

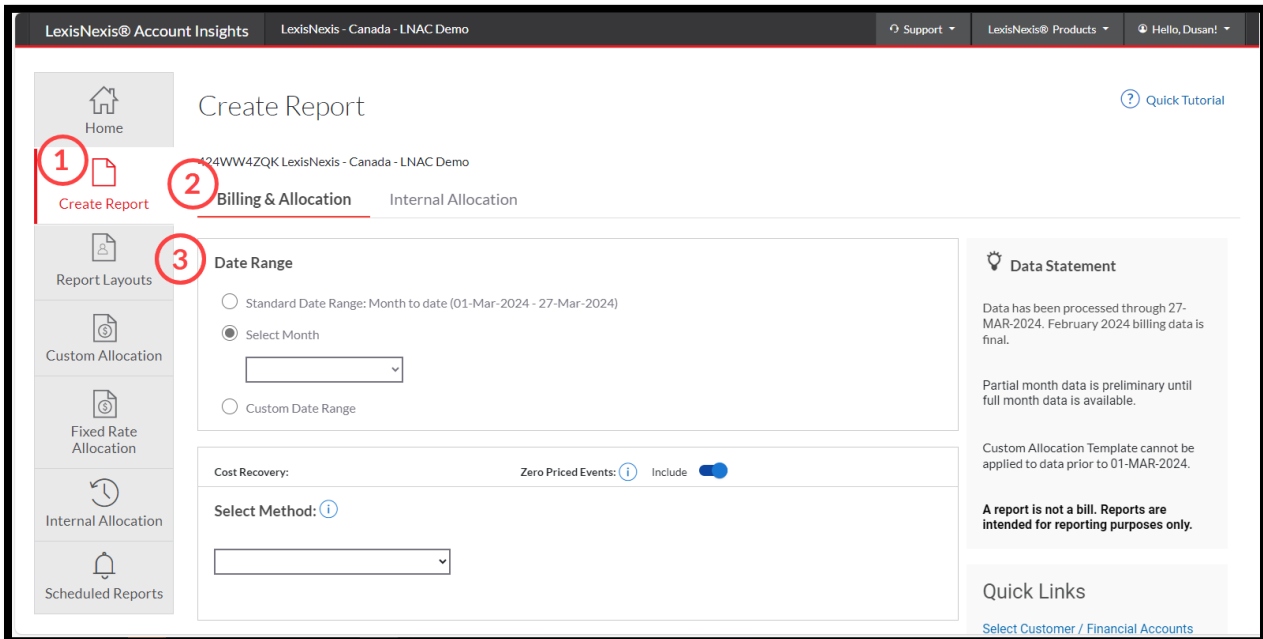
How do I run a simple usage report?

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 1st 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 interface for creating a report. The top navigation bar includes 'LexisNexis® Account Insights', 'LexisNexis - Canada - LNAC Demo', 'Support', 'LexisNexis® Products', and 'Hello, Dusan!'. The main content area is titled 'Create Report' and features a navigation menu on the left with options: Home, Create Report (1), Report Layouts, Custom Allocation, Fixed Rate Allocation, Internal Allocation, and Scheduled Reports. The 'Create Report' section is active, showing 'Billing & Allocation' (2) and 'Internal Allocation' tabs. The 'Date Range' section (3) offers three options: 'Standard Date Range: Month to date (01-Mar-2024 - 27-Mar-2024)', 'Select Month' (selected), and 'Custom Date Range'. Below this, there are sections for 'Cost Recovery' (Zero Priced Events: Include) and 'Select Method'. A 'Data Statement' section on the right provides information about data processing and availability. A 'Quick Links' section at the bottom right offers links for 'Select Customer' and '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	100.00 %		\$ 0.00	
Total Monthly Cost:	\$0.00		Recovery Amount:	\$0.00	

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

[Reset All Filters](#)

- 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

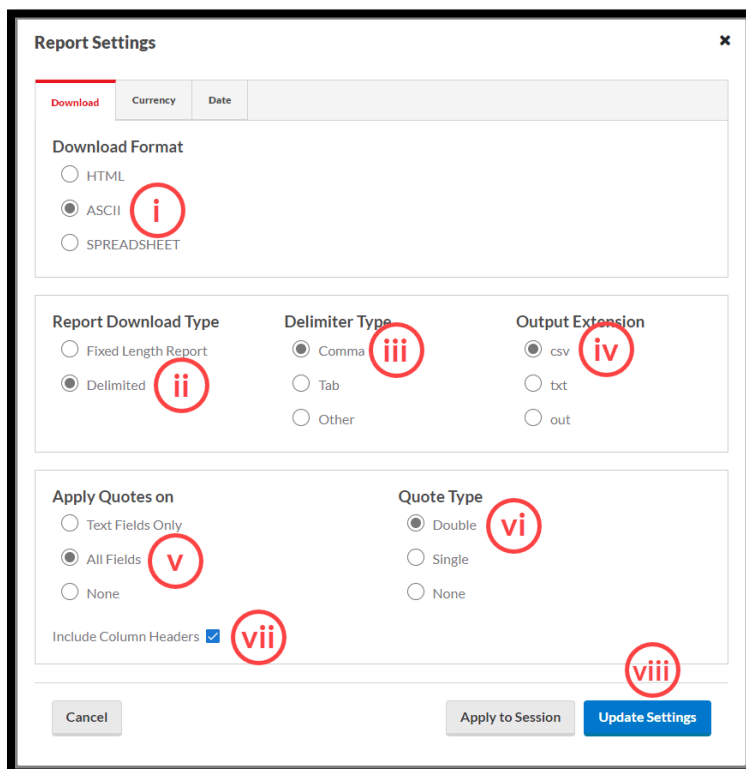
All Use

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](#)