New Report Module

Refer to On-Line help or our Help Desk at 1-800-767-2524 for assistance with the Reports available under the Reports tab until early 2005.

The following instructions pertain to the New Report Module tab.

Enhancements include:
- Various formats such as Excel, HTML, PDF and On-Screen
- Drill Down capability for selected summary reports
- Report Bursting which separates a report and emails to specified addressees
- Advanced sorts and filters
- Graphical representation of open claims on the Executive Summary sub-tab.

Basics of Navigation
2. Click on the Executive Summary sub-tab; two 3-D bar charts representing open claims displays.
   - The left side represents open claims by coverage type.
   - The right side represents loss types

Mouse over a column and the value displays

Click on a column representing a type of coverage

This chart updates to display financials based on Loss type

- Both charts are based on previous month-end financials.
- Click on the Domain button to request a new report
How to get around

- Icons with + (plus) signs are collapsed (closed) click to view contents.
- Icons with – (minus) signs are expanded (open) click to collapse.

Click on plus sign to open Standard Reports folder and select report type from list.

- Look for links, underlined items, which re-direct you to other functions.
- Return to the Executive Summary Charts by clicking on the Executive Summary sub-tab.
- Request new reports from the Report Listing sub-tab, then the Report Listing link if necessary.
- Click on the Library sub-tab to retrieve reports sent via library.
- Click on the Report Maintenance sub-tab to retrieve all other reports.

Example

The purpose of this example is to demonstrate the basics of New Report Module with step-by-step instructions on how to:

- Order a two line risk detail report and request that it be emailed
- Be notified if it fails to process
- View it
- Then request that it be updated monthly

Select Report type with Report Listing

Select the type of report you want to run. This is always done from the Report Listing Window.

1. If not already displayed, click on the Report Listing sub-tab.
Depending on where you are in the program you may need to click the **Report Listing** link, as shown below.

2. Open the **Standard Reports** folder by clicking on the plus sign next to it.

3. Open the **Claims** folder by clicking on the plus sign next to it.

4. Select the **Two Line Risk Detail** report by clicking on it.
Filters and Parameters

The **Advanced Listing** window appears

Choices here vary depending on the type of report selected

**Report Based On** – Accept the default of Division. The report’s main grouping will be Division.

**Roll-Up By** – Accept the defaults here in all three roll up levels. The report will be grouped by Location within Division, then by Location, then by Section.

Refer to page 50 in this document for more on these parameters.

**Valuation Date** - Default is always previous month-end. To choose an earlier valuation date type the month-end date or use the calendar icon to select.

**Available Filters** – Use filters to limit the type of claims to be included in the report.

An enhancement here and in the standard **Risk Detail** report is that you can now filter by loss, report and receipt dates.

For this example select all WC Indemnity claims since policy inception.

1. Select Loss Type by clicking on **Loss Type** under **Available Filters**
2. Click on **WC-Ind**

3. Click on the **Add button**
   - Change a filtering option by highlighting item in the View the Current Search Criteria area and clicking on the **Delete** button.
   - Clear all filters by clicking on the **Clear All** button.
   - Selected Filters determines the values listed under Available Values area.
   - A maximum of ten items can be selected for each type of filter; for example, ten states can be selected in addition to other filters.
   - Click and drag to select contiguous items.
   - Use the **Control** key and click to select non-contiguous items.

4. Click on the **Next** button.

**Delivery Options**
Options vary depending on the type of report selected.
The window below continues the example **Two Line Risk Detail** report.

Name the Report – for this example use the name **Sample**, even though up to 25 characters are allowed.
1. Report Format – Accept the default for this report. Available formats are HTML, Adobe Acrobat (PDF) or Excel, depending on the report.

2. Send Via – Click on the down arrow and choose email. Notice that the email form becomes enabled as soon as email is selected.

3. Interval – Accept the default of Once for this example. This where you would request monthly, quarterly, semi-annual, or annual updates.

4. Notify - click on this button to be notified of progress of report’s execution. For this example ask to be notified if report fails to process.

5. Click on the radio button for Error Notification Only.

6. Type a description such as Lost Time Claims or the Report Name in the Subject area.

7. Enter the email address for Notification delivery.

8. Click on the Submit button in the Notify Window. The Reset Button clears entries made here.

9. Click on the Submit button in the Delivery Options Window to send the report request.
The report is emailed and is similar to the example below.

Claimant Names are bolded for new claims reported the previous month.

