Reporting

Lesson Objectives

By the end of this lesson, you should be able to:

- Describe how lists can be used for "ad hoc" reporting
- Describe the functionality of the ClaimCenter Standard Reporting feature

This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

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Lesson Outline

- Using Lists as Reports
- ClaimCenter Standard Reporting

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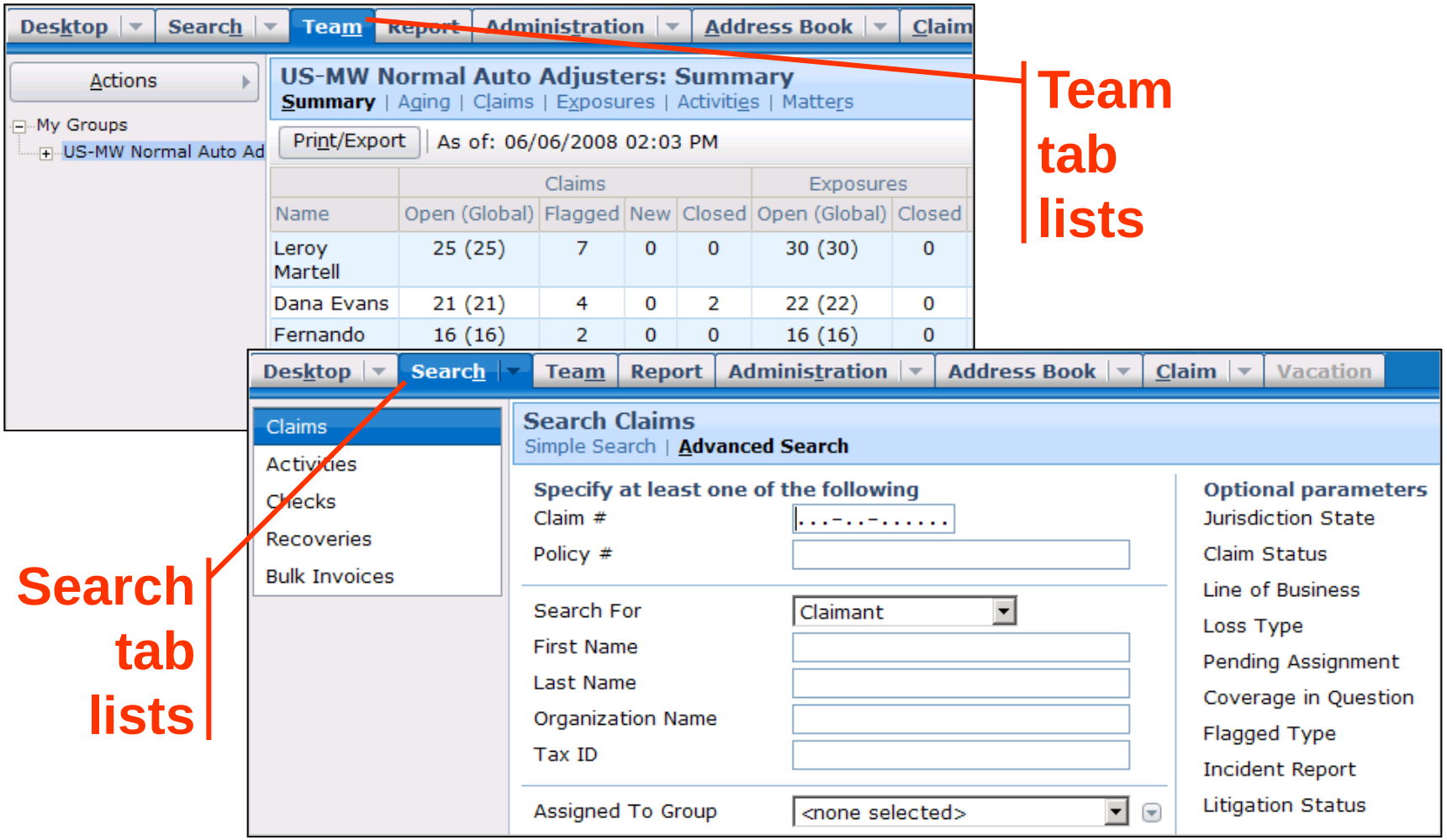
Using Lists as Reports

- Several list views in the base application can be used by managers, supervisors, and executives as reports



