How to Build Customized Reports
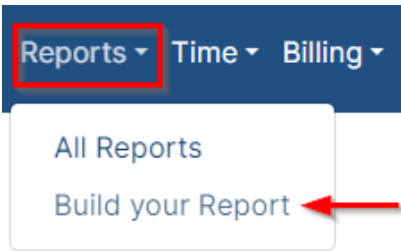
Objectives

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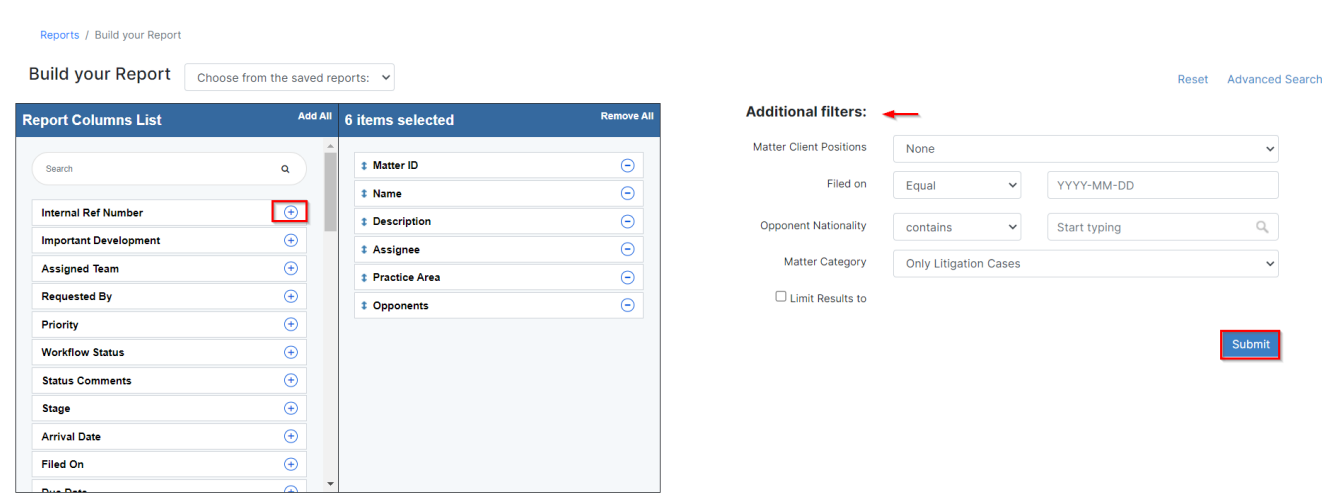
To do so, navigate to **"Build your Report"** under the Reports Module in the main menu

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.

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.

All reports can be exported to Excel or PDF.

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

Search

Internal Ref Number	⊕
Description	⊕
Important Development	⊕
Assigned Team	⊕
Assignee	⊕
Requested By	⊕
Practice Area	⊕
Priority	⊕
Status Comments	⊕
Filed On	⊕

↕ Matter ID	⊖
↕ Name	⊖
↕ Workflow Status	⊖
↕ Stage	⊖
↕ Arrival Date	⊖
↕ Category	⊖

ⓘ 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!