

Documents

Lesson Objectives

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

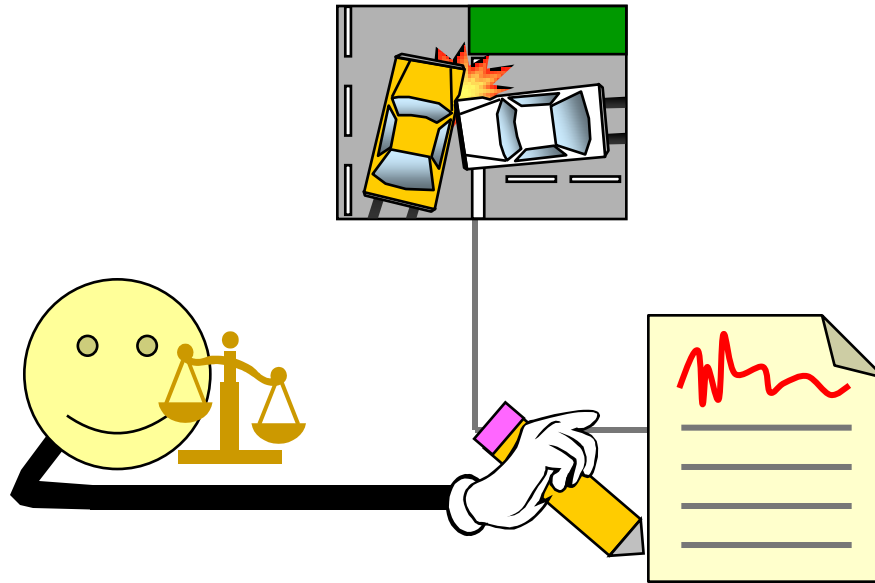
- Describe the functionality of documents
- Create documents
- Create emails
- Work with documents

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.”

Lesson Outline

- ▶ Document Basics
- ▶ Creating Documents
- ▶ Creating Emails
- ▶ Working with Documents

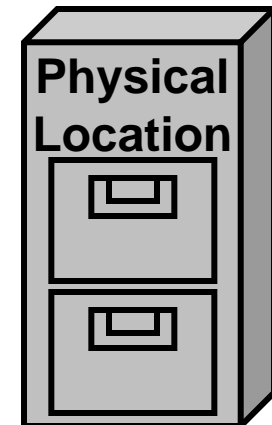
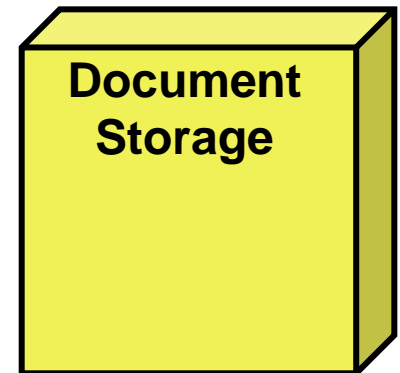
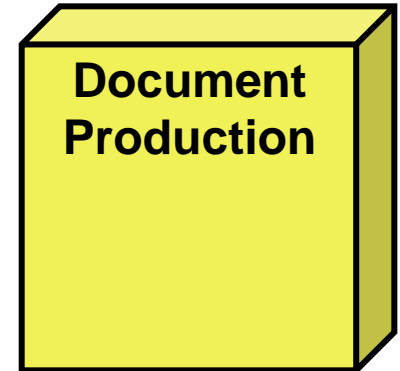
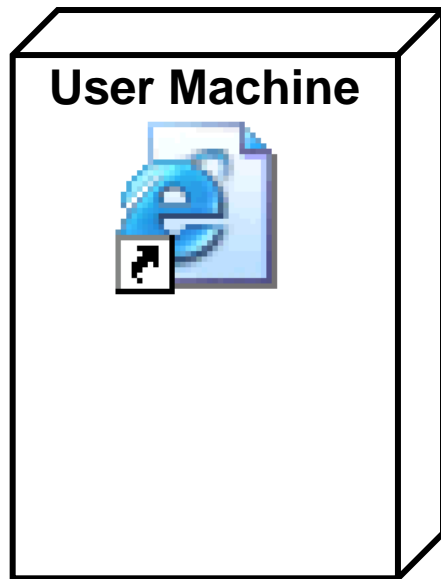
Documents



We received notice of an accident involving an automobile owned or operated by you on October 04, 2009.

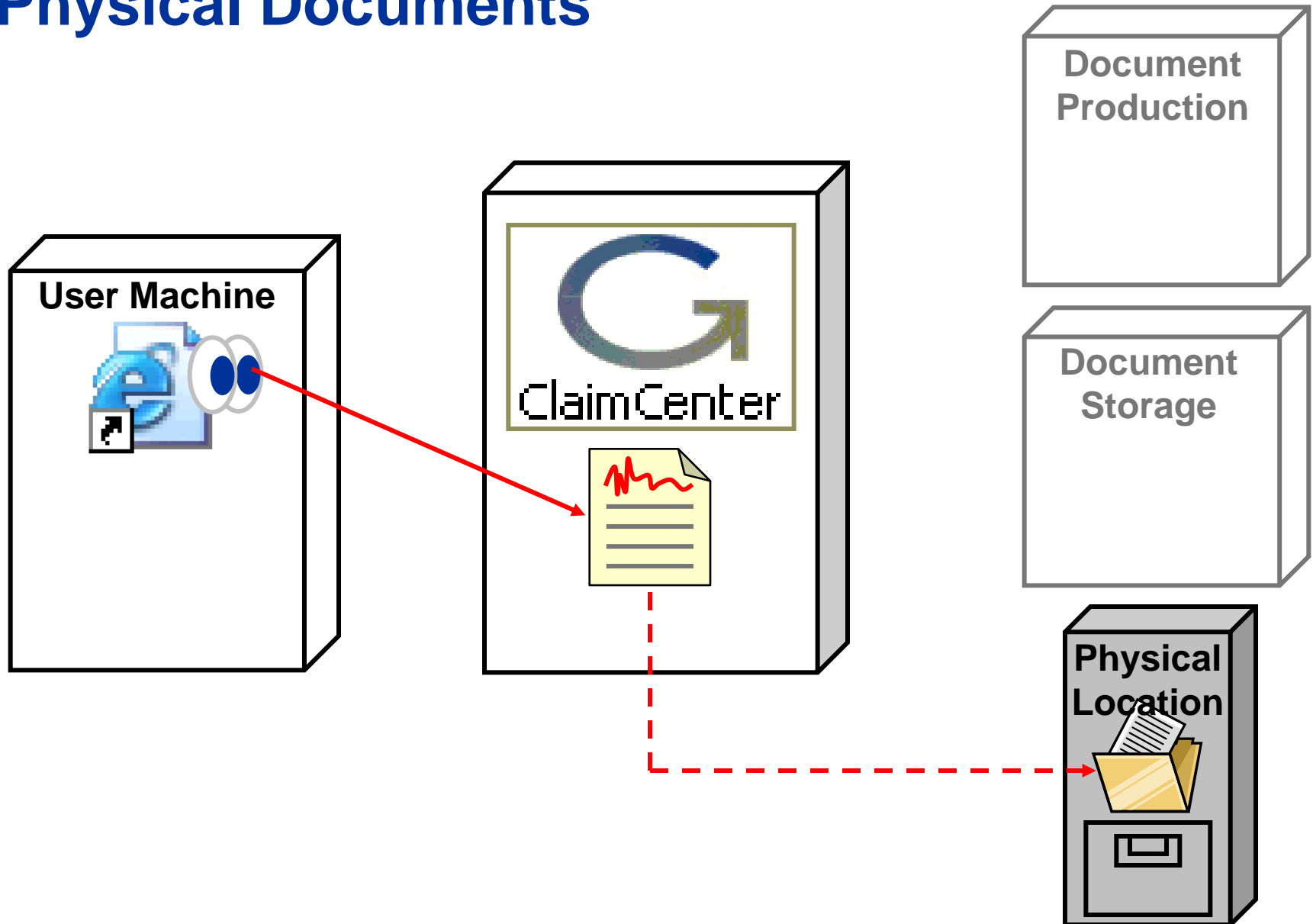
- ▶ A ClaimCenter document is a document which contains information relevant to the claim
- ▶ Documents are either:
 - Physical pieces of paper (such as a photograph of damaged property), or
 - Electronic files (such as a PDF, Word or Email document)

