

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.

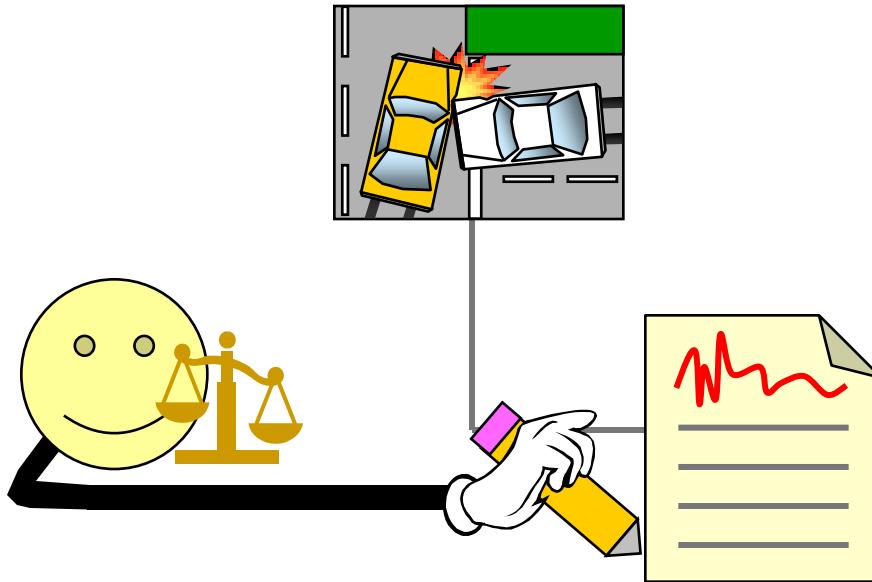
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

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

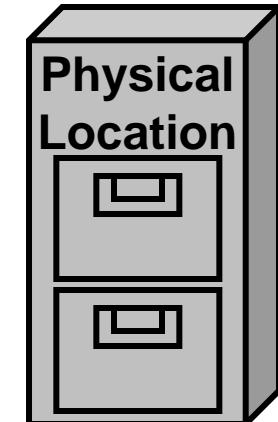
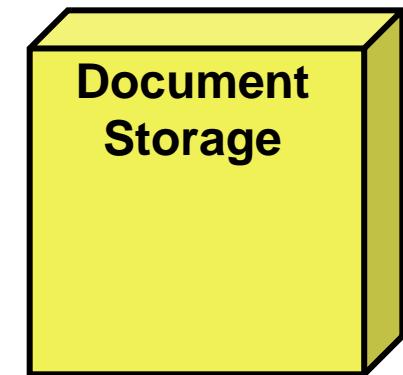
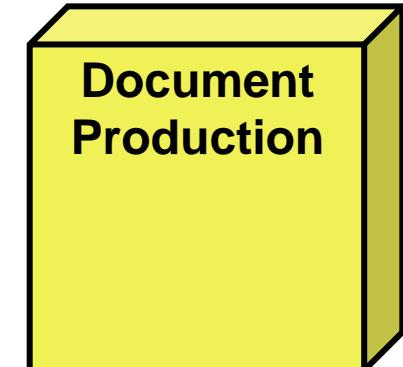
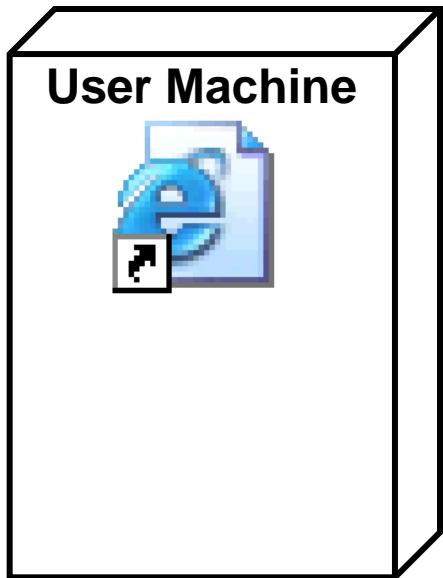
Documents



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

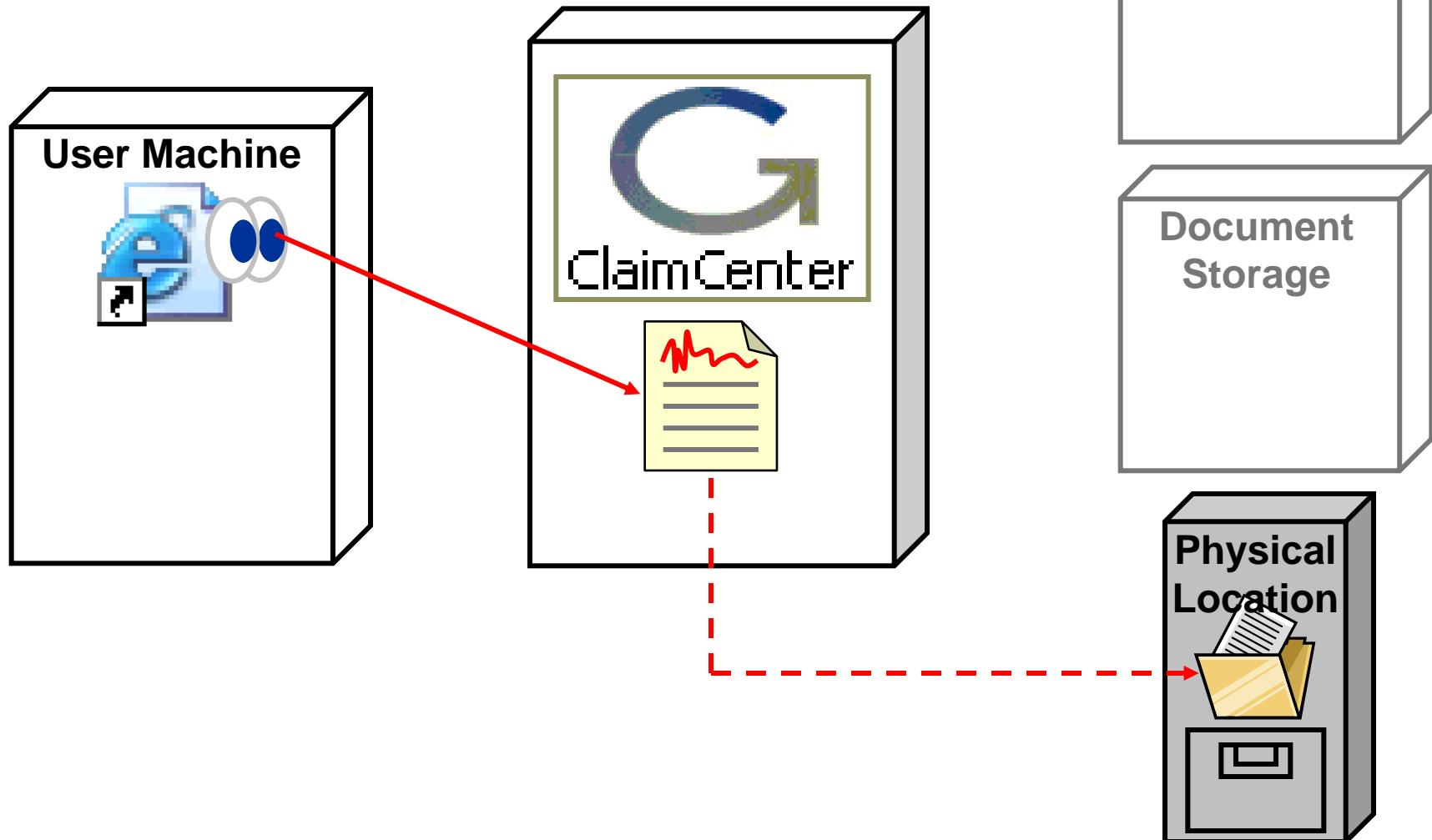
- ▶ A ClaimCenter document is a document which contains information relevant to the claim
- ▶ Documents are either:
 - Physical pieces of paper (such as a photograph of damaged property), or
 - Electronic files (such as a PDF, Word or Email document)

