Using Search in TAM Reports

SESSION HANDOUT

Prepared for Applied Client Network

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Target Audience:

X	Accounting		Account Executive
	Non-Insurance Accounting		Customer Service Representative
X	Administrative		New Producer
	Principal		Experienced Producer
	General		IT
	Human Resources		Other: (describe)

Seminar Type: Reports, Sales & Marketing

Seminar Level: Intermediate: An Intermediate level class takes the concepts originated from a basic level course, and adds more layers or parallel concepts. For functional courses, these classes will require the participant or attendee to have some basis to work from as they are learning new facets of the agency management system or software program.

Class Description: When a 'canned' TAM report doesn't let you get to the data that you want, then it's time to try the extremely capable, but somewhat more difficult to master, TAM Reports Search. Searches allow you to access almost any piece of data entered anywhere within the TAM system, and to output that information into a wide variety of formats for further manipulation and refinement. Attendees should leave this class with a clear understanding of what TAM Report Searches are capable of and enough understanding of the mechanics of the Search process to go back to their offices and begin experimenting on their own with confidence.

Learning Outcomes:

- Possess awareness of how the Report Searches in TAM expand ability to pull data from the system.
- Recognize the need for increased familiarity with criteria options when using a search as opposed to a canned report
- Demonstrate the ability to use the TAM Report Searches

Assumptions: This seminar is based on the following
TAM Version 12

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Introduction

One of the great things about TAM is the extremely well developed set of canned reports included at no additional cost for every single agency that uses it. A canned report gathers together data and then formats the output in a way that will make sense to even casual users of the system. But sometimes, there just isn't a canned report that will give us the information that we want. When such a situation occurs, it's time to at least consider reaching for a TAM Reports Search. Searches allow you to access almost any piece of data entered anywhere within the TAM system, and to output that information into many widely used file formats so that the data can be further manipulated or exchanged with other parties or software programs.

Basic Search Mechanics

In TAM Reports, Search is accessed by pressing its button on the main navigation toolbar running down the left side of the screen. From there, selections are made based on the information desired.

There are 4 tabs accessible when setting up a Search. In order to cover the basic mechanics of Search, this handout will start with a review of each of these tabs and the functions within.
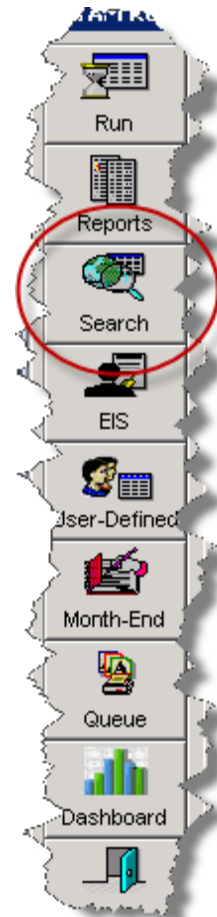
The Report Selection Tab

This is where you select the primary source for your data and what format you want your results to go to. There are 3 major areas you must make selections for here: Report Type, Report Choices, and Output Destination.

Report Type

In Search, the selection of Report Type is really the very highest level of source data that you will be using. Many of the data types you have available, like Activity data, can be entered into a variety of 'main' levels. Report Type is where you get to specify that you only want activities entered for customers or only for prospects or that you want any activity entered anywhere. Your selection at this highest level impacts what data file choices will be available to you later on in the selection process.
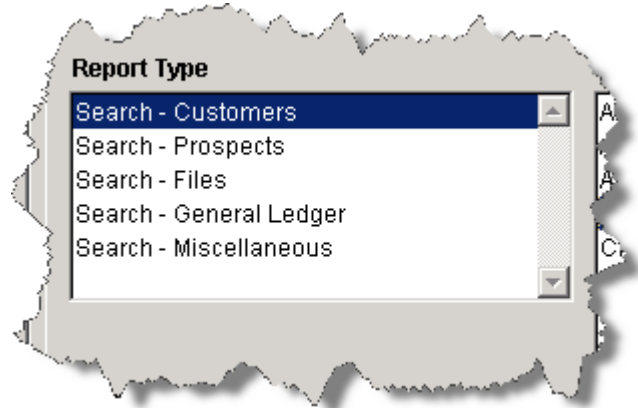
Search – Customers

This is your bread and butter search. Use it to get to almost anything that you've entered for a TAM Client. The only major omission is Custom Dec information.

