LexisNexis® Account Insights

Quick Reference

LexisNexis® Account Insights may be accessed directly at https://accountinsights.lexisnexis.com or via LexisNexis® Account Center. For a full tutorial of this product, please review the "Quick Tutorial" on the homepage.

On the LexisNexis® Account Insights sign-in screen, type your ID and password (same as your product ID and password) and click Sign-In.

You can also login via LexisNexis® Account Center by clicking the LexisNexis Account Insights link.

Create Report

1. Select the Create Report tab on the left of the screen.
2. Select a Date Range for your report.
3. Apply a Custom Allocation template (existing will show in dropdown).
4. Add a Report Layout OR select a Standard Report Selection.
5. Under Report Filters, selecting a filter allows you to include or exclude those filter attributes from your report.
6. Select User Display. The default is 'All Use'.
7. Under Currency Settings, click United States Dollar to update to a different currency.
8. Select Download Settings if changes are needed.
9. Select View or Download to run the report.
10. If View is selected, the report can be edited in the upper right-hand corner by clicking Actions.

Custom Allocation Template

1. Select the Custom Allocation Template tab on the left of the screen.
2. Enter a name for the template.
3. Select the Shared Level for this template.
4. Apply the Allocation Rates for each product, either using percentages or dollar amounts. All products are included by default.
5. To include Non-Usage Products, select the distribute toggle and enter a dollar amount to recover.
6. Under Custom Allocation Template Filters, all categories are included by default. If excluding items, they will not have usage amounts allocated to them, but the excluded items will be included in the report.
7. Click Save in the lower left corner.

Report Layouts

1. Click Report Layouts tab.
2. Click Create Report Layout.
3. Name and select the Shared Level.
4. Select the Base Report for the template.
5. Click Next at the bottom of the page.
6. Under Field Name, include fields by dragging and dropping it under Column Sequence.
7. If you wish to sum columns to calculate a new total charge amount, drag and drop them under the Sum of Charges header.
8. Click Next in the bottom right of the page.
9. Save the Report Layout on the following page.

Scheduled Reports

1. Create a Report.
2. Select View for the report.
3. Select Actions in the upper right-hand corner and click Save as Scheduled Report.
4. Enter a name for the report.
5. Review the account numbers included in the report.
6. Review the assigned templates.
7. Select the Shared Level.
8. Select the Schedule frequency.
9. Review Email Attachment Format. It will default to HTML.
10. Select Download Settings if changes are needed.
11. Update Send Report the To, Subject, and Message. The message is optional.
12. Click Save at the bottom.

Edit Template or Report

1. Click tab associated with the template or report.
2. Hover and click the ⋮ next to the report's name.
3. Select Edit Report.
4. Continue through to update the report.
5. Click Save at the end.

Delete Template or Report

1. Click tab associated with the template or report.
2. Hover and click the ⋮ next to the template's name.
3. Select Delete.
4. Click Delete to remove the template.