# Beyond the Basics with Applied Epic Reporting Part 1

SESSION HANDOUT



Applied Client Network www.appliedclientnetwork.org



## **Prepared for Applied Client Network**

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## Updated By:

Joe Pratts, CIC		Hoffman Brown Company		
get Audience:				
Accountant/Bookkeeper			Producer	
CSR		Х	Trainer	
Carrier			Vendor	
T Manager/Systems Coordinate	or		ALL	
Operations			Other: (describe)	
Principal/Owner				
	Joe Pratts, CIC <b>get Audience:</b> Accountant/Bookkeeper CSR Carrier T Manager/Systems Coordinat Operations Principal/Owner	Joe Pratts, CIC Hoffman Bro Get Audience: Accountant/Bookkeeper CSR Carrier T Manager/Systems Coordinator Operations Principal/Owner	Joe Pratts, CIC Hoffman Brown C Get Audience: Accountant/Bookkeeper CSR X Carrier T Manager/Systems Coordinator Operations	Joe Pratts, CIC Hoffman Brown Company get Audience: Accountant/Bookkeeper CSR   Producer X Trainer Carrier T Manager/Systems Coordinator   ALL Operations   Other: (describe) Principal/Owner



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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

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## **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

Field	ds:	IblReportTitle Label	•
⊿	Ap	opearance	
	Fo	nt Microsoft Sans Se	e
	Fo	ntColor MidnightBlue	2
	Hig	phlight 🗌 Transparent	
	Но	rizontalAlignr Left	=
	Te	xt Personal Lines 💌	
4	La	yout	
⊳	Lo	cation 2.375, 0	
⊳	Siz	e 5, 0.312	Ŧ
Te The	xt e tex	xt associated with the control.	
INR	eno	rtTitle (Label)	





### 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.

4	Appearan		
4	Image	(none)	
	(Name)	pic1	
۵	Layout		
⊳	Location	0.5, 0.188	
⊳	Size	1.042, 0.521	
	3/18		

- 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.



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.

Field	ds:	Shape2	Shape	•
⊿	A	ppearance	2	
	Fill	Color	Transpa	rent
	Lin	eColor	Black	
	St	yle	Rectangle	-
⊿	La	yout	Rectangle	
$\triangleright$	Lo	cation	Ellipse	
$\triangleright$	Siz	e	0.761, 0.24	

Style

- To size the shape, drag the squares surrounding it or type the correct numbers in the Size filed 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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Client Code	Client Name		Producer	Profit Center	Stage	Policy/Line
Policy Expir	ation Date: 9/5/	2014				
NWAMANAZ01	Donald Duck		ACCH01	REG	Issued	H0-4
Policy Expir	ation 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.

Fields:	Ibl10 L	abel	•		
Fo	nt	Microsoft Sans Serif,	*		
For	ntColor	Black			
Hig	hlight	Transparent			
Ho	rizontalAlignm	Left			
Te	xt	o your report 👻	Ξ		
This is w	vere you can	type instructions to yo	our n	eport	
וטו בט קבע	JUCI)				

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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nt:	Font style:	Size:	
ahoma ähoma imes New Roman rebuchet MS & Jtah	Regular Bold Oblique Bold Oblique	8 9 10 11 12 14 16	Cancel
Effects Strikeout Underline	Sample AaBbYy2	Zz	
	Script:		
	western	•	

This is were you can type instructions to your report...



### 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

Field	ds:	Total2	Total	٦
	Fo	rmula		
	IncludeBlanks		True	
	То	talField	BookOfBusiness.P	
⊿	La	yout		
$\triangleright$	Lo	cation	8.188, 0	
$\triangleright$	Siz	e	1, 0.24	
⊿	Mi	sc		1
	То	talType	Sum 💌	_
			Count	7
То	talī	Гуре	Average	
			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.

Dat	a Bements		Report Controls		
3	Description		Control	Description	
_	Branch Name		Average Billed Commission 1	TextBox	=
	Department Code		Average Billed Premium 1	TextBox	
	Department Name		AveragePoliciesPerCustomer1	TextBox	
	Policy Premium Billed		BilledCommission 1	TextBox	
	Policy Premium Annualized		BilledPremium1	TextBox	
	Policy Premium Estimated		Line_BillingCompanyCode1	TextBox	
	Dalian Daamina Danada dad	T	Lina loguingComponyCode1	TextBox	
	BOOKUT BUSINESS. POIICY. Premium Estimated				



- Click in the Format filed 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

Format Editor		
Format Type None Accounting Month Currency (Numeric) Currency (Text) Date Time Duration Numeric Percent Phone Number String Zip Code	Sample Output Decimal Places Use Parens For Negative Use Thousands Separa Prefix Suffix	2 ★ ves tor \$
\$#,##0.00		
	ОК	Cancel

	Maj	ог	Sor	t: Bo	ook	DfBL	sine	ss.C	lient	.Loo	kup(	Code	Foo	oter								_	Jacobson																
																														<b>in</b>	niun	nEst	imat	ted s	ssio	nEsti	mat	ed	
	Maj	ог	Sor	t: Bo	ook	DfBL	sine	ss.S	ervio	eRo	les.	Serv	cing	Role	1.N	ame	Foot	er				Ċ	)		 			 		 									
																			 	 			Nan	ne						 em	niun	nEsti	imat	ted s	ssio	nEsti	mat	ed 🗄	
in and				:::	:::		:::			::::					:::				 	 	:::	:::	man		 	 	 		- 11										
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