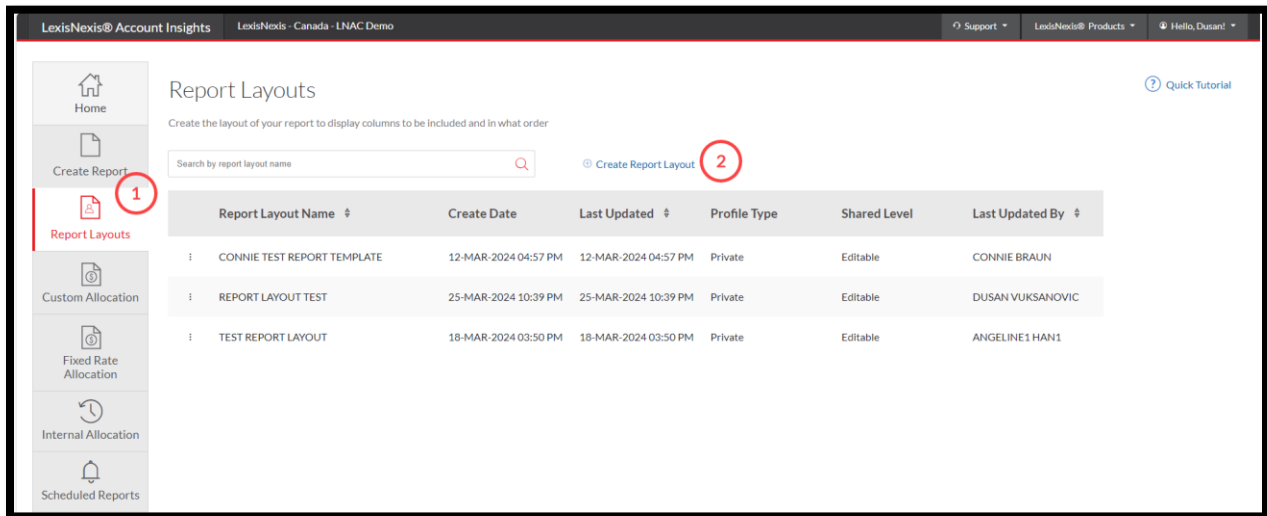


## How do I customize the look of my report?

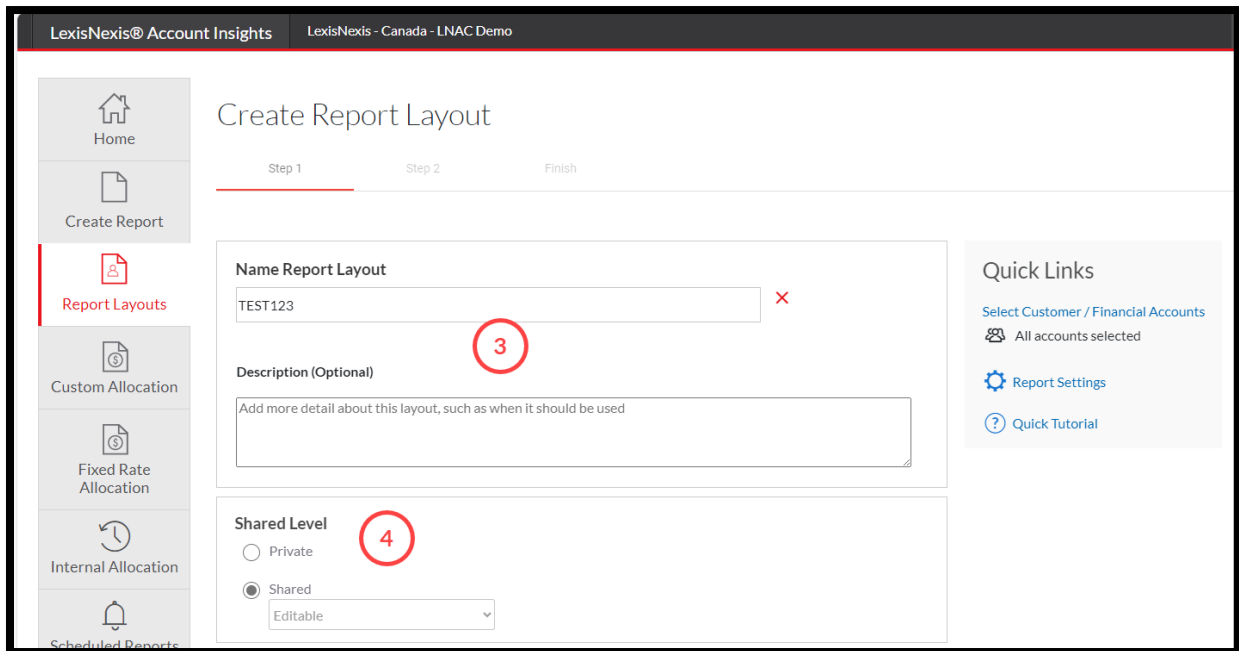
Customizing your usage and chargeback reports gives you the freedom to only see the usage and chargeback data relevant to you and your organization. In LexisNexis Account Insights, this feature is called **Report Layouts**, whereas in PowerInvoice, it was called **User-Defined Reports**.

