

SESSION HANDOUT

Beyond the Basics with Applied Epic Reporting Part 1

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Prepared for Applied Client Network

Applied Client Network
330 N. Wabash Ave, Suite 2000
Chicago, IL 60611
Phone: 800-383-2952

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Beyond the Basics with Applied Epic Reporting Part 1



Original Author:

Joe Pratts, CIC
Christina Bavaro
Kathryn A. Boehl

Hoffman Brown Company
Applied Systems, Inc
Applied Systems, Inc

September 2014
September 2014
September 2014

Updated By:

Joe Pratts, CIC

Hoffman Brown Company

October 2015

Target Audience:

<input type="checkbox"/>	Accountant/Bookkeeper
<input checked="" type="checkbox"/>	CSR
<input type="checkbox"/>	Carrier
<input checked="" type="checkbox"/>	IT Manager/Systems Coordinator
<input checked="" type="checkbox"/>	Operations
<input type="checkbox"/>	Principal/Owner

<input type="checkbox"/>	Producer
<input checked="" type="checkbox"/>	Trainer
<input type="checkbox"/>	Vendor
<input type="checkbox"/>	ALL
<input type="checkbox"/>	Other: (describe)

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Seminar Type: Reports

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 or brokerage management system or software program.

Class Description: Discover how to take a basic layout and customize it to fit your Agencies' needs. We will take a closer look at the insert options under report layouts. You will learn how to add a logo, header page, colors, shapes, totals, sub-totals and instructions within your report to make reports presentable to share with your staff, clients and carrier partners.

Learning Outcomes:

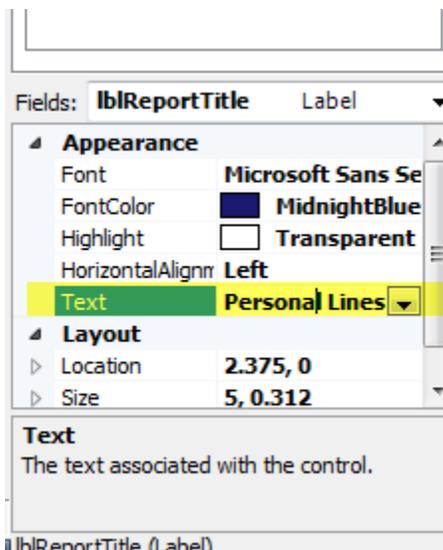
- Learn how to brand your reports and customize them to meet your agency standard.
- Demonstrate how to use all the different options under report layouts.
- Explain how to add Totals and Sub-totals to any report

Assumptions: This seminar is based on the following
Applied Epic 2014 MU8

Report Builder:

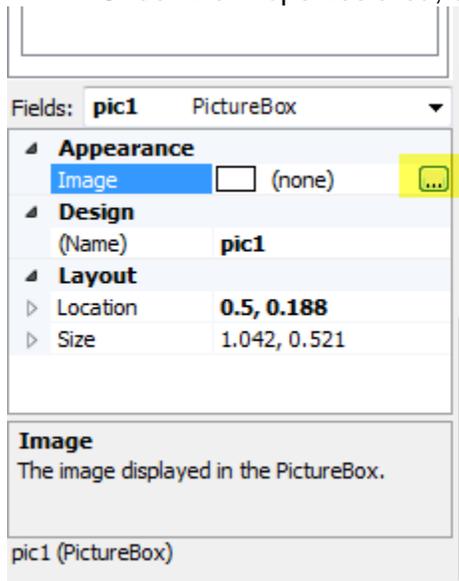
To add a Label

- Click the Insert tab
- Drag the Label to the desired area on the canvas
- Click on the Text field in the Properties area
- Type the desired text in the field



To add a logo:

- Click the Insert tab
- Drag a Picture Box to the desired area on the canvas
- Under the Properties area, click in the Image field to activate the ellipsis button.



- Click the ellipsis button
- Browse to find the image and click Open
- The picture box can be resized manually by using the handles around the image or by entering the correct size in the Properties area.



