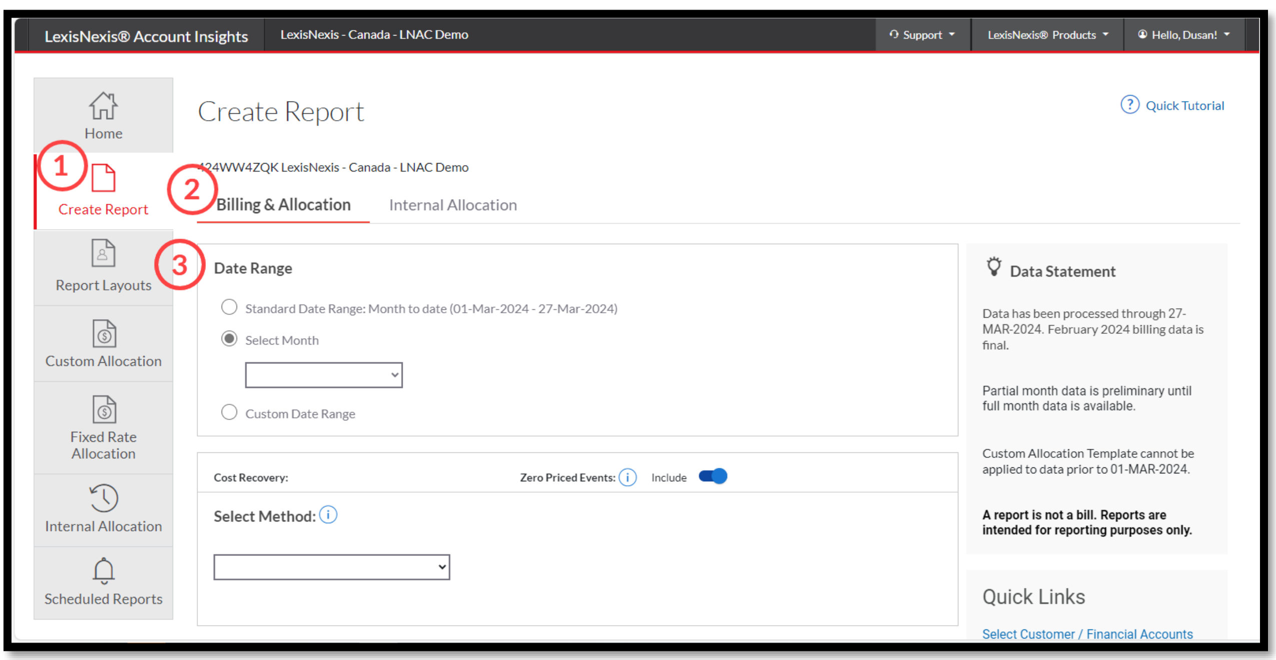
How do I run a simple usage report?

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.

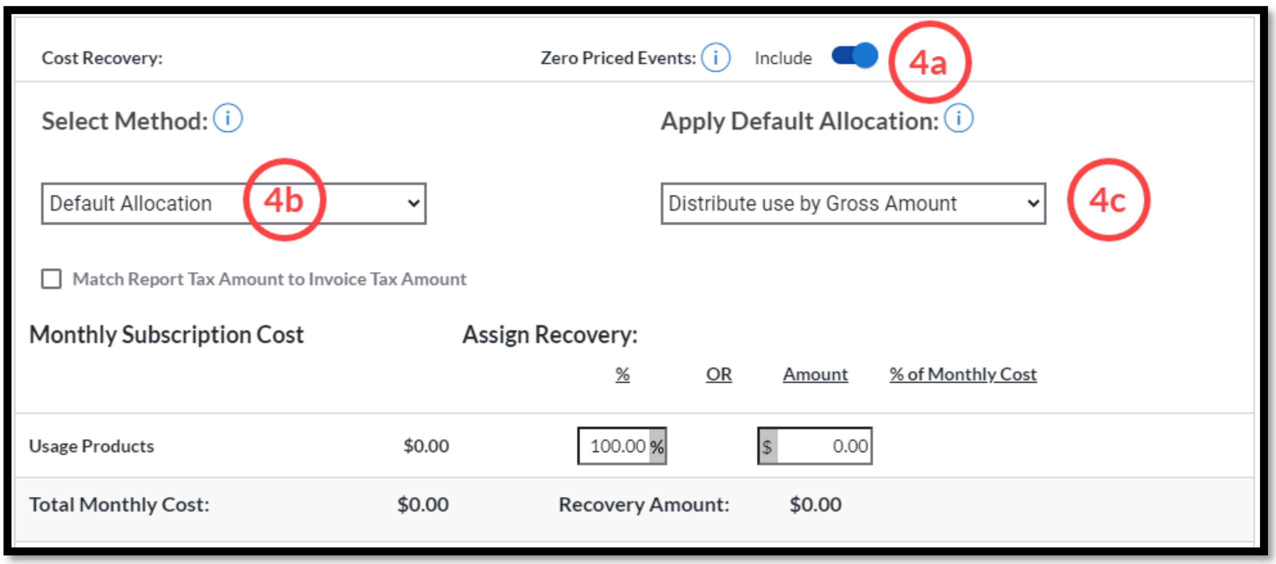
There are several ways you can customize your reports. You can read more about them under **How do I customize the look of my report?**, **How do I customize pricing for individual activities in my report?**, and **How do I customize the total value for all platform subscriptions in my report?**