**Modify and Re-Run a Report**

Continuing the example above, after reviewing the report you decide that you want an updated **Sample** report every month.

1. Click on the **Report Maintenance** sub-tab. All reports are listed here, except those prepared with the “on screen” option.

2. Click on the underlined report name, for this example it is **Sample**.
3. Under **Send Via** use the down arrow to select **email**
   Notice that the email fields become enabled as soon as email is selected.

4. Under **Interval** use the down arrow to choose **Monthly**.

5. Under **Start Date** enter the current date, or use the calendar icon.
   - Reports are valued as of previous month end
   - The day of the month entered here is the day it will run every month.

6. Under **End Date** enter date that the last report should run, in this case enter the 5th of next month (or use calendar icon).

7. The subject and message areas of the email form are available for your use.

8. Click on the **Re-Run** button and the maintenance window re-appears.

The report is generated every month and delivered to the email address entered above.

Claims reported since last month-end are highlighted in blue when viewed on screen.

This concludes the example. Please refer to the following reference section for more information on using the **New Report Module**.

**Reference**

The following reference covers the basics of requesting a report. Though several options are available, the process can be simplified to these steps in the following sequence.

2. Specify Delivery Options
   - Report Format - Excel, Adobe PDF, or HTML depending on report type
   - Delivery method – email, library or on screen
   - Frequency - Once or every month, quarterly, bi-annually, or annually

3. Retrieve Report by email or log-on to IntelliRisk NetSource and retrieve.
4. Re-run with modified delivery and/or format, if desired.

**Navigation**
The sub-tabs under the **New Report Module** tab are arranged like dividers in a notebook. Each sub-tab has a set of functions as described below.

The **Report Listing** sub-tab’s function is similar to the Menu in the previous release of IntelliRisk NetSource. Use this to select the type of report to run.

The **Library** sub-tab is the depository for reports sent via the library on the Delivery Options window. This is similar to the report request window in the Reports module.

The **Report Maintenance** sub-tab lists all reports, except when the **On Screen** option is chosen and the report is viewed only on the screen. This is similar to the Maintenance window in the Reports Module.

The first window that appears when logging onto IntelliRisk NetSource and clicking on the **New Report Module** tab is the **Reports Listing** sub-tab, as detailed in the next section.

Get a quick overview of open claims as of previous month-end by clicking on the **Executive Summary** sub-tab.
1. Mouse over a column to see the values.
2. The charts display information valued as of previous month-end.

**Report Listing**
1. The first step is to click on the **New Report Module** tab.
2. Then select report type from the **Report Listing** sub-tab, which can be accessed in one of three ways.

From the Executive Summary Chart. Click on the **Domain Button** and the list of reports slides out from the left side.
The **Report Listing** link directs you to the Report Listing Window throughout the New Report Module.

Another option is to click on the **Report Listing** sub-tab circled above. Depending on where you are in the program, you may be taken to the window above in which case you can click on the **Report Listing** link.

Open the Standard folder by clicking on the plus (+) sign next to it.

Each folder represents a category of reports, with specific reports within each folder.

Open a folder by clicking on the plus (+) sign next to it.
Report folders/categories are
1. Claims – Standard risk detail and summary, new abridged two line risk detail and more as shown above.
2. Litigation
3. Loss Control – Summarize by causes, injury types, body parts injured and new tenure at date of loss.
4. Managed Care Telephonic Case Management/Utilization Management – Status and details on WC cases managed by pre-injury consultants
5. Managed Care Bill Review – PPO penetration and provider bill audit reports
6. Managed Care - Lost time/return to work
7. Non-Occupational Disability
8. Point In Time Excel – Earlier than previous month-end valuation summary and detail reports, now do not require overnight processing.
9. Valuation Comparison – Summary and detail valuations at two points in time.

Advanced Listing Window and Report Organization
Once a report is selected from the Report Listing sub-tab, the advanced listing window displays. The choices here are based on the type of report selected.

“Report Based On” Parameter
Determines the main groupings of the report. For example, a Calendar Year Summary can be “based on” Accident State. The accident states would be listed with severity and frequency for each year.

- The parameter chosen under Report Based On can be used for bursting. It determines how the report will be separated and sent to recipients on the distribution list.
- Bursting applies to select reports.
Sort and Sub-total with Roll-Ups
Roll-Ups determine sub headings within the main grouping chosen in the Reports Based On field.

Filtering
If a report is not filtered then all claims reported since policy inception date for the selected account are included. Once a Report type is selected from the Report Listing sub-tab the Advanced Listing window appears with available filters for the selected report.

