



User Guide: **Interactive Reporting**

Creating Template Based Ad-Hoc Reports

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Contents

- Overview 4
- Getting Started 5
 - Configuring Producer Manager to Enable Interactive Reporting 5
 - Granting a Producer Manager Role Interactive Reporting Permissions 5
 - Roles in the Interactive Reporting Portal 5
 - Assigning Model Permissions in the Interactive Reporting Portal 6
 - Navigating to the Interactive Reporting Interface 6
- Basics of the Interactive Reporting Portal 7
 - What is a Report Template? 7
- Creating a New Template 8
- Edit Template Information 9
- Edit Template Content 10
 - Top Bar Key 10
 - Auto Refresh Mode in Interactive Reports 11
 - Columns 11
 - Creating Columns 11
 - Deleting Columns 12
 - Groups 12
 - Creating Groups 12
 - Removing Groups 13
- Filtering 13
 - Creating Filters 13
 - Creating Date Filters 15
 - Creating Advanced Filters 15
 - Deleting Filters 15
- Prompts 16
 - Creating a Prompt 16
 - Editing a Prompts Parameters 16
 - Deleting a Prompt 18
- Summary Functions 18

Using a Summary Function.....	18
Aggregate Functions	19
Using an Aggregate Function	19
Formatting and Page Layout	19
Editing Template Headers and Footers.....	19
Editing the Report Title.....	20
Changing a Column Header Name	20
Editing Report Fonts.....	20
Applying Copy/Paste Formatting	21
Formatting Numeric Values	21
Changing Page Format and Orientation	21
Generating Interactive Report Output.....	22
Exporting a Report.....	22
Scheduling a Report	23
Deleting a Template.....	26
Copying a Template	26
Sharing a Template	27
Copying a Shared Template	29
Viewing a Shared Template	30
Unshare a Template	31

Overview

What is Interactive Reporting

Interactive Reporting in Producer Manager gives users the ability to create flexible reports with custom criteria and output, helping to streamline operations and ensure regulatory compliance.

Interactive Reporting allows users to customize report content, report layouts and data display as well as choose from multiple export options.

What are the suggested ways or recommendations while designing or exporting a report?

Created template can be exported or scheduled based on users need. User can export it using Run Now or can schedule to run on future date based on calendar using Schedule option.

When designing a report like Year End Reports etc., we should apply required filters on the fields pulled in designer page so that it reduces impact on server and improves performance of the report

Export Recommendations:

- For reports where rows are expected to be over a million, PDF is the only choice. Eg: Year End Reports
- For reports expected between 100K to 1 M, CSV is a faster choice, while excel can also be done.
- For reports with less than a 100K excel is the recommended option when csv and pdf can also be done.
- Note: Excel maximum row limit is 1,048,576.

Getting Started

Configuring Producer Manager to Enable Interactive Reporting

To grant access to Interactive Reporting functionality, a user needs a Producer Manager account with a role configured with Interactive Reporting permissions. In addition, the user will need to have a Sircon user account with the *Reporting User* role in the reporting portal with the appropriate data model permissions.

Granting a Producer Manager Role Interactive Reporting Permissions

To make Interactive Reporting functionality available in Producer Manager for a user, the user must have a role with the Interactive Reporting permission.

To enable the Inactive Reporting Permission, first navigate to the *Maintain a Security Role* page by selecting Administration then *User Security* drop-down in the top navigation bar.

From the *Select Security Role* page, either choose an existing role or create a new one.

Next, find the *Interactive Reporting* option under the Inquiries section of the *Maintain Security Role* page and check the box to enable Interactive Reporting for the selected role.

The screenshot shows a configuration page for a security role. On the left, there are several sections: 'All Reports', 'Appointment', 'Information', 'Interactive Reporting', and 'Producer Hierarchy'. On the right, there is a list of permissions, each with a checkbox. The 'Interactive Reporting' checkbox is currently unchecked and is highlighted in yellow. The other permissions listed are: All Reports, Appointment Confirmation Inquiry, Appointment Request Status Inquiry, Appointments By State Inquiry, Appointments by Type Inquiry, Business Unit Appointment Termination Inquiry, Company Appointment List Inquiry, Firm Associated Individual Appointments Inquiry, Individual Appointments Inquiry, Invalid Individual Licensee Appointments Inquiry, Firm Information Inquiry, Individual Information Inquiry, and License Renewals Due.

Section	Permission	Checked
Inquiries	All Reports	<input checked="" type="checkbox"/>
	Appointment Confirmation Inquiry	<input checked="" type="checkbox"/>
	Appointment Request Status Inquiry	<input checked="" type="checkbox"/>
	Appointments By State Inquiry	<input checked="" type="checkbox"/>
	Appointments by Type Inquiry	<input checked="" type="checkbox"/>
	Business Unit Appointment Termination Inquiry	<input checked="" type="checkbox"/>
	Company Appointment List Inquiry	<input checked="" type="checkbox"/>
	Firm Associated Individual Appointments Inquiry	<input checked="" type="checkbox"/>
	Individual Appointments Inquiry	<input checked="" type="checkbox"/>
	Invalid Individual Licensee Appointments Inquiry	<input checked="" type="checkbox"/>
	Firm Information Inquiry	<input checked="" type="checkbox"/>
	Individual Information Inquiry	<input checked="" type="checkbox"/>
	Interactive Reporting	<input type="checkbox"/>
Producer Hierarchy	License Renewals Due	<input checked="" type="checkbox"/>

Roles in the Interactive Reporting Portal

The *Reporting User* role grants a user access to Interactive Reporting capabilities. All Producer Manager users with the security role identified in the previous section will be automatically granted this role.

Assigning Model Permissions in the Interactive Reporting Portal

A *Model Permission* is a security authorization assigned to individual users to give privileges to see specific data elements in a report.

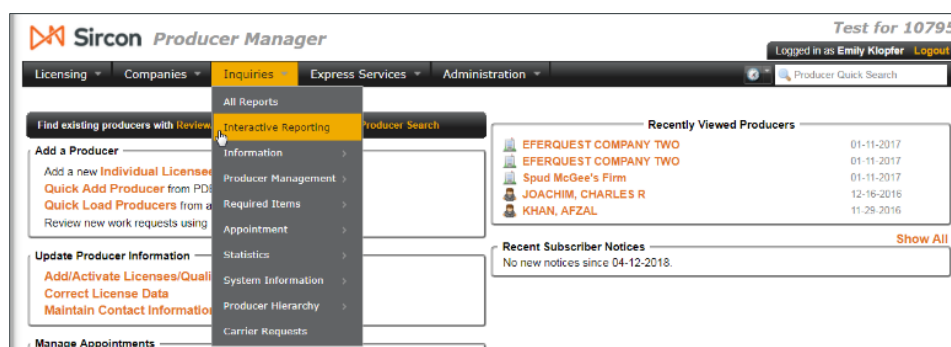
Currently there is only a single model permission: *Producer Licensing*. This model permission is automatically assigned to each user with the *Reporting User* role.