Document Management Architecture



- ▶ Five places where document information can exist

Document Management Architecture: Physical Documents

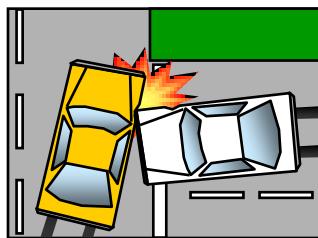


Electronic Document Production

template



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



Claim
100-00-100001



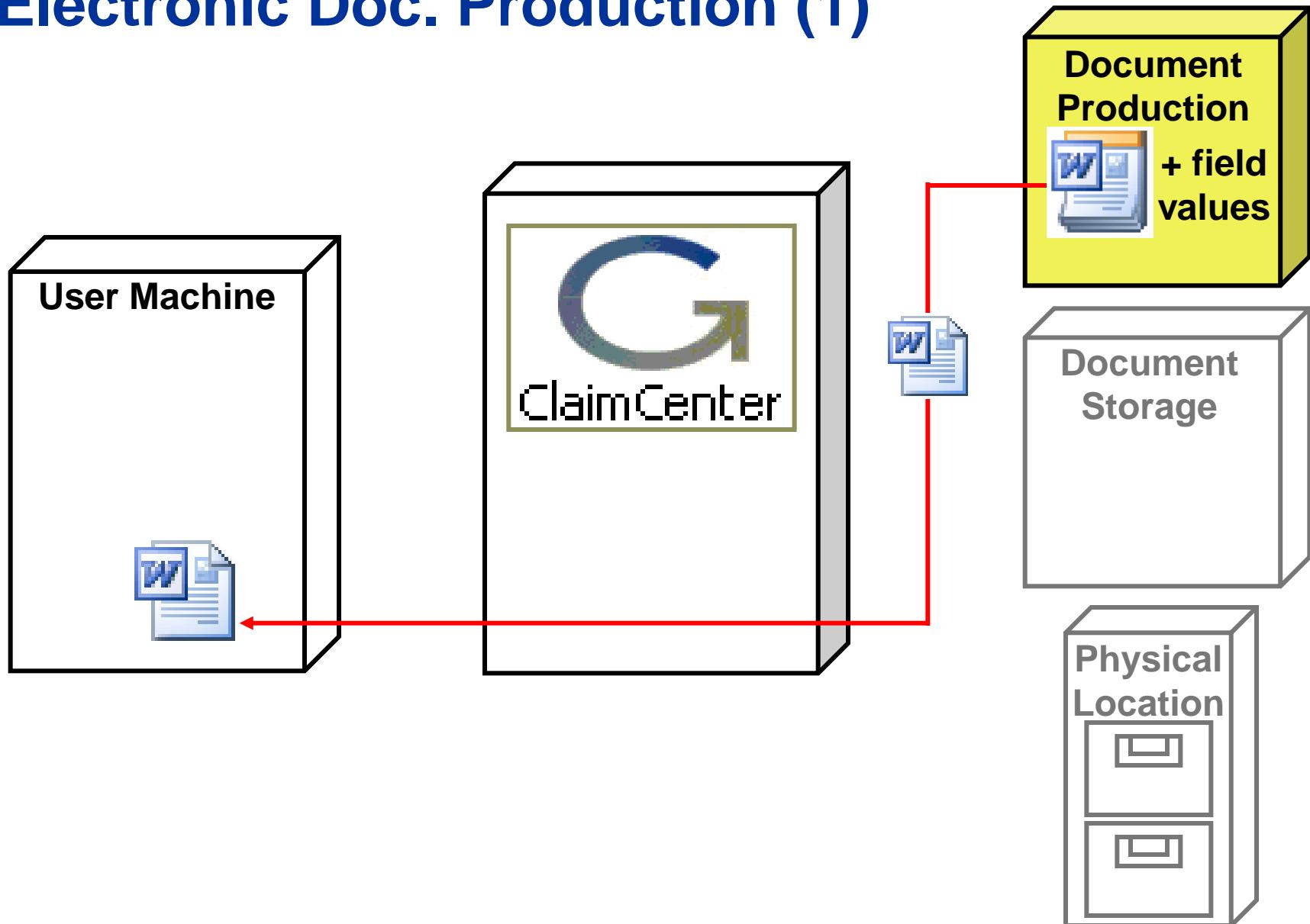
Dear Jim Means,
On May 3...



