

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 P

Add Chart Save & Run Save

Fields

Outline Filters 1

Groups

GROUP ROWS

Add group...

Claim: Owner Name X

GROUP COLUMNS

Add group...

Columns

Add column...

Claim: Claim Name X

Policy: Policy Name X

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 Detail Rows Subtotals Grand Total

9.

2. Dashboard

Dashboard Created:

- **Insurance Management Dashboard** – combines key charts to visualize operational metrics in one place.

Components Added:

1. **Pending Claims** – Bar Chart showing number of Pending, Approved, and Rejected claims.
2. **Policies Near Renewal** – Donut Chart showing upcoming policy expirations.
3. **Total Customers** – Metric component showing total active customers.

Procedure:

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.