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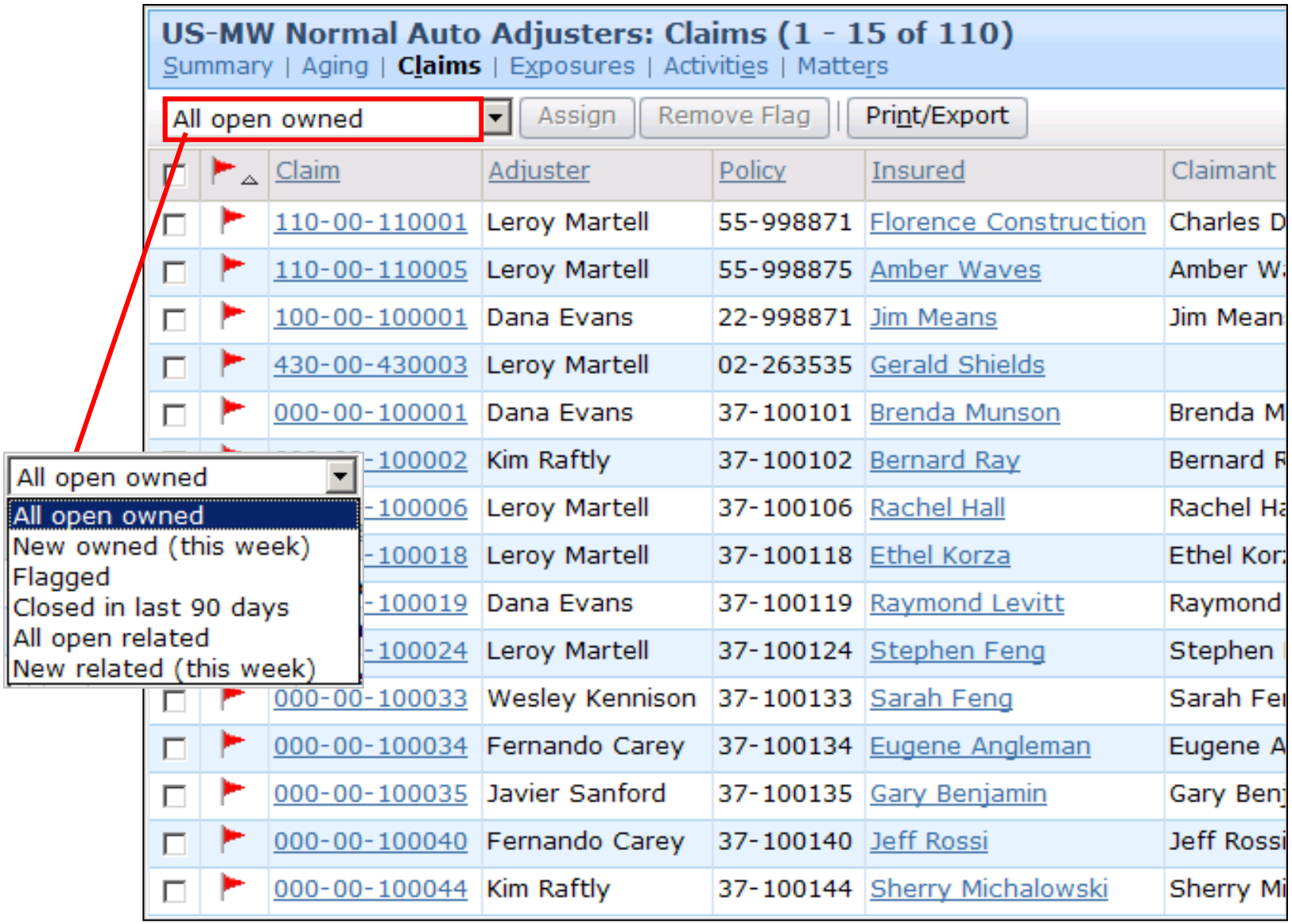
Team Tab Lists



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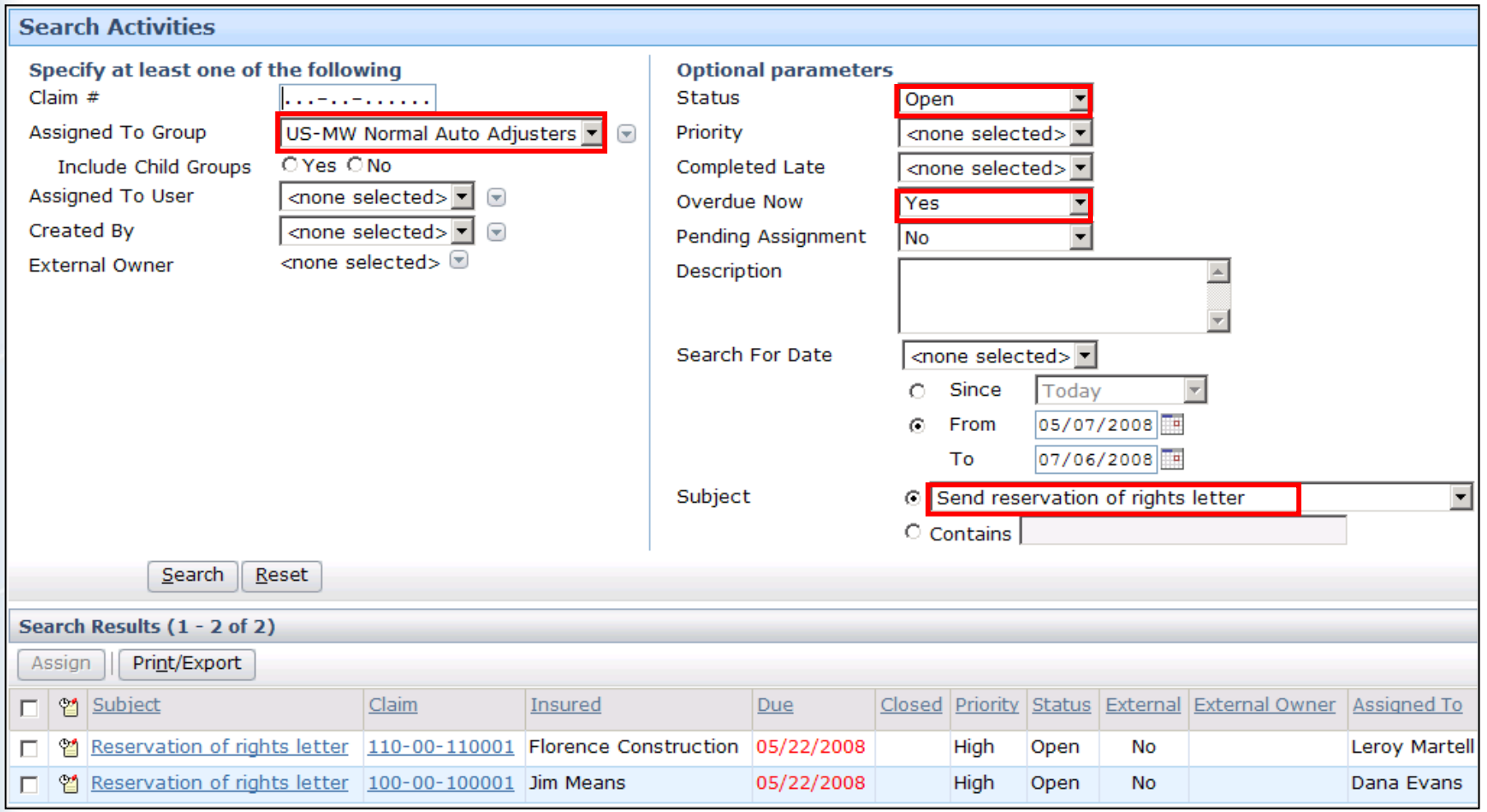
Search Tab Lists