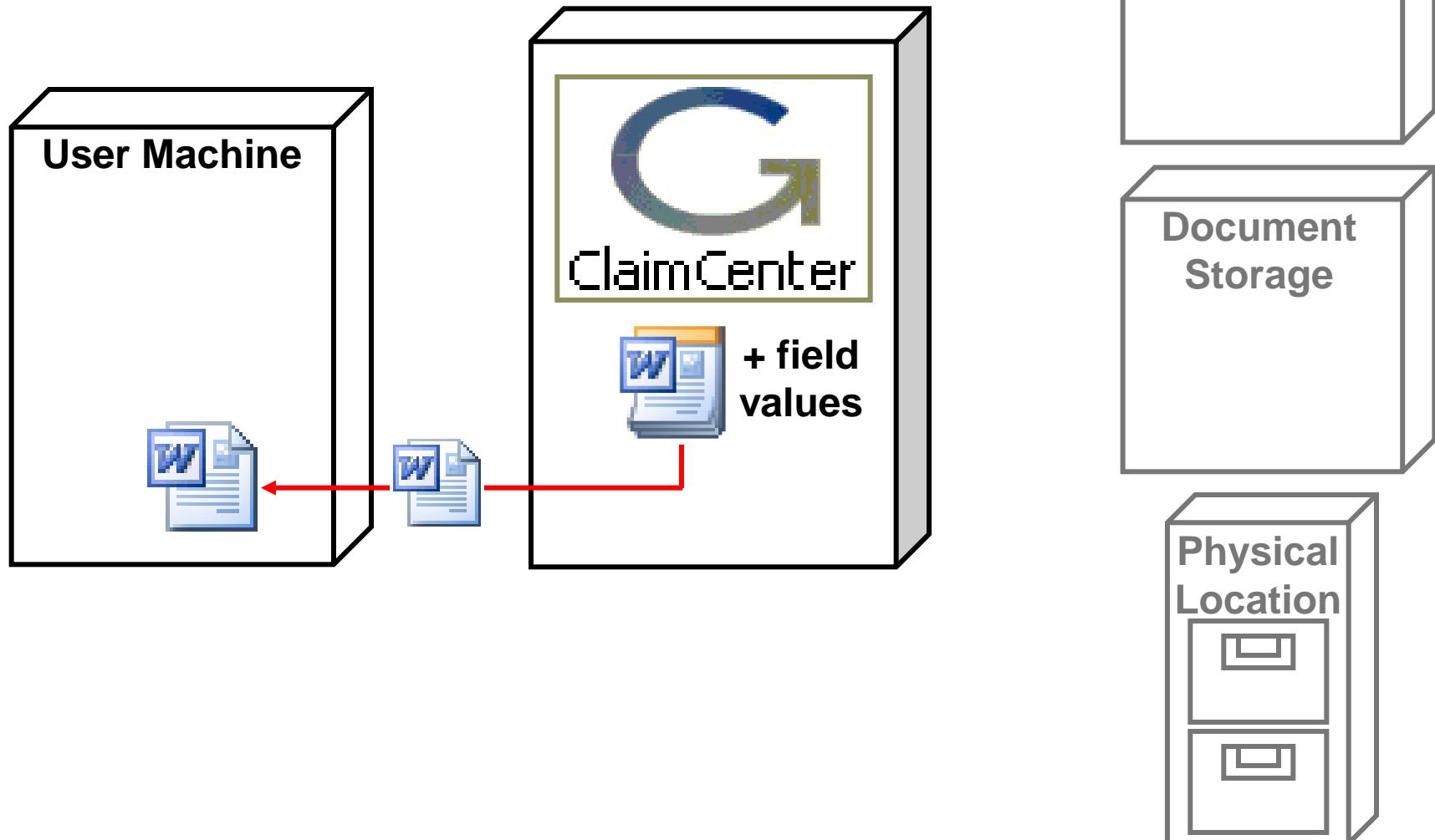
+
**Letter to Insured
MS Word
Draft**

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

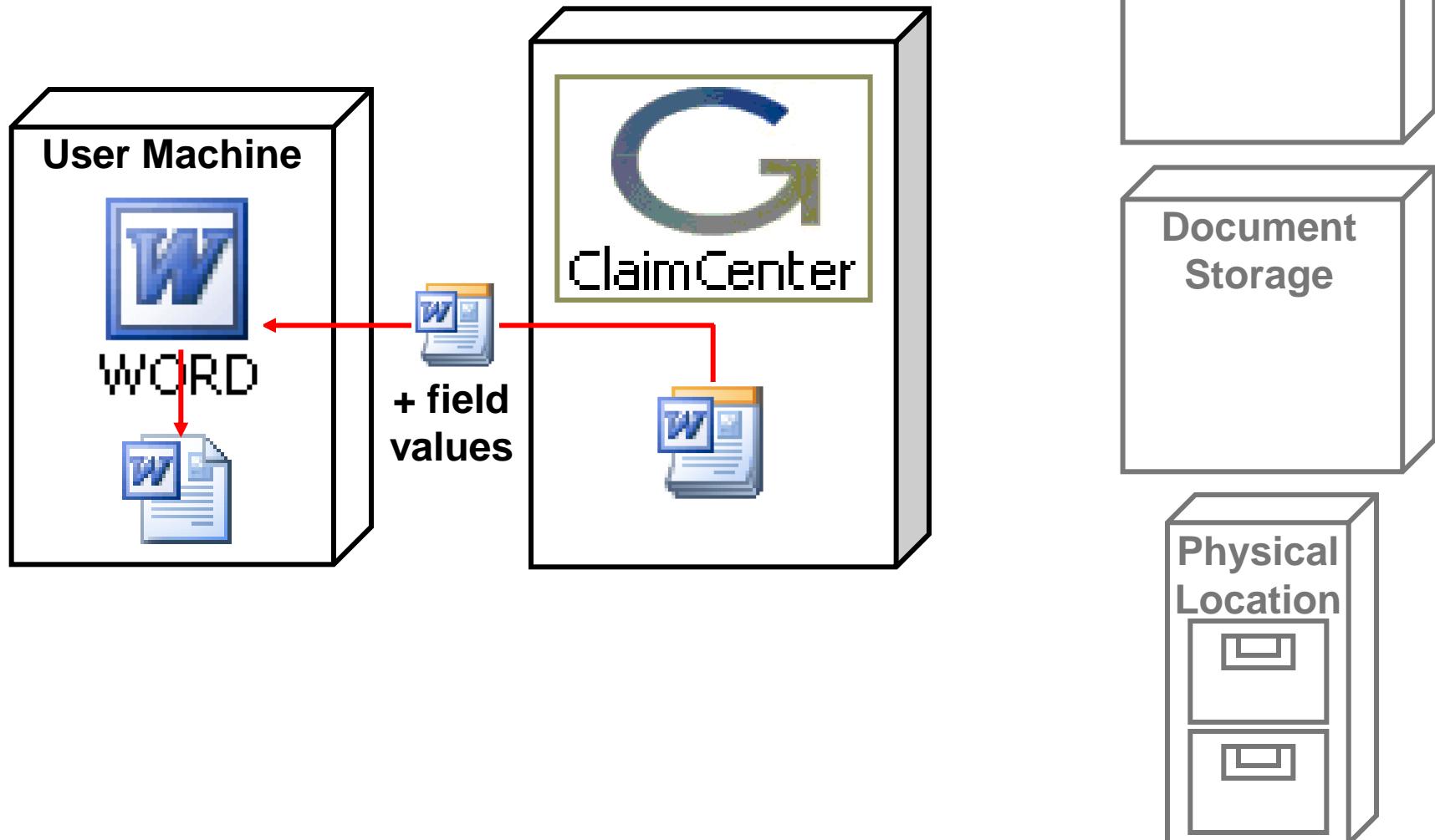
Document Management Architecture: Electronic Doc. Production (1)



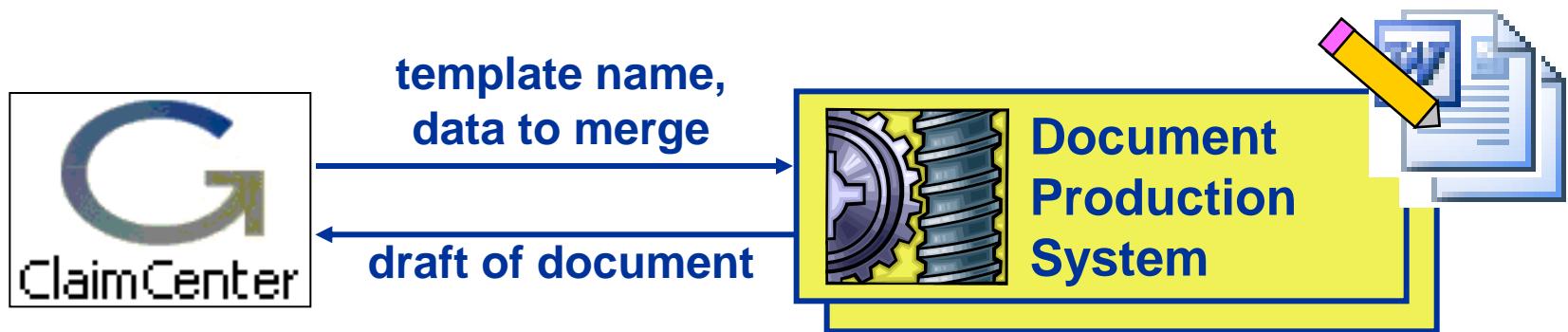
Document Management Architecture: Electronic Doc. Production (2)



