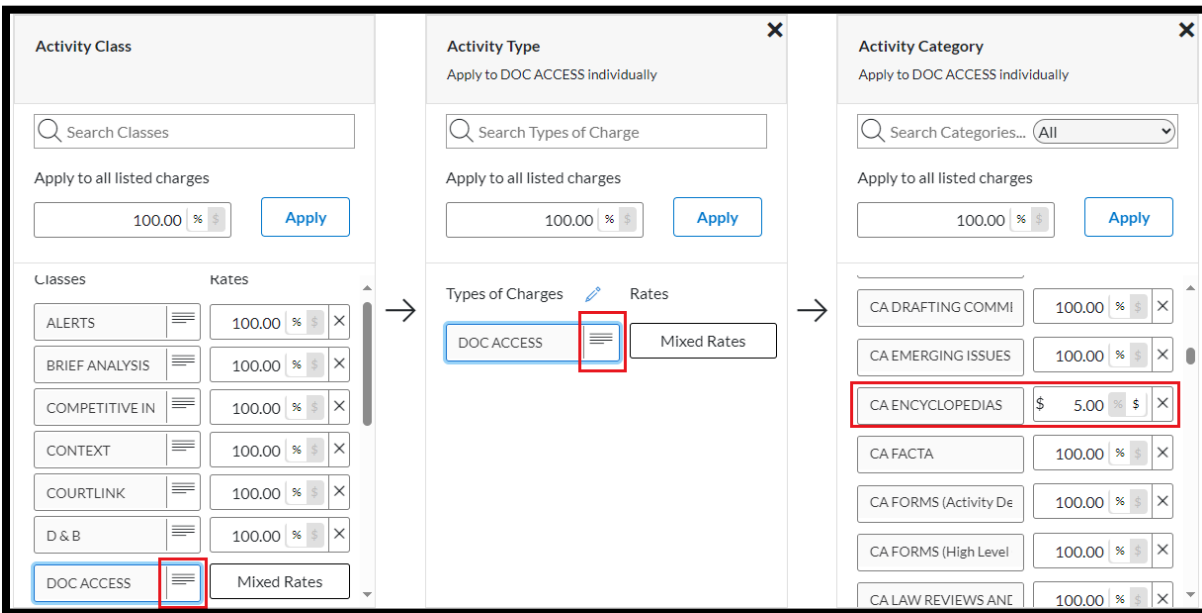


The screenshot displays three configuration panels for an activity:

- Activity Class:** A list of classes including LEXIS+ GENERAT, LITIGATION ANAL, LITIGATION PROF, MEDICAL NAVIG#, PATENT, PUBLIC RECORDS, SEARCH (highlighted), and VSA. Each class has a rate of 100.00 %.
- Activity Type:** A list of types including ACCESS CHARGE (highlighted), FEATURE FUNCTI, LEVEL 1 SEARCH, LEVEL 2 SEARCH, PUB REC SEARCH, and TP1-SEARCHES. Each type has a rate of 100.00 %.
- Activity Category:** A list of categories including IN CASES, IN LEGISLATION, STATI, LEXIS (highlighted with a rate of \$ 5.00), MY CASES, MY LEGISLATION, STATI, NEWSDESK EXPORT, and NO ACTIVITY DESCRIP. Each category has a rate of 100.00 %.

**b. Accessing a secondary source (e.g. legal encyclopedia):**

CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA ENCYCLOPEDIAS, switch to dollar sign and enter the value 5.00



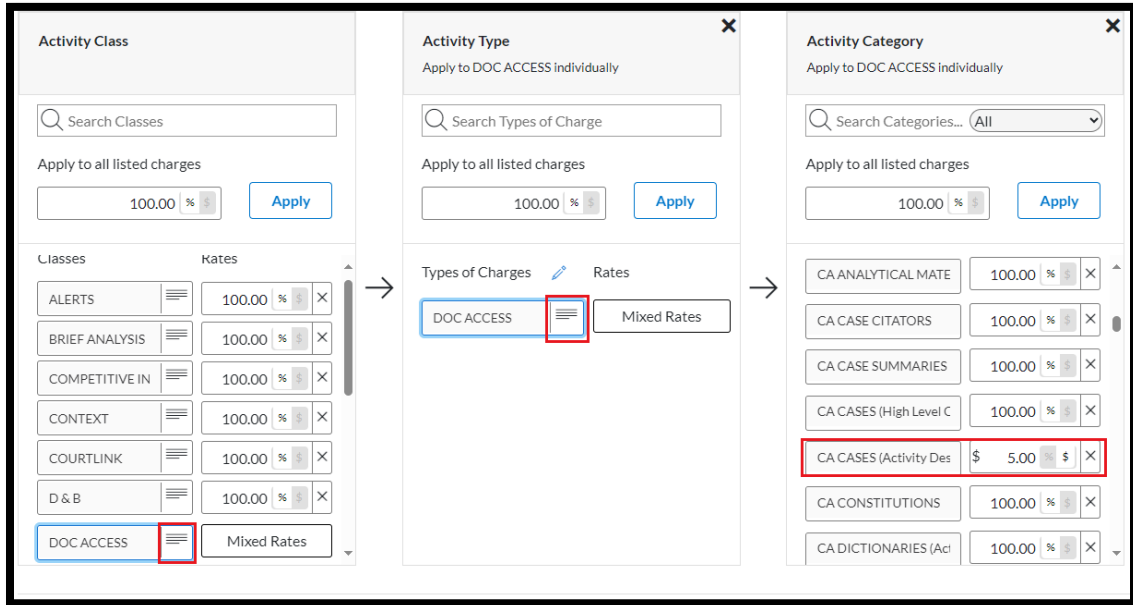
The screenshot displays three configuration panels for an activity:

- Activity Class:** A list of classes including ALERTS, BRIEF ANALYSIS, COMPETITIVE IN, CONTEXT, COURTLINK, D & B, and DOC ACCESS (highlighted). Each class has a rate of 100.00 %.
- Activity Type:** A list of types including DOC ACCESS (highlighted) and Mixed Rates. Each type has a rate of 100.00 %.
- Activity Category:** A list of categories including CA DRAFTING COMMI, CA EMERGING ISSUES, CA ENCYCLOPEDIAS (highlighted with a rate of \$ 5.00), CA FACTA, CA FORMS (Activity De), CA FORMS (High Level), and CA LAW REVIEWS ANE. Each category has a rate of 100.00 %.



c. **Accessing caselaw:**

CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA CASES (Activity Description), switch to dollar sign and enter the value 5.00

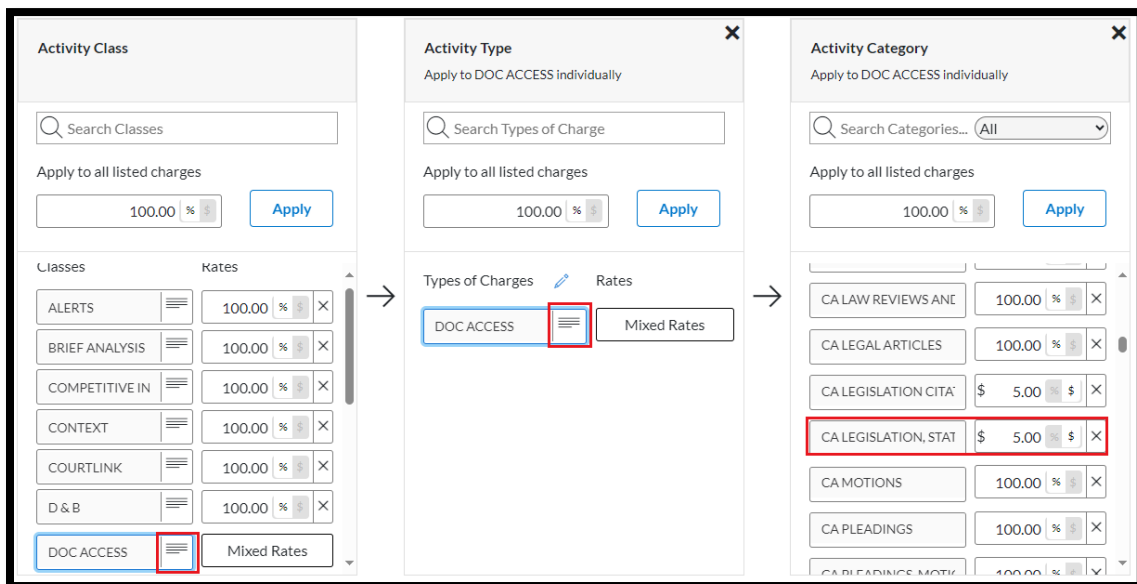


The screenshot shows three panels for configuring activity settings:

- Activity Class:** A search bar for classes and a table of classes with rates. The 'DOC ACCESS' class is selected, with a rate of 100.00 %.
- Activity Type:** A search bar for types of charge and a table of types. The 'DOC ACCESS' type is selected, with a rate of 100.00 %.
- Activity Category:** A search bar for categories and a table of categories with rates. The 'CA CASES (Activity Des)' category is selected, with a rate of \$ 5.00.