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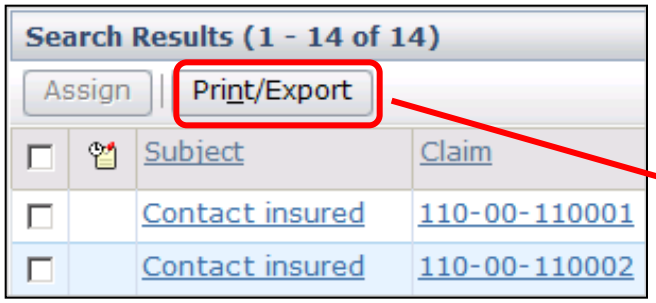
Printing and Exporting List Results



Microsoft Excel - Print[1].csv

File Edit View Insert Format Tools Data Window Help Adobe PDF

A1 fx This activity has been escalated

	A	B	C	D	E	F	G	H	I	J	K	L
1	This activit	Subject	Claim	Insured	Due	Closed	Priority	Status	External	External O	Assigned To	
2	No	Contact in	110-00-11(	Florence C	5/20/2008	5/20/2008	Urgent	Complete	No		Leroy Martell	
3	No	Contact in	110-00-11(	Harlow Bui	5/15/2008	5/15/2008	Urgent	Complete	No		Leroy Martell	
4	No	Contact in	110-00-11(	Carmelina'	5/10/2008	5/10/2008	Urgent	Complete	No		Leroy Martell	
5	No	Contact in	110-00-11(	Specialty F	5/22/2008	5/22/2008	Urgent	Complete	No		Leroy Martell	
6	No	Contact in	110-00-11(	Amber Wa	5/19/2008	5/19/2008	Urgent	Complete	No		Leroy Martell	
7	No	Contact in	110-00-11(	Wright Cor	5/30/2008	5/30/2008	Urgent	Complete	No		Leroy Martell	
8	No	Contact in	100-00-10(	Jim Means	5/20/2008	5/20/2008	Urgent	Complete	No		Dana Evans	
9	No	Contact in	100-00-10(	Gus Early	5/15/2008	5/15/2008	Urgent	Complete	No		Dana Evans	
10	No	Contact in	100-00-10(	Wendy Kil	5/10/2008	5/10/2008	Urgent	Complete	No		Dana Evans	

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Lesson Outline

- Using Lists as Reports
- ClaimCenter Standard Reporting

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ClaimCenter Standard Reporting

- Optional ClaimCenter feature which consists of reporting solution developed for supervisors and executives
  - Standard library of 40 reports
  - Designed to assess operational and financial health of organization
  - Accesses data from copy of ClaimCenter database
    - Improved report performance
    - Avoids compromising ClaimCenter performance