Document Management Architecture: Electronic Document Production

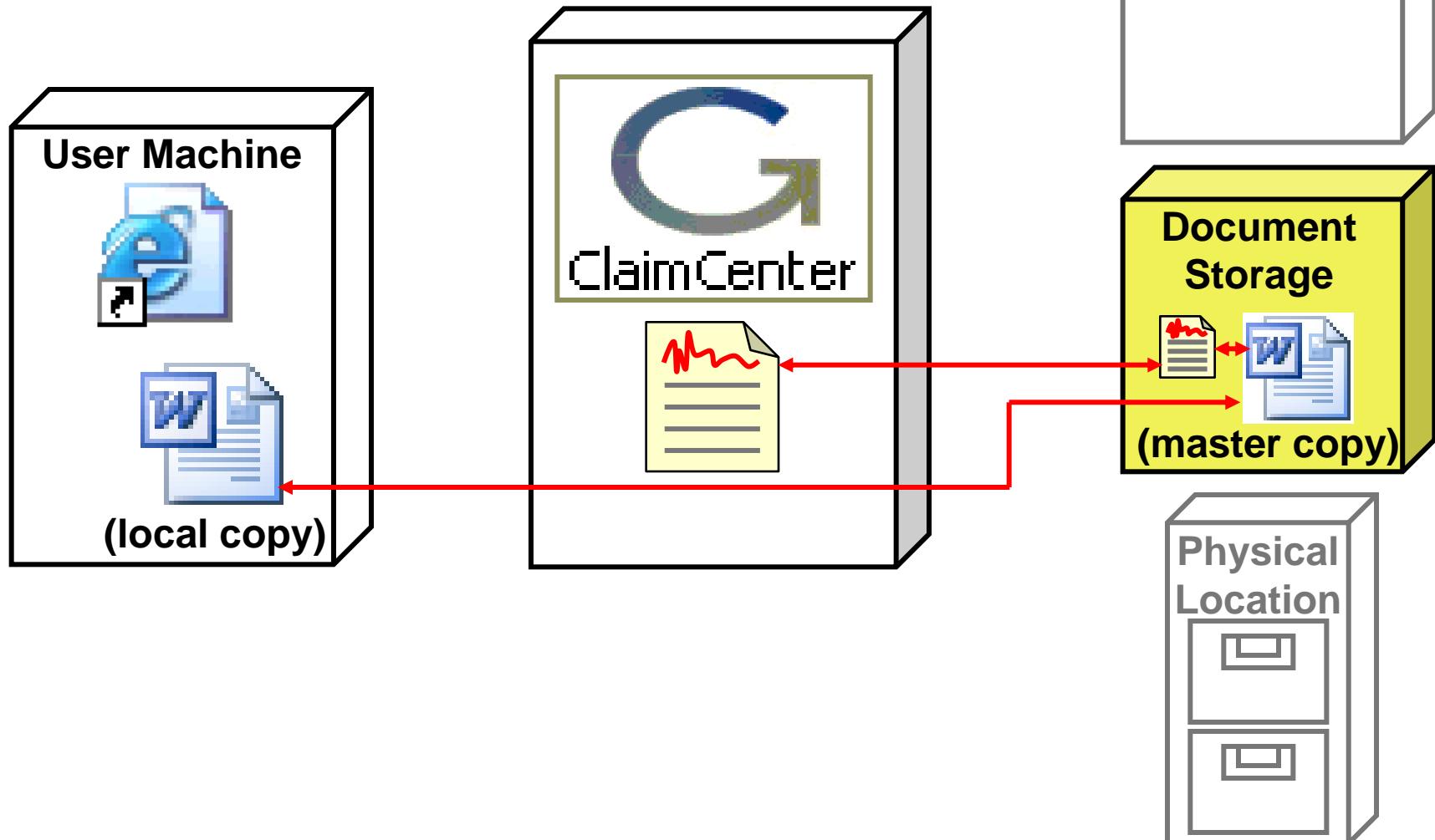


Document Production Integration

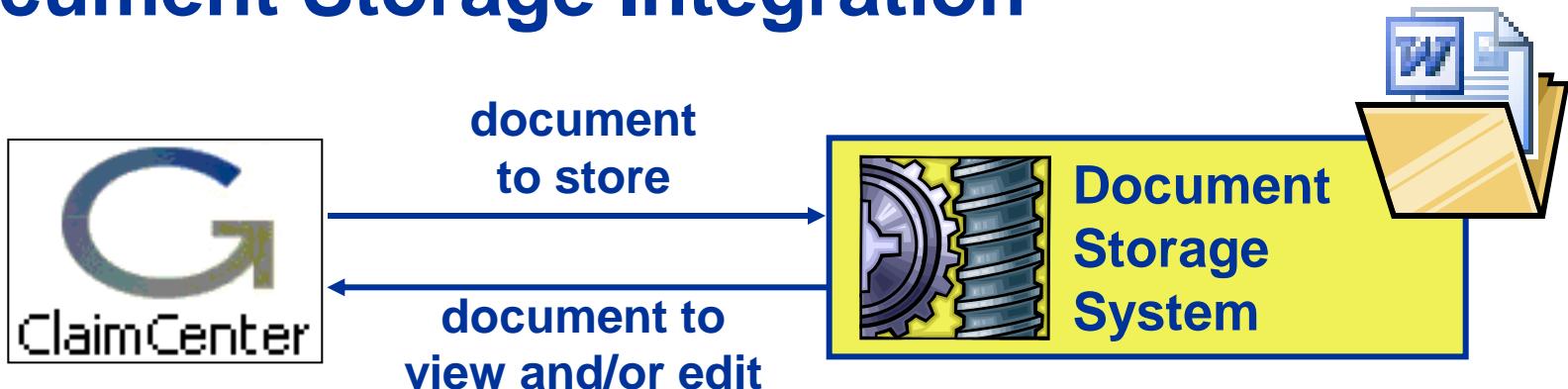


- ▶ Regardless of where the document production occurs, every instance of ClaimCenter has an integration point to a document production application somewhere in the ClaimCenter architecture
 - This application merges templates and data, and it may also store the document templates
- ▶ Nearly every implementation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