Document Management Architecture



- ▶ Five places where document information can exist

Document Management Architecture: Physical Documents

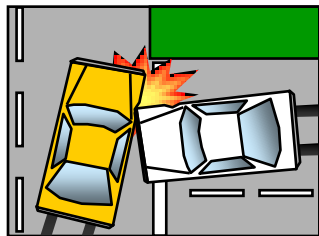


Electronic Document Production

template



**Dear <claimant.name>,
On <lossdate>...**



**Claim
100-00-100001**



**Dear Jim Means,
On May 3...**

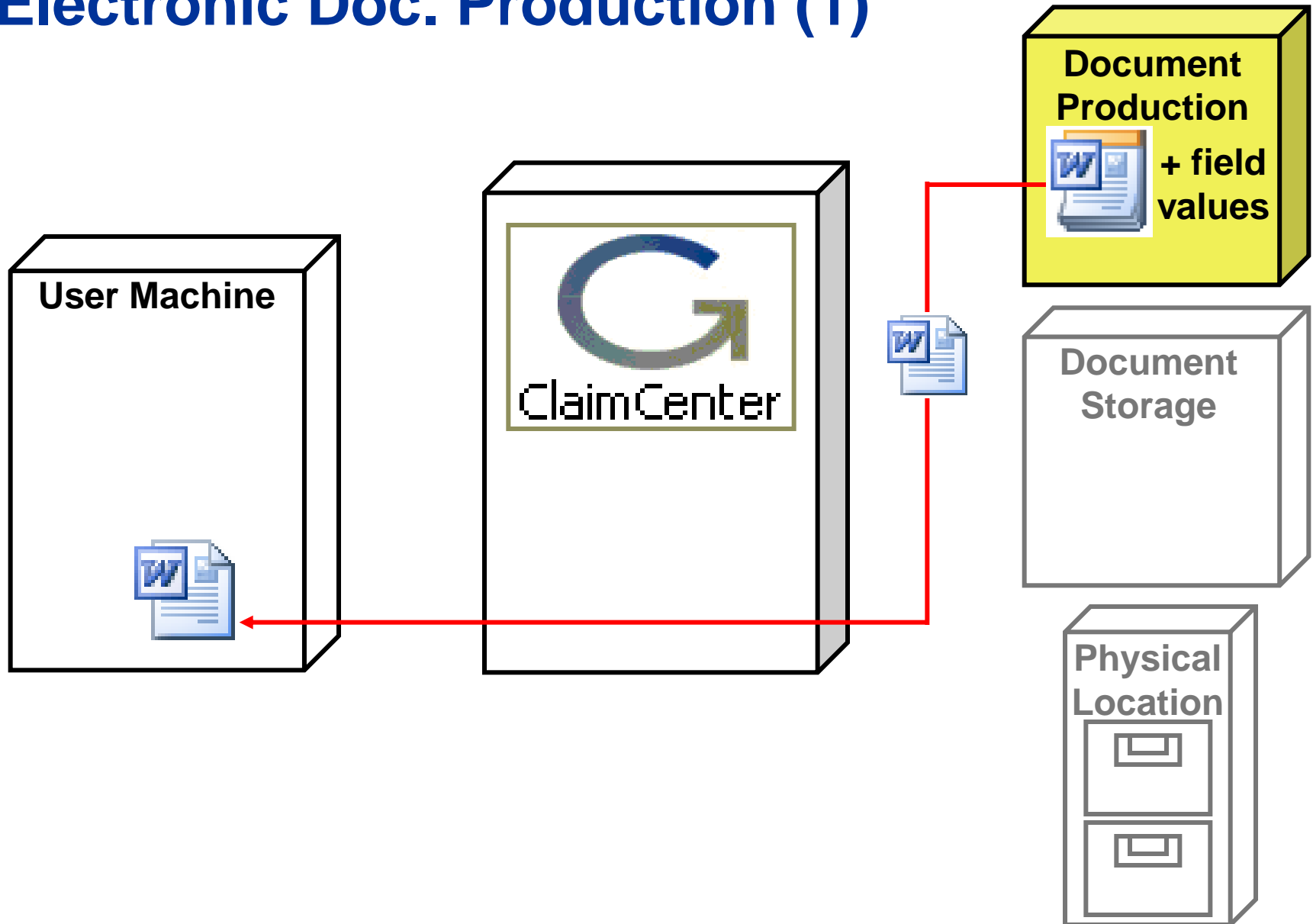
+



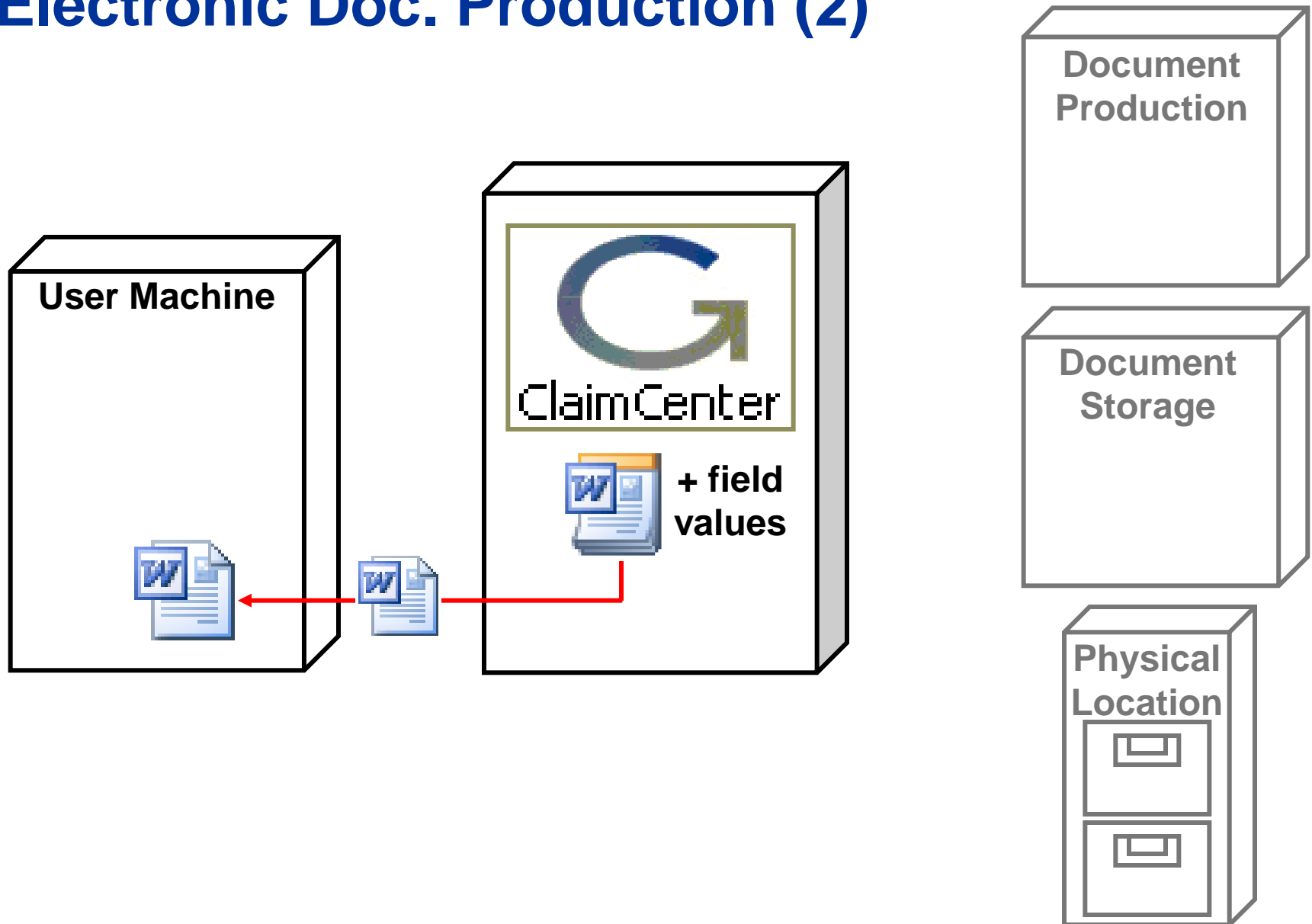
**Letter to Insured
MS Word
Draft**

- ▶ Document production is the act of creating a draft document by merging:
 - A template
 - A set of business data values

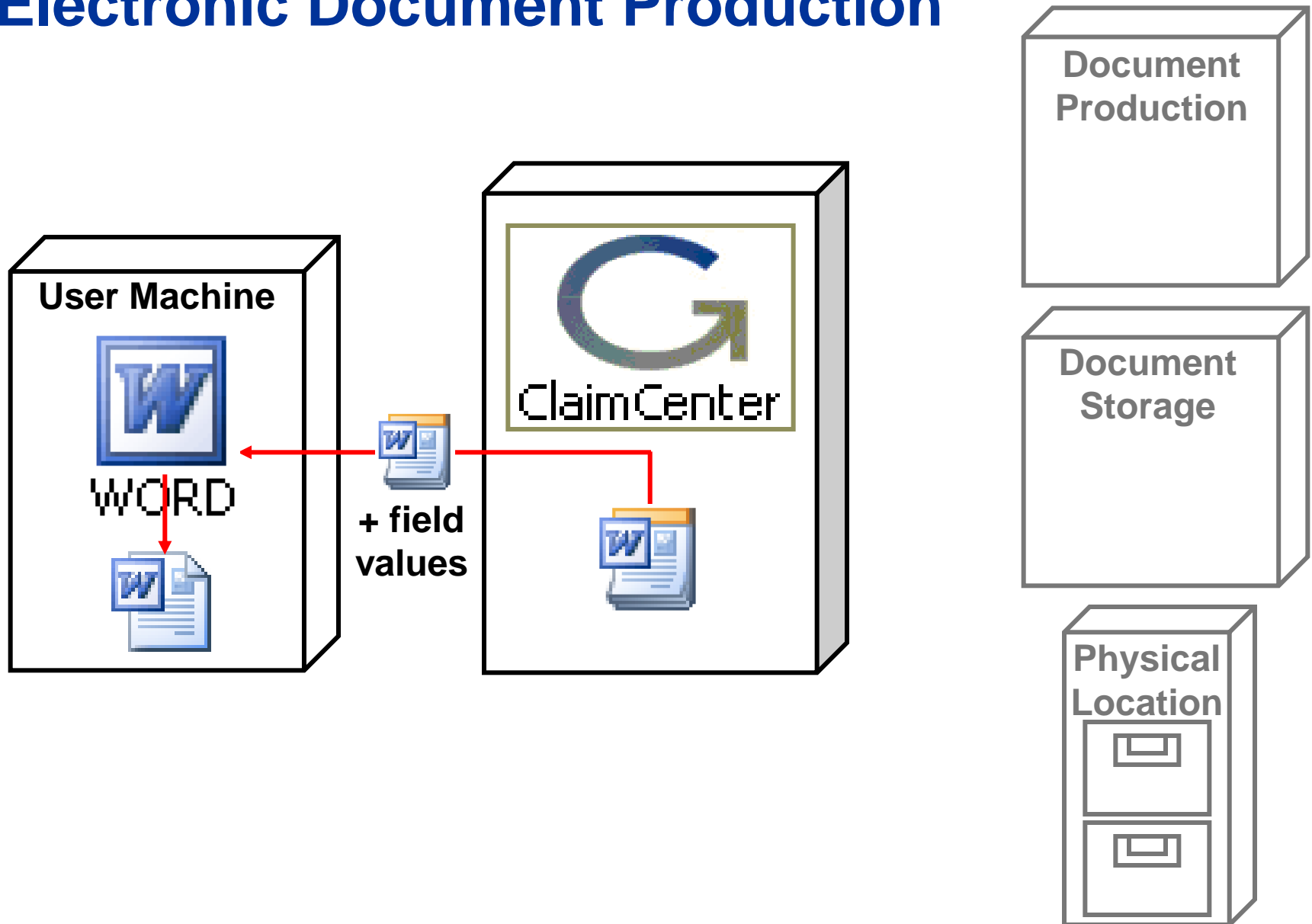
Document Management Architecture: Electronic Doc. Production (1)



