SESSION HANDOUT

Beyond the Basics with Applied Epic Reporting Part 2

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Prepared for Applied Client Network

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Original Author:

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Updated By:

Joe Pratts, CIC

Hoffman Brown Company

October 2015

Target Audience:

	Accountant/Bookkeeper		Producer
Χ	CSR	Χ	Trainer
	Carrier		Vendor
	IT Manager/Systems Coordinator		ALL
Χ	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 add multiple layouts to one report. We will show you how to: Create summary reports that only show totals only on one layout and details on the other. Run financial and year-to-date reports with one layout for monthly and one for annual with results by department, branch or agency. Add reports to Agent Answer or Schedule reports that can be emailed on a daily, weekly or monthly basis.

Learning Outcomes:

- Learn how to use one report to run multiple layouts.
- Create Total only reports for your management team.
- Learn how to add reports to schedule reports on a daily, weekly or monthly basis.

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

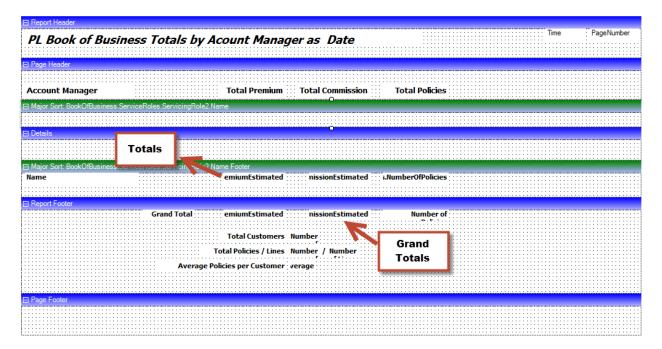


Create a Summary Report:

We will start with a Book of Business – Policy Book and we custom build a second Layout which will only display Totals.



We will show you how to add Totals and Grand Totals

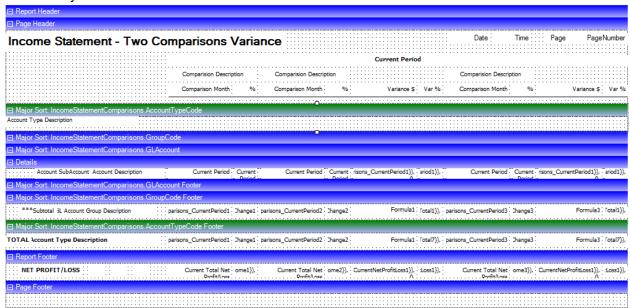




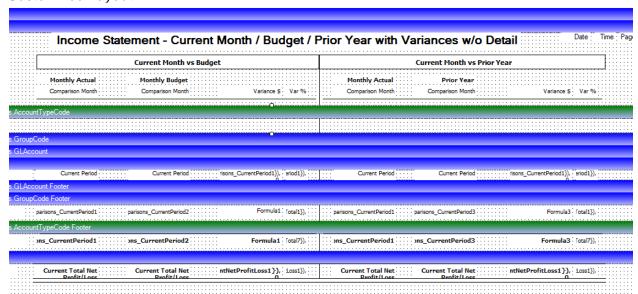
Use Multiple Layouts:

We will take an in-depth look at the General Ledger Income Statement – Comparisons and customize the Two Comparisons With Variances Current Period and Two Comparisons With Variances Year to Date.

Default Layout

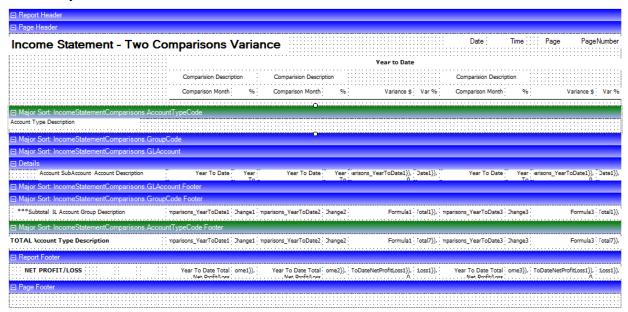


Customized Layout





Default Layout



Customized Layout