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

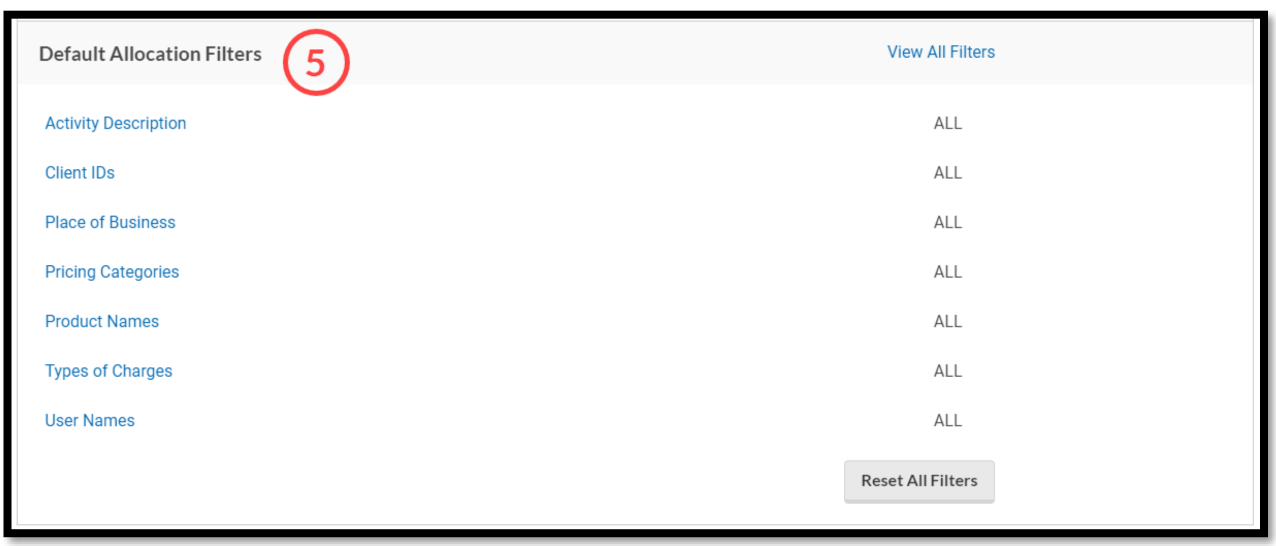
1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure you are on the **Billing & Allocation** option.
3. Select the **Date Range** for which you want to run the report. There are 3 options:
    a. **Standard Date Range**: runs a **Month-to-date** report, i.e. 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.



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.