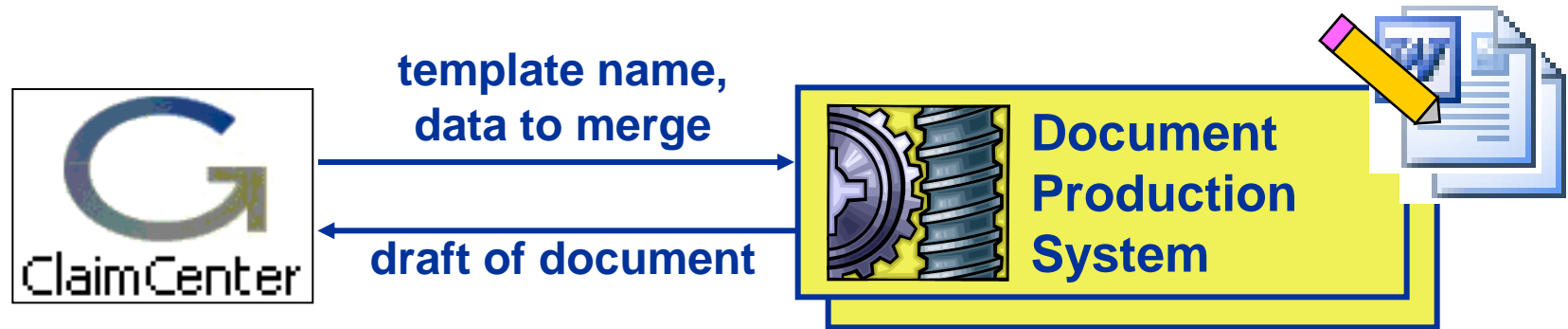
Document Management Architecture: Electronic Doc. Production (2)



Document Management Architecture: Electronic Document Production

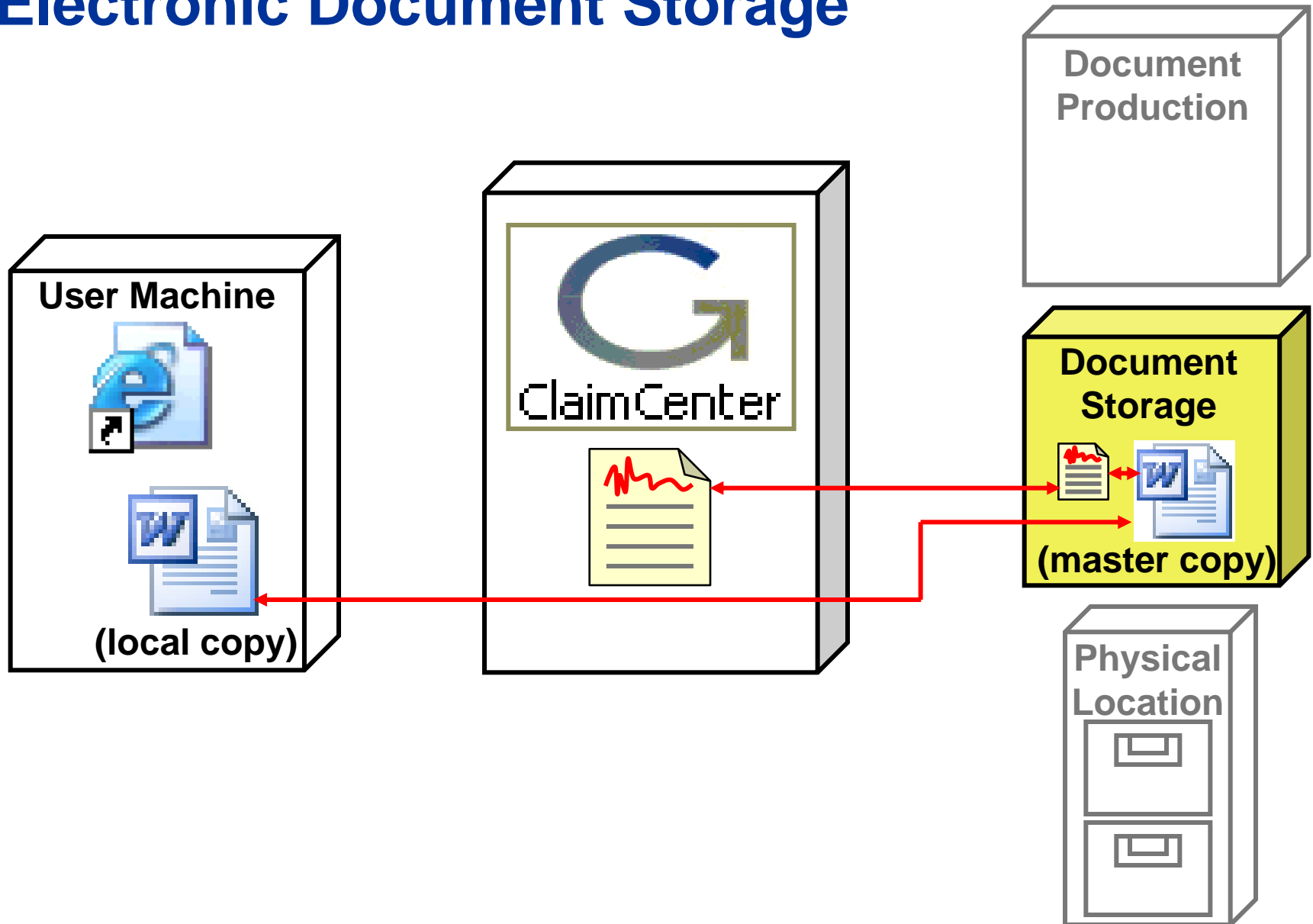


Document Production Integration

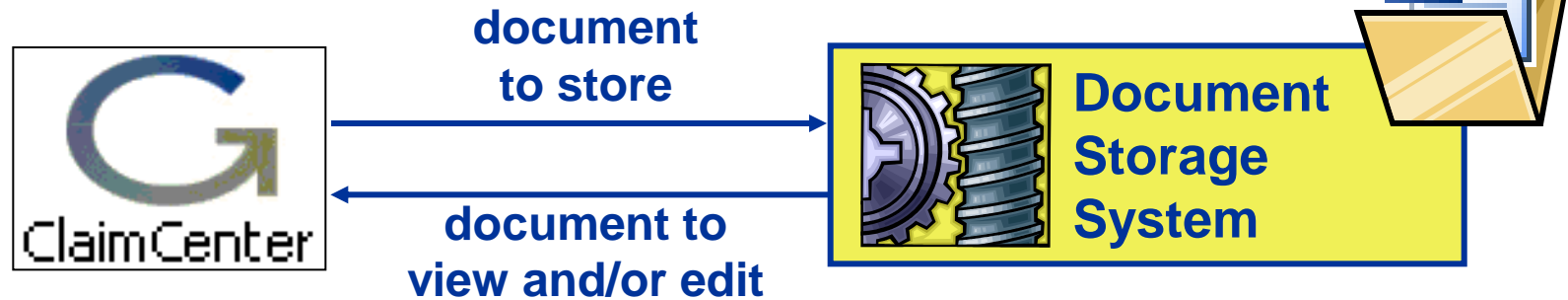


- ▶ Regardless of where the document production occurs, every instance of ClaimCenter has an integration point to a document production application somewhere in the ClaimCenter architecture
 - This application merges templates and data, and it may also store the document templates
- ▶ Nearly every implementation has at least some documents created using applications on each user's machine (such as Microsoft Word)

Document Management Architecture: Electronic Document Storage

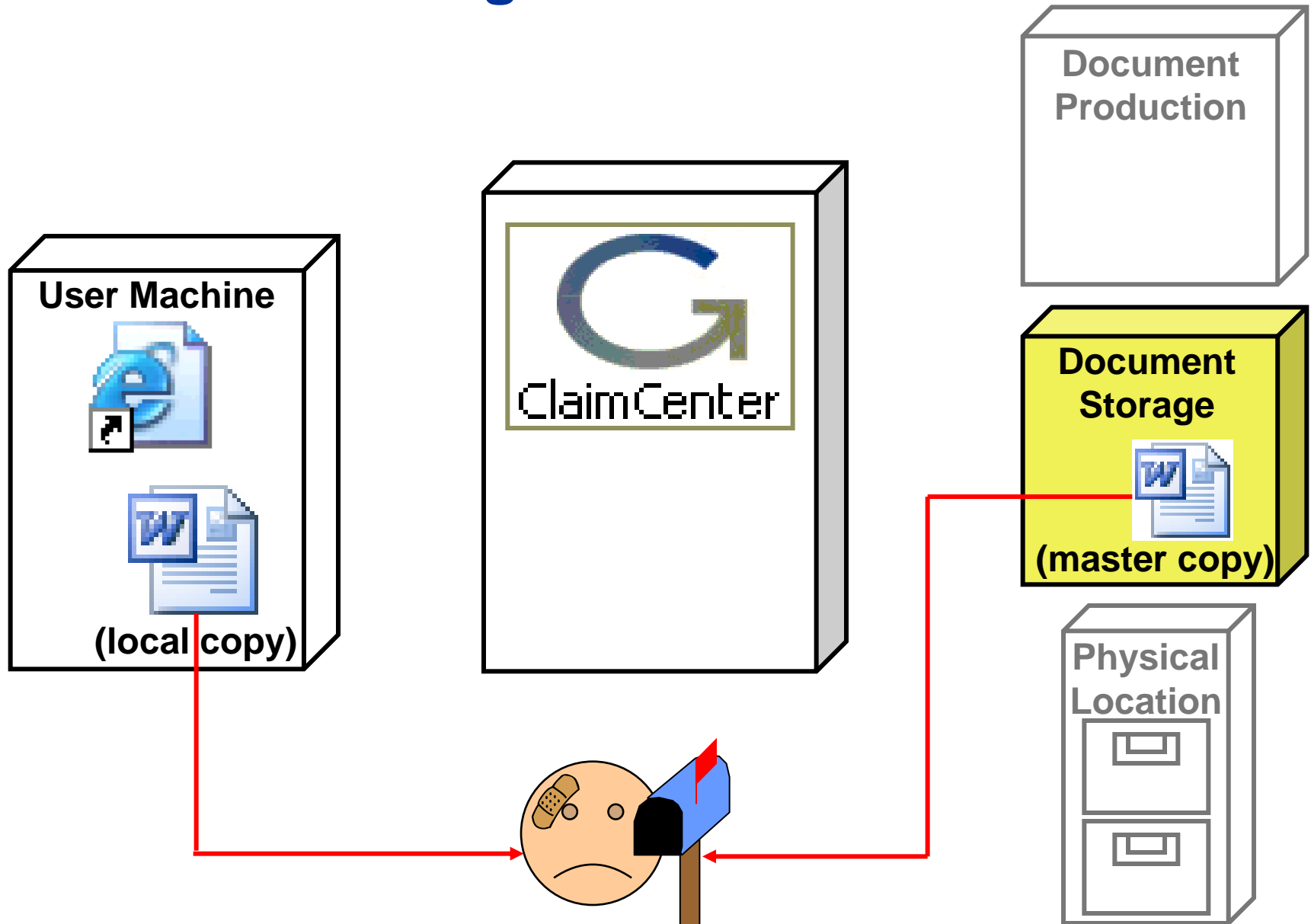


Document Storage Integration



- ▶ Every instance of ClaimCenter has an integration point to a document storage application, such as ImageRight
 - This application stores "master" copies of documents