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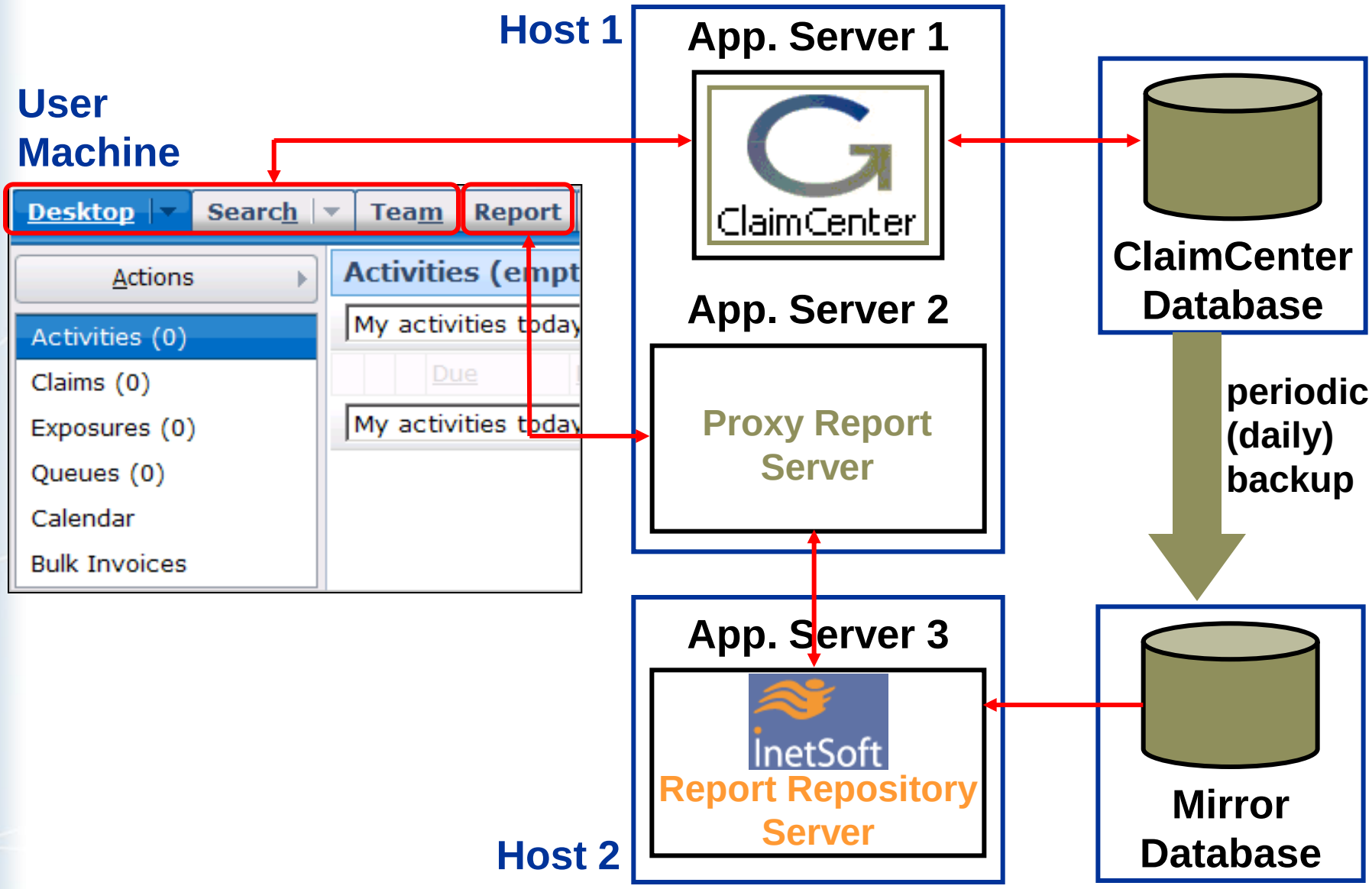
ClaimCenter Standard Reporting Architecture



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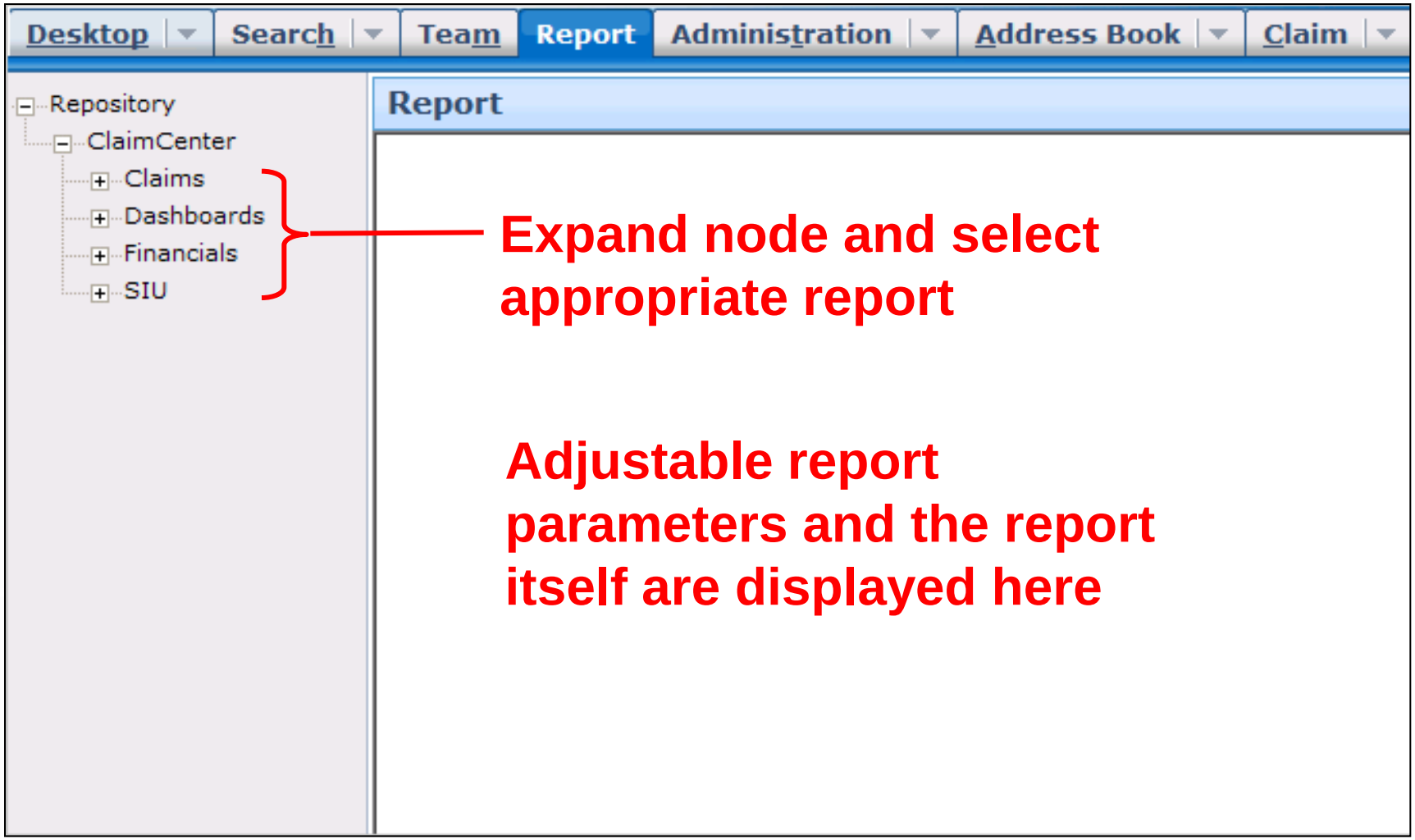
The Report Tab



