

How to Build Customized Reports

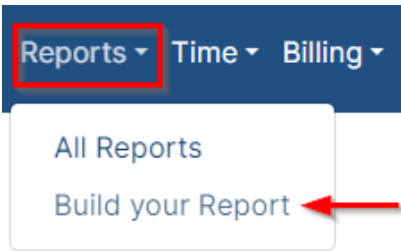
Objectives

- Create your own reports using the Report Builder

Steps

In addition to the predefined reports, users can create custom reports with the report builder and select the content they need.

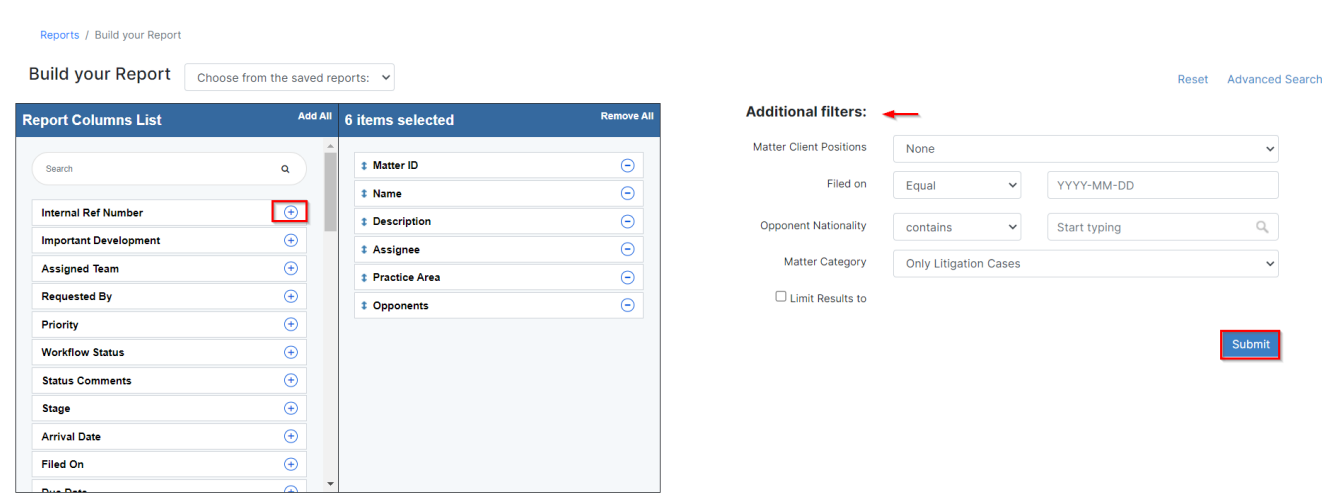
To do so, navigate to **"Build your Report"** under the Reports Module in the main menu



The report builder allows you to build your own customized reports and select the content as desired.

You can select from a pool of items to add to the report.

Select which columns to include on your report, such as the matter Id, Name, Assignee, Practice Area, etc. Column order is adjustable.



You can apply additional filters as well.

Reports / Build your Report

Build your Report

Choose from the saved reports: ▾

[Reset](#) [Advanced Search](#)

Report Columns List

Add All

0 items selected

Remove All

Matter ID

Internal Ref Number

Name

Description

Important Development

Assigned Team

Assignee

Requested By

Additional filters:

Matter Client Positions

None

Filed on

Equal

YYYY-MM-DD

Opponent Nationality

contains

Start typing

Matter Category

Only Litigation Cases

☐ Limit Results to

Submit

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The customized report can be saved under any name and run in a timely manner. In addition, the customized report can be shared among selected team members whenever desired so that they can view and use the same report as well.

Report Details					
Matter ID	Name	Description	Assignee	Practice Area	
M00000230	Agency Grid X ABC Company	Dear Legal team, A new litigation cas...		Arbitration	Agency Grid
M00000227	Administrative Litigation Case- Business Department	The administrative case against the busi...	Carolina Robinson	Administrative	
M00000226	BLC Vs. Albert Insurance Company- Banking Case		Alice Jones	Banking	Albert Insurance Company
M00000223	Josephine VS ABC Services	Hi Carolina, You can find the details of ...	Carolina Robinson	Civil	ABC Services
M00000217	Alberto-Criminal case		Carolina Robinson	Criminal	
M00000215	Advanced Insurance vs Adam Banking Case			Constitutional Court	

Export ▾

Save Report

Export to Excel

Export to PDF

All reports can be exported to Excel or PDF.

Save Report

Report Name

Plaintiff Client Cases

Share With

Start typing

Alice Jones

Carolina Robinson

Save

Cancel

Reports can be built once and then run at any time. They can also be edited and deleted at any time.

Simply choose from the list of saved reports, and do the changes you want.

Matters Per Workflow

Matters Per Workflow



Report Columns List	Add All	6 items selected	Remove All
<div>Search</div> <div>Internal Ref Number</div> <div>Description</div> <div>Important Development</div> <div>Assigned Team</div> <div>Assignee</div> <div>Requested By</div> <div>Practice Area</div> <div>Priority</div> <div>Status Comments</div> <div>Filed On</div> <div>Due Date</div>		<div>Matter ID</div> <div>Name</div> <div>Workflow Status</div> <div>Stage</div> <div>Arrival Date</div> <div>Category</div>	



The Customized report will be listed under the matters' reports on the Reports Page.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!