Search – Prospects

This is the Prospect side equivalent of 'Search – Customers' above. If you use Prospects in TAM, learning how to use this area is not optional; you NEED these.

Search – Files

This is where you can get at the data stored on the main screens for the Files area of TAM. Unlike many other searches, these are somewhat limited in comparison to most of the other searches – but that is only because if you want a broader search on specific items entered that relate to a file type you can probably go and do a Search – Miscellaneous to get at it.

Search – General Ledger

This is where you can extract the data related to your General Ledger accounts & balances (the type of information you would see on an income statement or balance sheet), cash journal information & balances, or the detail for items that affect your general ledger balances (think Status of Accounts type info)

Search – Miscellaneous

There are many areas in TAM where a particular type of data is present for Customer, Prospects & Files. Activities, Attachments, Contacts & in a more limited sense Transactions are all examples of this. If you want your search to capture information for that type of data regardless of what main area of TAM it is associated with, then you need to start down here with Miscellaneous.

Report Choices

This is where you select the primary 'database' used to store information for the type of 'file' or information that you selected under Report Type. The vast array of choices here are a big part of what allow instructors on this topic to say things like "Searches allow you to access almost any piece of data entered anywhere within the TAM system". Even application and form data can be extracted using the selections available here. The only major data element that you won't find here is information contained within Custom Decs.
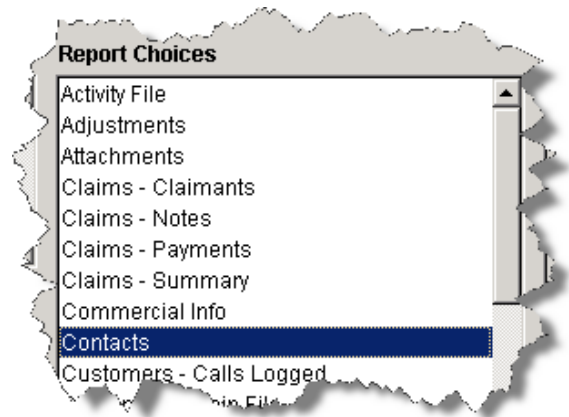
Output Destinations

Where do you want the data that you gather with your search to go? That's what you are deciding with Output Destination. It is exceedingly rare to find a 3rd party software package , vendor or service provider that can't or won't accept at least one of the file types you are able to create with the choices here. The most commonly used selections are:
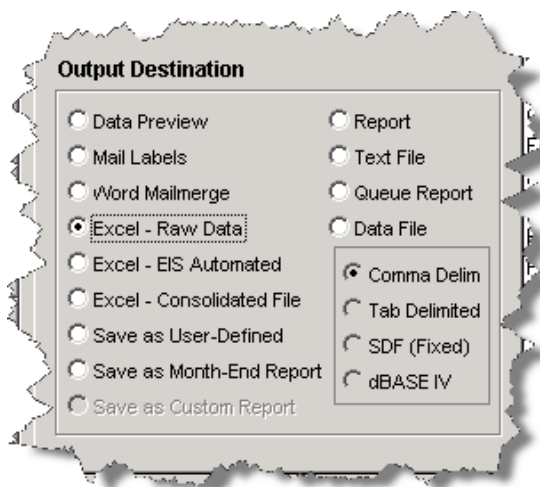
Data Preview

One of the main attractions of this data output option is that from here you can go on to "Edit Report Format" and construct a true custom report which can then be saved as a User Defined report within TAM. (This is a powerful feature, but not one that we will be covering in this class.) You can also preview the results of your search here, and then apply additional filter or sort options, and then sending the report on to another output destination.

Word Mailmerge

Don't use this. It's much better to use the TAM Reports Wizard which is much more functional, gives you the option to attach your generated documents and add activities automatically and is easier to use too. If you don't want to use the wizard, then consider sending your data into excel and doing the Word mailmerge yourself.