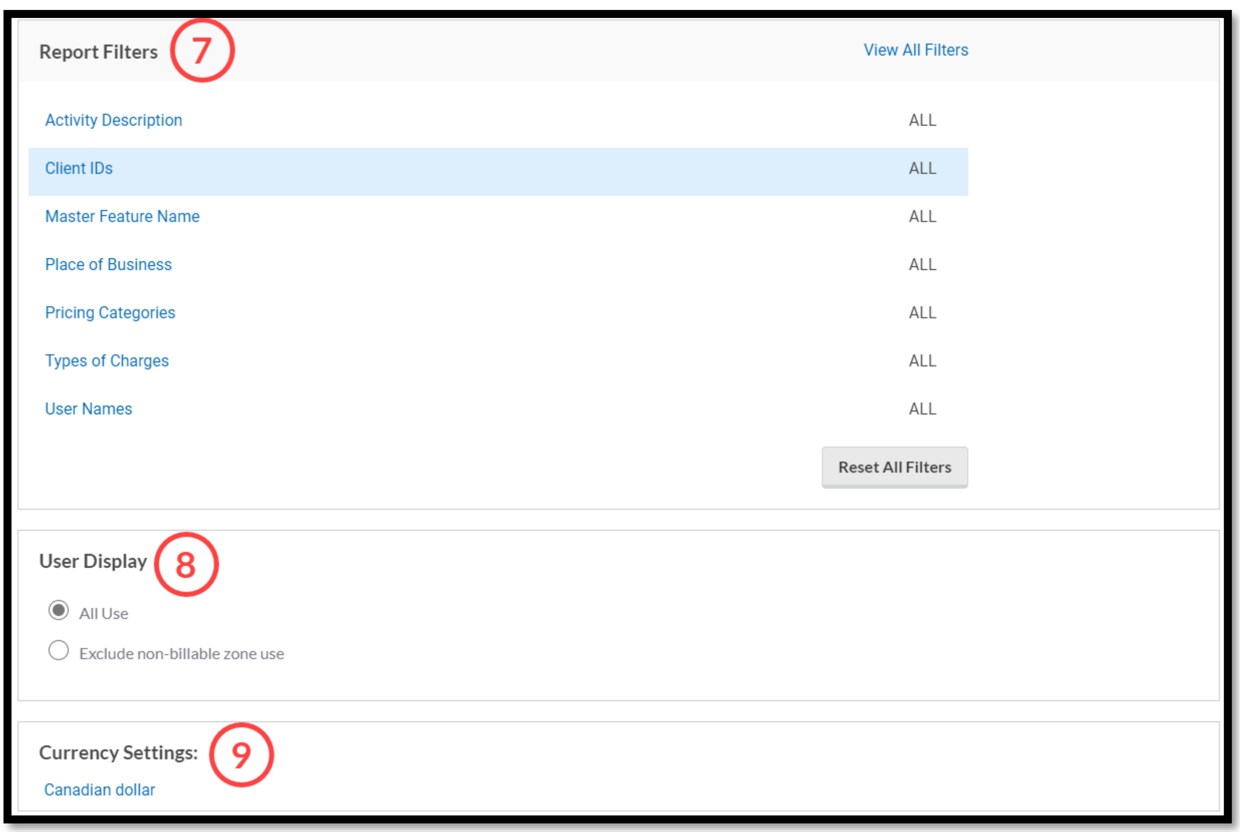


5. Ensure that **Default Allocation Filters** are selected as **ALL.**



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

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



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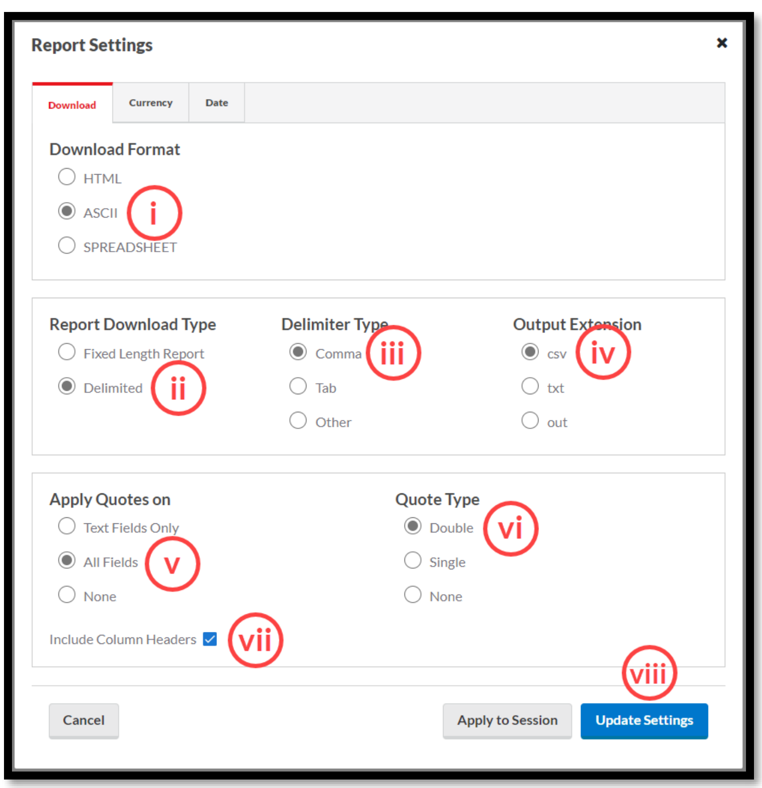
10. Before running the report, consider the following 2 options:
    a. If you are looking to download a report immediately, then select your preferred settings under **Download Settings** by clicking the format link.
    b. Once chosen, click the **Download** button. For best reporting output, we recommend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



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