

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.”

Lesson Outline

- ▶ Using Lists as Reports
- ▶ ClaimCenter Standard Reporting

Using Lists as Reports

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

The screenshot illustrates two examples of how the base application provides lists as reports:

- Team tab lists:** The top window shows a summary view for "US-MW Normal Auto Adjusters" with tabs for Summary, Aging, Claims, Exposures, Activities, and Matters. It displays a grid of claims and exposures for three users: Leroy Martell, Dana Evans, and Fernando.
- Search tab lists:** The bottom window shows a search interface for claims, with tabs for Desktop, Search, Team, Report, Administration, Address Book, Claim, and Vacation. It includes a sidebar for optional parameters and a search form for specifying claim details like Claim #, Policy #, and search criteria for Claimant, First Name, Last Name, Organization Name, Tax ID, and Assigned To Group.

Team
tab
lists

Search
tab
lists

Team Tab Lists

US-MW Normal Auto Adjusters: Claims (1 - 15 of 110)

[Summary](#) | [Aging](#) | **Claims** | [Exposures](#) | [Activities](#) | [Matters](#)

All open owned

Assign Remove Flag Print/Export

	Claim	Adjuster	Policy	Insured	Claimant
<input type="checkbox"/>	110-00-110001	Leroy Martell	55-998871	Florence Construction	Charles D.
<input type="checkbox"/>	110-00-110005	Leroy Martell	55-998875	Amber Waves	Amber W.
<input type="checkbox"/>	100-00-100001	Dana Evans	22-998871	Jim Means	Jim Mean
<input type="checkbox"/>	430-00-430003	Leroy Martell	02-263535	Gerald Shields	
<input type="checkbox"/>	000-00-100001	Dana Evans	37-100101	Brenda Munson	Brenda M.
<input type="checkbox"/>	100-00-100002	Kim Raftly	37-100102	Bernard Ray	Bernard R.
<input type="checkbox"/>	100-00-100006	Leroy Martell	37-100106	Rachel Hall	Rachel Ha.
<input type="checkbox"/>	100-00-100018	Leroy Martell	37-100118	Ethel Korza	Ethel Kor.
<input type="checkbox"/>	100-00-100019	Dana Evans	37-100119	Raymond Levitt	Raymond L.
<input type="checkbox"/>	100-00-100024	Leroy Martell	37-100124	Stephen Feng	Stephen F.
<input type="checkbox"/>	000-00-100033	Wesley Kennison	37-100133	Sarah Feng	Sarah Fei.
<input type="checkbox"/>	000-00-100034	Fernando Carey	37-100134	Eugene Angleman	Eugene A.
<input type="checkbox"/>	000-00-100035	Javier Sanford	37-100135	Gary Benjamin	Gary Benj.
<input type="checkbox"/>	000-00-100040	Fernando Carey	37-100140	Jeff Rossi	Jeff Rossi
<input type="checkbox"/>	000-00-100044	Kim Raftly	37-100144	Sherry Michalowski	Sherry Mi.

All open owned

All open owned

New owned (this week)

Flagged

Closed in last 90 days

All open related

New related (this week)

Search Tab Lists

Search Activities

Specify at least one of the following

Claim #	<input type="text" value="....."/>
Assigned To Group	<input type="text" value="US-MW Normal Auto Adjusters"/> <input type="button" value="..."/>
Include Child Groups	<input type="radio"/> Yes <input type="radio"/> No
Assigned To User	<input type="text" value="<none selected>"/> <input type="button" value="..."/>
Created By	<input type="text" value="<none selected>"/> <input type="button" value="..."/>
External Owner	<input type="text" value="<none selected>"/>