Excel – Raw Data

Does just what it sounds like; it takes the results of your search and sends it into a newly created Microsoft Excel file. It will create and even load excel for you. This is far and away the most popular, and arguably the most useful, output destination available.

Data File

Usually used when the desired result is to send your data to another software program or 3rd party entity that will be performing some sort of service for you with the data. Increasingly however, these programs or recipients will accept the file created using Excel – Raw data above.

Criteria

For the most part, the mechanics of selecting criteria in Search is just like it is in the canned reports. But there is an important difference; the canned reports, to some degree, enable even those TAM users with very little knowledge of how their agency management system operates or how their procedures impact that operation to still generate reports that will make sense. For many common uses, Searches are a little bit more demanding of the user.
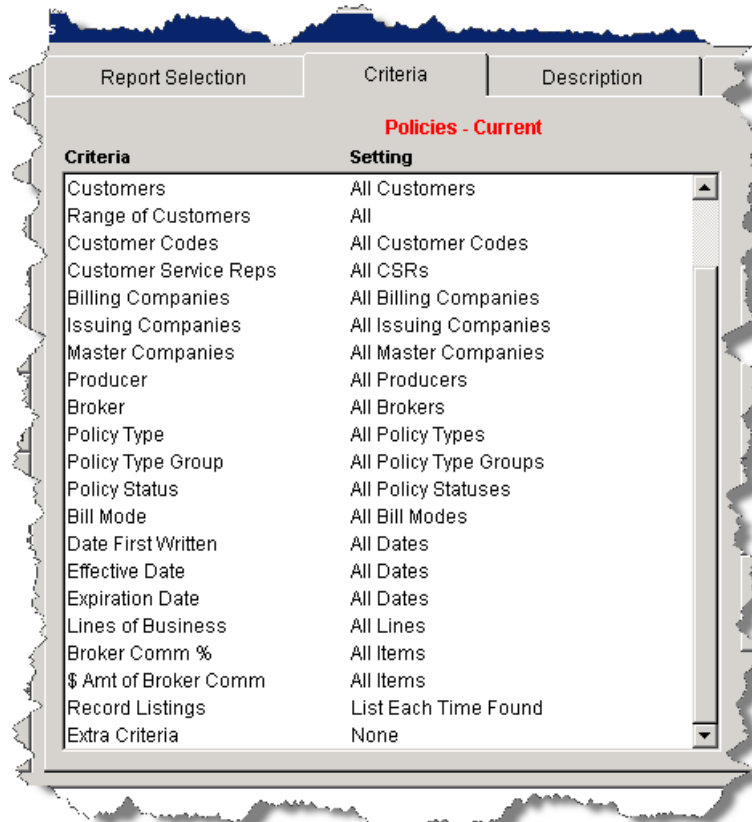
For example: The canned Book of Business has a criteria that allows the user to automatically exclude any policy billing screen that has a zero premium with a simple yes or no entry. And the criteria on the Book of Business report for Expiration Date is set to just exclude policies that expired in a previous month. These types of selections make running a basic Book of Business for only policies that are currently in force (the very definition of what a Book of Business should show) pretty easy. The Search of Policies Current has neither of these features to simplify getting a basic book of business report. So the 'Searcher' will need to work a bit harder on making sure they have the right criteria than the 'Reporter' does.