Navigating to the Interactive Reporting Interface

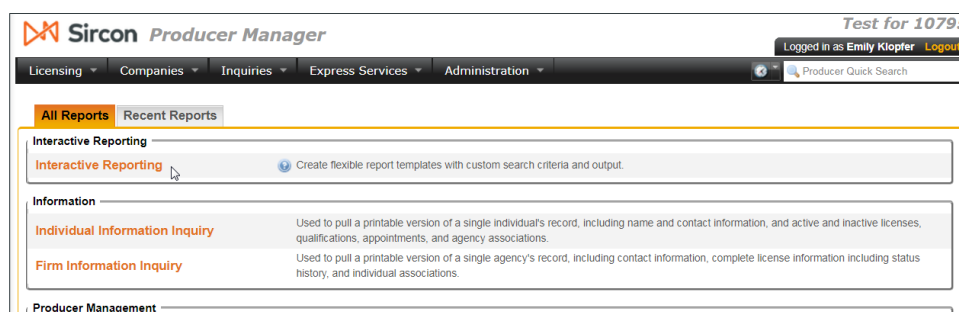
The Interactive Reporting Portal is accessed through single sign-on authentication from Producer Manager.

A user needs to first log into Producer Manager using their username and password. Once logged into the application there are two options to navigate to the Interactive Reporting Portal.

1. There is a link to Interactive Reporting in the *Inquiries* drop-down in the top navigation bar.



2. There is a link to Interactive Reporting on the *All Reports* page. To navigate to the *All Reports* page select *All Reports* from the *Inquiries* drop-down in the top navigation bar.



Note: Either link will open the Interactive Reporting portal in a new tab in the same browser as the Producer Manager application. Producer Manager will remain open both applications can be used concurrently.

Basics of the Interactive Reporting Portal

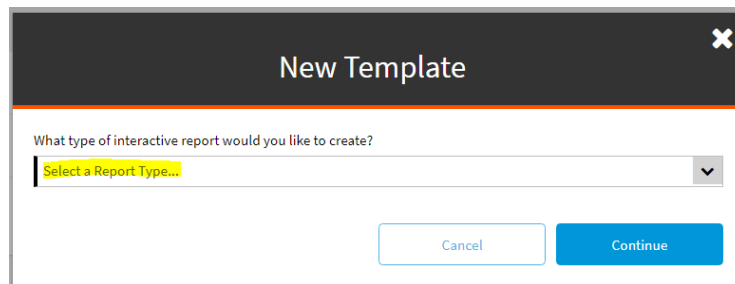
Once you have navigated into the Interactive Reporting Portal from Producer Manager, the Interactive Reports page will automatically open in a new tab in the browser.

This page is the Interactive Reporting Dashboard which is used to create and manage Interactive Reports Templates.

What is a Report Template?

A *Report Template* is an arrangement of data elements and formatting defined by either Sircon or an individual user that is used to generate report output.

A Report Template defined by Sircon is called *Report Type* and is selected when a user initially creates a new Template. The Report Type essentially defines the initial data elements and formatting for common use cases that a user can customize to fit their specific reporting needs.



An Interactive Report that a user creates is called a *Template*. A user-defined template has the following elements:

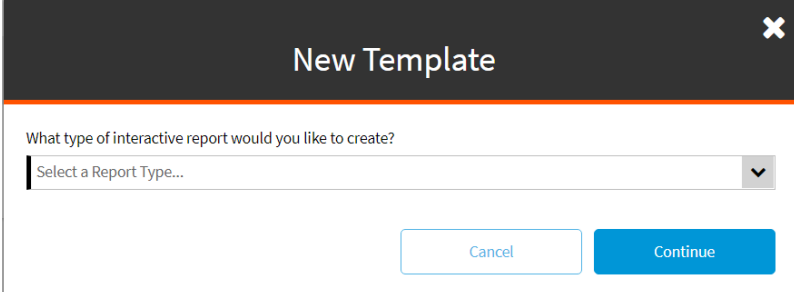
- Name (A unique identifier for the template)
- Creator
- Date Created
- Report Type (The Sircon defined template from which the template was modified)
- Description (Information on the purpose or instructions on how to use the report)



Creating a New Template

To create a new template, click the blue *New Template* button in the upper right hand corner of the Interactive Reporting page.

This will open a dialog box where you can select the *Report Type* from which the template will be created.

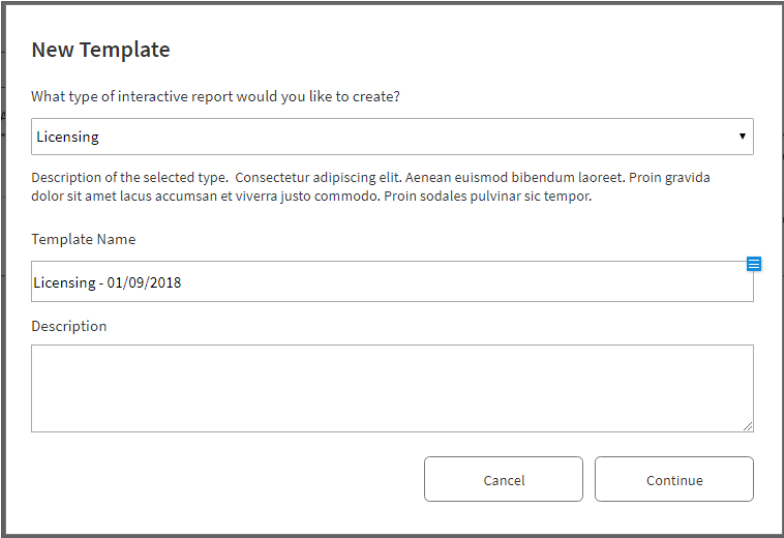


Next, choose a *Template Name* and *Description*.

The *Template Name* is a required field which must be unique. The Name field is seeded with the *Report Type* followed by the date.

Allowed special character list in template name-(!, @, \$, &, *, (), -, _ , +, =, :, ' , comma, dot, space, ~)

Not allowed special character list in template name (` , %, ?, <>,",{},[], #, ^, | , \ , / ; ,).