Document Management Architecture: Electronic Document Storage

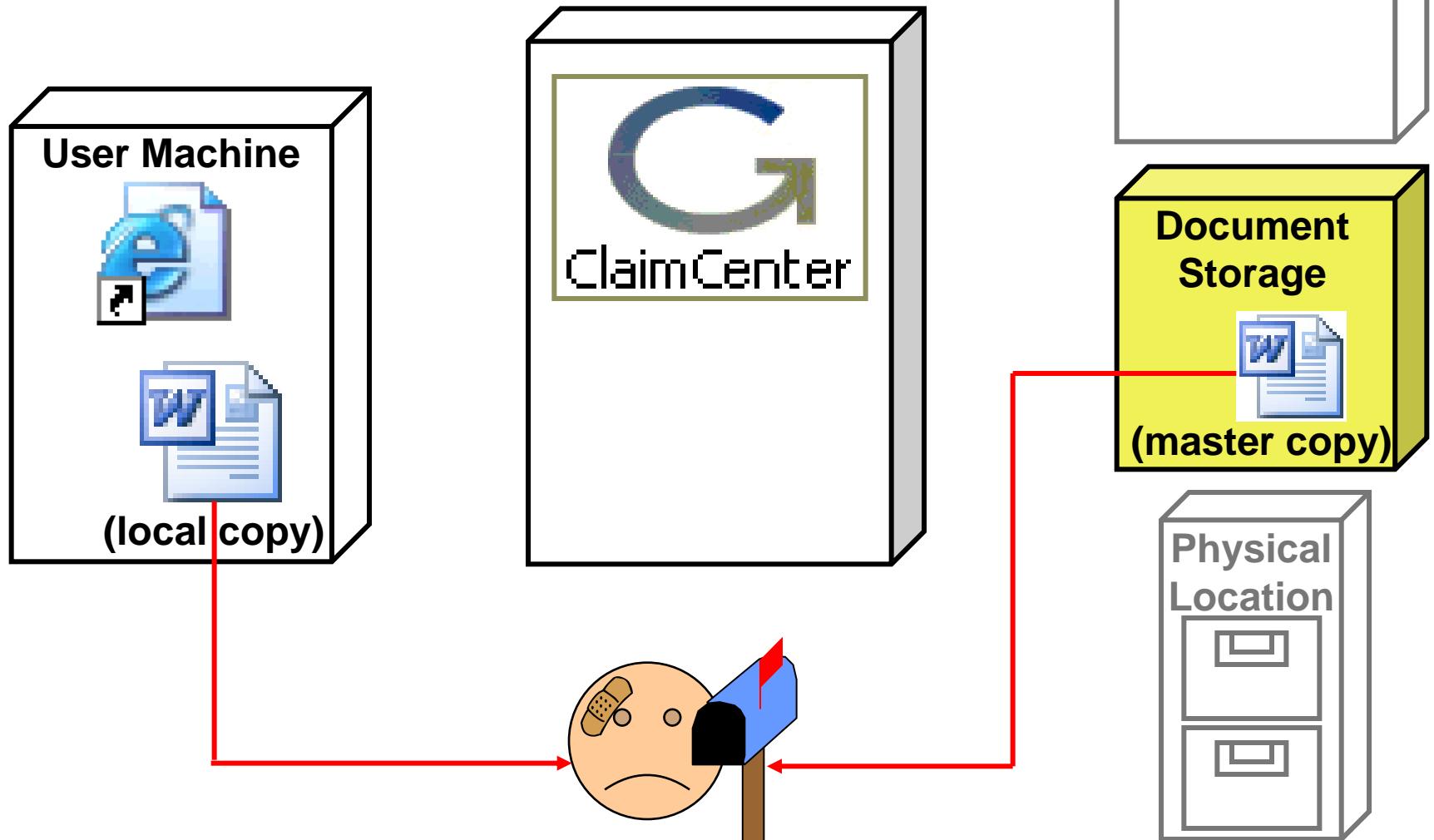


Document Storage Integration

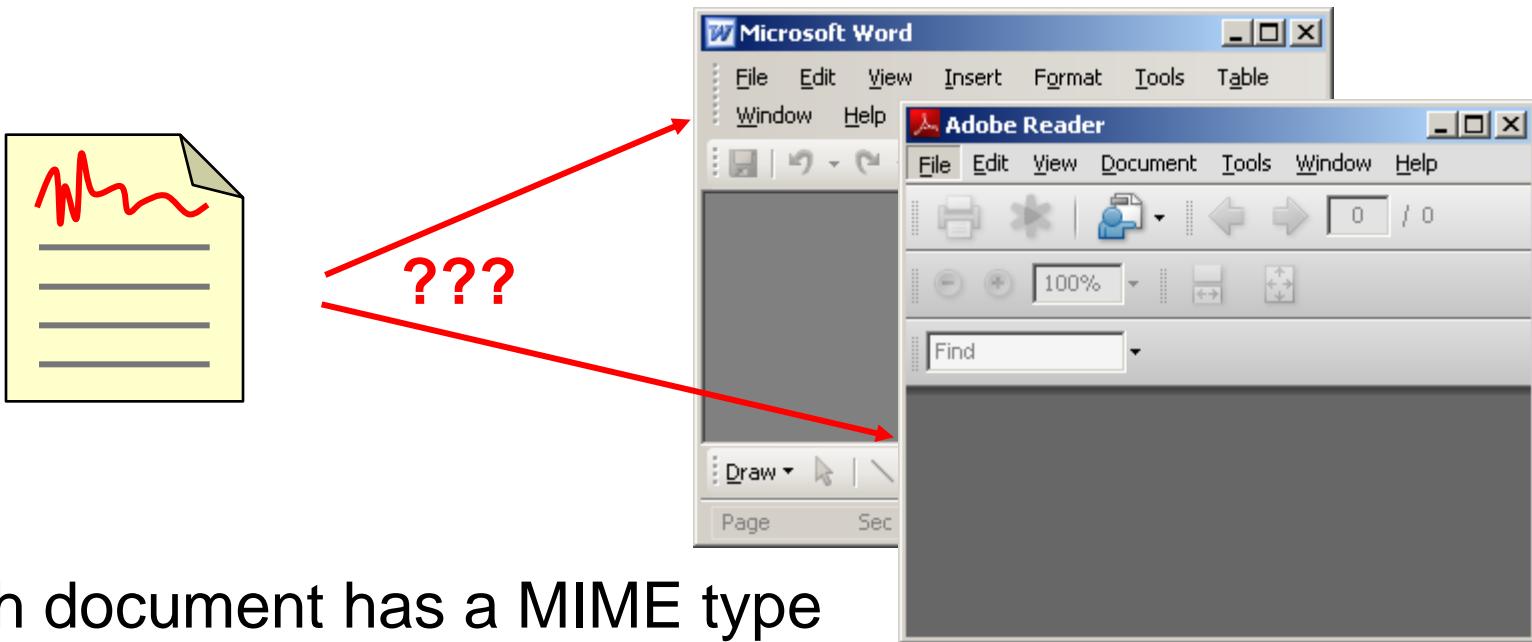


- ▶ Every instance of ClaimCenter has an integration point to a document storage application, such as ImageRight
 - This application stores "master" copies of documents

Document Mailing



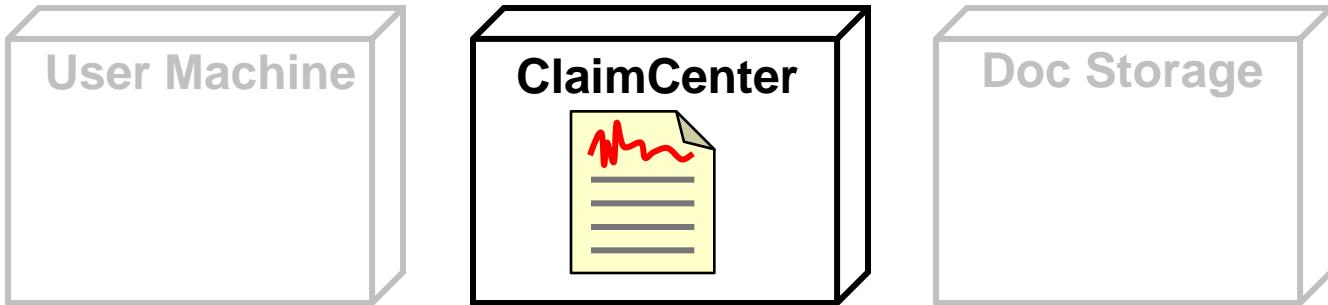
Important Document Attributes



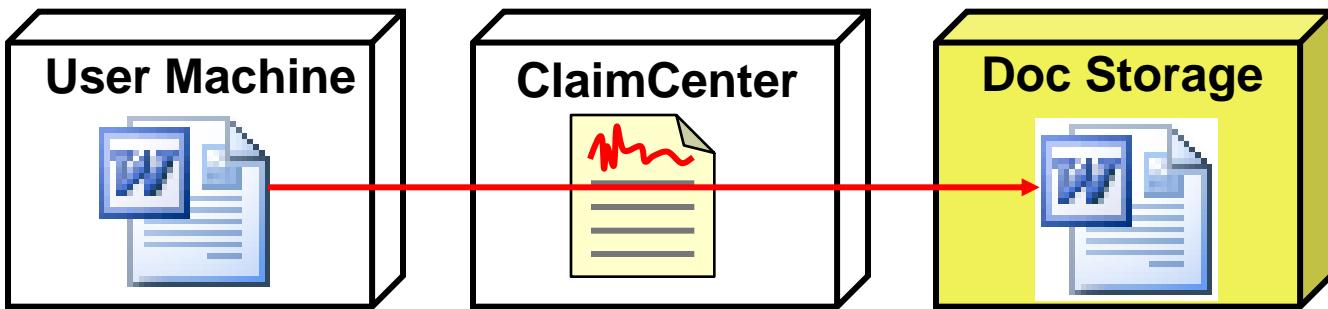
- ▶ Each document has a MIME type
 - This is used by the user's local machine to determine what application to use to view a document (such as using Adobe Acrobat for PDF files)
- ▶ Each document has a security type
 - Sensitive documents are visible only to you, your supervisors, and people with permission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

Three Ways to Create a Document

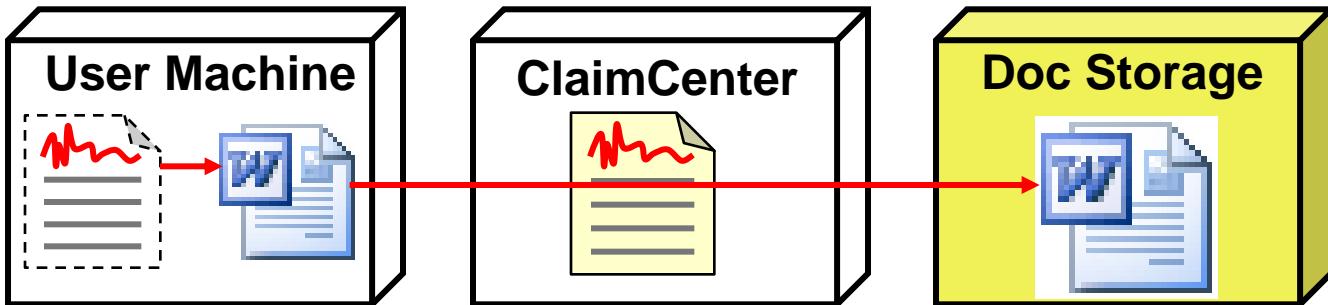
Identify that
a paper
document
exists



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

The screenshot shows a software interface with a blue header bar containing links for Desktop, Search, Team, Address Book, and Claim (000-00-000203). Below the header is a toolbar with icons for a flag, a car, and other claim-related functions. The main area is a white window titled "Actions" which displays a hierarchical menu. The "New Document" option under "New ..." is highlighted with a red box and a blue selection bar.

New ...

- [Note](#)
- [Email](#)
- [Matter](#)
- [Evaluation](#)
- [Negotiation](#)

New Transaction

- [Other](#)

New Document

- [Create from a template](#)
- [Attach an existing document](#)
- [Indicate existence of a document](#)

New Activity

- [Correspondence](#)
- [Interview](#)
- [New Mail](#)
- [Reminder](#)
- [Request](#)

New Exposure

- [Choose by Coverage Type](#)

Claim Actions

- [Assign Claim](#)
- [Close Claim](#)
- [Print Claim](#)
- [Sync Status](#)
- [Validate Claim Only](#)
- [Validate Claim + Exposures](#)
- [Validate Policy](#)

Adding Records of Paper Documents

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

New Document

Update Cancel

Name	★ Diagram of accident site
Description	Diagram of accident site
Related To	none (Claim-level)
Author	Albert Lee
Recipient	
Inbound	<input type="radio"/> Yes <input checked="" type="radio"/> No
Status	★ Approved
Security Type	Unrestricted document
Type	★ Diagram

Adding Existing Documents as Attachments

New Document

New Document

Update Cancel

Create from a template

Attach an existing document

Indicate existence of a document

Document Contents

Attachment * C:\IMG00005.jpg [Browse...](#)