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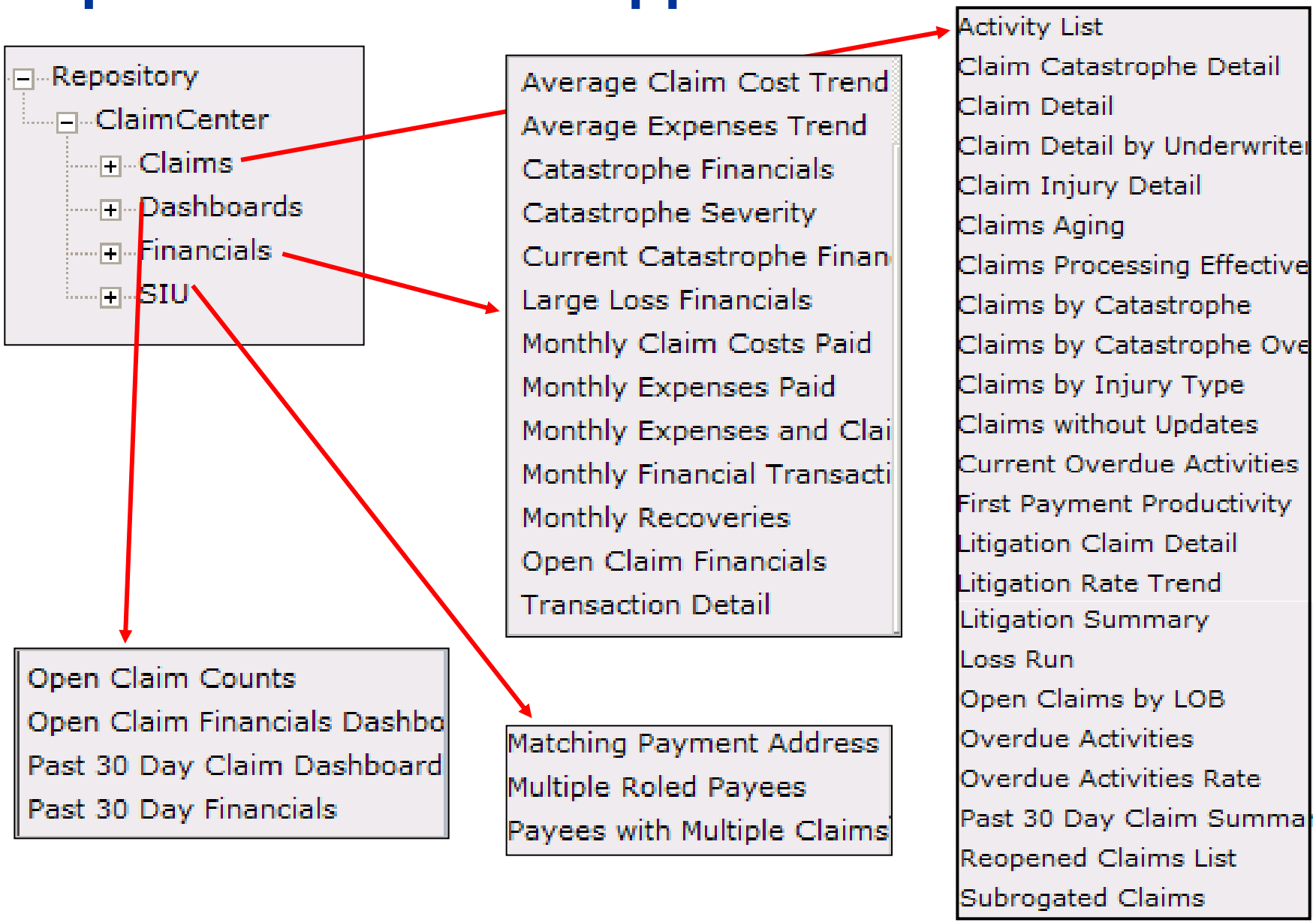
Reports in the Base Application