The *Description* is an optional free-form field that can be used to display additional information or instructions for the template.

Click *Continue* to create the new template. The template editor will automatically open so that you can immediately begin editing. Templates can also be opened by clicking on the name in the list of templates on the Interactive Reports page.

Edit Template Information

To edit template information, including Name and Description from the Interactive Reporting Dashboard, click the “...” option for the template which you would like to Edit Details in the *Templates* Widget. This will open a menu; select the *Edit Details* option.

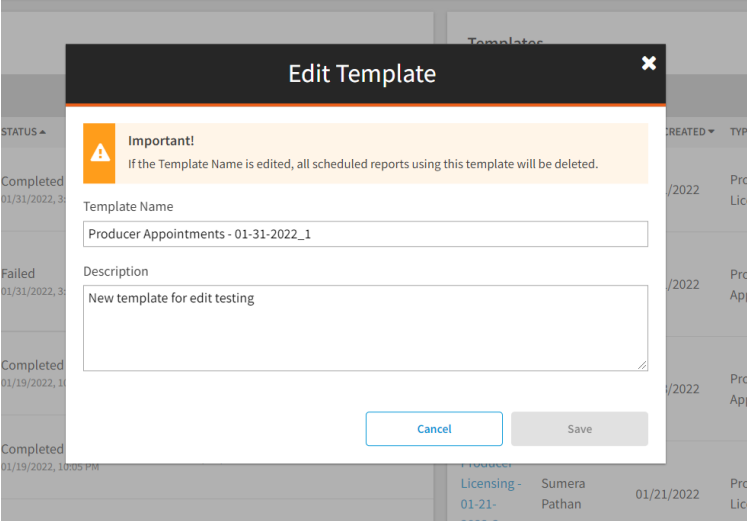
This will open a modal which allows user to modify the template name and template description. A message will also be displayed warning users that if name is updated then any associated scheduled jobs will be deleted.

The *Template Name* is a required field which must be unique.

Updating the Template Name triggers any associated

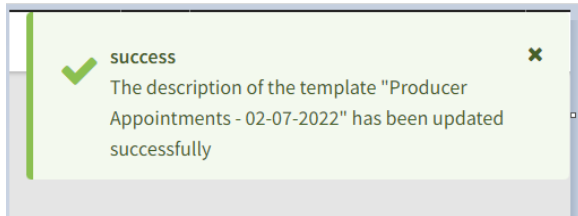
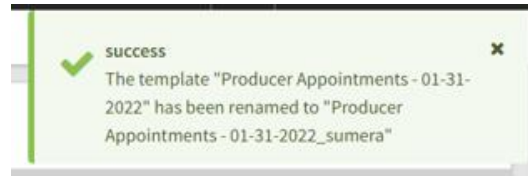
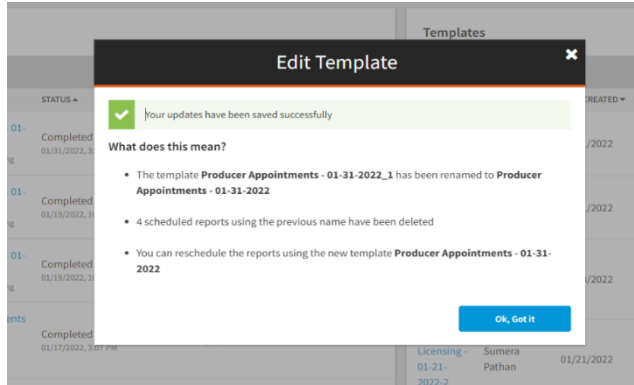
scheduled reports or completed reports associated with that template to be deleted.

Once creator clicks Save, the Template Name gets updated, and the creator receives a message describing the update.



The screenshot shows a modal window titled "Edit Template" with a close button (X) in the top right corner. Below the title bar is an "Important!" warning message: "If the Template Name is edited, all scheduled reports using this template will be deleted." There are two input fields: "Template Name" with the value "Producer Appointments - 01-31-2022_1" and "Description" with the value "New template for edit testing". At the bottom right are "Cancel" and "Save" buttons.

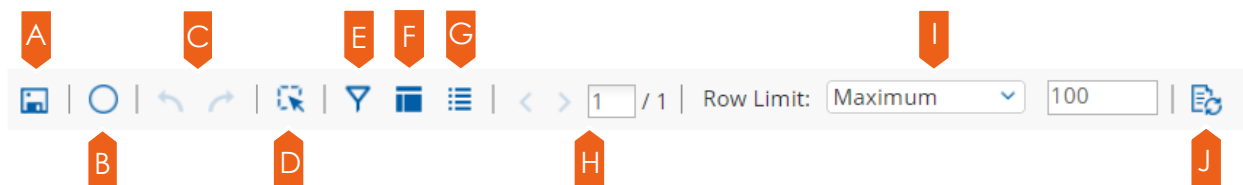
The *Description* is an optional free-form field that can be used to display additional information or instructions for the template. Updating Description does not affect the scheduled or completed jobs and the creator receives a message describing the update



Edit Template Content

Once there is a template, the next step is to modify the template by selecting data elements, filtering, grouping, and formatting for the report.

Top Bar Key



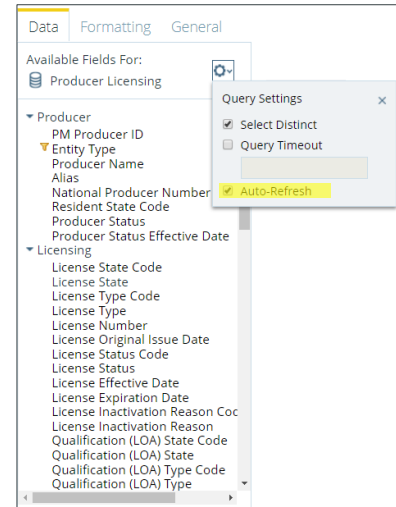
- A. Save Template
- B. Busy Indicator
- C. Undo / Redo
- D. Select / Deselect All
- E. Filters
- F. Layout
- G. Prompts
- H. Page Navigation

- I. Displayed Row Limits (this does not limit the report output, but only the content in the browser)
- J. Refresh Report Data

Auto Refresh Mode in Interactive Reports

When you disable the Auto Refresh mode in Interactive Reporting, you can design your report layout first, including calculations and filtering, without querying the database until you have completed making changes. When the report layout is complete, you can re-enable Auto Refresh mode. Data retrieval occurs once, and your report displays the requested data. Disabling auto refresh can improve performance by reducing the number of queries executed against the data source.

