

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.

Download Settings: ASCII	
Download View 4	Reset All

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

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Home	Account Numbers: 424WVYYHP (LEXISNEXIS - A CANADA - LNAC DEMO.) 111 Gordon Baker Rd; NORTH	Date Range: 01-Apr-2024 - 01-Apr-202 Report Date: 02-Apr-2024	Financial Accou	LLAR	Exchange Rate	s			Action Ed		^	
Create Report	Zero Priced Events: (i) Include	•)						(ownload we As Sche	duled Rep	port
ے Report Layouts	DETAIL BY CLIENT USER											
(S) Custom Allocation	CLIENT USER NAME U	BUS	CE OF TIME SINESS KEEPER ID	MASTER FEATURE NAME	USER GROUP	MEMBER PROFILE NAME	DATE	PRICING CATEGORY	ACTIVITY DESCRIPTION	TYPE OF CHARGE	QUANTITY	CONTRACT GROSS AMOUNT
Fixed Rate Allocation	CLIENTID CO- CLIENTID GORD BILL	BAK RD: BROUGHCO-OP YOR ONI M2H CAN	RDON (ER TIMEKEEPER RTH ID RK: DEFINED + 3R1; ADA	LEXIS+™ CANADA MASTER FEATURE	GROUP DEFINED	MEMBER PROFILE NAME DEFINED	APR-	PRICING CATEGORY DEFINED	SEARCH - EMAIL	AS UPDATES ARE AVAILABLE ALERT	1	s 0.00) r 4
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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 Private
Scheduled Reports: Daily (Update data from first day of the month) Business Day Weekly
Bi-Monthly Monthly



- 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	.1)		
То:	training@lexisnexis.ca		
	Separate e-mail addresses by semicolon		
Subject:	ALERT TEST		
Message:	Alert Test		
12			
Save	ancel		