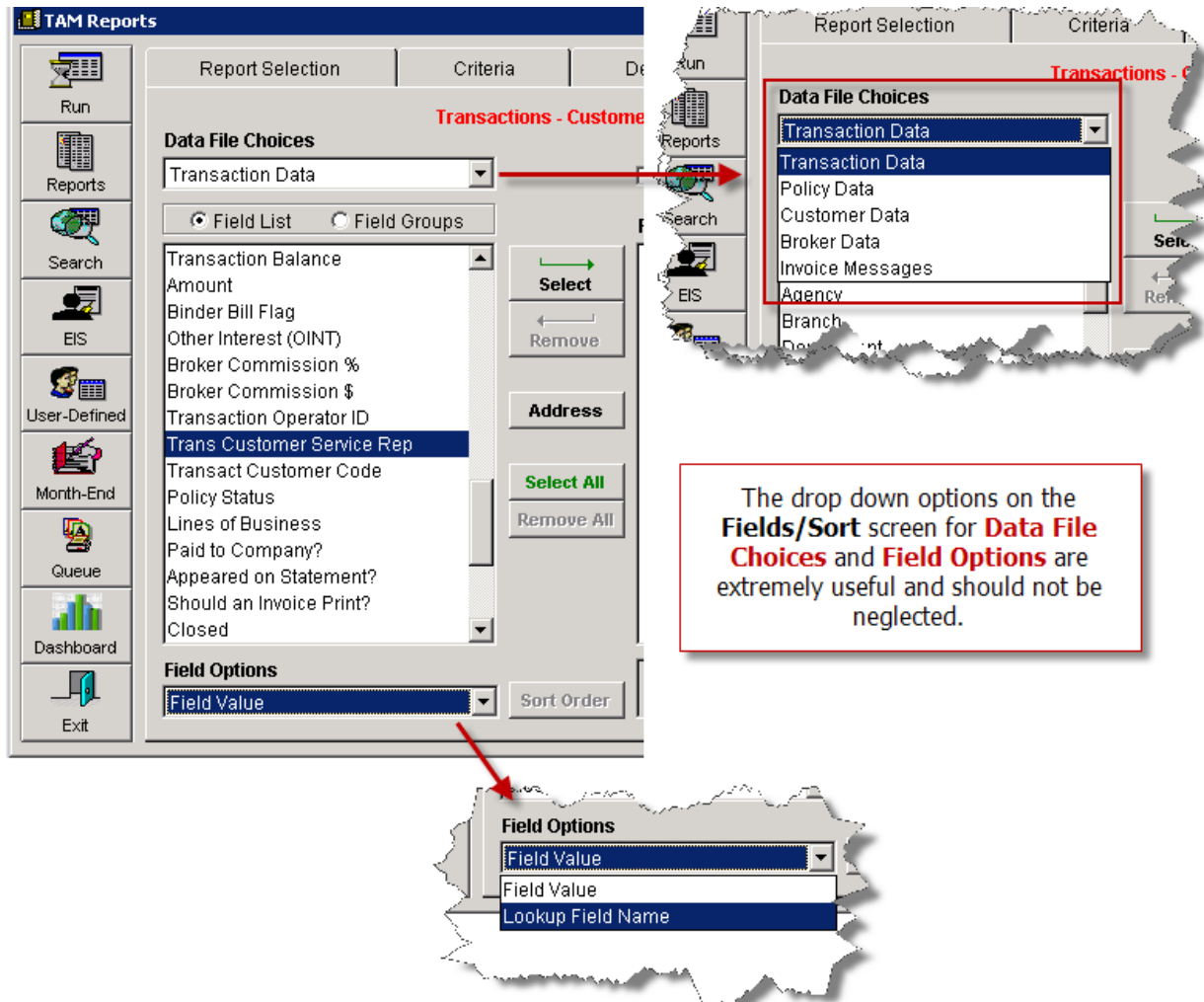The pay off for this increased awareness and diligence is that the Searcher will be able to get data out of the system that the Reporter cannot.

Description

While there are almost certainly uses for typing information into the Notes/Description area, the author of this handout has not yet discovered them.

Fields/Sort

This is the tab where a lot of the magic of Search takes place. The intent is pretty straight forward; you select the fields that you want included for each one of the records that will be sent to your chosen output destination.

The drop down options on the **Fields/Sort** screen for **Data File Choices** and **Field Options** are extremely useful and should not be neglected.

These options do not apply when running a Report, so this Tab is grayed out when not using Search.

There are 3 areas of particular importance that we will be looking at on this tab; Data File choices, the Filed List, and Field Options.

Data File choices

Remember back when you made your selection under "Report Choices"? Well, you're not limited to extracting data only from that one data source in all cases. For most of the more 'main stream' searches, you will find that you have access to other database fields here under Data File choices.

