

Phase 9: Reports & Dashboards

This phase focused on creating visual representations of key metrics in the Insurance Claim & Policy Management System. Charts and dashboards were used to help Managers and Admins monitor claims, policies, and customer activity effectively.

1. Reports with Charts

Reports Created:

- **Claims by Status** – Track the number of claims that are Pending, Approved, or Rejected.
- **Policies Near Renewal** – Identify policies approaching their end date for renewal reminders.

Procedure:

1. Navigate to **Reports** → **New Report**.
2. Select **Claims** (or **Policies**) as the report object.
3. Apply filters:
 - Claims: Status = Pending / Approved / Rejected
 - Policies: End Date = Next 30 Days
4. Group Rows:
 - Claims: Group by Status
 - Policies: Group by Policy Type
5. Click **Add Chart** (top-right of report builder).
6. Select **Chart Type**:
 - Claims: **Bar Chart**
 - Policies: **Donut Chart**
7. Configure axes and labels.
8. Click **Save & Run** to generate the report with chart.

Purpose: Provides quick insights to Managers on pending claims and expiring policies.

REPORT

New Claims with Policy Report

Claims with Policy [Refresh] [Undo]

[Add Chart] [Save & Run] [Save]

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Claim: Owner Name ↑	Claim: Claim Name	Policy: Policy Name
Konda Mounika (3)	CLM001	Health Plus Plan
	Accident Claim 2025	Health Plus Plan
	Accident Claim 2025	Health Plus Plan
Subtotal		
Total (3)		

Row Counts [On] Detail Rows [On] Subtotals [On] Grand Total [On]

1. Navigate to **Dashboards → New Dashboard**.
2. Name it: Insurance Management Dashboard.
3. Click **+ Component → Select Report** (from created reports).
4. Select chart type and configure display options.
5. Arrange multiple components on the canvas for clear visualization.

6. Save and **Refresh Dashboard** to view live data.

Purpose: Allows Managers and Admins to monitor operations in real-time, take decisions, and follow up on pending tasks efficiently.