d. **Accessing legislation:**

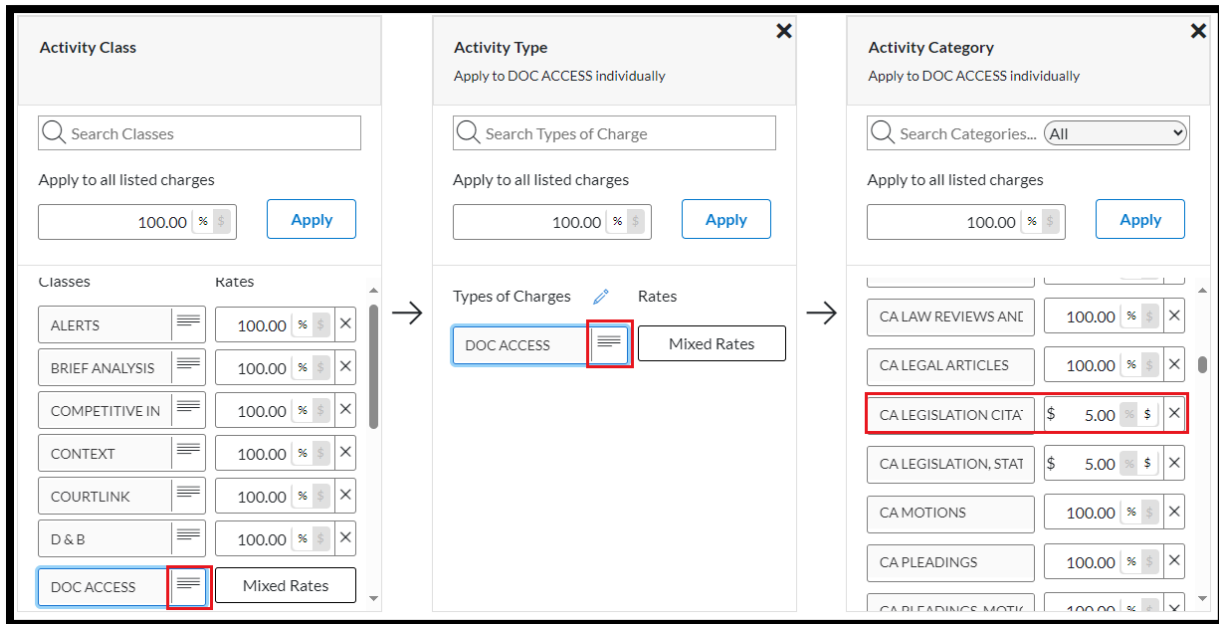
CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA LEGISLATION, STATUTORY CODES AND COURT RULES, switch to dollar sign and enter the value 5.00



The screenshot shows three panels for configuring activity settings:

- Activity Class:** A search bar for classes and a table of classes with rates. The 'DOC ACCESS' class is selected, with a rate of 100.00 %.
- Activity Type:** A search bar for types of charge and a table of types. The 'DOC ACCESS' type is selected, with a rate of 100.00 %.
- Activity Category:** A search bar for categories and a table of categories with rates. The 'CA LEGISLATION, STAT' category is selected, with a rate of \$ 5.00.

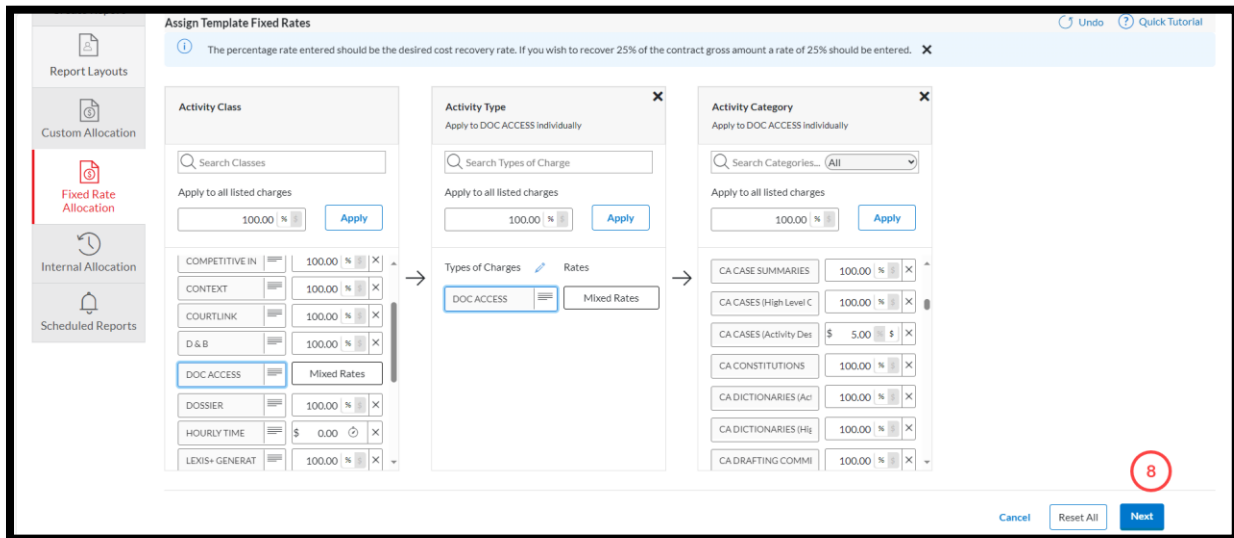
- e. **Accessing caselaw or legislation citator**  
 CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → CA LEGISLATION CITATORS or CA CASE CITATORS, switch to dollar sign and enter the value 5.00