So if you've been frustrated by the way that a canned report doesn't export a piece of data like the full Customer Name, you can make sure that your Search does export it by going in and selecting that specific field once you change your data File choice over to "Customer Data" if it is an available option.

The ability to make a report choice such as Transactions - Customer, but then select a Producer or CSR Code from another screen so that information can be analyzed based not on the code associated with a policy at the time the transaction was entered but instead by who is assigned to that account or policy right now can be very useful.

Field List / Field Groups

The main reason you are here on this tab. You must select available fields displayed on the left and put them into the "Fields Selected" column on the right in order for that data to be included in the file you create with this Search.

Changing the radio button from "Field List" over to "Field Groups" will allow you to select multiple related fields at the same time.

Field Options

Use this drop down selection to change from "Field Value", which will extract just the code, over to "Lookup Field Name" when you want to extract the full name or description of the item in question. So if you don't want just the CSR code of AR, this is how you can instead extract AR's full name as entered in the CSR Field definition list of "Anne Richmond".


Save

While not strictly necessary, it's a good idea to use the Save button on this screen before running your Search. That way, if something causes your Search to not run successfully, you won't have to re-do all of your field selections and settings.

Special Searches

There are 3 Searches in the TAM system designed specifically to assist agencies in their account rounding efforts. They are designed to look for accounts that either have or lack specific combinations of coverage. Used properly, they can be very valuable and therefore have warranted inclusion in their own section of this document.
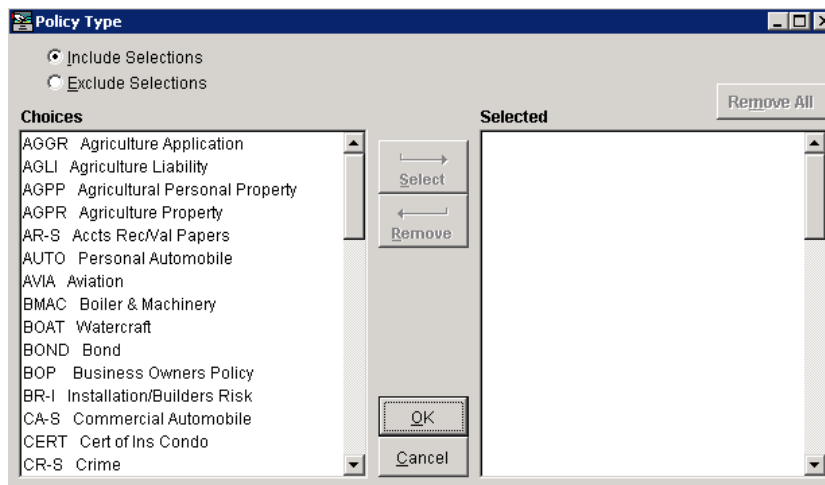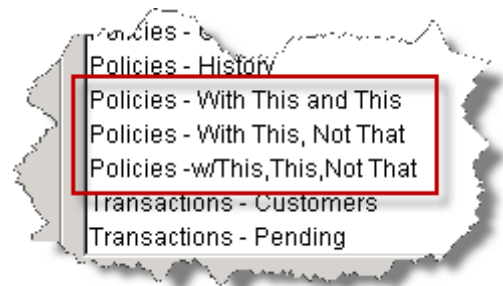
It's important to remember that for each of these reports, you can select multiple policy types for each of the "with" or "without" policy selection criteria provided. For example, when selecting the search of policies "with this and this", the first "you will be creating two separate lists of policies, each capable of having any policy type in your system in it.

Policies – With This and This

Used to find any client that has two specified policy types. In order to be selected as part of this search, the client must have at least one policy from each of the two policy list criteria.

Policies – With This, Not That

Used to find any client that has one policy type but not another policy type. This is the search that comes to mind for almost everyone when they first hear of this capability within TAM. Caution, those that have expired "W/o These Policies" will not pull because it found those policies.

Policies – w/This, This, Not That

Used to find any client that has at least one policy from two separate lists but no policies from a third list. So when someone wants to identify all of the clients for whom the agency writes a property coverage line and an auto coverage line but no excess liability coverage line, this is the search they are looking for.