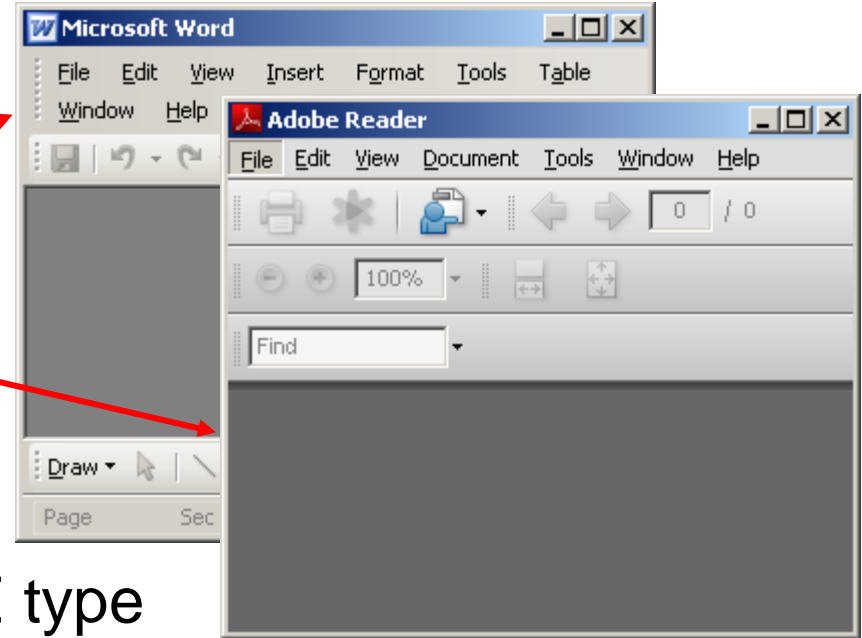
Document Mailing



Important Document Attributes



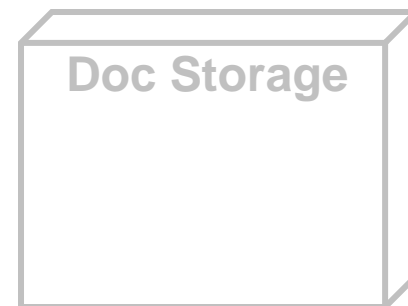
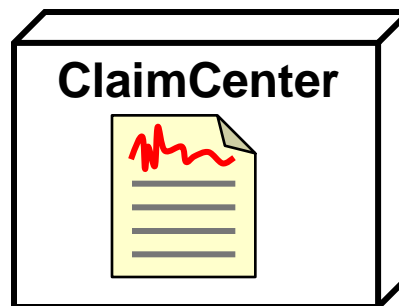
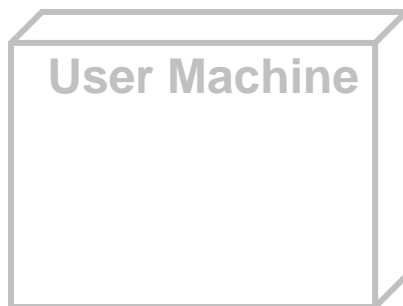
???



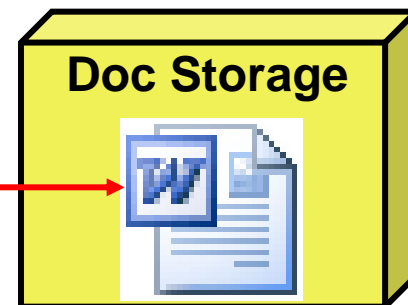
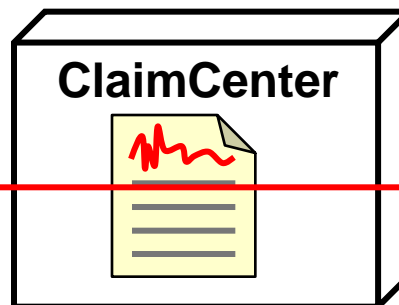
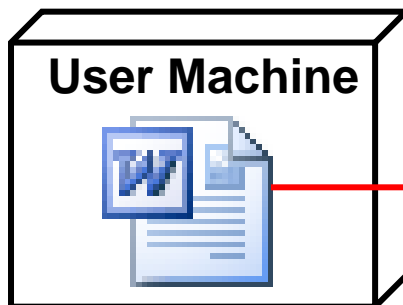
- ▶ Each document has a MIME type
 - This is used by the user's local machine to determine what application to use to view a document (such as using Adobe Acrobat for PDF files)
- ▶ Each document has a security type
 - Sensitive documents are visible only to you, your supervisors, and people with permission to view sensitive documents

Three Ways to Create a Document

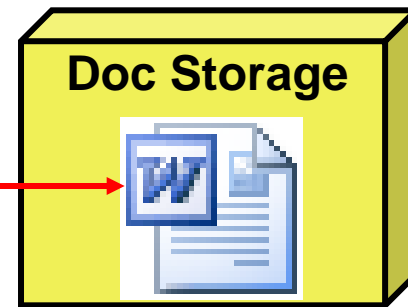
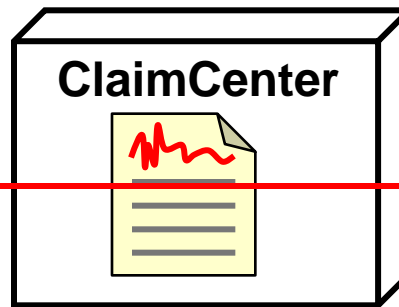
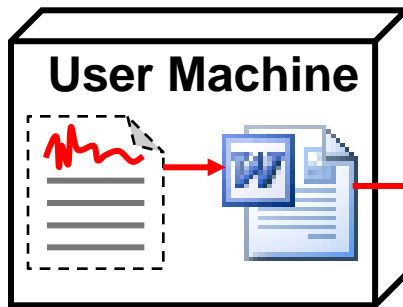
Identify that
a paper
document
exists



Link (upload)
an existing
electronic file



Create a doc
from a
ClaimCenter
document
template

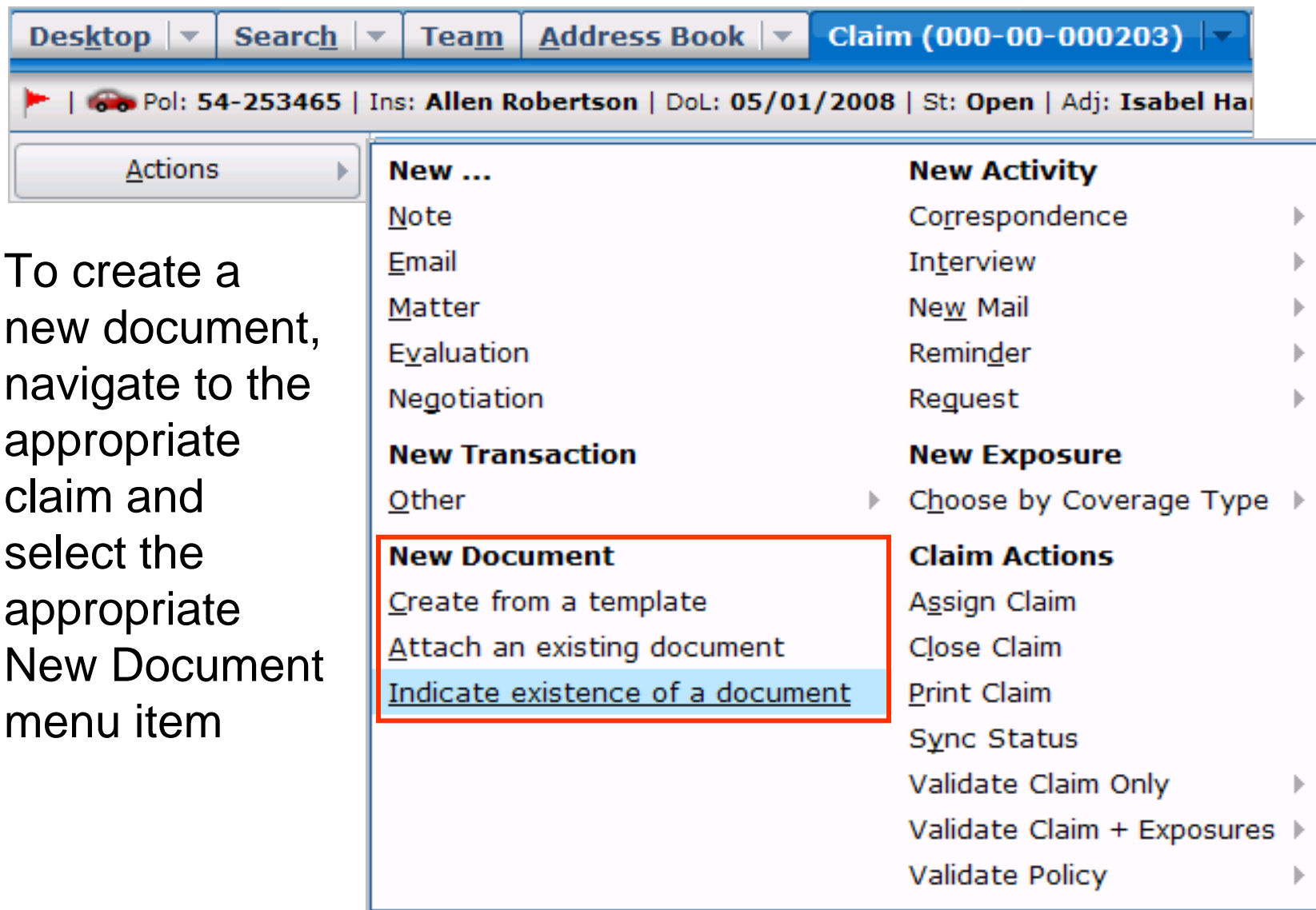


Lesson Outline

- ▶ Document Basics
- ▶ **Creating Documents**
- ▶ Creating Emails
- ▶ Working with Documents