Name * Damage to insured vehicle

Description Photograph taken by insured

MIME Type * JPEG Image

Related To (1) 1st Party Vehicle - Allen Robertson

Author Allen Robertson

Recipient

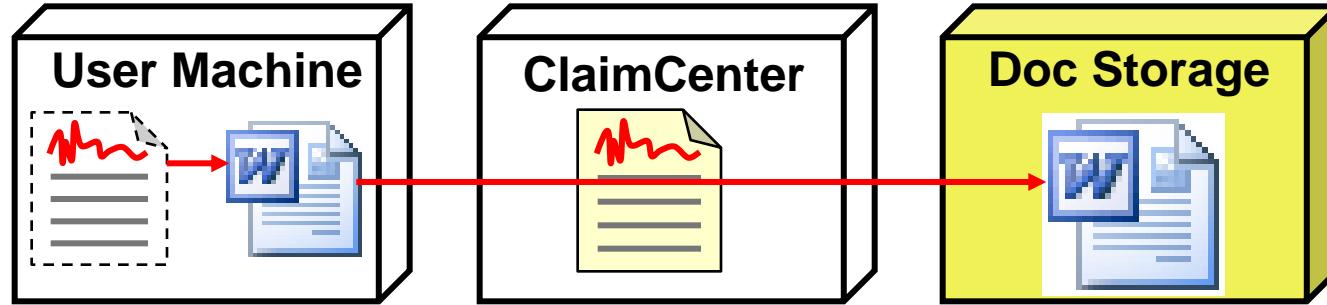
Inbound Yes No

Status * Approved

Security Type Unrestricted document

Type * 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

The screenshot illustrates the process of adding a document via template. It shows two windows: a main 'New Document' dialog and a secondary 'Document Templates' search results window.

Main Window (Top Left):

- Title Bar:** New Document
- Buttons:** Update, Cancel
- Section:** Document Contents
- Form Fields:** Name (required), Description, MIME Type (required)
- Search Icon:** A magnifying glass icon with a red box around it, located next to the 'Name' field.

Secondary Window (Bottom Right):

- Title Bar:** New Document
- Section:** Document Templates (Return to New Document)
- Buttons:** Cancel
- Form Fields:** Type (Letter sent), Line of business (Auto), State (<none selected>), Keywords, Date, Section, Identifier
- Buttons:** Search, Reset
- Section:** Search Results (1 - 2 of 2)
- Table:** Shows two search results.

Search Results Table Headers:

	Template	Type	Line of business	State	Date Modified
--	----------	------	------------------	-------	---------------

Search Results Data:

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)

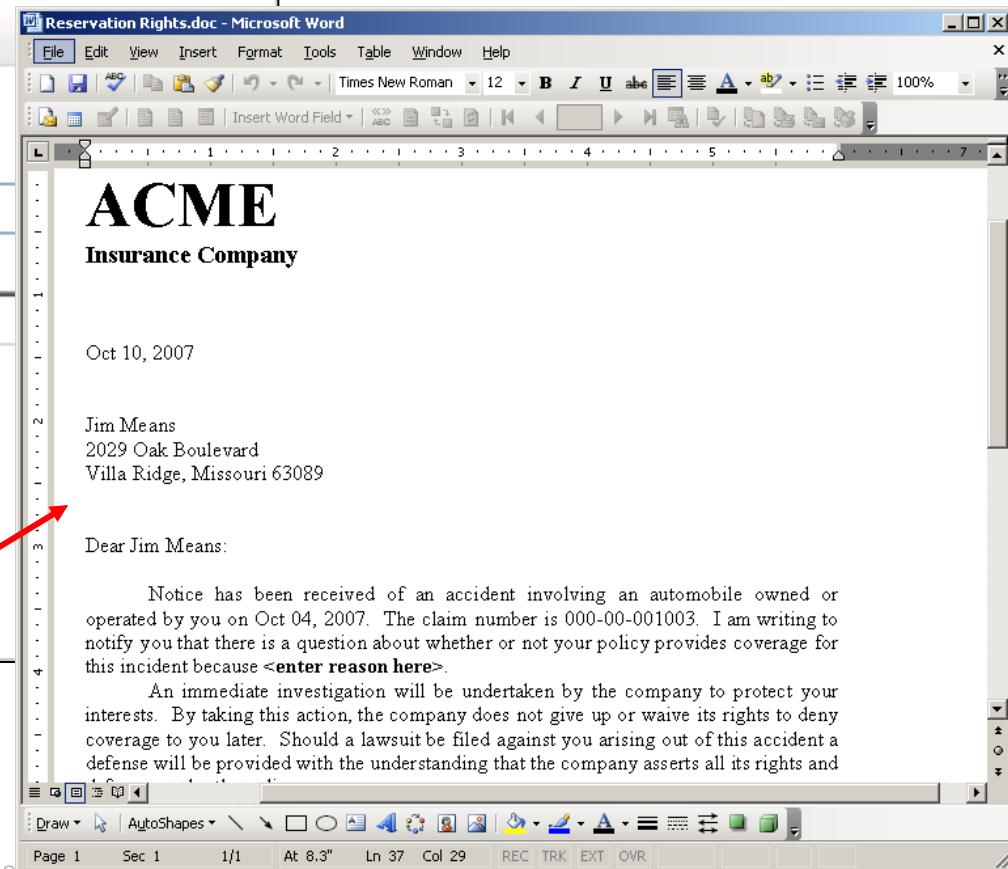
To Jim Means

From Isabel Harkin

CC Karen Egertson

3 - Generate Document

Create Document



Object Values in Template Documents

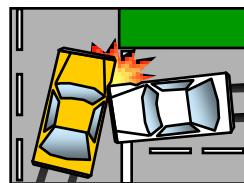
system
date



contact:
Jim Means



claim:
000-00-001003

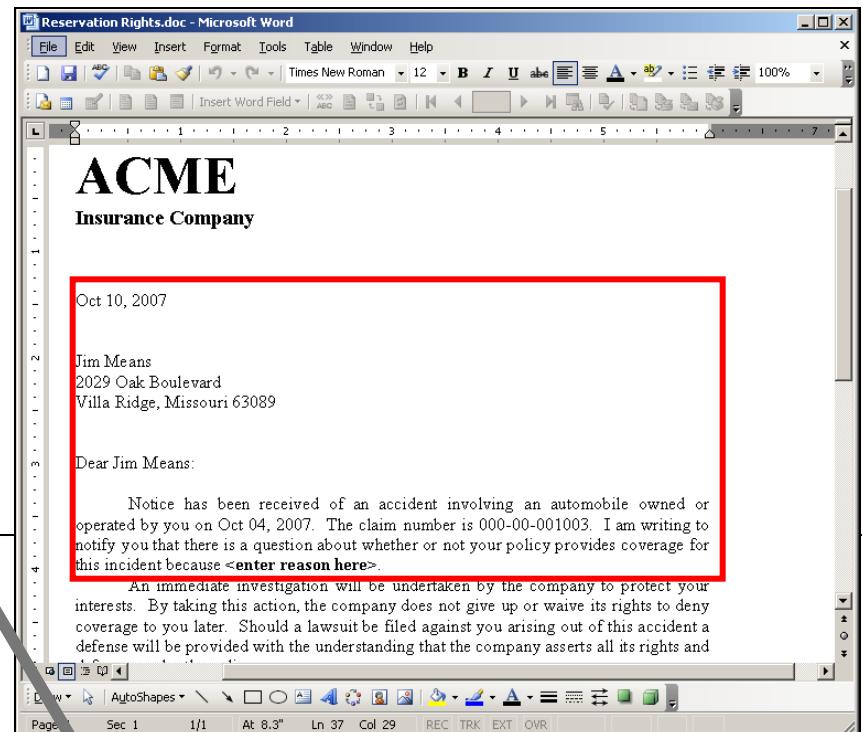


Oct 10, 2007

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>.



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

The screenshot shows a Microsoft Word document window. At the top, there's a toolbar with various icons. Below the toolbar, the menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Table', 'Window', and 'Help'. The main content area contains a large bold heading 'ACME' followed by several paragraphs of text. The text discusses an incident on Oct 04, 2007, with a claim number of 000-00-001003. It states that there is a question about coverage and that an investigation will be conducted. A red box highlights the phrase 'there appears to be a discrepancy regarding whether you were the driver, and you are the only covered driver on the policy.' A red arrow points from the top text block in the image to this highlighted phrase in the template. At the bottom of the document, there's a signature line with 'Jim Means' and a date '2029', followed by another paragraph of text. The status bar at the bottom of the screen shows 'Page 1 Sec 1 1/1 At 6.5" Ln 28 Col 56 REC TRK EXT OVR'.