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Sample Report Formats

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Overdue Activities

Group: US-MW Normal Auto Adjusters
Adjuster: Angel Espinoza
LOB: ALL
Loss Type: ALL
Loss Cause: ALL
Claim Number: ALL
Days Overdue >= : 0

Adjuster	Claim Number	Activity Description	Activity Due Date	Days Overdue
Espinoza, Angel	000-00-100001	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100002	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100002	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100003	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100003	Review claim	03/17/2007	294
Espinoza, Angel	000-00-100004	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100004	Review claim	03/17/2007	294
Espinoza, Angel	000-00-100005	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100005	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100006	Review claim	03/14/2007	297
Espinoza, Angel	000-00-100006	Review claim	03/15/200	
Espinoza, Angel	000-00-100007	Review claim	03/12/200	
Espinoza, Angel	000-00-100007	Review claim	03/14/200	
Espinoza, Angel	000-00-100008	Review claim	03/11/200	
Espinoza, Angel	000-00-100008	Review claim	03/16/200	
Espinoza, Angel	000-00-100009	Review claim	03/12/200	
Espinoza, Angel	000-00-100009	Review claim	03/15/200	
Espinoza, Angel	000-00-100010	Review claim	03/16/200	
Espinoza, Angel	000-00-100011	Review claim	03/11/200	
Espinoza, Angel	000-00-100011	Review claim	03/17/200	
Espinoza, Angel	000-00-100012	Review claim	03/12/200	
Espinoza, Angel	000-00-100012	Review claim	03/16/200	
Espinoza, Angel	000-00-100013	Review claim	03/11/200	
Espinoza, Angel	000-00-100013	Review claim	03/13/200	
Espinoza, Angel	000-00-100014	Review claim	03/13/200	
Espinoza, Angel	000-00-100014	Review claim	03/15/200	
Espinoza, Angel	000-00-100015	Review claim	03/11/200	

Report generated at Jan 5, 2008 3:19:16 PM Guidewi

Table format

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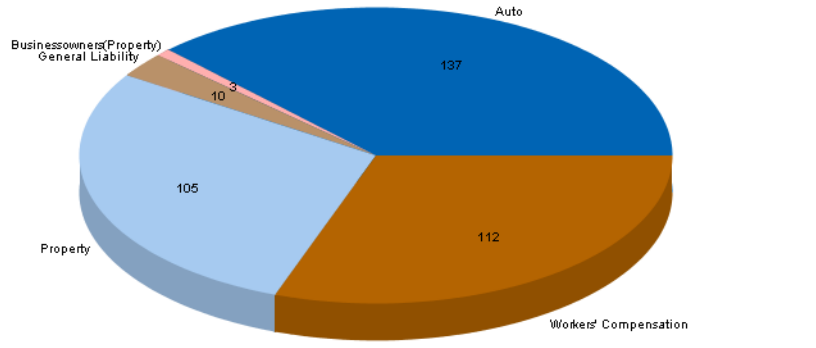
Open Claims by LOB

Report Description: Pie Chart of number of Open Claims by LOB. Allows drilling down to Claim Detail



Pie graph format

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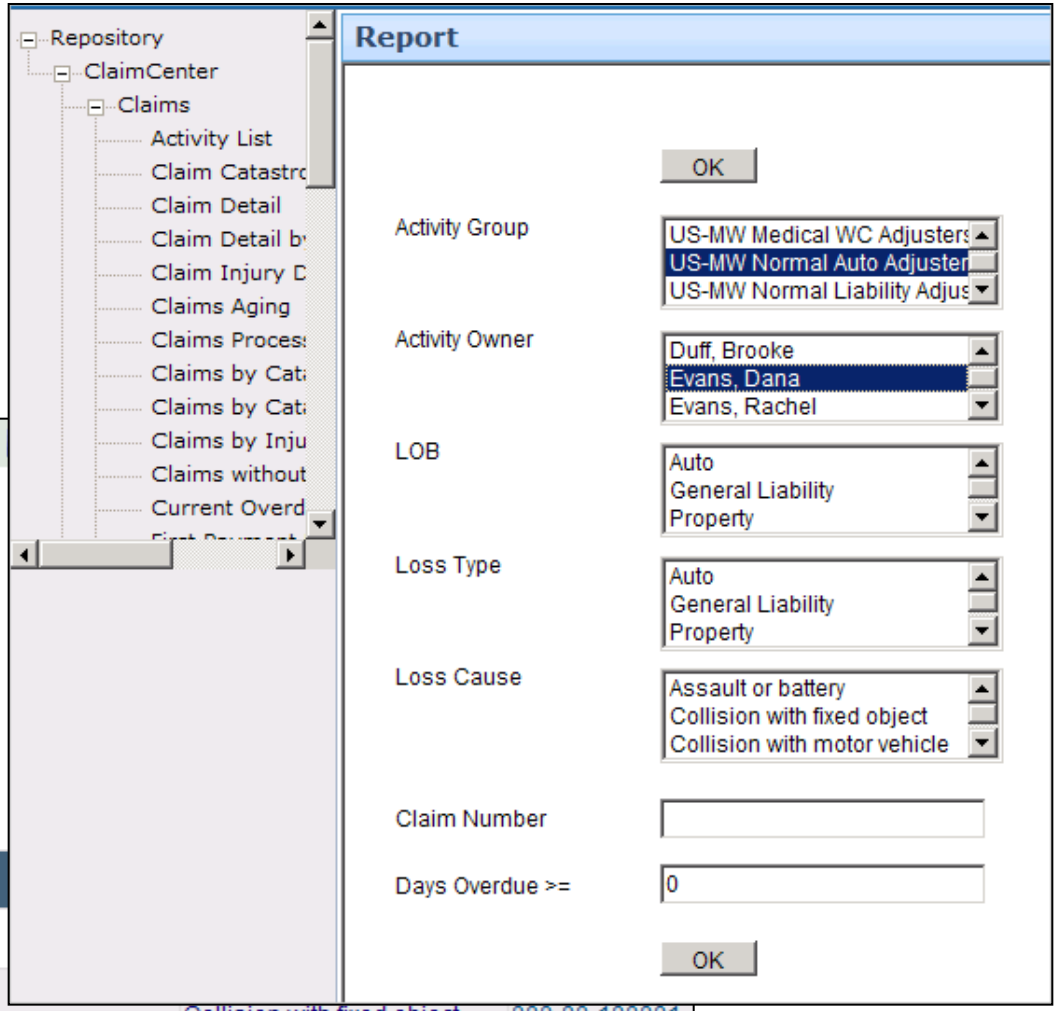
Report Parameters