The screenshot shows three panels for configuring fixed rates:

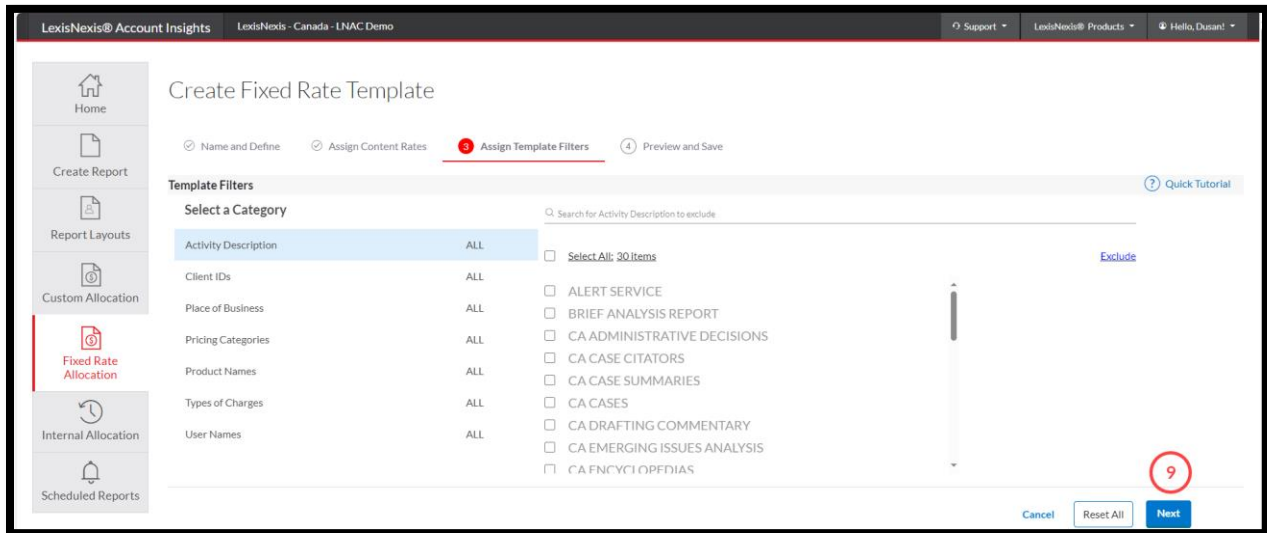
- Activity Class:** A list of classes including ALERTS, BRIEF ANALYSIS, COMPETITIVE IN, CONTEXT, COURTLINK, D & B, and DOC ACCESS. The DOC ACCESS class is selected, and its rate is set to 100.00 %.
- Activity Type:** A list of types of charges including DOC ACCESS and Mixed Rates. The DOC ACCESS type is selected, and its rate is set to 100.00 %.
- Activity Category:** A list of categories including CA LAW REVIEWS AND, CA LEGAL ARTICLES, CA LEGISLATION CITATORS, CA LEGISLATION, STAT, CA MOTIONS, CA PLEADINGS, and CA PLEADINGS MOTI. The CA LEGISLATION CITATORS category is selected, and its rate is set to \$ 5.00.