To disable Auto Refresh, click the small icon in the upper-right corner of the Data tab to open the Query Setup dialog box, then disable the Auto Refresh option.



To refresh the report when auto refresh is disabled, use the Refresh Report Data button in the Top bar.



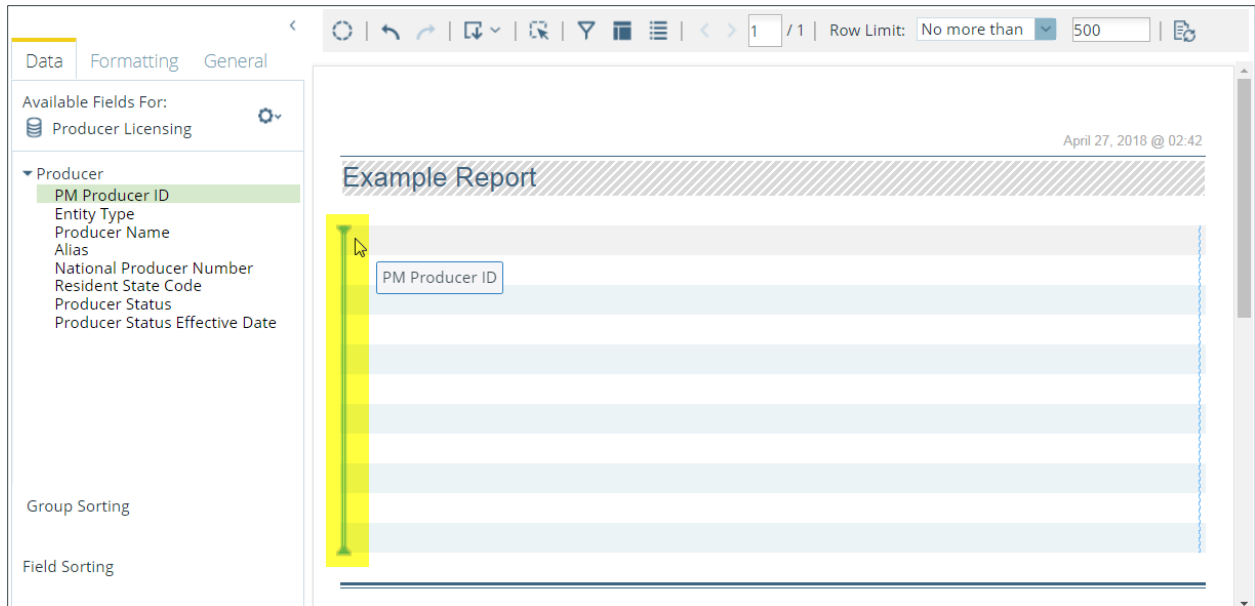
Columns

Interactive reports are built by clicking and dragging fields from your data source onto a report canvas to create columns.

Creating Columns

To add a column, click and drag a field from the Data tab in the left pane. Drag the field over the report canvas on the right until a vertical green line appears, then drop the field in place. The field becomes a column in your report. Alternately, you can right click and select *Add to Columns*. The column will appear in the rightmost position in the canvas.

You can rearrange the order of columns by clicking on the headers and dragging the columns to the right or left of their current location. When a green line appears, you can drop the column there. You can also resize your columns by selecting the bar to the right or left of the column header and dragging it until your columns are the correct size.



A list of columns in the report can be found in the layout section of the top menu.

Deleting Columns

To remove a column from the report, drag the column header from the report or from the Layout section to the trashcan that will appear in the bottom right had corner of the page. Columns can also be deleted by right clicking on the column header and selecting the *Remove* option.

Groups

Data can be organized in interactive reports by grouping fields, such as Entity Type or State. After you get your data organized into groups, you can sort the data by clicking on the arrows that appear next to the group names.

Creating Groups

There are a few different methods of adding Groupings to a template.

1. If the field you want to group by is already a column in your report, click the column header and drag it up above the other headers in your report. Release the mouse button once the horizontal green line appears.
2. If the field is not already a column in your report, drag it from the *Data* tab in the left pane. Drop the field in the space above the report headers. Alternatively, Right Click on the field you want to group by in the *Data Tab* in the left pane and select *Add to Groups*.
3. If you want to group data by more than one field, you can nest it into a group by dragging the field or column header beneath the original group. If you use Right Click to add more than one filter the most recently added will be nested beneath the preceding groupings.

Groupings are displayed both at the bottom of the left pane and in the layout section of the top menu.

The screenshot shows a software interface with a left pane and a main report area. The left pane has tabs for 'Data', 'Formatting', and 'General'. Under 'Data', there is a section for 'Available Fields For: Producer Licensing' with a list of fields including 'PM Customer ID', 'PM Producer ID', 'Entity Type', 'Producer Name', 'Alias', 'SSN / EIN', 'National Producer Number', 'Resident State Code', 'Resident State', 'Producer Status Code', 'Producer Status', and 'Producer Status Effective Date'. Below this is a 'Group Sorting' section with 'Producer Status Code' selected and 'Ascending' chosen. At the bottom of the left pane, 'Field Sorting' is shown with 'Producer Name' selected and 'Ascending' chosen. The main report area has a top menu with a 'Layout' section containing 'Groups' and 'Columns'. The 'Groups' section shows 'Producer Status Code' selected. The 'Columns' section shows 'PM Producer ID', 'Entity Type', 'Producer Name', and 'Producer Status'. Below the top menu is a message: 'The row limit has been reached, however you can keep working with this subset of data.' The main report area displays a 'Group Example Report' with a group header 'Producer Status Code: AC' and a table of data.

PM Producer ID	Entity Type	Producer Name	Producer Status
609417	Firm	1 2 3 ASAP BAIL LLC	Active
609412	Firm	123 ASSOC LLC	Active
613908	Firm	12 INTERACTIVE LLC	Active
519964	Firm	1717 BROKERAGE SERVICES INC	Active
528088	Firm	1717 CAPITAL MANAGEMENT CO.	Active
522939	Firm	1776 INSURANCE BROKERS	Active
68585	Firm	17TH STATE INSURANCE AGENCY INC	Active
47146	Firm	1-800-4-INSURE, INS SERV, INC	Active
30615	Firm	(198AJ) TOMMY R ROBERTS	Active

Removing Groups

To remove a group from the report, drag the group header from the report to the trashcan that will appear in the bottom right had corner of the page. Alternatively, the grouping can be dragged from the Layout section to the trashcan.

Filtering

Filters restrict or limit the data that is presented in an Interactive report. Any field can be used to create a filter.