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

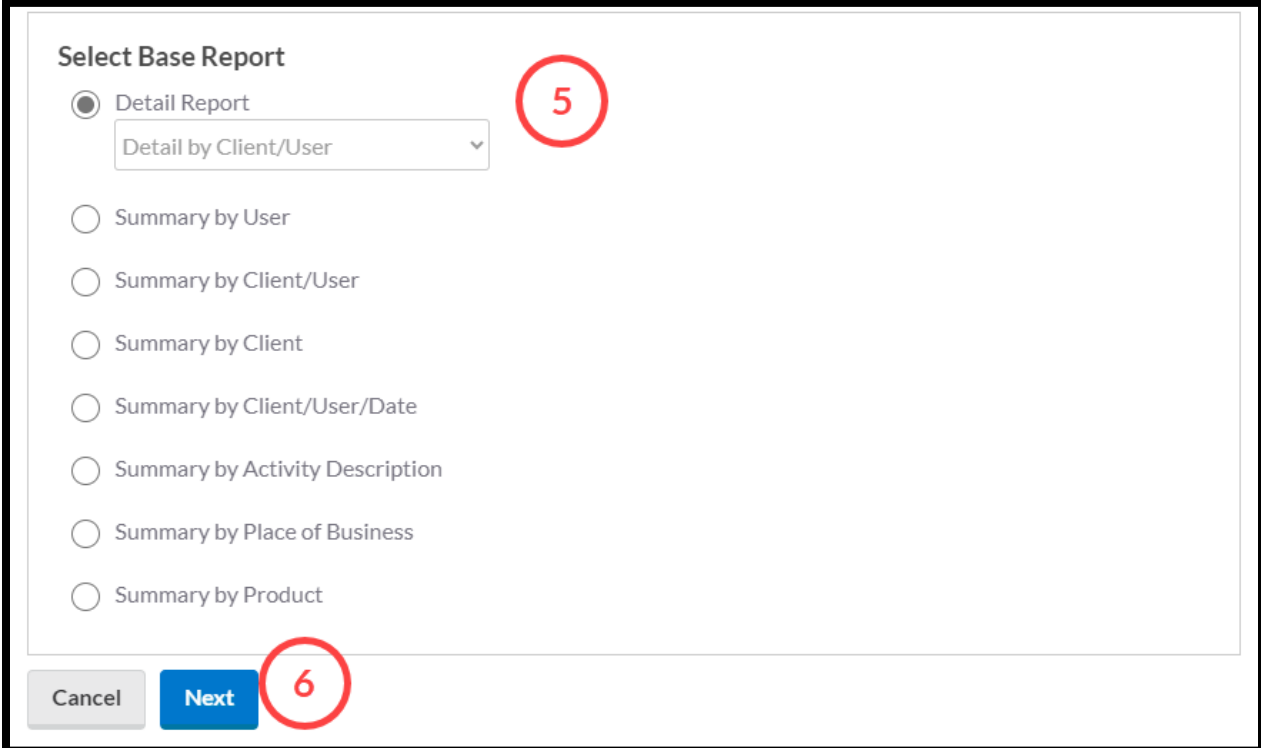
**4** Shared

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 ▼

Summary by User

Summary by Client/User

Summary by Client