8. Once you are happy with your amendments of individual item prices, click **Next**.

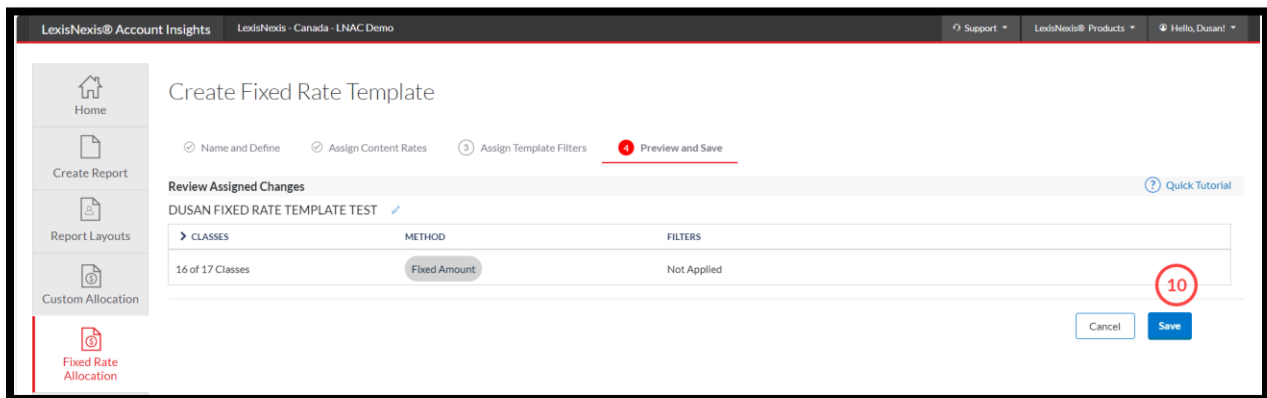


The screenshot shows the 'Assign Template Fixed Rates' dialog box with the 'Next' button circled in red. The dialog box is titled 'Assign Template Fixed Rates' and includes a warning message: 'The percentage rate entered should be the desired cost recovery rate. If you wish to recover 25% of the contract gross amount a rate of 25% should be entered.' The dialog box is divided into three panels: Activity Class, Activity Type, and Activity Category. The Activity Class panel shows a list of classes including COMPETITIVE IN, CONTEXT, COURTLINK, D & B, DOC ACCESS, DOSSIER, HOURLY TIME, and LEXIS-GENERAT. The Activity Type panel shows a list of types of charges including DOC ACCESS and Mixed Rates. The Activity Category panel shows a list of categories including CA CASE SUMMARIES, CA CASES (High Level C), CA CASES (Activity Des), CA CONSTITUTIONS, CA DICTIONARIES (Act), CA DICTIONARIES (Hig), and CA DRAFTING COMMI. The 'Next' button is circled in red.

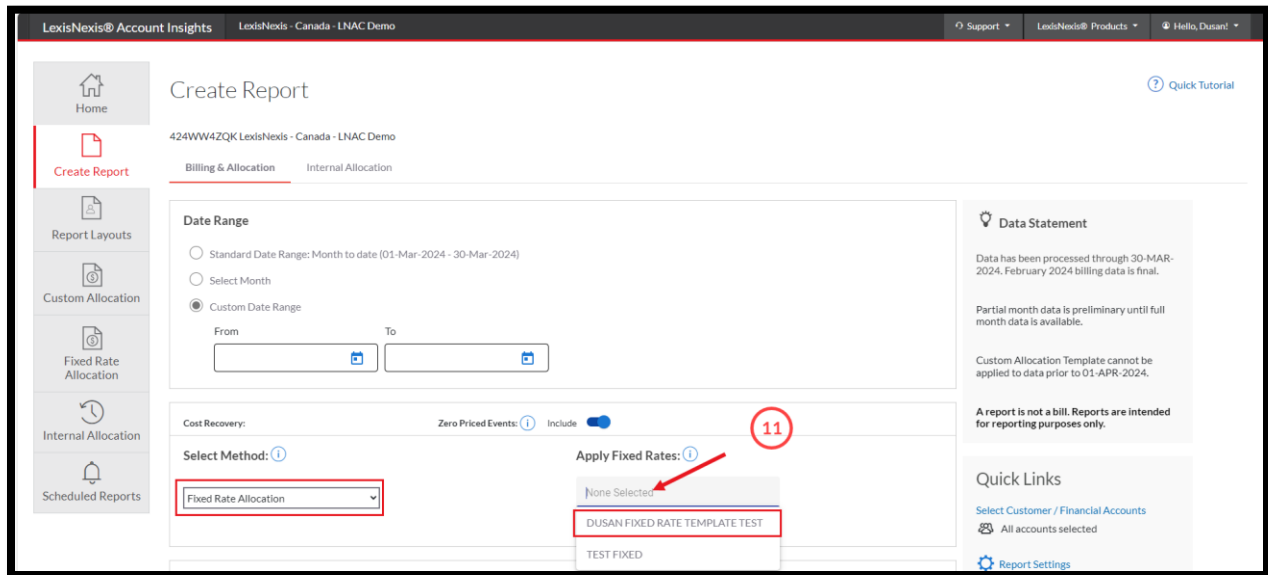
9. If you are looking to completely exclude specific items, you can select them from the list under the **Assign Template Filters** step.
  - a. If yes, select the items you wish to exclude.
  - b. If not, just click **Next**.