Creating Filters

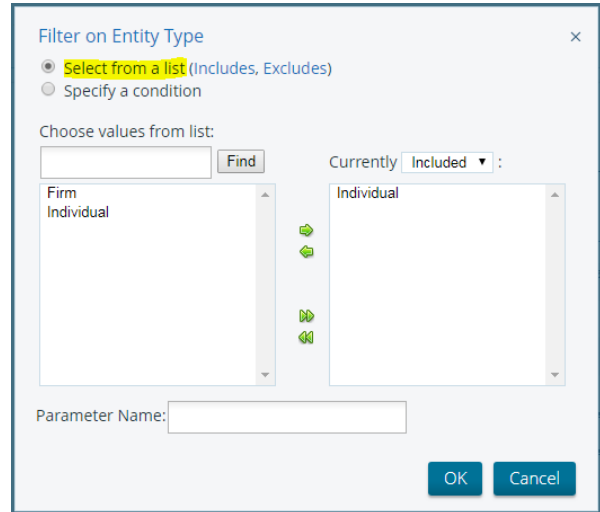
To create a filter first drag an available field into the Filter Panel in the top menu or right click and select *Filter*. The Filter dialog box appears. In the filter dialog box there are two options available for filtering: "Select from a List" and "Specify a Condition."

When using "Select from a List", notice that within the dialog box there are two boxes.

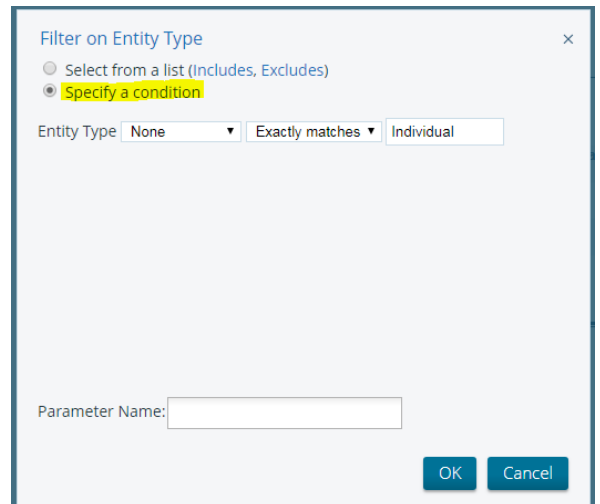
On the left is a box where all the possible values associated with the chosen field are listed. Above this box is a search box that can be used to find specific values from this list.

On the right is a box that will list all the currently selected values for the filter. Above this box is an option for the filter to either include or exclude the selected fields.

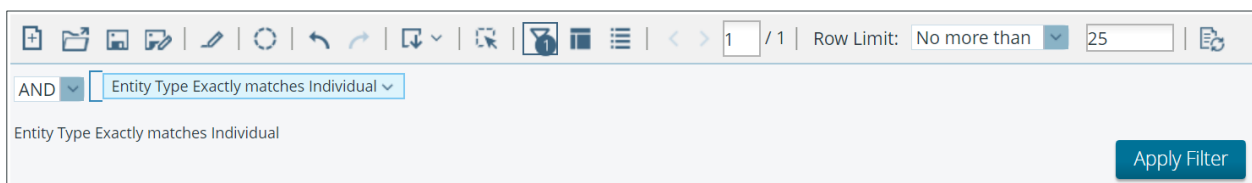
The green arrows add or remove the values from the right-hand list of selected values. Single arrows move highlighted values, which double arrows move the entire list of values.



When using the "Specify a Condition" option, there will be selection boxes that can be used to create the filter. The dropdown boxes specify some of the conditions of the filter while the last box is where you input the value that you want to filter on.



After selecting the values and criteria for the filter click "ok" at the bottom right. The report display updates as soon as the filter is added. The filter appears in the Filter box and an icon displays next to the field name in the Data tab. The number of filters added to the report appears next to the filter icon in the toolbar.

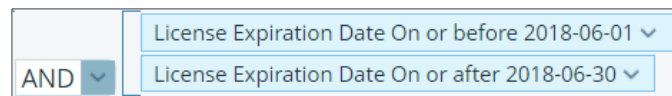


Creating Date Filters

To create a date filter, first click and drag a date field from the right pane into the filters area or right click and select filter. The Filters dialog box opens.

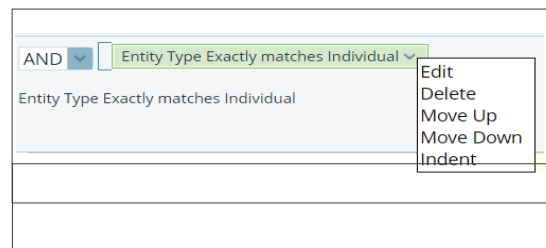
Next to the field name, choose a date constraint from the list, then click the small arrow on the right to display the date picker. To create a "date range" you must add two filters: one for the start date, and one for the end date.

The report displays updates as soon as the filter is added. The filter appears in the Filter box and an icon displays next to the field name in the Data tab. The number of filters added to the report appears next to the filter icon in the toolbar.

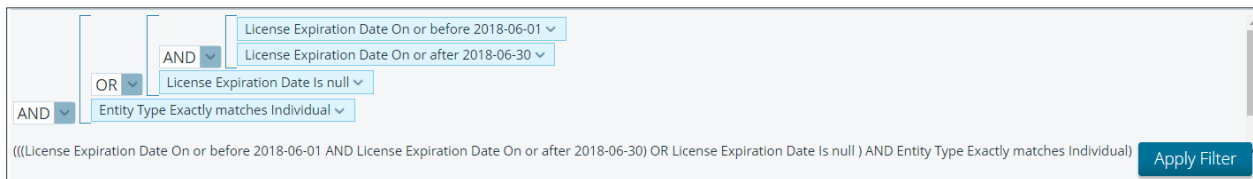


Creating Advanced Filters

Filter can be created using multiple groups of fields, rather than a single group of fields. Filters with multiple groups are called advanced filters. To create an advanced filter, drag the fields into the Filter Panel and click on the down arrow for a filter to move items into multiple groups by moving them up, down, and indenting them to create a hierarchy.



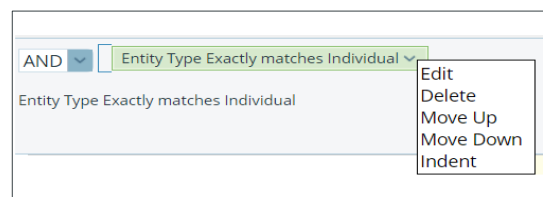
This example would result in all the individuals who either have a license that expired in the month of June 2018 or a license which does not have an expiration date.