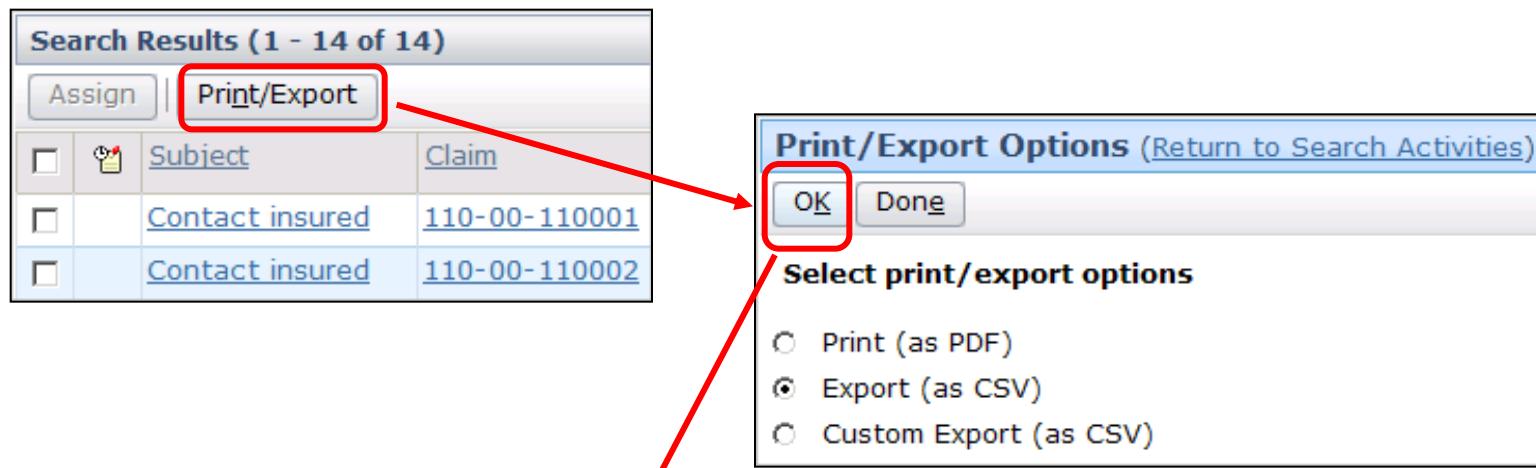
Optional parameters

Status	<input type="text" value="Open"/>
Priority	<input type="text" value="<none selected>"/>
Completed Late	<input type="text" value="<none selected>"/>
Overdue Now	<input type="text" value="Yes"/>
Pending Assignment	<input type="text" value="No"/>
Description	<input type="text"/>
Search For Date	<input type="text" value="<none selected>"/>
Since	<input type="text" value="Today"/>
From	<input type="text" value="05/07/2008"/> <input type="button" value="..."/>
To	<input type="text" value="07/06/2008"/> <input type="button" value="..."/>
Subject	<input type="text" value="Send reservation of rights letter"/>
	<input type="radio"/> Contains <input type="text"/>

Search Results (1 - 2 of 2)

<input type="button" value="Assign"/>	<input type="button" value="Print/Export"/>								
<input type="checkbox"/> Subject	Claim	Insured	Due	Closed	Priority	Status	External	External Owner	Assigned To
<input type="checkbox"/> Reservation of rights letter	110-00-110001	Florence Construction	05/22/2008		High	Open	No		Leroy Martell
<input type="checkbox"/> Reservation of rights letter	100-00-100001	Jim Means	05/22/2008		High	Open	No		Dana Evans

Printing and Exporting List Results



The screenshot shows a Microsoft Excel spreadsheet titled 'Print[1].csv'. The spreadsheet contains 10 rows of data, each representing a contact record. The columns are labeled A through L. The data includes fields such as Subject, Insured, Due, Closed, Priority, Status, and Assigned To. The 'Assigned To' column lists names like Leroy Martell, Dana Evans, and Jim Means. A status message 'This activity has been escalated' is visible in the top-left cell of the grid. A red arrow points from the 'OK' button in the 'Print/Export Options' dialog to the 'Print[1].csv' Excel window.