10. Finally, if you are happy with all your settings, click the **Save** button.



11. You can apply this newly created Gross Amount custom pricing to individual usage items when you click **Create Report** tab > **Select Method = Fixed Rate Allocation** > **Apply Fixed Rates** = click on the grey box and select the name of your Fixed Rate Allocation template



12. When you run the report, the new pricing will be displayed under the column **CONTRACT NET AMOUNT**.

#### IMPORTANT NOTE FOR PRICING CUSTOMIZATION:

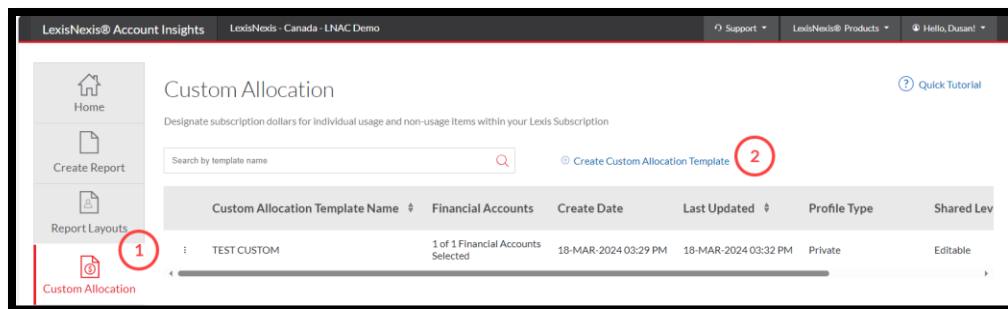
Only activities that have a **Contract Gross Amount** value that is higher than \$0 can be customized. All values that have a **Contract Gross Amount** value of \$0 cannot be customized. This is one of the reasons why users should carefully decide whether to have a **Doc-Access Pricing Model**, a.k.a. **Default Pricing Model** or **Search and Document Access Pricing Model**, a.k.a. **Hybrid Pricing Model**.

If your organization is looking to customize pricing, we recommend selecting the **Search and Document Access Pricing Model**. The reason is that, via this model, access to all primary sources (like caselaw, legislation, and case & legislation citators) will carry a **Gross Contract Amount** of \$0 and you will be able to modify the chargeback value of running a search as well as accessing secondary sources, like textbooks, legal encyclopedias, commentaries, law reviews and journals.

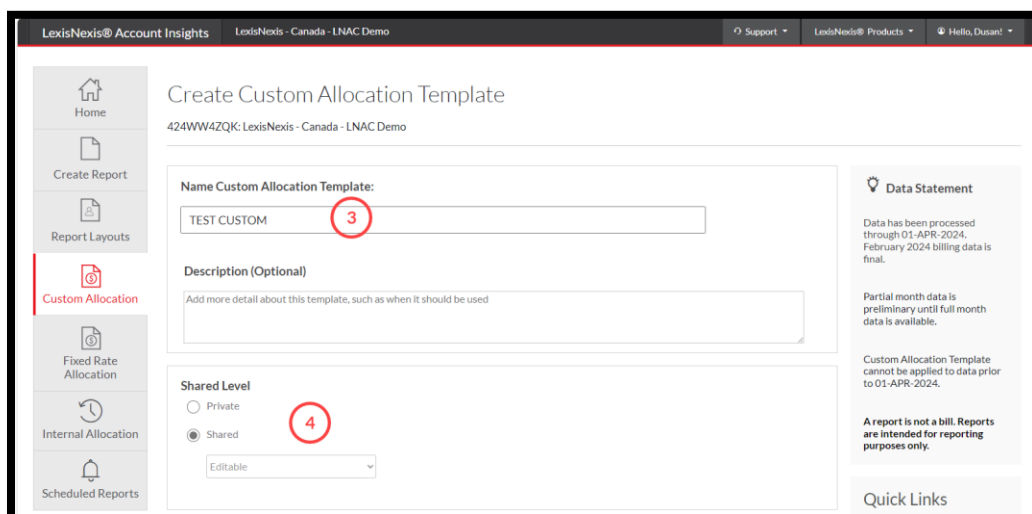
## How do I customize the total value for all platform subscriptions in my report?

There is a new feature in LexisNexis Account Insights that allows users to customize their own reference value for all platform subscriptions for chargeback purposes. This value is important because it serves as the reference for pro rating chargebacks within the **CONTRACT NET AMOUNT** column, ensuring that you are maximizing your total cost recovery dollars.