The New Document Menu

- ▶ To create a new document, navigate to the appropriate claim and select the appropriate New Document menu item



Adding Records of Paper Documents

Create from a template

Attach an existing document

Indicate existence of a document

New Document

New Document

Name ★

Description

Related To

Author

Recipient

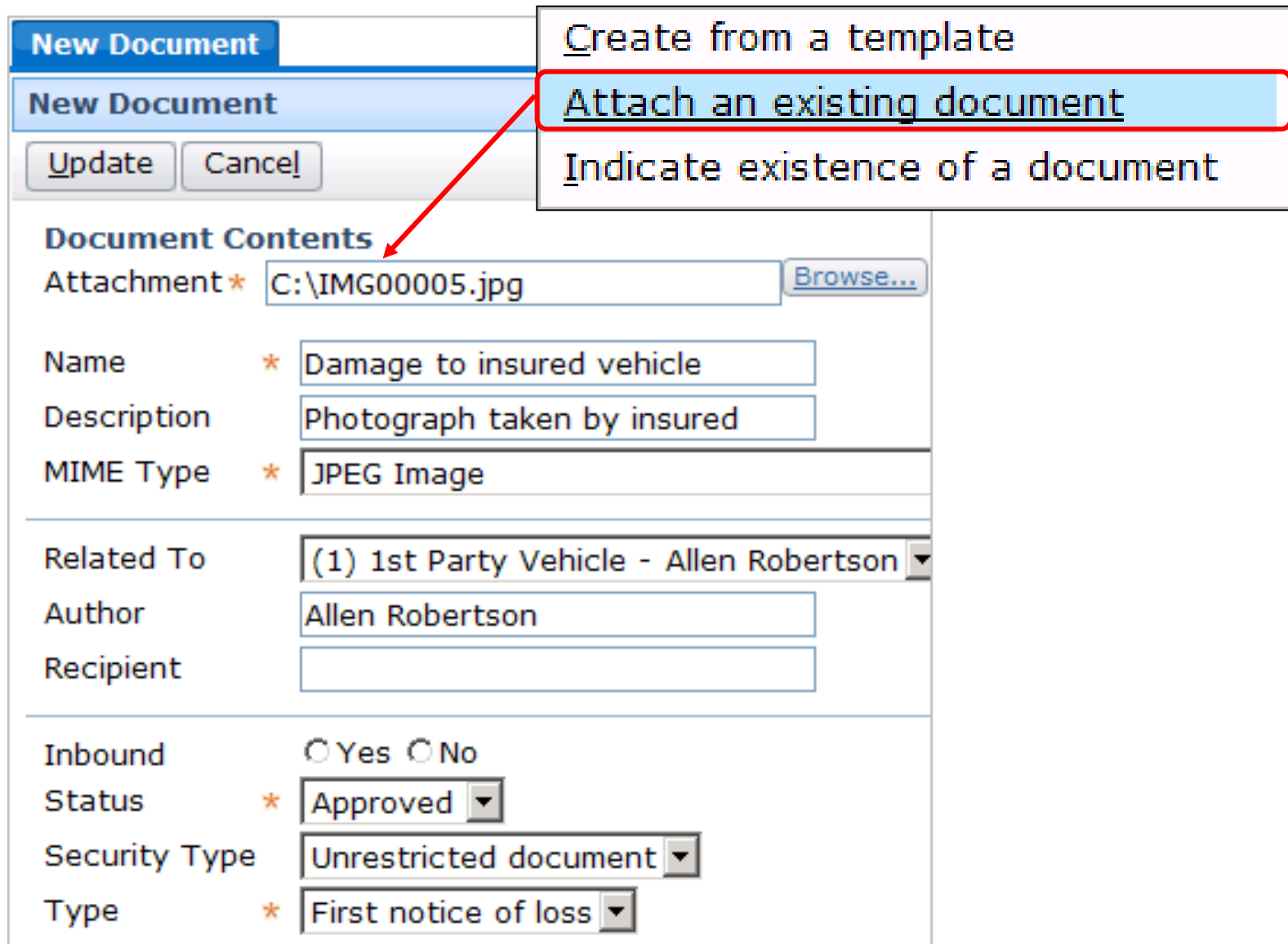
Inbound ☐ Yes ☐ No

Status ★

Security Type

Type ★

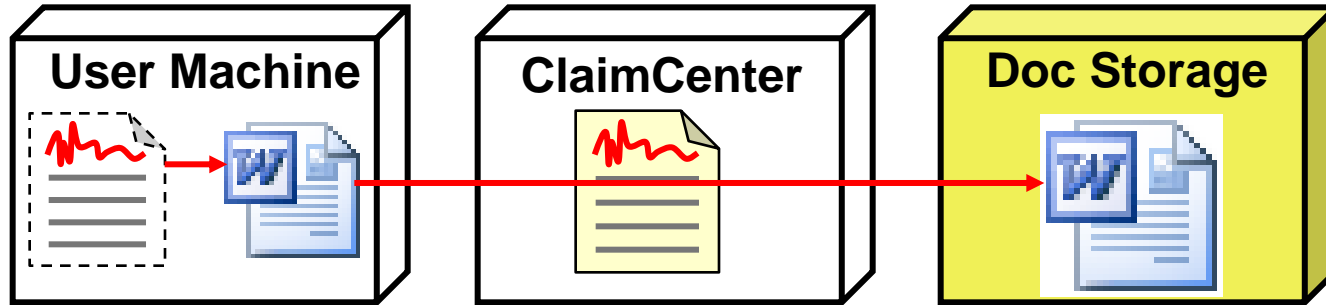
Adding Existing Documents as Attachments



The screenshot shows a 'New Document' form. A callout box on the right contains three options: 'Create from a template', 'Attach an existing document' (highlighted with a red border and a red arrow pointing to the 'Attachment' field), and 'Indicate existence of a document'. The form fields are as follows:

New Document	
New Document	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	
Document Contents	
Attachment *	<input type="text" value="C:\IMG00005.jpg"/> <input <="" td="" type="button" value="Browse..."/>
Name *	<input type="text" value="Damage to insured vehicle"/>
Description	<input type="text" value="Photograph taken by insured"/>
MIME Type *	<input type="text" value="JPEG Image"/>
Related To	<input type="text" value="(1) 1st Party Vehicle - Allen Robertson"/>
Author	<input type="text" value="Allen Robertson"/>
Recipient	<input type="text"/>
Inbound	<input type="radio"/> Yes <input type="radio"/> No
Status *	<input type="text" value="Approved"/>
Security Type	<input type="text" value="Unrestricted document"/>
Type *	<input type="text" value="First notice of loss"/>

Adding Documents By Using a Template

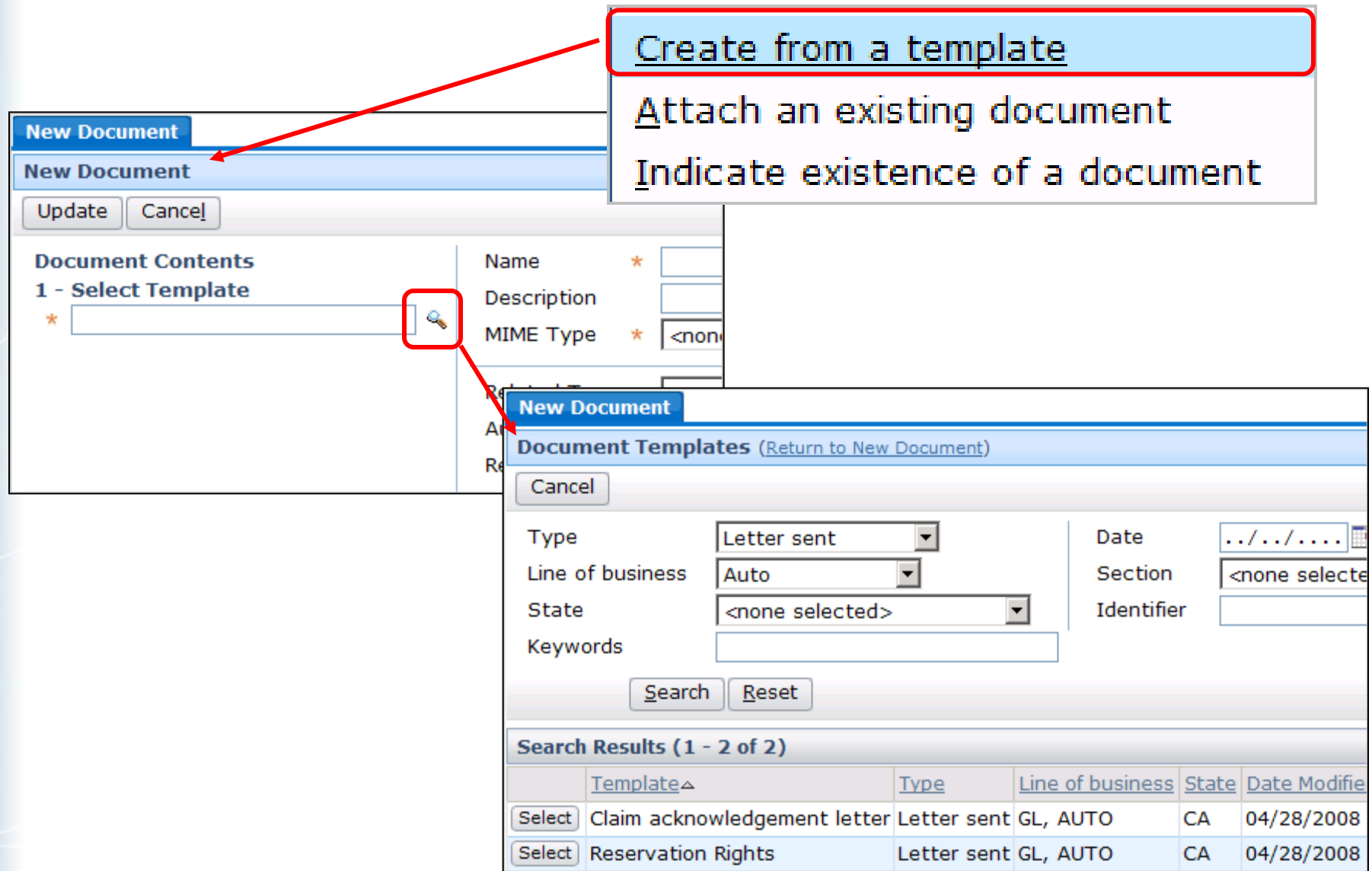


- ▶ Adding a document by using a template is a multi-step process which involves:
 1. Selecting the template
 2. Generating the document
 3. Modifying the document text
 4. Specifying any additional values
 5. Saving the document

Adding Document Via Template

Step 1: Select the Template

Create from a template
Attach an existing document
Indicate existence of a document



New Document

New Document

Update Cancel

Document Contents

1 - Select Template

Name *

Description

MIME Type * <none>

New Document

Document Templates (Return to New Document)

Cancel

Type Letter sent

Line of business Auto

State <none selected>

Keywords

Date ../././....