Summary by Client/User/Date

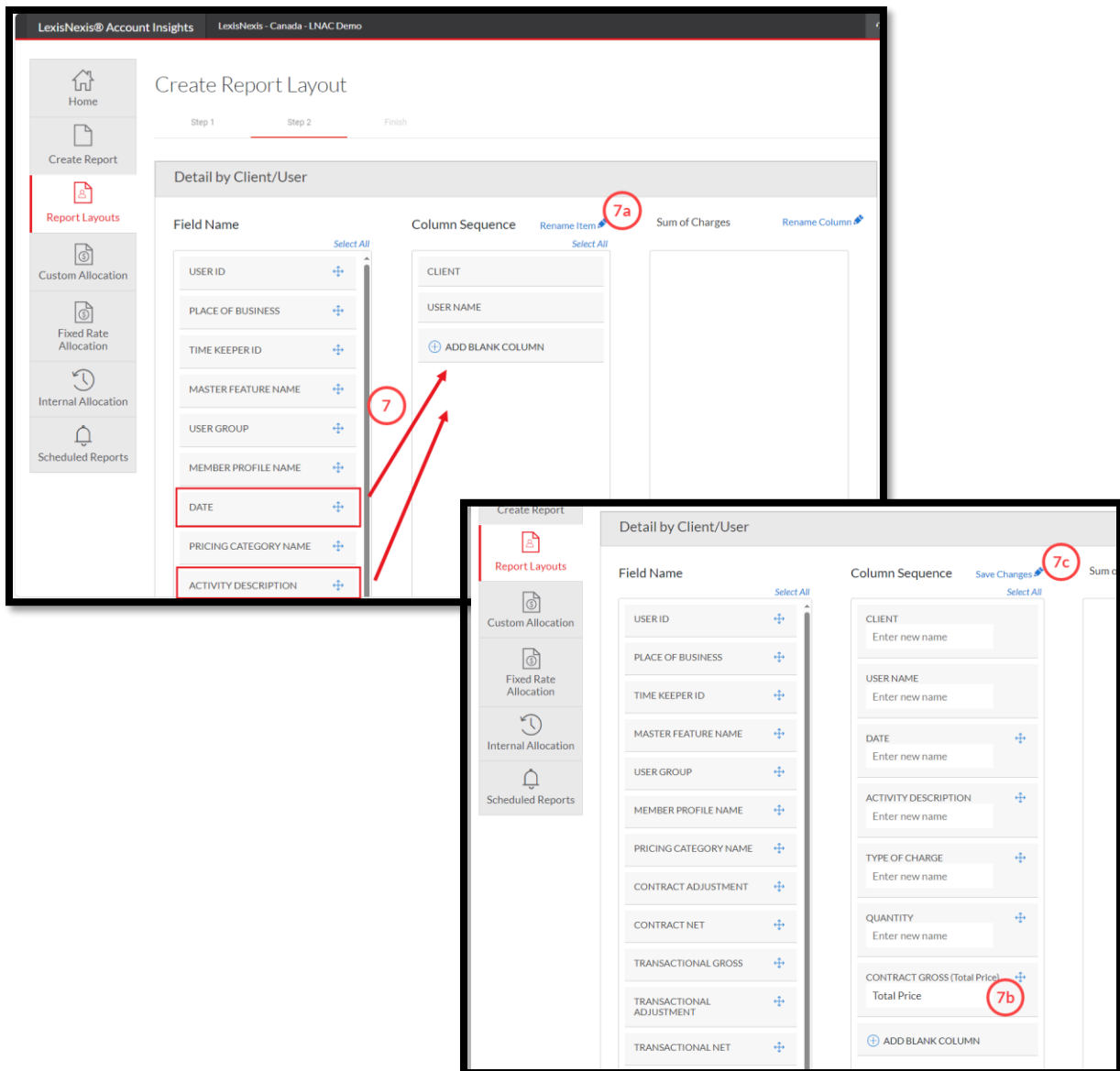
Summary by Activity Description

Summary by Place of Business

Summary by Product

Cancel **Next** 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.)