1. From anywhere within LexisNexis Account Insights, click the **Custom Allocation** tab.
2. Click the **Create Custom Allocation Template** link.



3. Give a name to your **Fixed Rate Template** under the **Name Custom Allocation Template** box. If you want, enter the description of the Custom Allocation Template in the next box.
4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
  - a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.



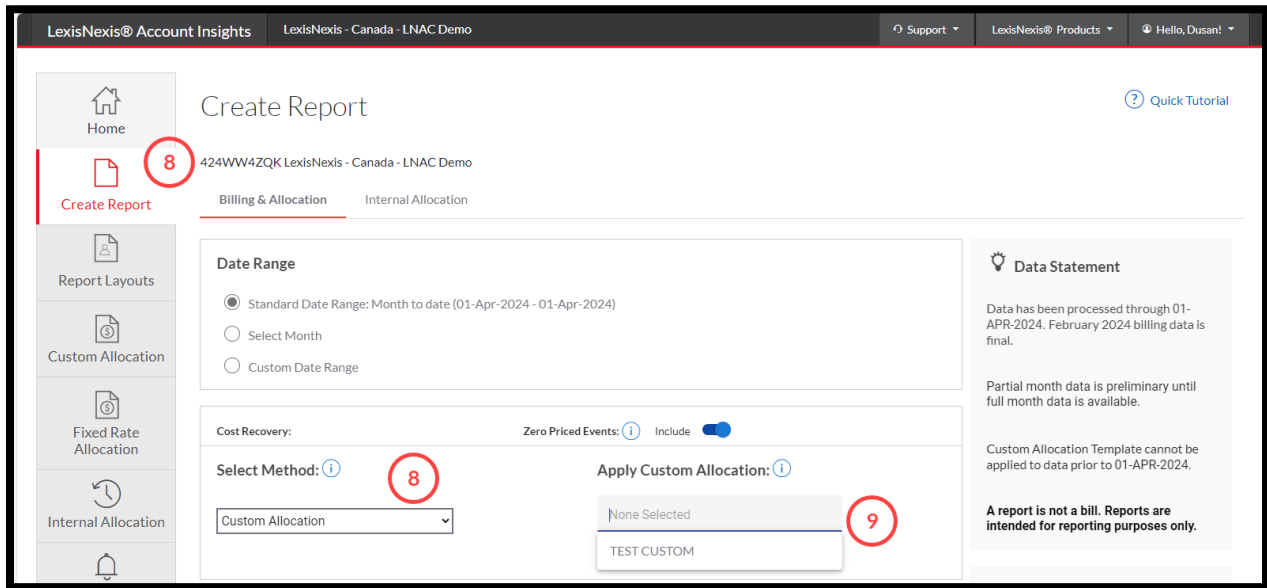
5. Next, under the **Monthly Subscription Cost** option, enter the values you wish to allocate for each Usage and Non Usage product. The values can be expressed either in dollars (e.g. \$1,000.00) or as percentages of the individual product’s subscription value (e.g. 25%).

Monthly Subscription Cost:		Apply Default Allocation:		
		*All checked items require a value		
		Include	%	OR Amount
Context		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 0.00
Diligence		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 0.00
Intelligize		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 0.00
Lexis		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 2,000.00
Practical Guidance		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 2,000.00
QuickLaw		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ 1,000.00
Monthly Cost:	\$0.00	Allocation:	∞%	\$5,000.00
Total Monthly Cost:	\$0.00	Allocated:	∞%	\$5,000.00

6. Under **Custom Allocation Template Filters**, make sure to exclude any categories from your custom allocation.

Custom Allocation Template Filters	<a href="#">View All Filters</a>
Select a Category	
Activity Description	ALL
Client IDs	ALL
Place of Business	ALL
Pricing Categories	ALL
Types of Charges	ALL
User Names	ALL
<a href="#">Reset All Filters</a>	

- Once you are happy with your selections, click the **Save** button.
- To assign your custom allocation as a part of a report, go to **Create Report** and under **Cost Recovery** option, click on the **Select Method** dropdown and select **Custom Allocation**.
- Under **Apply Custom Allocation**, click the **None selected** grey box and select your custom allocation.