Section <none selected>

Identifier

Search Reset

Search Results (1 - 2 of 2)

	Template△	Type	Line of business	State	Date Modified
Select	Claim acknowledgement letter	Letter sent	GL, AUTO	CA	04/28/2008
Select	Reservation Rights	Letter sent	GL, AUTO	CA	04/28/2008

Adding Document Via Template

Step 2: Generate the Document

Select Reservation Rights

New Document

New Document

Update Cancel

Document Contents

1 - Select Template

★ Reservation Rights

2 - Specify object values

Related To none (Claim-level)

To Jim Means

From Isabel Harkin

CC Karen Egertson

3 - Generate Document

Create Document

Reservation Rights.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Times New Roman 12 B I U abc

Insert Word Field

ACME
Insurance Company

Oct 10, 2007

Jim Means
2029 Oak Boulevard
Villa Ridge, Missouri 63089

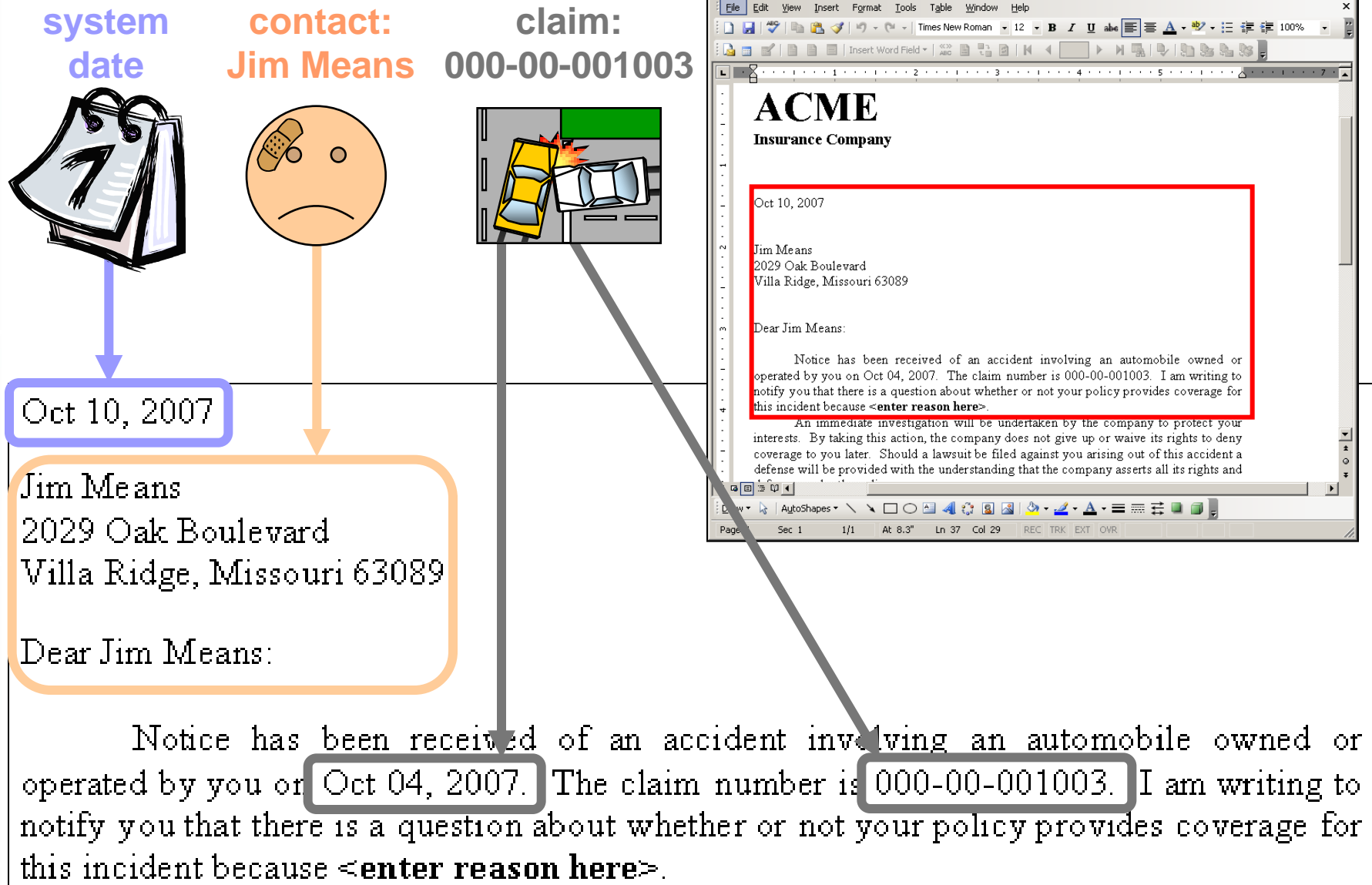
Dear Jim Means:

Notice has been received of an accident involving an automobile owned or operated by you on Oct 04, 2007. The claim number is 000-00-001003. I am writing to notify you that there is a question about whether or not your policy provides coverage for this incident because <enter reason here>.

An immediate investigation will be undertaken by the company to protect your interests. By taking this action, the company does not give up or waive its rights to deny coverage to you later. Should a lawsuit be filed against you arising out of this accident a defense will be provided with the understanding that the company asserts all its rights and

Page 1 Sec 1 1/1 At 8.3" Ln 37 Col 29 REC TRK EXT OVR

Object Values in Template Documents

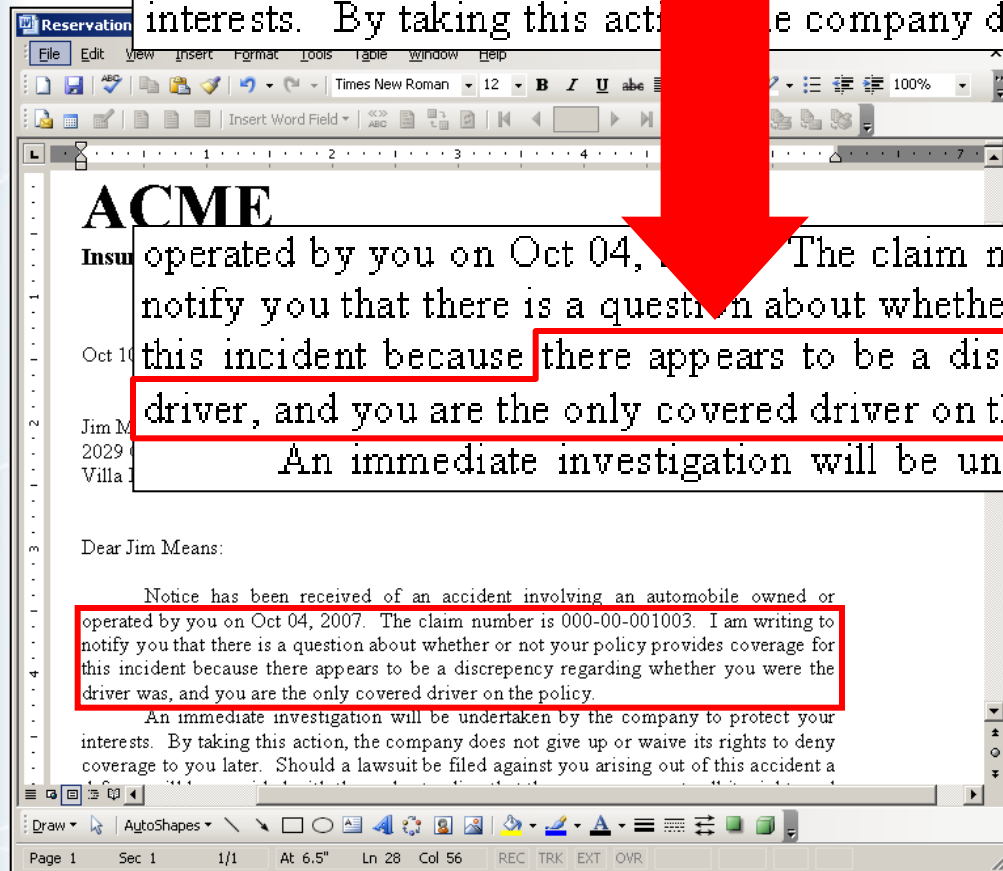


Adding Document Via Template

Step 3: Modify the Document Text

operated by you on Oct 04, 2007. The claim number is 000-00-001003. I am writing to notify you that there is a question about whether or not your policy provides coverage for this incident because <enter reason here>.

An immediate investigation will be undertaken by the company to protect your interests. By taking this action, the company does not give up or waive its rights to deny



Adding Document Via Template

Step 4: Specify Any Additional Values

New Document

New Document

Document Contents

1 - Select Template

★

Reservation Rights

2 - Specify object values

Related To

none (Claim-level)

To

Jim Means

From

Isabel Harkin

CC

Karen Egertson

3 - Generate Document

4 - Specify file location

★

C:\Documents and Settings\ncab

Browse...