Adding Document Via Template

Step 4: Specify Any Additional Values

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

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	<input type="radio"/> Yes <input type="radio"/> 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

Document Contents

1 Documents

Related To	<none selected>	Status		
Section	<none selected>	Author		
Name or Identifier		Include Hidden Docu		
From	<input type="button" value="Search"/>	<input type="button" value="Reset"/>		
CC				
3 Hide Documents				
4	Name	Actions	Type	Status
<input type="checkbox"/>	Reservation Rights	<input type="button" value="View"/> <input type="button" value="Edit"/>	Letter sent	Approved
<input type="checkbox"/>	Damage to insured vehicle	<input type="button" value="View"/> <input type="button" value="Edit"/>	First notice of loss	Approved

Documents and Activities

Activity

Activity Detail for Claim 000-00-000203

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	* <input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<none selected> ▾

Documents

Remove Name

New Note

Topic
Security Type
Subject
Related To
Confidential
Text

Activity Assignment

Assigned To Isabel Harkin

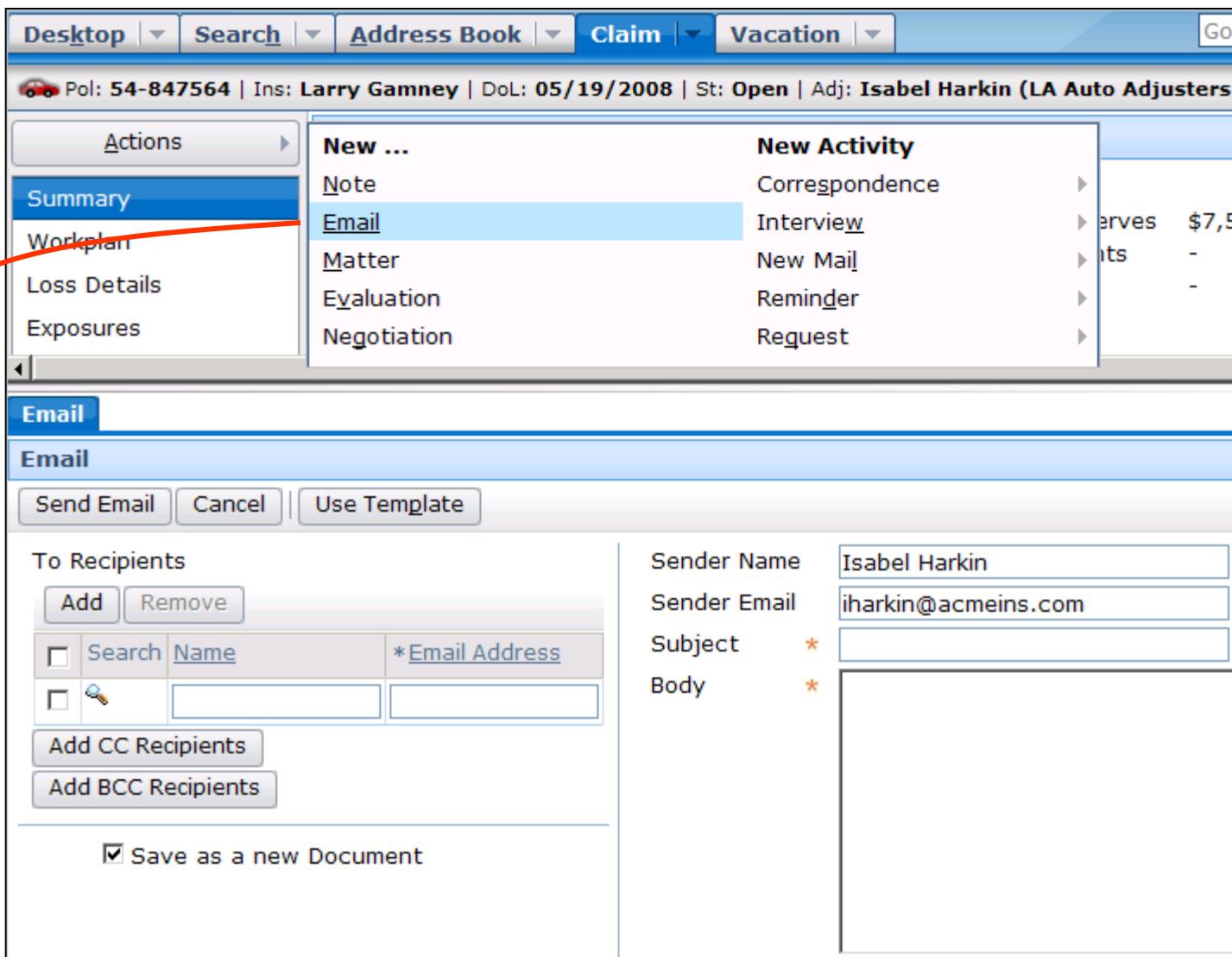
Lesson Outline

- ▶ 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



Creating New Email – Recipients

The screenshot shows the 'Email' screen within a software application. At the top, there's a toolbar with 'Email' (highlighted in blue), 'Send Email', 'Cancel', and 'Use Template' buttons. Below the toolbar, the main area is titled 'Email'. It has sections for 'To Recipients' and 'CC Recipients', each with 'Add' and 'Remove' buttons and search fields. In the 'To Recipients' section, 'Larry Gamney' is listed with the email address 'lgamney@earthlink.net'. In the 'CC Recipients' section, 'Allen Robertson', 'Carl Rand', 'Judy Rand', 'Karen Egertson', and 'Larry Gamney' are listed. On the right side, there are fields for 'Sender Name' (Isabel Harkin) and 'Sender Email' (iharkin@acmeins.com). The 'Subject' and 'Body' fields both have red asterisks indicating they are required. A large text area labeled 'Attachments' with 'Add' and 'Remove' buttons is also present.

- ▶ 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 shows the 'Email' creation interface. On the left, there's a 'Use Template' button highlighted with a red box. A red arrow points from this button to a 'Find Email Template' dialog box on the right. The dialog has fields for 'Topic' (empty) and 'Keywords' (set to 'salvage'), with 'Search' and 'Reset' buttons. Below these is a 'Template' section with a 'Select' button and a list item 'Salvage Commenced' also highlighted with a red box. The main email creation window on the left shows recipient fields ('To Recipients' and 'CC Recipients') and a body text area. The body text area contains a message about salvage operations and a signature from Isabel Harkin.

Email

Send Email Cancel Use Template

To Recipients

Add Remove

Search Name *Email Address

Larry Gamney lgamney@earthlink.net

CC Recipients

Add Remove

Search Name *Email Address

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

The screenshot shows two overlapping windows. The top window is titled 'Email' and contains fields for 'To Recipients' (with 'Larry Gamney' entered), 'CC Recipients', and 'BCC Recipients'. The 'Send Email' button is highlighted with a red box. The bottom window is titled 'Documents' and includes fields for 'Related To' and 'Section', a search bar, and a table of documents. A red arrow points from the 'Save as a new Document' checkbox in the 'Documents' window to the corresponding checkbox in the 'Email' window.