	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: 110-00-110	Florence C	5/20/2008	5/20/2008	Urgent	Complete	No			Leroy Martell	
3	No	Contact in: 110-00-110	Harlow Bui	5/15/2008	5/15/2008	Urgent	Complete	No			Leroy Martell	
4	No	Contact in: 110-00-110	Carmelina	5/10/2008	5/10/2008	Urgent	Complete	No			Leroy Martell	
5	No	Contact in: 110-00-110	Specialty	5/22/2008	5/22/2008	Urgent	Complete	No			Leroy Martell	
6	No	Contact in: 110-00-110	Amber Wa	5/19/2008	5/19/2008	Urgent	Complete	No			Leroy Martell	
7	No	Contact in: 110-00-110	Wright Cor	5/30/2008	5/30/2008	Urgent	Complete	No			Leroy Martell	
8	No	Contact in: 100-00-100	Jim Means	5/20/2008	5/20/2008	Urgent	Complete	No			Dana Evans	
9	No	Contact in: 100-00-100	Gus Early	5/15/2008	5/15/2008	Urgent	Complete	No			Dana Evans	
10	No	Contact in: 100-00-100	Wendy Kil	5/10/2008	5/10/2008	Urgent	Complete	No			Dana Evans	

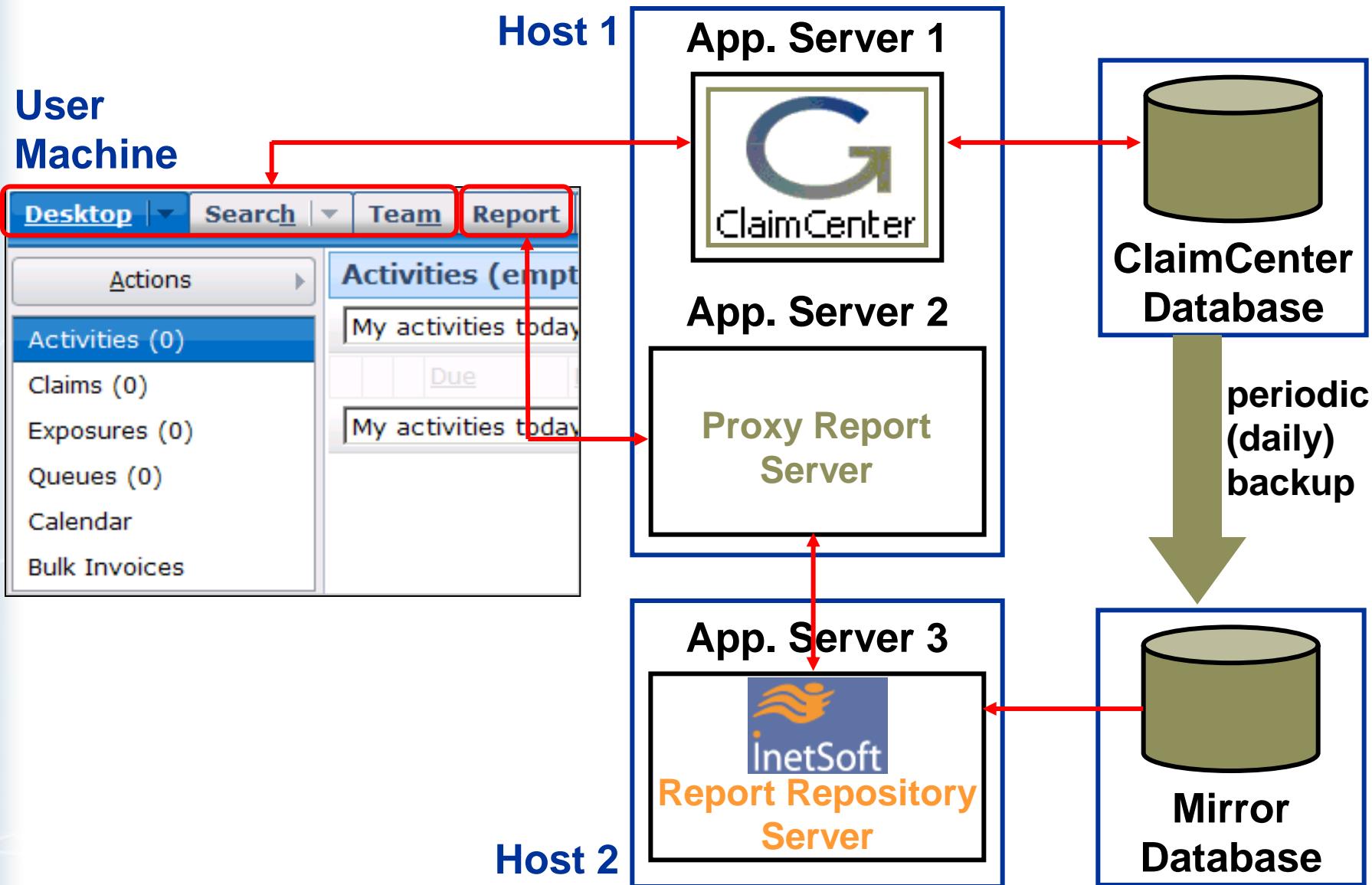
Lesson Outline

- ▶ Using Lists as Reports
- ▶ ClaimCenter Standard Reporting

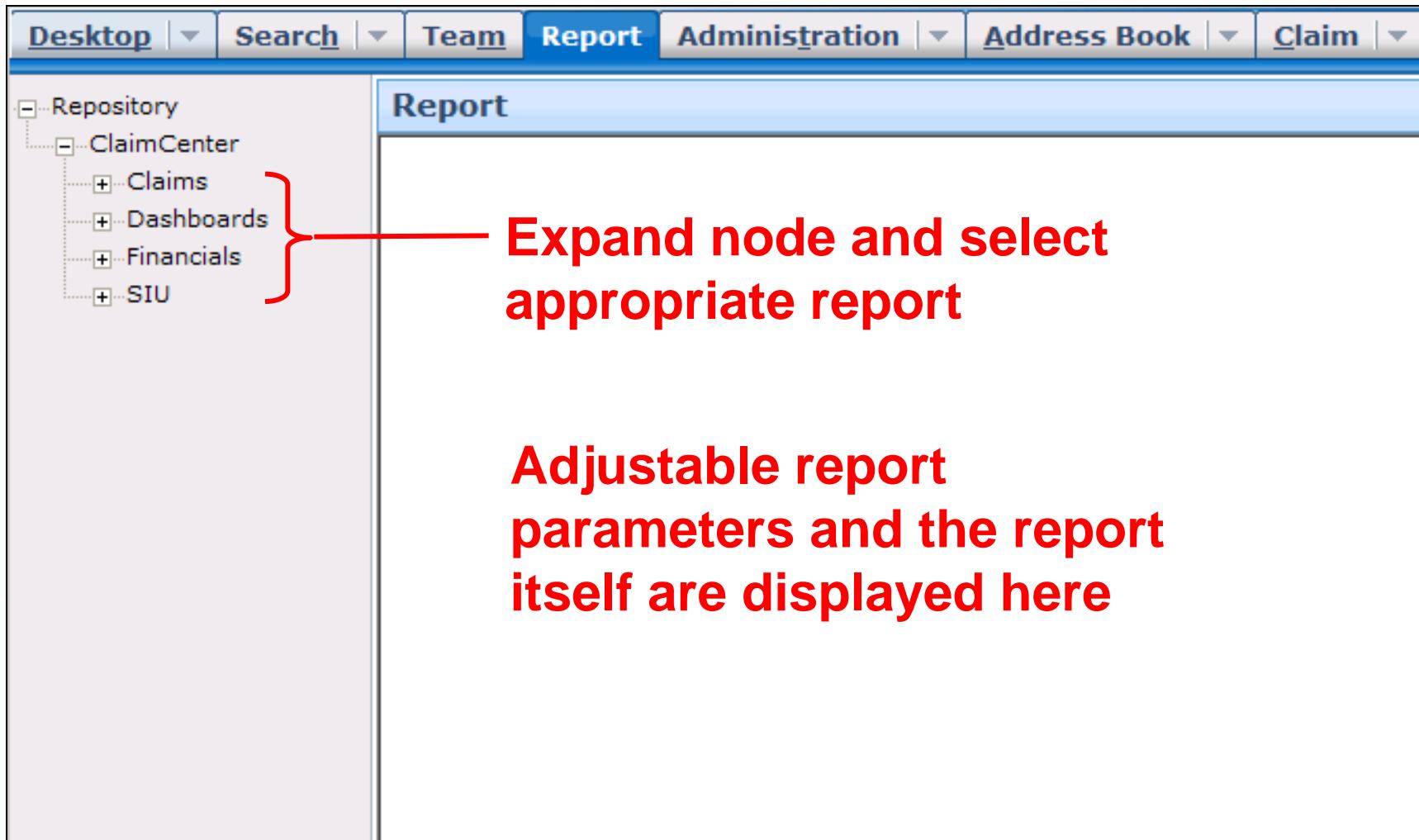
ClaimCenter Standard Reporting

- ▶ 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

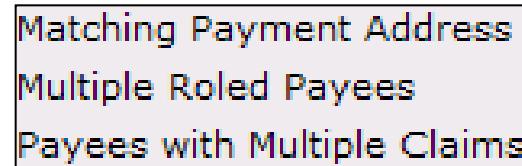
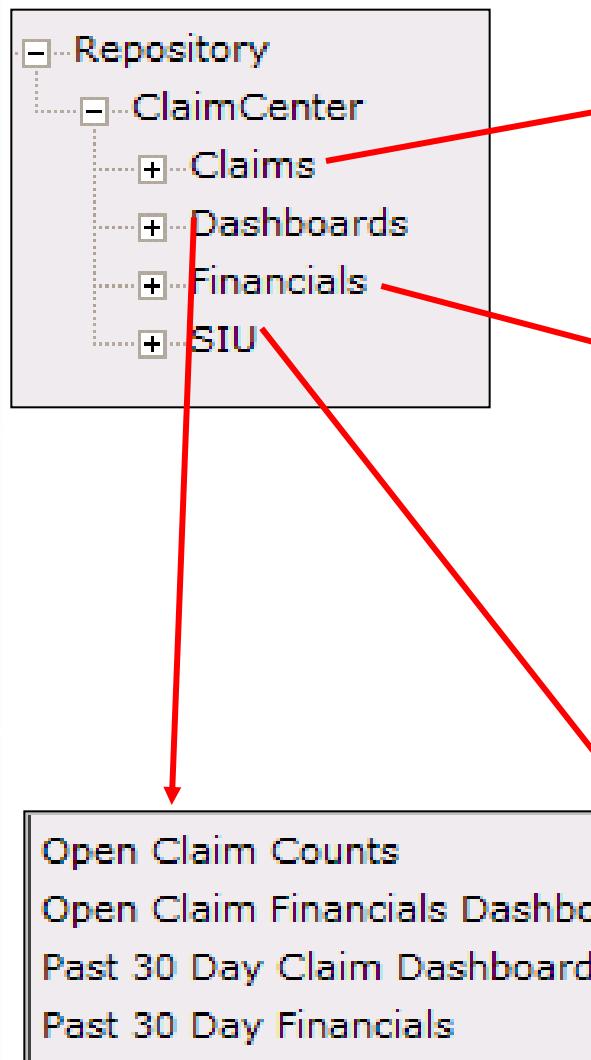
ClaimCenter Standard Reporting Architecture