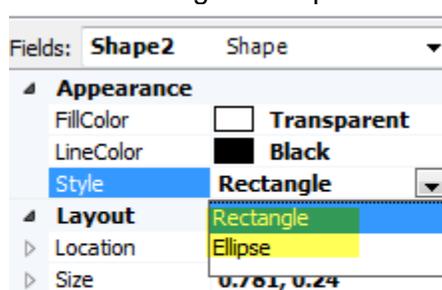
Client Code Client Name

Department: Commercial Lines

FRIEVIL-01 Pratts Cuban Bakery

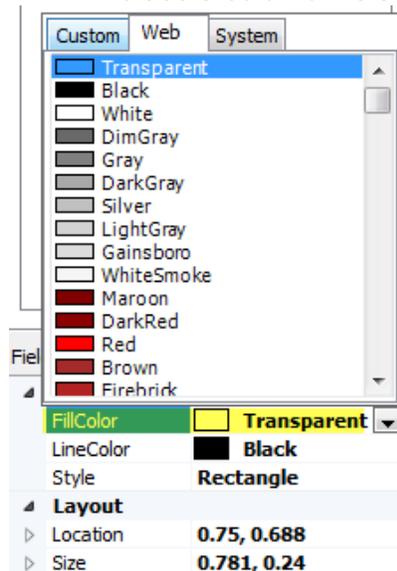
To Add Shapes and Colors

- Click the Insert tab
- Drag a Shape to the desired place on the canvas
- To specify the shape, click in the Style field of the Properties area and choose either Rectangle or Ellipse.



Style

- To size the shape, drag the squares surrounding it or type the correct numbers in the Size field of the Properties area.
- To add a color to the shape, click in the Fill Color and select the desired color



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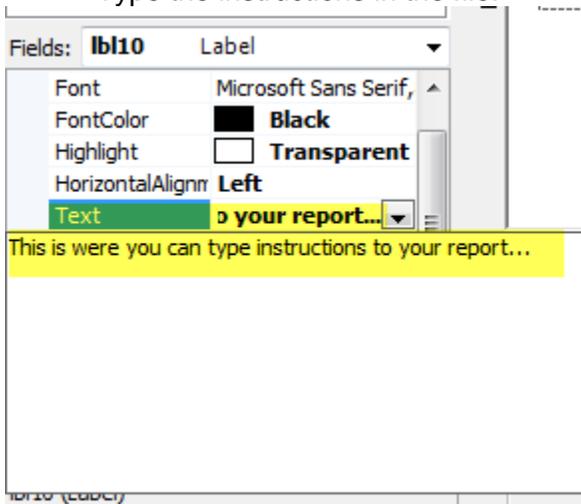
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Client Code	Client Name	Producer	Profit Center	Stage	Policy/Line
Policy Expiration Date: 9/5/2014					
NWAMANAZ01	Donald Duck	ACCH01	REG	Issued	HO-4
Policy Expiration Date: 9/6/2014					
MAIMANSH01	Donald Duck	ACCH01	REG	Cancelled	PAUT

To add Instructions to the report

- Click on the Insert tab
- Drag the Label to the desired area on the canvas
- Click the on the Text filed in the Properties area
- Type the instructions in the file.