1. Click on the filter criteria under Available Filters. Values based on the selected filter are listed to the right.

2. Select values.
   - Up to ten items may be selected, for example, up to ten accident states. This can be combined with other items. Ten accident states and up to ten cause codes can be selected, for instance.
   - Click and drag to select contiguous items.
   - While pressing the Control key, click to select non-contiguous items.

3. Click on the Add button after each selection; the criteria moves to the white box labeled “View the Current Search Criteria” on the right side.
   - Delete individual criteria by highlighting and clicking on the Delete button.
   - Delete all criteria by clicking on the Clear All button.
   - The Report Listing link (circled above) in the upper portion of the window returns you to the Report Listing window so you can select another report and start over.
   - Click on the underlined report title (circled above) for a report description.

4. Click on the Next button.
The options below are covered here

1. **On Screen or Schedule** – Some reports can display immediately on the screen or be scheduled to run once, monthly, quarterly, bi-annually, or annually.
2. **Report Format** – Depending on the report selected the formats available are HTML, Adobe Acrobat, and Excel.
3. **Send Via** - Reports can be emailed or sent to the reports library.
4. **Interval** – A Report can be scheduled to run once, monthly, quarterly, bi-annually, annually.

### On Screen

The default is based on selected report. An **On Screen** selection allows viewing of summary reports immediately with the option of drilling down and downloading to Excel and/or Adobe Acrobat.

The **Schedule** option requires that you request the report and retrieve it from email or the library in IntelliRisk. Use this for reports that are to be emailed or updated on monthly, quarterly, semi-annually, or annually.

1. Click the **On Screen** radio button if not already selected. Select summary reports are available on screen.

2. Click on the **Submit** button.
The example shown here is a Loss Control report.

Click on the blue claim count to drill down.

Download the entire report by clicking on the XL (Excel) or PDF (Adobe Acrobat) link, in the lower left corner of the window.

Drill down to details related to a specific group of claims by clicking on the blue underlined claim count as shown above.

Another report displays with the details of the selected claims, as shown below.

Download detailed information by clicking on the XL (Excel) or PDF (Adobe Acrobat) link.
Order a report to run once or on a scheduled frequency.

1. Click on the **Schedule** radio button.
2. Name the report; up to 25 characters are allowed.
3. Choose Format by clicking the down arrow under **Report Format**. Formats vary based on type of report selected.
4. Choose email or Library by clicking on the down arrow under **Send Via**.
   - Library stores reports up to 90 days.
   - Choose email to have the report emailed to you and others that you specify.

5. Type an email address or click on the address book icon to choose an email address or distribution list to send to more than one recipient.
   - The Reply address field is populated with the registered IntelliRisk User ID. This also prevents replies to our mainframe.
   - The **Reply Address** can be changed.
   - **Subject**: This is available for your use
   - Message area is available for your use
   - Use the **Notify** button to be notified of the status of the report preparation.
   - The **Clear All** button erases choices
   - The **Cancel** button abandons the process
Save Email Addresses
Use the address book to save addresses and distribution lists.

1. Email must be selected under Send-Via.

2. Click on the address book icon. The Address book window appears.

3. **Display Name** field is used to enter a name for the person whose e-mail address you want to save.

4. Accept the default of email as the Delivery Option.

5. Tab to the white box next to **Email Address** and enter an email address.

6. Click on the **Add** button.
   - Notice the email address moves to the list in the lower part of the window.
   - Report Caster message may appear stating that the address was saved. Click on the X to close the message. The delivery options window re-appears.

7. Repeat for each person who should receive the report.
**Distribution List**

Use a distribution list to send reports to more than one person. Email addresses must be entered into the address book first, as shown above.

1. Click on the address book icon in the Delivery Options window.
2. **Display name** is used to enter name of the Distribution List.

3. Use drop down arrow next to email and choose **Distribution list**.

4. Click on the **Add** button and the window below appears.

5. Click on the address to add to the list so it is highlighted as shown here.

6. Click on the Right arrow so that email address moves to the right side of the window.

7. Repeat until addresses for all members of the distribution list is complete.
   - **Take an address off the list** - Highlight the address and click on the single left arrow
   - **Add all email addresses at once** - Click on the Right double arrow
   - **Erase all email addresses at once** - Click on the left double arrow.
8. Click on the **Save** button. The Address book window re-appears.