Deleting Filters

To delete a filter, click the down arrow for the filter and select "delete".

Note that if you try to delete a filter that is in an invalid state, you will receive an error. You must fix the filter so that it is valid before being able to delete the filter.



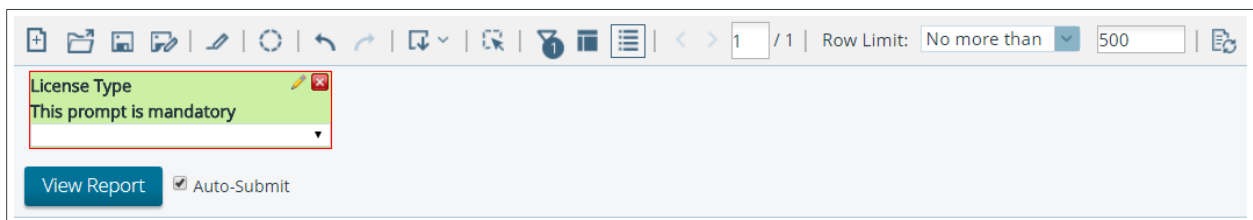
Prompts

Like filters, Prompts restrict or limit the data that is presented in an Interactive report. However, a prompt lists all the possible values that the field could be filtered through as an easily accessible control mechanism such as a drop-down list, radio button, or check box. This enables users to make filtered fields whose values are easily updated.

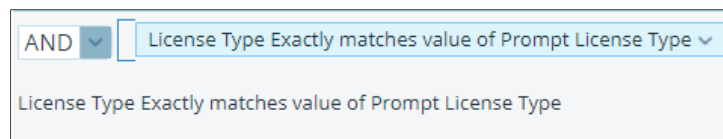
Creating a Prompt

To create a prompt, first drag an available field into the Prompt Panel in the top menu or right click and select *Prompt*. The field will appear in the top prompt menu.

When a prompt is created, it is defaulted to a drop-down and will prevent the report contents from being generated until one or more values are chosen.



Once a value is chosen a corresponding filter will be created in the top filter menu and applied to the report contents. This filter will correspond to the values chosen in the prompt.

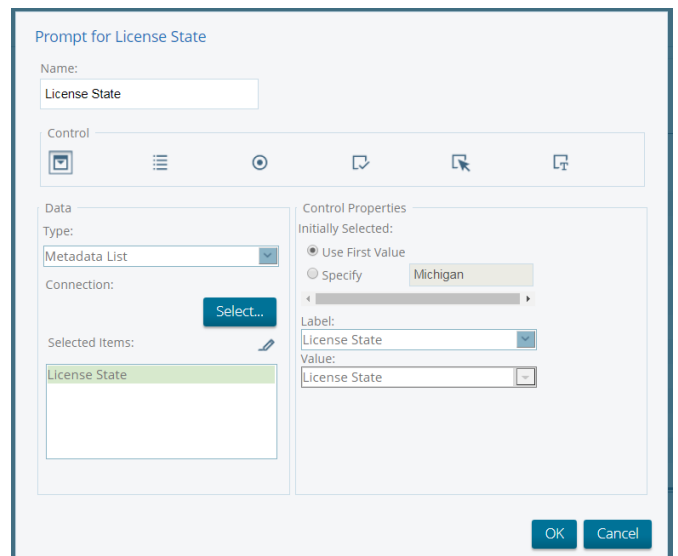


Editing a Prompts Parameters

To edit a prompt, first click the edit pencil in the upper right corner of the prompt. A prompt dialog box will open.

To change the prompt name, edit the text in the top Name field.

Control type affects the way that the values are presented. To change the control type, click between the options in the control section of the dialog box. Some of the options allow for single-select, while other options allow for multi-select.



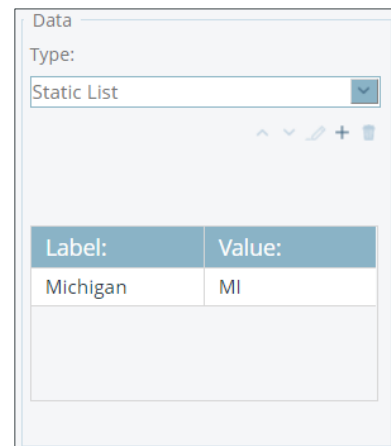
Below is a more detailed description of the types of controls that can be used by a prompt.

Control Type	Description
Drop-down	Users select a value from a drop-down list of options.
List	Users select a value from a scrolling list. This prompt control type allows users to make multiple selections.
Radio button	Users click a radio button to choose a value. You can set the radio buttons to display vertically or horizontally.
Check box	Users select a check box to choose a value. This prompt control type allows users to make multiple selections within a set of check boxes. You can set the check boxes to display vertically or horizontally.
Button	Users click a button to choose a prompt value. This prompt control type allows users to make multiple selections within a set of buttons. You can set the buttons to display vertically or horizontally.

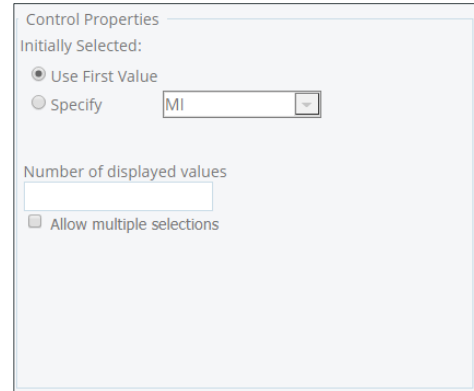
The Data section of the prompt dialog box affects what values are used by the prompt.

When Type is set to *Metadata* list the values are automatically generated from the list of all existing values.

When Type is set to *Static List* the user chooses both what values to include in the prompt as well as how those values will be represented. For example, if there is a row with Label set as Michigan and Value set as 'MI' then in the prompt will display to the user Michigan in the list of values, but the value that is compared against the data in the column will be 'MI'. To add a value to the list click '+' icon. To delete a value, click the trash icon.

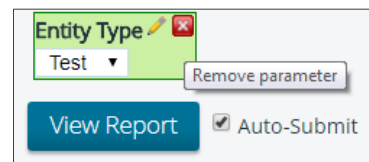


The Control Properties section of the prompt dialog box allows the user to further refine how the prompt displays and uses values. This section controls things such as what value to use first, whether to allow for multi-select of values, and the number of displayed values.



Deleting a Prompt

To delete a prompt click the red 'X' icon in the upper right corner of the prompt. This will remove the prompt but will not remove the corresponding filter. The Filter will be updated to reflect the last selection from the prompt.