Email

To Recipients

CC Recipients

BCC Recipients

Send Email | Cancel | Use Template

Documents

Related To: <none selected>

Section: <none selected>

Name or Identifier:

Search | Reset

Hide Documents

	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 Identif
Sea

Hide Documents

	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](#))

[Update](#) [Cancel](#)

Activity Pattern	
Subject	* <input type="text" value="Salvage Vehicle"/>
Short Subject	<input type="text"/>
Class	* <input type="button" value="Task"/>
Type	General
Category	<input type="button" value="Request"/>
Code	* <input type="text" value="salvage_vehicle"/>
Priority	* <input type="button" value="Normal"/>
Mandatory	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Calendar Importance	* <input type="button" value="Medium"/>
Claim loss type	<input type="button" value="<none selected>"/>
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	<input type="text"/>
Email Template	<input type="text" value="Salvage Commenced"/>
Recurring	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Activity Pattern Dates	
Target days	<input type="text" value="3"/>
Target hours	<input type="text"/>
Target start point	<input type="text"/>
Include these days	<input type="text"/>
Business calendar type *	<input type="text" value="Federal"/>
Escalation days	<input type="text" value="4"/>
Escalation hours	<input type="text"/>
Escalation start point	<input type="text"/>
Include these days	<input type="text"/>
Business calendar type *	<input type="text" value="Federal"/>

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

The screenshot shows the 'Activity' tab selected in a software interface. The title bar reads 'Activity Detail for Claim 000-00-000605'. Below the title bar are several buttons: Update, Complete, Skip, Assign, Create Email (which is highlighted with a red box), Link Document, Cancel, and View Notes. The main area is divided into two sections: 'Details' and 'Documents'. The 'Details' section contains the following fields:

- Subject: Salvage Vehicle
- Description: Salvage Vehicle
- Related To: none (Claim)
- Due Date: 05/22/2008
- Escalation Date: 05/23/2008
- Priority: Normal
- Calendar Importance: Medium
- Mandatory: No
- Status: Open
- Externally Owned: Yes No
- External Owner: <none selected>

The 'Documents' section contains a 'New Note' form with the following fields:

- Topic: <none selected>
- Security Type: <none selected>
- Subject: (empty field)
- Related To: none (Claim-level)
- Confidential: Yes No
- Text: (large empty text area)

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	
<input type="button" value="Search"/> <input type="button" value="Reset"/>			
<input type="button" value="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
<input type="checkbox"/>		Status	
<input type="checkbox"/>		Final	
<input type="checkbox"/>		Approved	

- ▶ 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			
	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

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

The diagram illustrates the process of viewing and editing electronic documents. It consists of three main components:

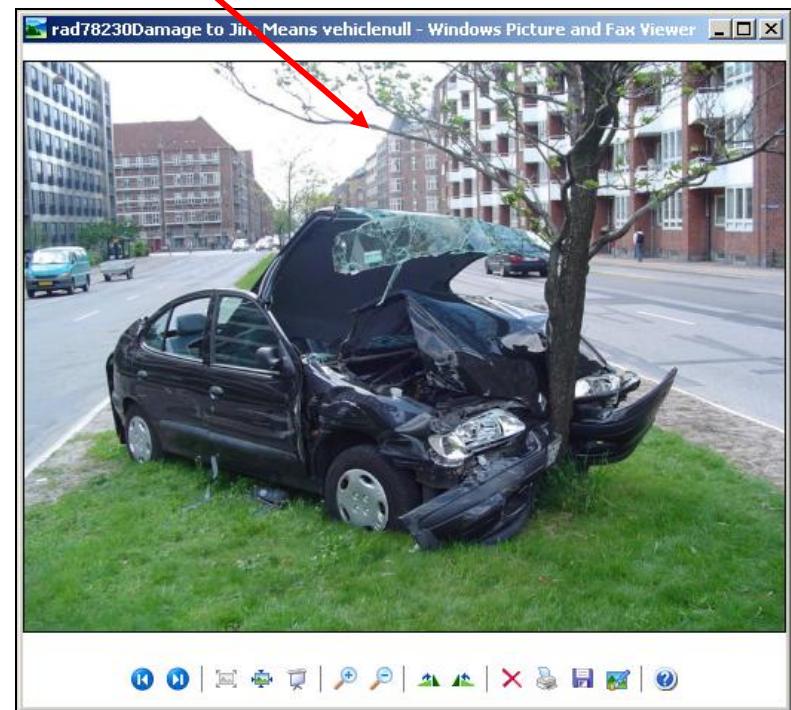
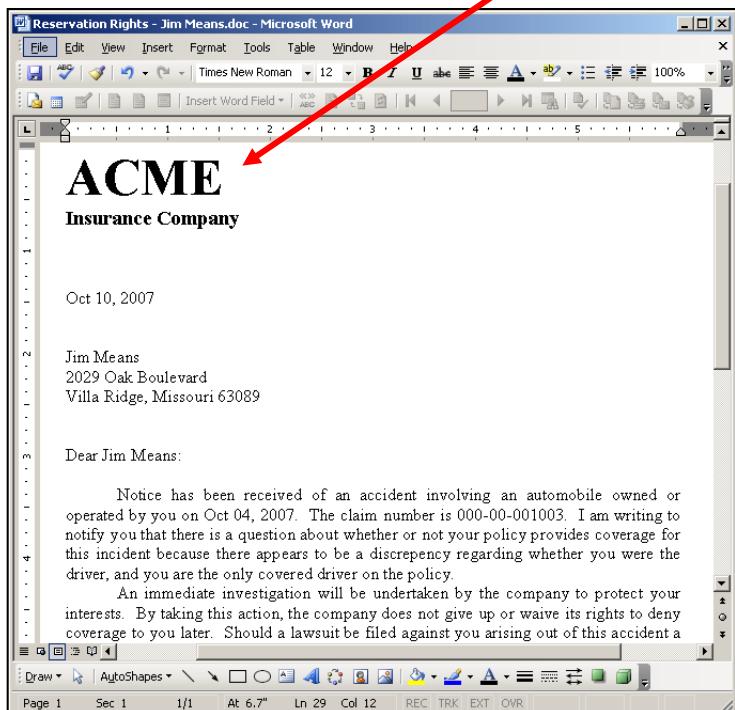
- List of Documents:** A table showing a list of stored documents. Two specific documents are highlighted with red boxes:
 - Reservation Rights**: Has a checked checkbox in the Actions column.
 - Damage to insured vehicle**: Has a checked checkbox in the Actions column.
- Document Details (Edit Screen):** A form for updating document details. The "Reservation Rights" document is selected for editing. The "Update" and "Cancel" buttons are highlighted with red boxes.
- Document Details (View Screen):** A read-only view of the "Damage to insured vehicle" document. Its details are listed below:

Name	Description	MIME Type
Damage to insured vehicle	Photograph taken by insured	JPEG Image
Related To	(1) 1st Party Vehicle - Jim Means	
Author	Allen Robertson	
Recipient		
Inbound	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Status	Approved	
Security Type	<none selected>	
Type	Letter sent	
Hidden	<input checked="" type="radio"/> Yes <input type="radio"/> No	

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

Viewing Electronic Documents

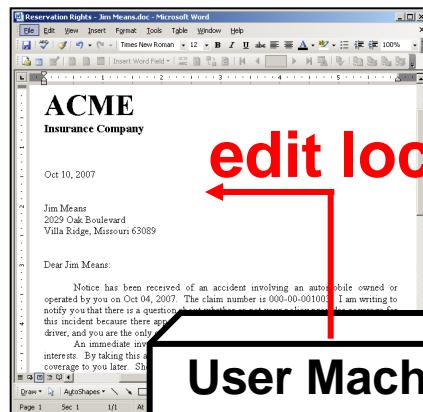
Name		Actions	Type
<input type="checkbox"/>	Reservation Rights	View Edit	Letter sent
<input type="checkbox"/>	Email Sent - Policyholder Claim Notification	View	Email
<input type="checkbox"/>	Diagram of accident site		Diagram
<input type="checkbox"/>	Damage to insured vehicle	View	First notice of loss



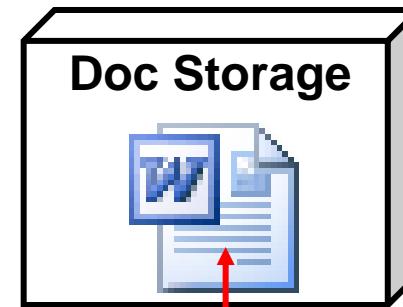
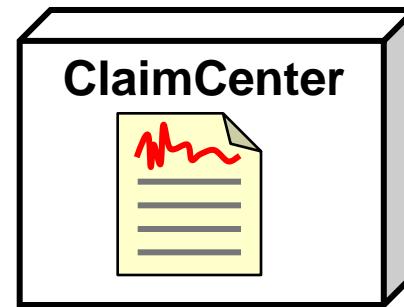
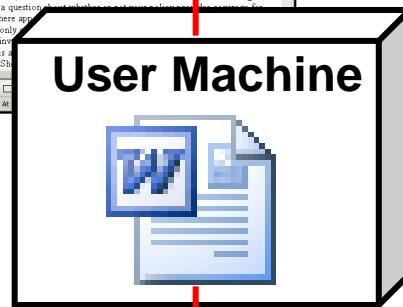
Editing Electronic Documents

Name	Actions
Reservation Rights	View Edit

Name	Actions
Reservation Rights	Edit Local Copy Upload Cancel



edit local copy



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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