Page 1 of 2

Overdue Activities

Activity Group: US-MW Normal Auto Adjusters
Activity Owner: Dana Evans
LOB: ALL
Loss Type: ALL
Loss Cause: ALL
Claim Number: ALL
Days Overdue >= : 0

Activity Group	Activity Owner	LOB		
US-MW Normal Auto Adjusters	Evans, Dana	Auto		
US-MW Normal Auto Adjusters	Evans, Dana	Auto	Collision with fixed object	000-00-100001
US-MW Normal Auto Adjusters	Evans, Dana	Auto	Collision with fixed object	000-00-100007
US-MW Normal Auto Adjusters	Evans, Dana	Auto	Collision with fixed object	000-00-100007
US-MW Normal Auto Adjusters	Evans, Dana	Auto	Collision with fixed object	000-00-100013
US-MW Normal Auto Adjusters	Evans, Dana	Auto	Collision with fixed object	000-00-100013

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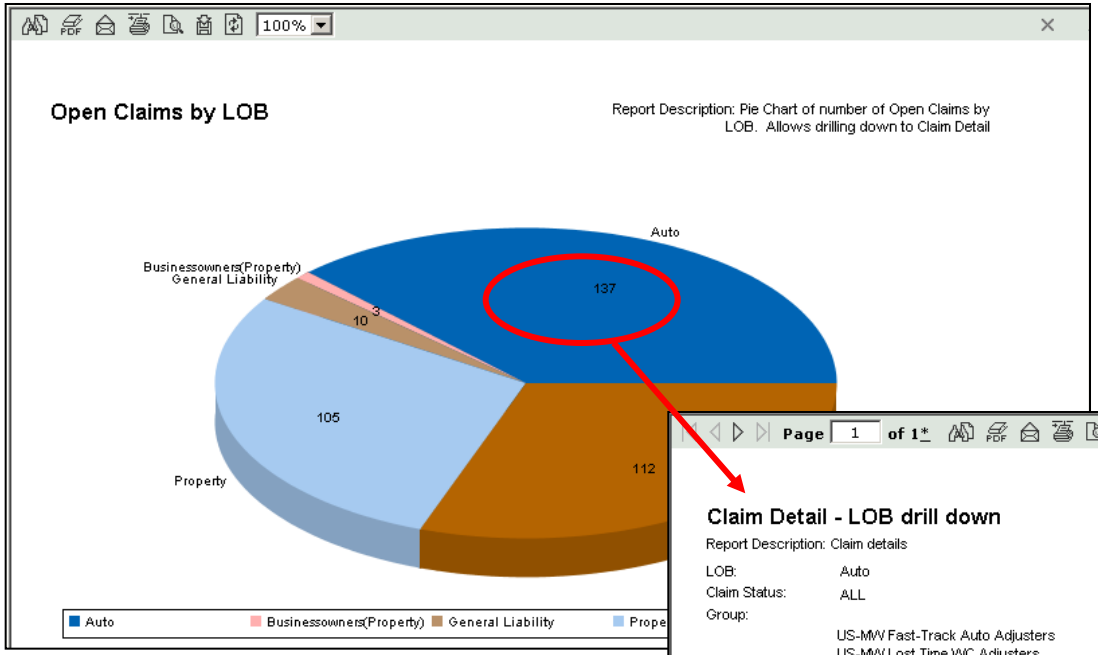
Drilldown Reports



Page 1 of 1* 100%

Claim Detail - LOB drill down

Report Description: Claim details

LOB: Auto
Claim Status: ALL
Group:

US-MW Fast-Track Auto Adjusters
US-MW Lost Time WC Adjusters
US-MW Medical WC Adjusters
US-MW Normal Auto Adjusters
US-MW Normal Liability Adjusters
US-MW Normal Property Adjusters
US-MW Training 01
US-MW Training 13
US-MW Training 19
US-NE Normal Auto Adjusters
US-NG Normal Auto Adjusters