Summary Functions

Summary functions can be applied to columns that contain numeric values in a report. A summary function is a summarization technique that performs calculations on values in columns, groups, or in the entire report.

Using a Summary Function

To use a summary function, first select the down arrow next to a report column that contains numeric values. Select Summary from the menu, then choose the summary type.

Summary Type	Description
None	No summary function assigned
Average	Calculates the average value in a given column
Count	Counts the items in a group or report, but does not require a numeric value.
Count Distinct	Counts the distinct occurrences of a certain value in a column; does not require a numeric value
Max	Identifies the highest or largest value in a column
Min	Identifies the lowest or smallest value in a column
Sum	Calculates a total sum of the group or report (group level, and running total in the report footer)

The results of a summary function will appear at the bottom of the report or grouping.

Aggregate Functions

Aggregate functions can be applied to columns that contain numeric and non-numeric values in a report. Aggregate functions return a single value (for example, Average, Maximum, Minimum), calculated from the values in a column. For example, the sum of a column results from adding all the values in the column.

Using an Aggregate Function

To use an aggregate function first select the down arrow next to a report column that contain values. Select Aggregate from the menu, then choose the aggregate type.

Aggregate Type	Description
None	No summary function assigned
Average	Calculates the average value in a given column
Count	Counts the items in a group or report but does not require a numeric value.
Count Distinct	Counts the distinct occurrences of a certain value in a column; does not require a numeric value
Max	Identifies the highest or largest value in a column
Min	Identifies the lowest or smallest value in a column
Sum	Calculates a total sum of the group or report (group level, and running total in the report footer)

The aggregate function will update the values of the selected column with the selected function.

Formatting and Page Layout

The Formatting tab in the left pane can change the appearance of a report, including font color, size, text alignment, background color options, and more.

The General tab in the left pane contains options for page size, orientation, and other formatting options.

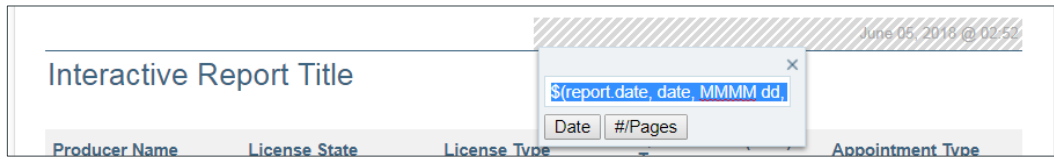
Editing Template Headers and Footers

To create the page headers, double-click the upper-left or upper-right corner of the report.

A pop-up dialog box appears. You can:

- Delete any existing words, or enter a new header and press <ENTER>.
- Click Date and press <ENTER> to insert a date and time stamp in the page header. The date and page count can be customized by adding text, such as, Today: \$(report.date), instead of using the default, \$(report.date).

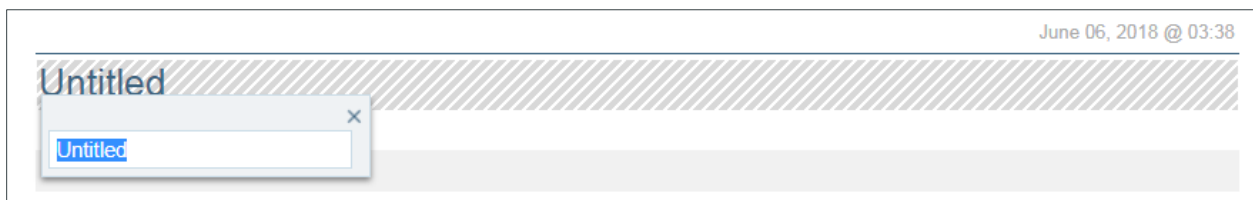
- Click #/Pages and press <ENTER> to insert the number of pages in the report, as in 1/1 (page one of one).



Repeat this process for the page footers, at bottom-left and bottom-right.

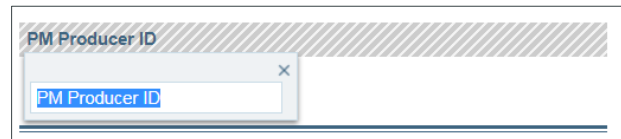
Editing the Report Title

To edit the report title, double-click Untitled; a pop-up dialog box appears. Enter a title for your report in the text box; then press <ENTER>.



Changing a Column Header Name

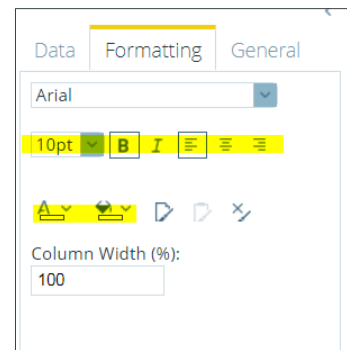
To change a column header name, double-click the column header; a pop-up dialog box appears. Enter the new header name and press <Enter>.



Editing Report Fonts

The Formatting tab contains options to edit fonts within a report. The font type, size, color, effect, alignment, and background color can all be changed. Font changes can be applied to the header, footer, title, groups, headings, and column contents.

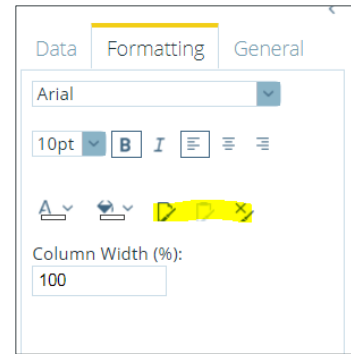
To edit a font, select the report element which contains the text to edit so that it is highlighted. Then open the formatting tab in the left pane. Use the font option in the pane to edit font as desired.



Applying Copy/Paste Formatting

The Copy formatting/Paste formatting options on the Formatting tab can copy column formatting to other columns in your report.

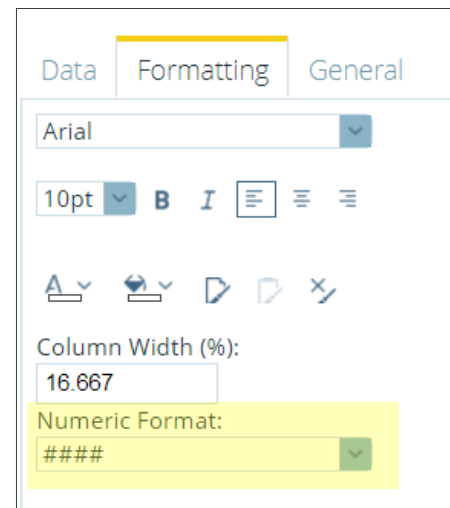
Select the column that contains the formatting to copy, then click *Copy Formatting*. Select the column to apply that format and click *Paste Formatting*.