Name

★

Reservation Rights

Description

The initial contact reservat

MIME Type

★

Microsoft Word Document

Related To

none (Claim-level)

Author

Isabel Harkin

Recipient

Inbound

☐ Yes ☐ No

Status

★

Approved

Security Type

<none selected>

Type

★

Letter sent

Adding Document Via Template

Step 5: Save the Document

New Document

New Document

Update **Cancel**

Documents

Related To: Status



Section: Author

Name or Identifier:

Include Hidden Documents

Search **Reset**

Hide Documents

<input type="checkbox"/>	<u>Name</u>	<u>Actions</u>	<u>Type</u>	<u>Status</u>
<input type="checkbox"/>	 Reservation Rights	View Edit	Letter sent	Approved
<input type="checkbox"/>	 Damage to insured vehicle	View Edit	First notice of loss	Approved

Documents and Activities

Activity

Activity Detail for Claim 000-00-000203

[Update](#) | [Complete](#) | [Assign](#) | [Create Document](#) | [Link Document](#) | [Cancel](#)

Details

Subject


★ Send reservation of rights letter

Description


Related To

none (Claim ▼)

Due Date

05/23/2008 

Escalation Date

06/05/2008 

Priority

★ High ▼

Calendar Importance

★ Not On Calendar ▼

Mandatory

Yes


Status

Open

Externally Owned

★ ☐ Yes ☒ No

External Owner

<none selected> ▼ 

Documents

[Remove](#) [Name](#)

New Note

Topic

Security Type

Subject

Related To

Confidential

Text

Activity Assignment

Assigned To Isabel Harkin

Lesson Outline

- ▶ Document Basics
- ▶ Creating Documents
- ▶ **Creating Emails**
- ▶ Working with Documents

Outbound Email

- ▶ Emails are a form of document that may be sent from ClaimCenter
 - Optionally stored as a document of the claim
 - May use templates to produce
- ▶ Emails are used by Adjusters . . .
 - to send claim status information to the insured
 - to send documents to the attorney or an outside vendor
- ▶ Emails can automatically be associated with activities
- ▶ Emails can be sent automatically via business rules

Creating a New Email – Menu Action

The screenshot displays the Guidewire software interface. At the top, there are tabs for Desktop, Search, Address Book, Claim, and Vacation. Below these, a header bar shows case information: Pol: 54-847564, Ins: Larry Gamney, DoL: 05/19/2008, St: Open, Adj: Isabel Harkin (LA Auto Adjusters). The main interface is divided into two sections. The top section contains a list of actions: Summary, Workplan, Loss Details, and Exposures. The bottom section is titled 'Email' and contains a form for creating a new email. The form includes fields for Sender Name (Isabel Harkin), Sender Email (iharkin@acmeins.com), Subject, and Body. There are also buttons for 'Send Email', 'Cancel', and 'Use Template'. A red arrow points from the 'Email' option in the 'New ...' menu to the 'Email' tab in the main interface.

Desktop Search Address Book Claim Vacation Go

Pol: 54-847564 | Ins: Larry Gamney | DoL: 05/19/2008 | St: Open | Adj: Isabel Harkin (LA Auto Adjusters)

Actions

- New ...
 - Note
 - Email
 - Matter
 - Evaluation
 - Negotiation
- New Activity
 - Correspondence
 - Interview
 - New Mail
 - Reminder
 - Request

Summary
Workplan
Loss Details
Exposures

Email

Email

Send Email Cancel Use Template

To Recipients

Add Remove

☐ Search Name *Email Address

☐

Add CC Recipients

Add BCC Recipients

☒ Save as a new Document

Sender Name Isabel Harkin

Sender Email iharkin@acmeins.com

Subject *

Body *

Creating New Email – Recipients

Email

Send Email Cancel Use Template

To Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>		Larry Gamney	lgamney@earthlinl

CC Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>			

Add BCC Recipient

☒ Save

Sender Name Isabel Harkin

Sender Email iharkin@acmeins.com

Subject *

Body *

Attachments

Add Remove

Document Name

- Allen Robertson
- Carl Rand
- Judy Rand
- Karen Egertson
- Larry Gamney

- ▶ All claim parties involved will display as possible recipients
- ▶ Recipients may be searched for using Address Book
- ▶ An Email address will automatically be displayed if available

Creating New Email – Message Body

- ▶ Enter text manually or use pre-defined templates
- ▶ Optionally add claim-related documents

The screenshot displays the 'Email' form in the Guidewire software. The main form has a header bar with 'Email' and a sub-header 'Email'. Below the header are buttons for 'Send Email', 'Cancel', and 'Use Template'. The 'Use Template' button is highlighted with a red box, and a red arrow points from it to a modal window titled 'Find Email Template (Return to Email)'. This modal window contains a 'Cancel' button, a 'Topic' field, a 'Keywords' field with the value 'salvage', and 'Search' and 'Reset' buttons. Below the modal window is a 'Template' section with a 'Select' button and a list of templates, including 'Salvage Commenced', which is highlighted with a red box. The main form also includes sections for 'To Recipients' and 'CC Recipients', each with 'Add' and 'Remove' buttons and a table for adding recipients. The 'Subject' field is set to 'Salvage Commenced'. The 'Body' field contains the text: 'This is to acknowledge that we have begun salvage operations on your car. You will receive notice from a Salvage operator via email within the next 5 business days. Please feel free to contact me if you have any questions. Sincerely, Isabel Ha'. The 'Attachments' section at the bottom has 'Add' and 'Remove' buttons. A checkbox labeled 'Save as a new Document' is checked.

Email

Email

Send Email Cancel **Use Template**

To Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>		Larry Gamney	lgamney@earthlin

CC Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>			

Add BCC Recipients

☒ Save as a new Document

Sender Name Isabel Harkin

Sender Email iharkin@acmeins.com

Subject ★ Salvage Commenced

Body ★ This is to acknowledge that we have begun salvage operations on your car. You will receive notice from a Salvage operator via email within the next 5 business days. Please feel free to contact me if you have any questions. Sincerely, Isabel Ha

Attachments Add Remove

Document Name

Find Email Template (Return to Email)

Cancel

Topic

Keywords salvage

Search Reset

Template

Select Salvage Commenced

Sending New Email

- ▶ Clicking the Send Email button causes the email to be sent to the recipients
- ▶ If you check “Save as a new Document” the email is stored as one of the Claim documents

Email

Email

Send Email Cancel Use Template

To Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>		Larry Gamney	lgamney@earthlink

CC Recipients

Add Remove

<input type="checkbox"/>	Search	Name	*Email Address
<input type="checkbox"/>			

Add BCC Recipients

☒ Save as a new Document

Include Hidden Documents ☐ Yes ☒ No

Documents

Related To

Section

Name or Identifier

Search Reset

Hide Documents

<input type="checkbox"/>	Name	Actions	Type	Status	Author	Date Modified
<input type="checkbox"/>	Email Sent: Salvage Commenced	View		Final	Auto-generated	06/16/2008 04:35 PM

Viewing a Sent Email

An email about this claim has been sent. The contents of the email were as follows:


Claim number:	000-00-000605
Subject:	Salvage Commenced
To address:	lgamney@earthlink.net;
Cc address:	
Bcc address:	
From address:	iharkin@acmeins.com
Related to:	None
Body:	This is to acknowledge that we have begun salvage operations on your car. You will receive notice from a Salvage operator via email within the next 5 business days. Please feel free to contact me if you have any questions. Sincerely, Isabel Harkin 650 919-2345
Attachments:	
Date Sent:	Mon Jun 16 16:35:39 PDT 2008

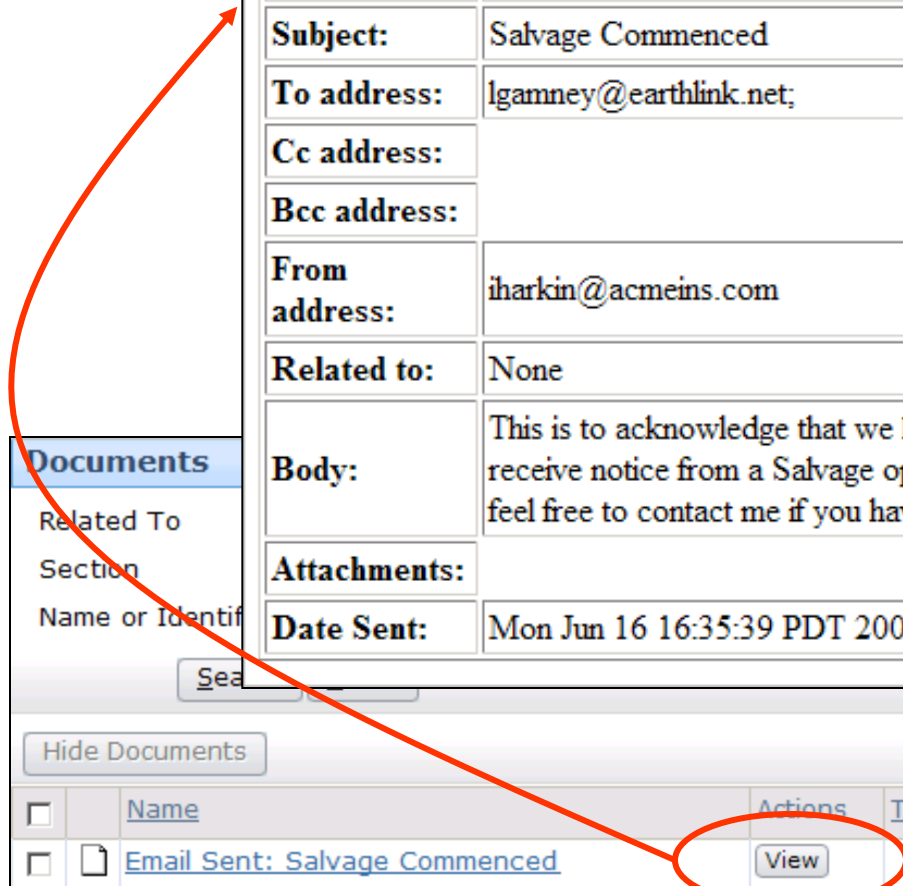
Documents

Related To
Section
Name or Identifier

Search

Hide Documents

<input type="checkbox"/>	Name	Actions	Type	Status	Author	Date Modified
<input type="checkbox"/>	 Email Sent: Salvage Commenced	View		Final	Auto-generated	06/16/2008 04:35 PM