9. Select distribution list by clicking anywhere on the line that has list you want to use. It should be highlighted.

- **Modify** a distribution list by selecting and click on the **Modify** button.
- **Delete** a distribution list by selecting and clicking on the **Delete** button.

Click on the **Select** button The Delivery Options window re-appears. The **To:** field is populated with the distribution list name.
**Burst**

Selected reports can be emailed in sections to many email addresses based on various criteria, such as locations. In this example, the Safety Manager for the Watertown location is sent a section of the Return to Work report with claims only for Watertown. The Safety Manager for the California location is sent the section with only California claims.

1. **The Schedule radio button must be selected.**

2. **Email must be selected under Sent Via.**
   - If the **Burst Report** checkbox is disabled when Email is selected, the function does not exist for that report.
   - Depending on the selected report, it still may be sent using a distribution list.

3. **Click on the address book icon.** Email addresses for the report delivery will appear in the address book.
Following are instructions for creating a list of email addresses with corresponding criteria for separating a report and where to send it. In this example, the Watertown Return to Work claims will be sent to Safety Mgr 1 and the California Return to Work claims will be sent to the Safety Mgr 2.

1. Name the list **RTW** and click on distribution list from the drop down down arrow.

2. Click on the **Add** button.

3. Select email address from the left side under **Available E-mail Addresses**.

4. Under **Value** enter the Division Code for the section of the report being delivered to the selected email address.

5. Click on the single right facing arrow. The email address and division code are copied to the **Distribution List Members** area on the right side, separated by a comma.
   - Repeat for each email address receiving a section of the report
   - Send the entire report by selecting the email address and not adding the Division code.
   - Remove an address from the list by highlighting and clicking on the left facing arrow.
   - Remove all addresses from the list by clicking on the left facing double arrow.
6. When finished click on the **Save** button. The report caster message may appear stating that the list was saved. Click on the X to exit the message.

7. Select the list from the address book.

8. The **Delivery Options** Window re-appears. Submit the Report.
Retrieve a Report

There are four ways to retrieve reports:

1. Retrieve from the Library sub-tab if sent via Library on the Delivery Options window. Reports can be stored here for up to 90 days.

2. All reports can be retrieved from the Report Maintenance sub-tab, except those viewed with the “On Screen” option.

3. View reports immediately on the screen by choosing the On Screen option from the delivery window, if available.

4. Request that report be emailed when finished processing.

Retrieve Report via Library

The Library is a depository with storage up to 90 days of reports sent via Library.

1. Click on the Library sub-tab.
2. If the screen appears as below, click on the Library icon.
3. Click on the Claims globe.

- Reports sent via the library are listed here
- Reports sent via e-mail that are 2 MB or larger generate an email message with a link to the library tab.
5. Report folders are displayed after clicking on the globe.
   - Each folder can contain many versions of a report.
   - Most recent report in each folder is listed on the right side.

6. Open folder with report name and the contents of the folder are displayed on the right side. The first time a report runs there is only one version, as shown here.

7. Click on the blue number one; it opens and can be printed and saved.

- The Red X deletes the report
- The blue View displays all iterations of selected report, as shown below.

This is an example of a report that has been run three times, once in Excel and twice in HTML.
**Maintenance sub-tab**

Modify and re-run a report from the Maintenance sub-tab. Report formats and delivery options are modified and re-submitted for processing.

1. Click on the **Report Maintenance** sub-tab.  
   All reports are listed here, except those prepared with the “on screen” option.

2. Click on the underlined report name. 
   The Delivery Options window for the selected report appears.

3. Under **Send Via** use the down arrow to select **Email** or **Library**.

4. Under **Interval** choose the frequency of updates.  
   - If a frequency was selected under Interval, Under **Start Date** enter the date that the first report should run, keeping in mind that all reports are updated once a month at the end of the month.  
   - Under **End Date** enter the last date the report should run, this is optional.

5. Enter email address or choose from address book.

6. Click on the **Re-Run** button and the maintenance window re-appears.  
   The report is re-submitted based on the options above.

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**Retrieve a Modified Report**

Follow these instructions to retrieve a report that was modified and sent via the **Library**. Reports sent via email can be retrieved from the email address or the **Maintenance** sub-tab.

1. Click on the **Library** sub-tab.
2. Click on the folder with your report name on the left side of the window.

Both reports are listed on the right side with information on the date of execution, formats used, and version number.

3. Click on the version number to view and print.
   - Delete the report by clicking on the red X, if desired.
   - Select another report from the list on the left side of the screen and notice changes on the right side of the window.