Claim Number	Claim Status	Line of Business	Loss Year	Group	Adjuster	Loss Date
000-00-000415	Open	Auto	2007	US-MW Fast-Track Auto Adjusters	Sampson, Patrick	05/16/2007
000-00-000419	Open	Auto	2007	US-MW Normal Auto Adjusters	Beebe, Peter	05/02/2007
000-00-000521	Open	Auto	2007	US-MW Training 13	Tudent13, Sam	12/01/2007
000-00-000523	Open	Auto	2007	US-MW Training 01	Tudent01, Sam	12/01/2007
000-00-000525	Open	Auto	2007	US-MW Training 13	OWorker13, Colm	12/01/2007
000-00-000603	Open	Auto	2007	US-MW Fast-Track Auto Adjusters	Pickering, Guadalupe	12/02/2007
000-00-000701	Open	Auto	2007	US-MW Training 19	Tudent19, Sam	12/03/2007
000-00-000923	Open	Auto	2007	US-MW Normal Property Adjusters	Evans, Dana	12/24/2007

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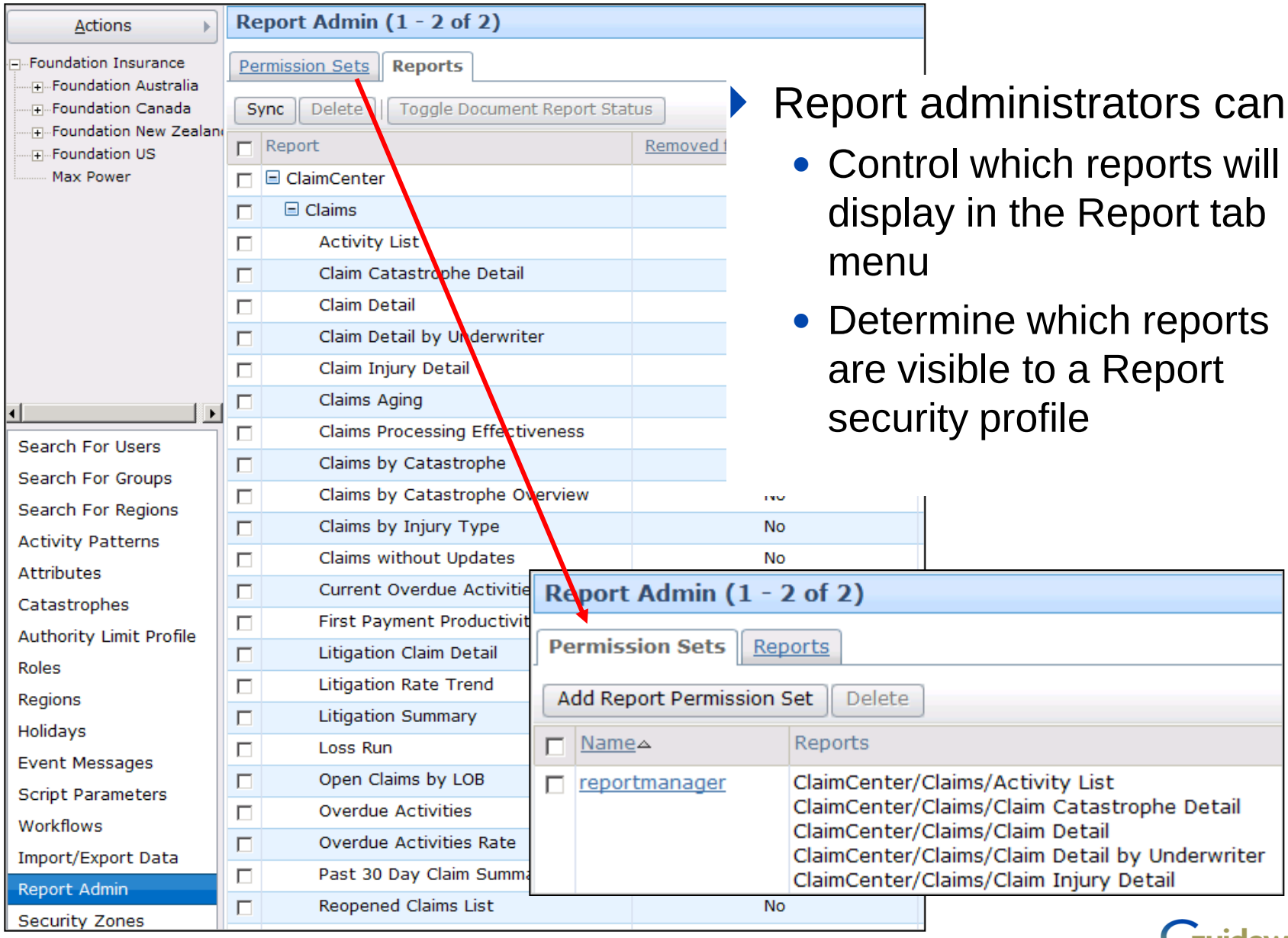
Report Administration



- Report administrators can
  - Control which reports will display in the Report tab menu
  - Determine which reports are visible to a Report security profile

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Lesson Objectives Review

You should now be able to:

- Describe how lists can be used for "ad hoc" reporting
- Describe the functionality of the ClaimCenter Standard Reporting feature

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