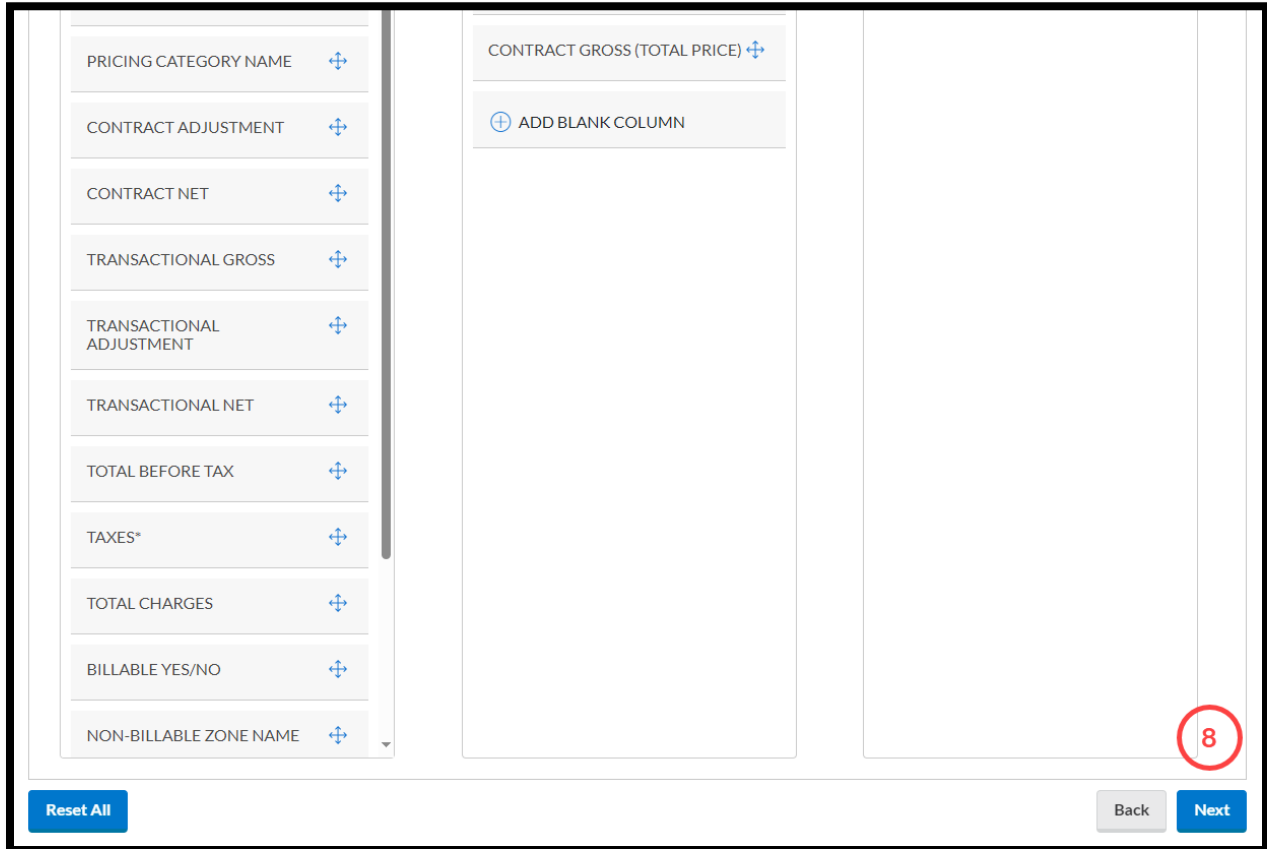


The image displays two screenshots of the LexisNexis Account Insights 'Create Report Layout' interface, illustrating the process of customizing a report layout.

**Top Screenshot:** Shows the 'Detail by Client/User' view. The 'Field Name' list on the left includes fields like USER ID, PLACE OF BUSINESS, TIME KEEPER ID, MASTER FEATURE NAME, USER GROUP, MEMBER PROFILE NAME, DATE, PRICING CATEGORY NAME, and ACTIVITY DESCRIPTION. The 'Column Sequence' list on the right includes CLIENT, USER NAME, and ADD BLANK COLUMN. A red circle '7' highlights the 'Field Name' list. A red circle '7a' highlights the 'Rename Item' link. Red arrows point from 'DATE' and 'ACTIVITY DESCRIPTION' in the 'Field Name' list to the 'Column Sequence' list.

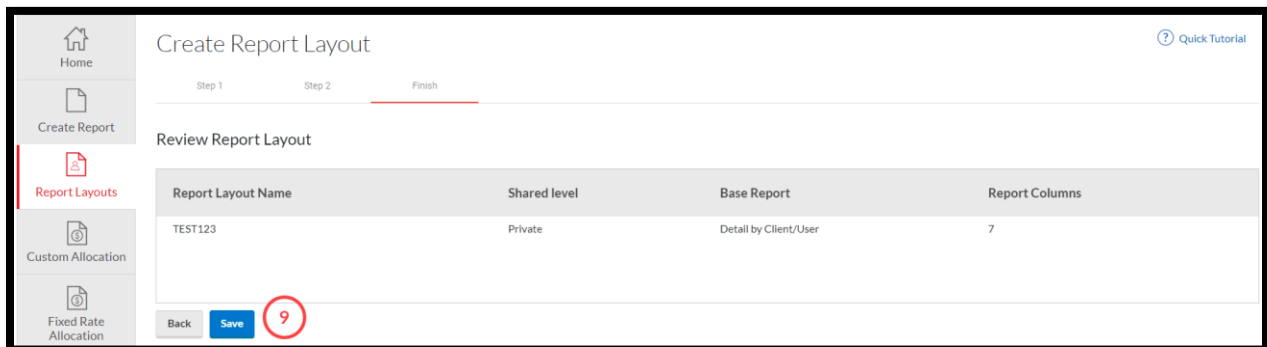
**Bottom Screenshot:** Shows the 'Detail by Client/User' view with the 'Rename Item' link clicked. The 'Column Sequence' list now shows input fields for 'CLIENT' and 'USER NAME'. A red circle '7b' highlights the 'CONTRACT GROSS (Total Price)' field. A red circle '7c' highlights the 'Save Changes' link.

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. On the right, there is a main workspace with a header 'CONTRACT GROSS (TOTAL PRICE)' and a button 'ADD BLANK COLUMN'. At the bottom, there are three buttons: 'Reset All', 'Back', and 'Next'. The 'Next' button is circled in red with the number 8.