The Report Tab



Reports in the Base Application



Sample Report Formats

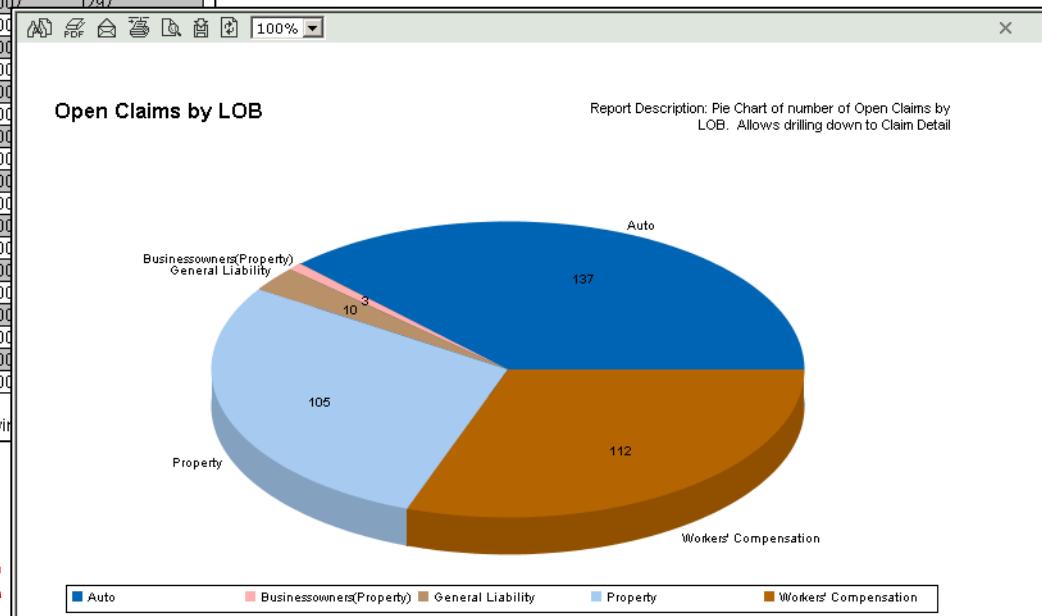
Overdue Activities

Group: US-MV 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	03/15/2007	296
Espinoza, Angel	000-00-100007	Review claim	03/12/2007	300
Espinoza, Angel	000-00-100007	Review claim	03/14/2007	299
Espinoza, Angel	000-00-100008	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100008	Review claim	03/16/2007	297
Espinoza, Angel	000-00-100009	Review claim	03/12/2007	298
Espinoza, Angel	000-00-100009	Review claim	03/15/2007	295
Espinoza, Angel	000-00-100010	Review claim	03/16/2007	294
Espinoza, Angel	000-00-100011	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100011	Review claim	03/17/2007	299
Espinoza, Angel	000-00-100012	Review claim	03/12/2007	300
Espinoza, Angel	000-00-100012	Review claim	03/16/2007	297
Espinoza, Angel	000-00-100013	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100013	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100014	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100014	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100015	Review claim	03/11/2007	300

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

Table format



Pie graph format

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

Report

Activity Group:

Activity Owner:

LOB:

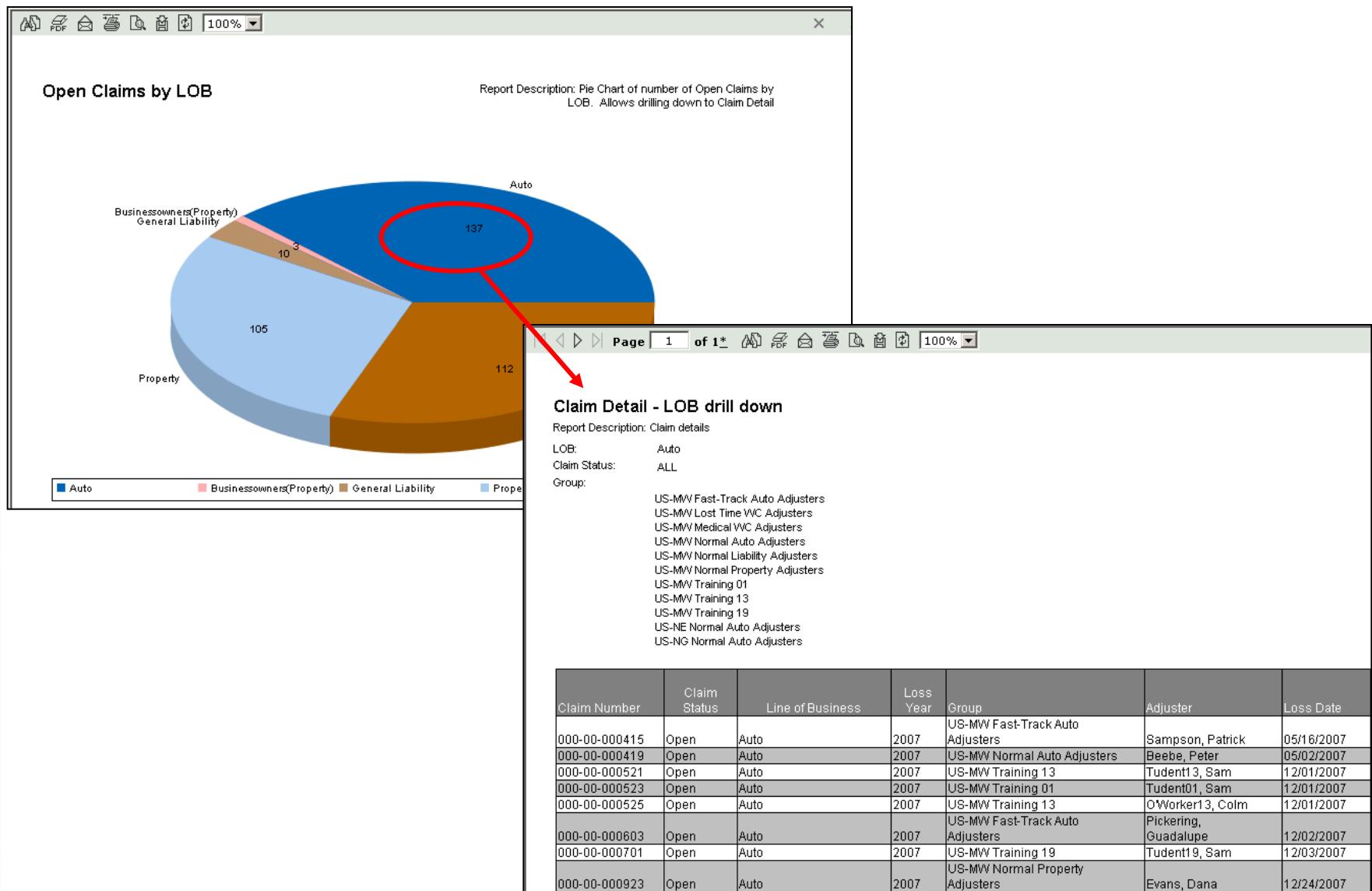
Loss Type:

Loss Cause:

Claim Number:

Days Overdue >= :

Drilldown Reports



Report Administration

The screenshot shows the Report Admin interface with two main tabs: "Permission Sets" and "Reports". A red arrow points from the "Reports" tab in the top window down to the "Reports" tab in the bottom window.

Report Admin (1 - 2 of 2) - Reports Tab (Top Window)

Sync		Delete	Toggle Document Report Status
<input type="checkbox"/>	Report		Removed
<input type="checkbox"/>	ClaimCenter		
<input type="checkbox"/>	Claims		
<input type="checkbox"/>	Activity List		
<input type="checkbox"/>	Claim Catastrophe Detail		
<input type="checkbox"/>	Claim Detail		
<input type="checkbox"/>	Claim Detail by Underwriter		
<input type="checkbox"/>	Claim Injury Detail		
<input type="checkbox"/>	Claims Aging		
<input type="checkbox"/>	Claims Processing Effectiveness		
<input type="checkbox"/>	Claims by Catastrophe		
<input type="checkbox"/>	Claims by Catastrophe Overview		
<input type="checkbox"/>	Claims by Injury Type		No
<input type="checkbox"/>	Claims without Updates		No
<input type="checkbox"/>	Current Overdue Activities		
<input type="checkbox"/>	First Payment Productivity		
<input type="checkbox"/>	Litigation Claim Detail		
<input type="checkbox"/>	Litigation Rate Trend		
<input type="checkbox"/>	Litigation Summary		
<input type="checkbox"/>	Loss Run		
<input type="checkbox"/>	Open Claims by LOB		
<input type="checkbox"/>	Overdue Activities		
<input type="checkbox"/>	Overdue Activities Rate		
<input type="checkbox"/>	Past 30 Day Claim Summary		
<input type="checkbox"/>	Reopened Claims List		

Report Admin (1 - 2 of 2) - Permission Sets Tab (Bottom Window)

Add Report Permission Set		Delete
<input type="checkbox"/>	Name	Reports
<input type="checkbox"/>	reportmanager	ClaimCenter/Claims/Activity List ClaimCenter/Claims/Claim Catastrophe Detail ClaimCenter/Claims/Claim Detail ClaimCenter/Claims/Claim Detail by Underwriter ClaimCenter/Claims/Claim Injury Detail

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

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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