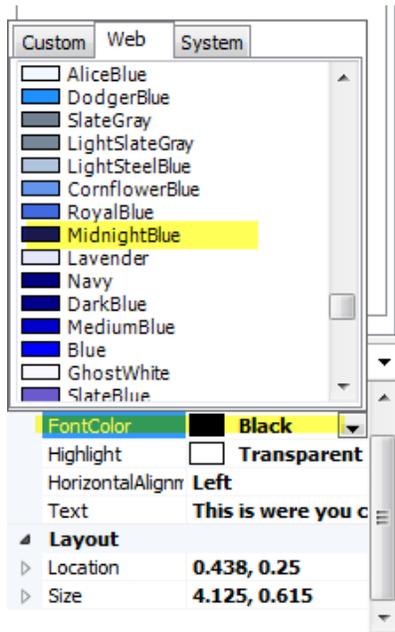


To change the color of the text

- Click the Font Color filed and select the color

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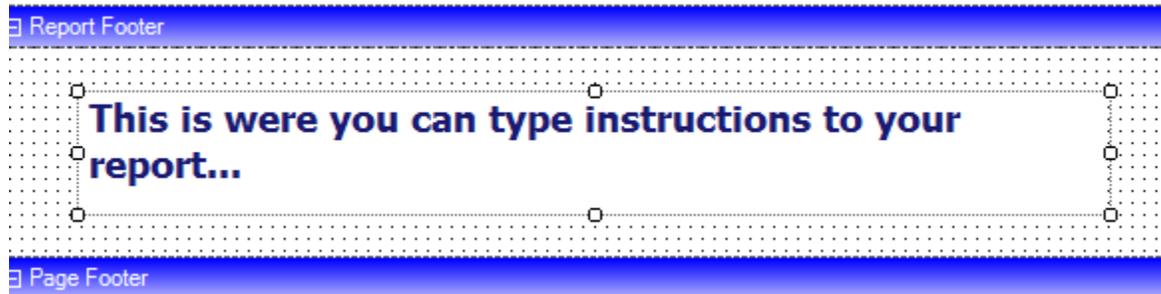
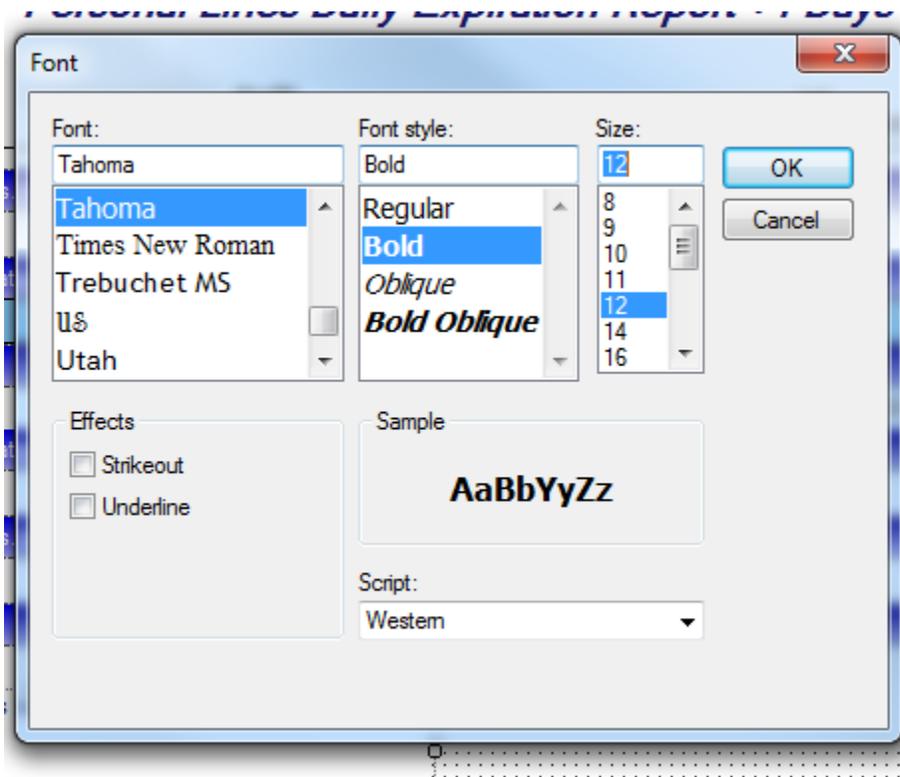


To change the Font

- Click on the Font field on the Properties area and click the ellipsis button.
- Choose the Font, Font Style and Size