Associating Email Templates with Activities

Activity Pattern Detail - Salvage Vehicle ([Up to Activity Patterns](#))

Activity Pattern		Activity Pattern Dates	
Subject	* Salvage Vehicle	Target days	3
Short Subject		Target hours	
Class	* Task	Target start point	Cl
Type	General	Include these days	Bus
Category	Request	Business calendar type *	Feb
Code	* salvage_vehicle	Escalation days	4
Priority	* Normal	Escalation hours	
Mandatory	* <input type="radio"/> Yes <input checked="" type="radio"/> No	Escalation start point	Cl
Calendar Importance	* Medium	Include these days	Bus
Claim loss type	<none selected>	Business calendar type *	Feb
Automated only	* <input type="radio"/> Yes <input checked="" type="radio"/> No		
Available for closed claim	* <input type="radio"/> Yes <input checked="" type="radio"/> No		
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No		
Document Template			
Email Template	Salvage Commenced		
Recurring	* <input type="radio"/> Yes <input checked="" type="radio"/> No		

Sending Emails from Activities

- ▶ When activity is open the Create Email button displays
- ▶ Selecting the Create Email button opens up a popup in the worksheet containing a New Email screen

Activity

Activity Detail for Claim 000-00-000605

[Update](#) | [Complete](#) | [Skip](#) | [Assign](#) | **Create Email** | [Link Document](#) | [Cancel](#) | [View Notes](#)

Details

Subject *

Description

Related To

Due Date *

Escalation Date

Priority *

Calendar Importance *

Mandatory No

Status Open

Externally Owned * ☐ Yes ☒ No

External Owner

Documents

[Remove](#) | [Name](#) | [View](#) | [Type](#) | [Status](#) | [Aut](#)

New Note

Topic

Security Type

Subject

Related To

Confidential ☐ Yes ☒ No

Text

Lesson Outline

- ▶ Document Basics
- ▶ Creating Documents
- ▶ Working with Documents

The Documents Screen

Documents

Related To

<none selected>

Status

Section

<none selected>

Author





Name or Identifier

Include Hidden Documents

Search



Reset

Hide Documents

<input type="checkbox"/>	Name▼	Actions	Type	Status
<input type="checkbox"/>	 Reservation Rights	<div><div>View</div><div>Edit</div></div>	Letter sent	Approved
<input type="checkbox"/>	 Email Sent - Policyholder Claim Notification	<div><div>View</div></div>	Email	Final
<input type="checkbox"/>	 Diagram of accident site		Diagram	Approved
<input type="checkbox"/>	 Damage to insured vehicle	<div><div>View</div></div>	First notice of loss	Final

- ▶ All documents, regardless of how they were created, appear on the Documents screen
 - However, a document may not be listed if it is marked sensitive or hidden

"Known to Exist" (Paper) Documents

Hide Documents			
<input type="checkbox"/>	Name ▼	Actions	Type
<input type="checkbox"/>	 Reservation Rights	View Edit	Letter sent
<input type="checkbox"/>	 Email Sent - Policyholder Claim Notification	View	Email
<input type="checkbox"/>	 Diagram of accident site	View	Diagram
<input type="checkbox"/>	 Damage to insured vehicle	View	First notice of loss

Document Details ([Return to Documents](#))

[Edit](#)

Name	Diagram of accident site
Description	Sketch of site by police
Related To	none (Claim-level)
Author	Albert Lee
Recipient	
Inbound	
Status	Approved
Security Type	Unrestricted document
Type	Diagram
Hidden	No

- ▶ You can view or edit the data about the document, but because it is only known to exist, you cannot view the document itself

Viewing Data About Electronic Documents

- ▶ Data about stored documents may be viewed and edited unless the Status is set to Final

The screenshot displays a document management interface. At the top, a 'Hide Documents' button is visible. Below it is a table listing documents:

<input type="checkbox"/>	Name	Actions	Type
<input type="checkbox"/>	Reservation Rights	View Edit	Letter sent
<input type="checkbox"/>	Email Sent - Policyholder Claim Notification	View	Email
<input type="checkbox"/>	Diagram of accident site		Diagram
<input type="checkbox"/>	Damage to insured vehicle	View	First notice of loss

Red boxes highlight the 'Reservation Rights' and 'Damage to insured vehicle' documents. Red arrows point from these documents to their respective 'Document Details' pop-ups.

Document Details (Return to Documents)





Update Cancel

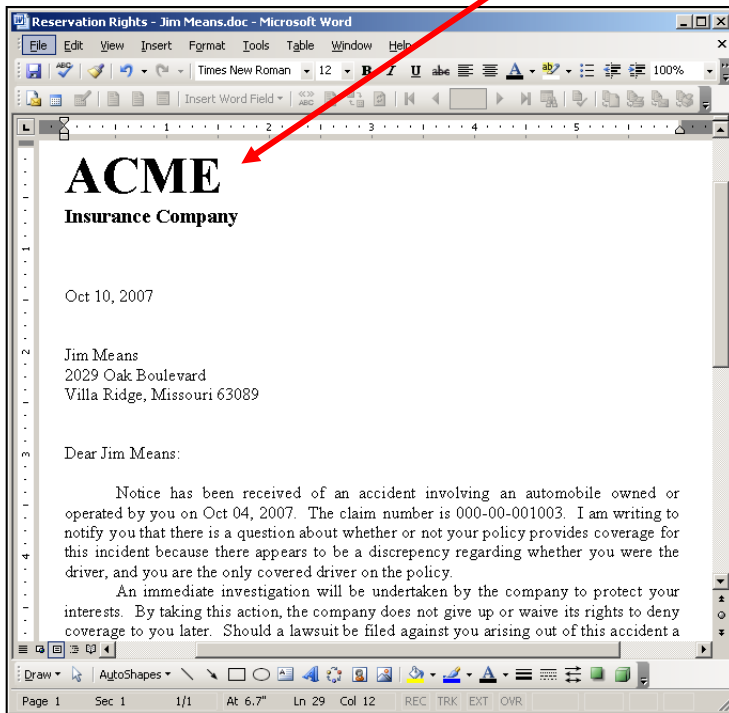
Name: Reservation Rights
Description: The initial contact reservation
MIME Type: Microsoft Word Document
Related To: none (Claim-level)
Author: Isabel Harkin
Recipient:
Inbound: ☐ Yes ☐ No
Status:
Security Type: <none selected>
Type: Letter sent
Hidden: ☐ Yes ☒ No

Document Details (Return to Documents)


Name: Damage to insured vehicle
Description: Photograph taken by insured
MIME Type: JPEG Image
Related To: (1) 1st Party Vehicle - Jim Means
Author: Allen Robertson
Recipient:
Inbound: ☐ Yes ☐ No
Status: Final
Security Type: Unrestricted document
Type: First notice of loss
Hidden: No


Viewing Electronic Documents

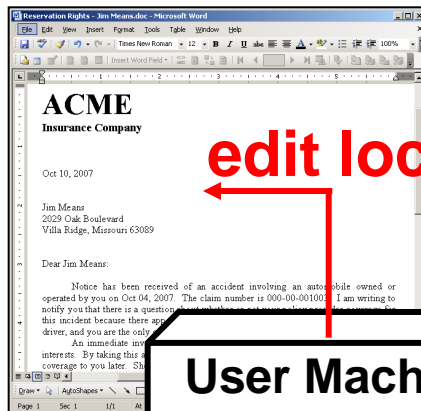
Hide Documents			
<input type="checkbox"/>	Name ▾	Actions	Type
<input type="checkbox"/>	 Reservation Rights	<input type="button" value="View"/> <input type="button" value="Edit"/>	Letter sent
<input type="checkbox"/>	 Email Sent - Policyholder Claim Notification	<input type="button" value="View"/>	Email
<input type="checkbox"/>	 Diagram of accident site		Diagram
<input type="checkbox"/>	 Damage to insured vehicle	<input type="button" value="View"/>	First notice of loss



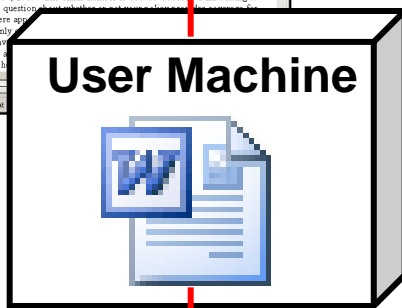
Editing Electronic Documents

<input type="checkbox"/>	Name ▾	Actions
<input type="checkbox"/>	 Reservation Rights	<input type="button" value="View"/> <input type="button" value="Edit"/>

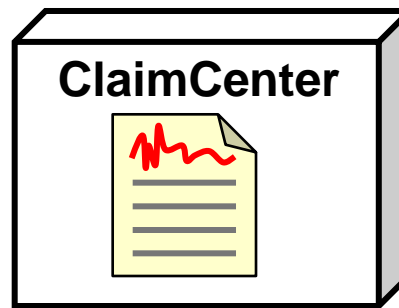
<input type="checkbox"/>	Name	Actions
<input type="checkbox"/>	 Reservation Rights	<input type="button" value="Edit Local Copy"/> <input type="button" value="Upload"/> <input type="button" value="Cancel"/>



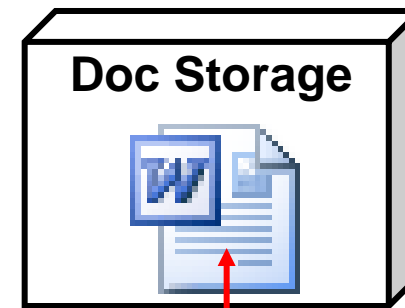
edit local copy



User Machine



ClaimCenter



Doc Storage

upload

Lesson Objectives Review

You should now be able to:

- Describe the functionality of documents
- Create documents
- Work with documents

Review Questions

1. What is the primary difference between a document "known to exist" and an electronic document?
2. What is the significance of a document's MIME type?
3. What are the two ways that electronic documents can be added to ClaimCenter?
4. When a document already exists in ClaimCenter and you choose to edit it, where is the edited copy stored while it is being edited? What must you do to have the edited copy replace the master copy?
5. Under what circumstance might a user edit a document created from a template before uploading it to the document management system?

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