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## Create Report

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Home

Create Report

Report Layouts

Custom Allocation

Fixed Rate Allocation

Internal Allocation

Billing & Allocation Internal Allocation

**Date Range**

Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024)

Select Month

Custom Date Range

Cost Recovery: Zero Priced Events:  Include

Select Method: **8**

Apply Custom Allocation: **9**

None Selected

TEST CUSTOM

**Data Statement**

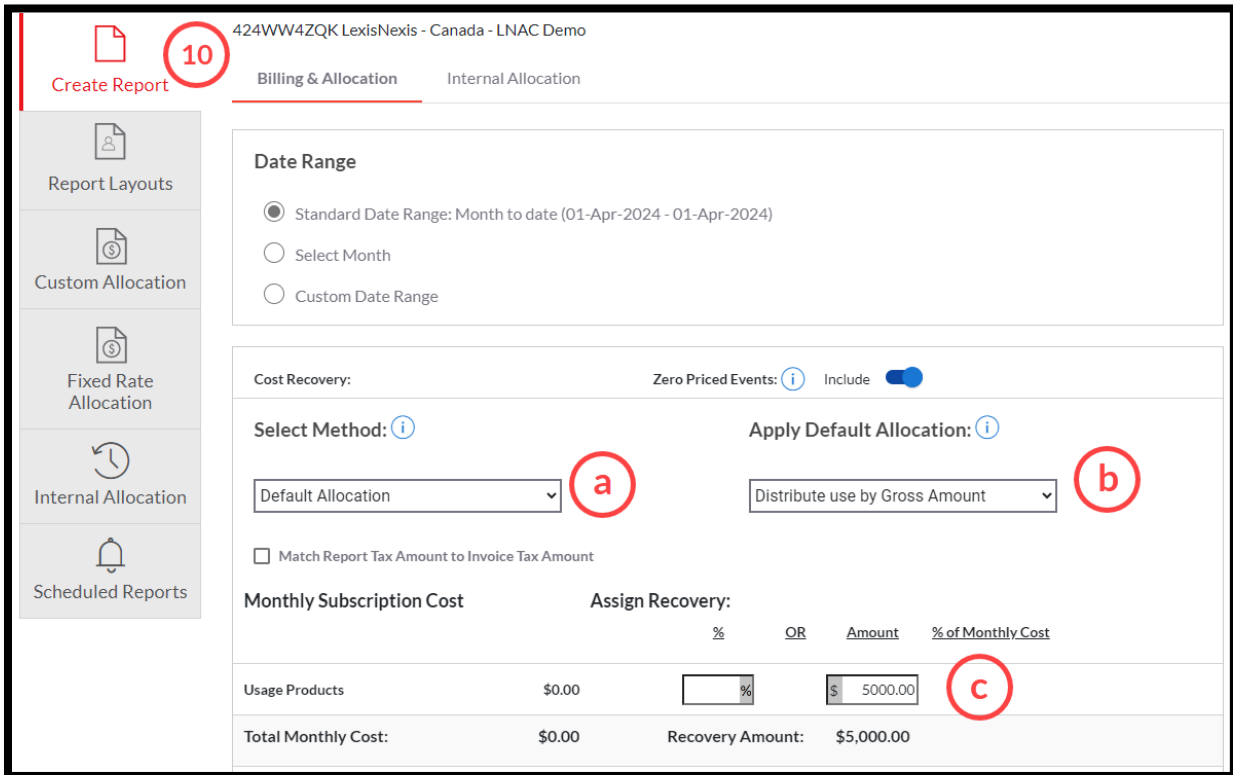
Data has been processed through 01-APR-2024. February 2024 billing data is final.

Partial month data is preliminary until full month data is available.

Custom Allocation Template cannot be applied to data prior to 01-APR-2024.

**A report is not a bill. Reports are intended for reporting purposes only.**

10. As an alternative to this process, you also do a manual custom allocation without creating a template when you are in the **Create Report** tab.
  - a. Under **Cost Recovery**, click on the **Select Method** dropdown and select **Default Allocation**.
  - b. Choose **Distribute use by Gross Amount**.
  - c. Under the **Monthly Subscription Cost** option, assign either the dollar amount or the percentage amount to Usage and Non Usage products.



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**Create Report** Billing & Allocation Internal Allocation

**Date Range**

Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024)

Select Month

Custom Date Range

**Cost Recovery:** Zero Priced Events:  Include

**Select Method:**  **Apply Default Allocation:**

**a**  **b**

Match Report Tax Amount to Invoice Tax Amount

**Monthly Subscription Cost** **Assign Recovery:**

		%	OR	Amount	% of Monthly Cost
Usage Products	\$0.00	<input type="text"/>		\$ 5000.00 <b>c</b>	
<b>Total Monthly Cost:</b>	<b>\$0.00</b>		<b>Recovery Amount:</b>	<b>\$5,000.00</b>	

11. Once you are happy with all your selections, click **View** or **Download** to obtain the report.
12. Irrespective of the option you choose (whether through a **Custom Allocation** template or a manual allocation within the **Default Allocation** option), all pro rated chargebacks with the new Recovery Amount will be displayed in the **CONTRACT NET AMOUNT** column of the report.