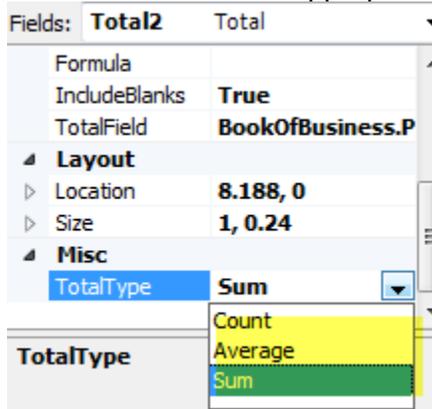
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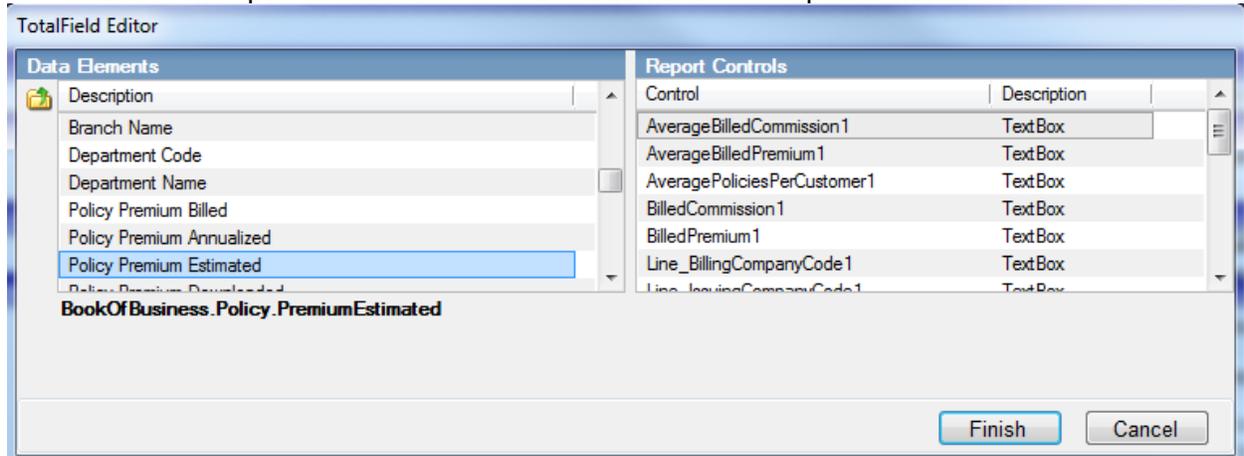


To add a Total or Sub-total

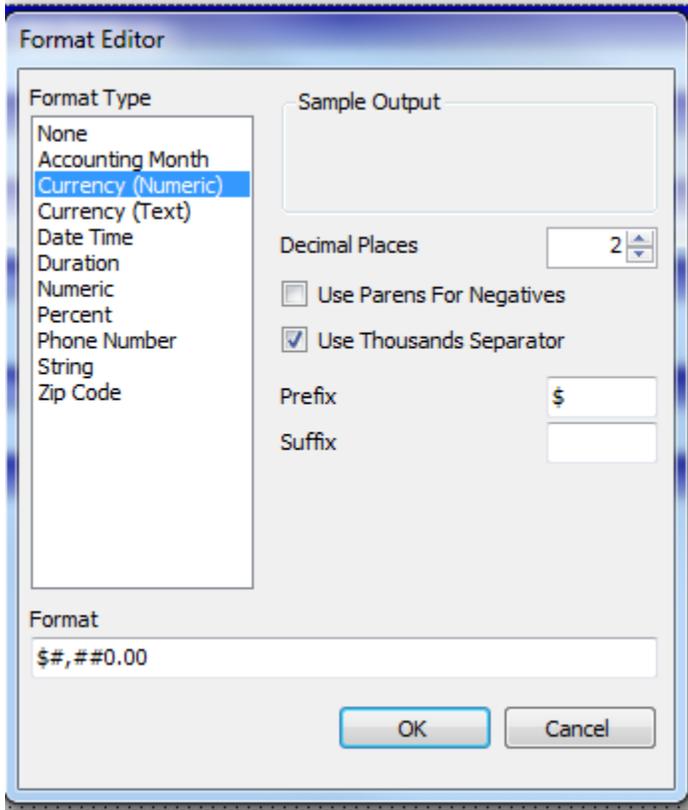
- Click the Insert tab
- Drag a Total to the desired area on the canvas
 Note: Total produces different results depending where in the report you place it. If you place the Total in the Major Sort, it returns the total only for that section, this could be a Sub-total. If you place the Total in the report footer, it returns a Grand total for the entire report.
- In the Properties area, click in the Total Type field to activate the dropdown menu and then make the appropriate section: Count, Average or Sum



- Next specify the criterion for which you would like the count, average or sum. To specify the criterion, click the Total Field Box, then click the ellipsis button. The Total Field Editor will open select the correct Data Elements or Report Controls and click finish.



- Click in the Format field of the Properties area and click the ellipsis button.
- The Format Editor window will open. Choose the correct Format Type, make other selections as appropriate and click OK
-



Major Sort: BookOfBusiness.Client.LookupCode Footer	
	:miumEstimated ssionEstimated
Major Sort: BookOfBusiness.ServiceRoles.ServicingRole1.Name Footer	
Name	:miumEstimated ssionEstimated
Report Footer	
Grand Total	:PremiumEstimated nmissionEstimated