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

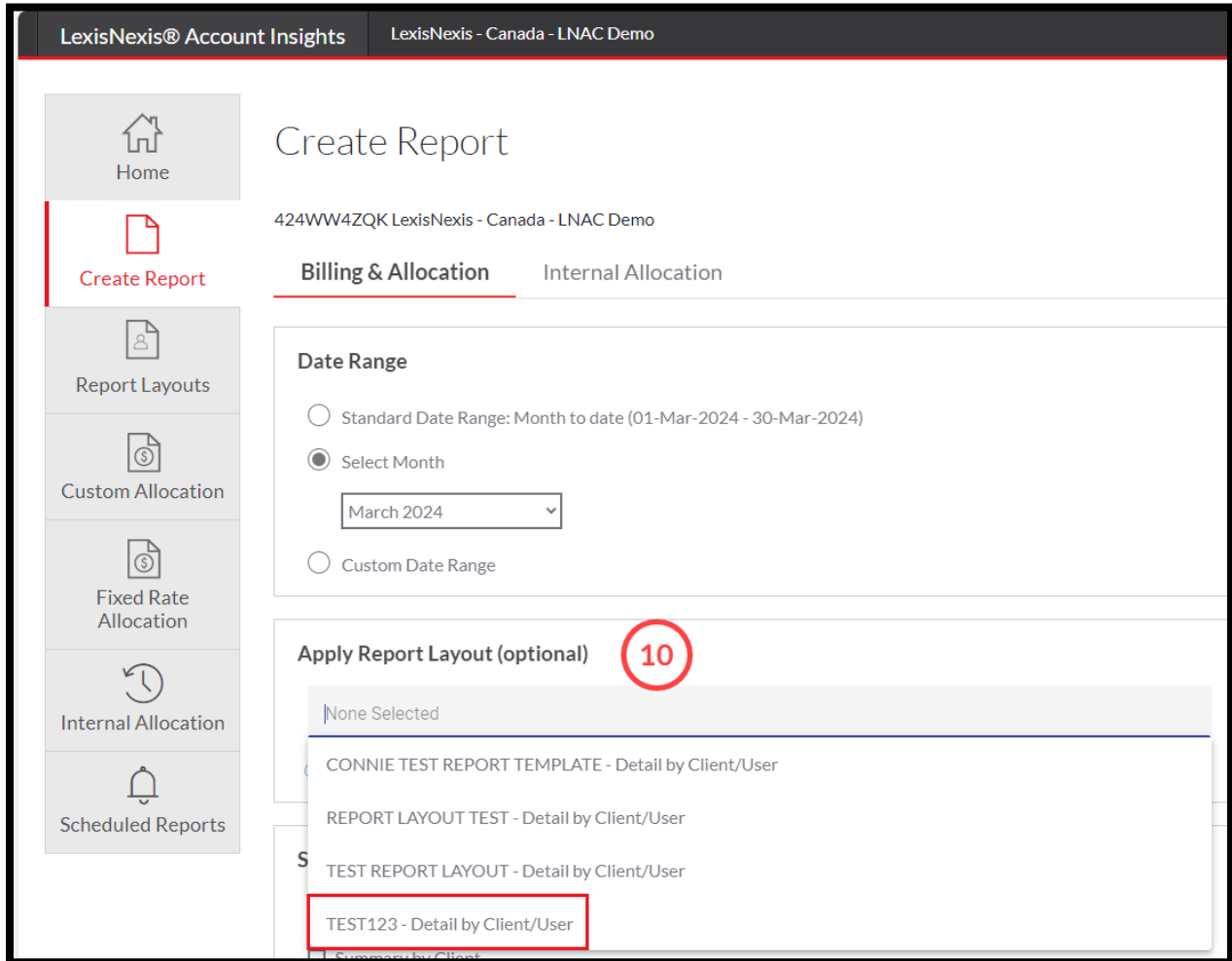


The screenshot shows the 'Review Report Layout' screen. It has a breadcrumb trail: Step 1, Step 2, Finish. A sidebar on the left contains navigation options: Home, Create Report, Report Layouts (highlighted), Custom Allocation, and Fixed Rate Allocation. The main content area has a table with the following data:

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

At the bottom, there are 'Back' and 'Save' buttons. The 'Save' button is circled in red with the number 9.

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

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**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**