Formatting Numeric Values

If a column contains numeric values, use the formatting tab to change the formatting associated with those values. Click inside the column you want to format, so it appears selected. Click the Formatting tab, then choose the appropriate format for the values in your column.

In some instances, numeric values might have already been formatted. For example, currency symbols are already included in sales figures. Such formatting is inherited from metadata associated with the data source. However, user selected formatting can override inherited formats if necessary.



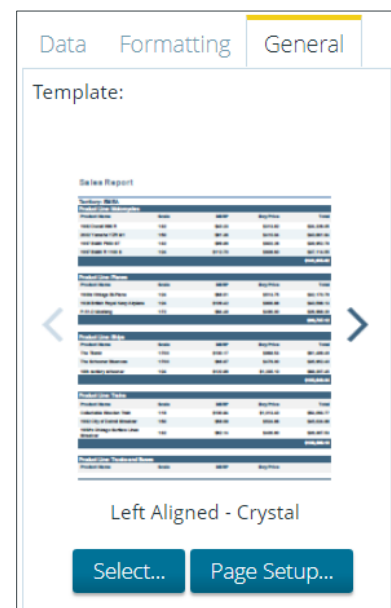
Changing Page Format and Orientation

By default, Interactive Report creates a portrait mode page in Letter format (8.5" x 11").

To change page orientation, click the General tab, then click *Page Setup*. In the *Page Setup* dialog box, click the appropriate icon. Click *OK* to save your changes.

To change page format, click the General tab, then click *Page Setup*. In the *Page Setup* dialog box, choose the correct page format for the report. Page margin measurements are displayed in the lower part of the dialog box. Adjust the measurements as needed. Click *OK* to save the changes.

To change general report formatting, click the General tab, then use the left and right arrows to page through available formatting templates. Click *Select* to see all formatting templates. To change



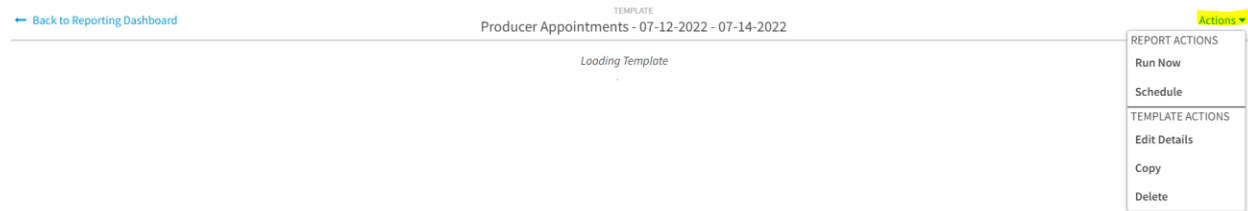
the report template, answer Yes or No when prompted to keep that formatting change.

Generating Interactive Report Output

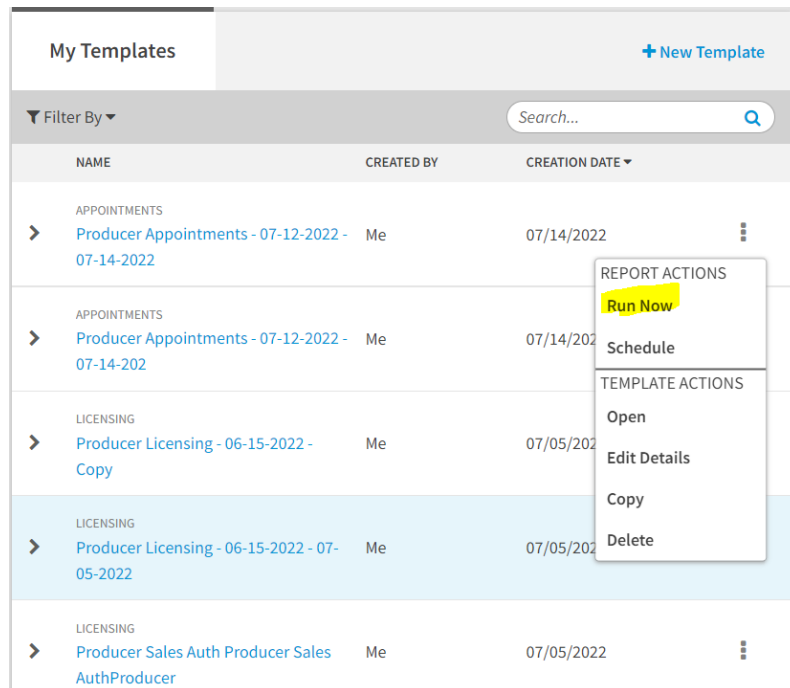
Exporting a Report

Interactive reports can be exported as an Excel, PDF, or CSV file. There are two methods to export a Report.

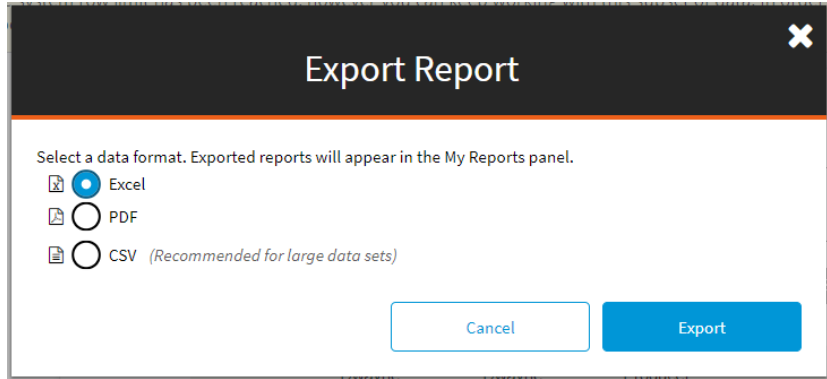
1. To Export a report from the Report Builder page, click on the *Action Dropdown* in the top right corner of the screen and select Run Now option



2. To Export a report from the Interactive Reporting Dashboard, click the "..." option for the template which you would like to export in the *Templates* Widget. This will open a menu; select the *Run Now* option.



This will open a dialog box. Select the file format for the report. After clicking *Export* the report will begin running the background and the Interactive Reporting Dashboard will open.



To view the status of an exported report, use the *My Reports* widget on the Interactive Reporting Dashboard. Reports that are still running will appear in a Queued or Running Status with the *Name* in black text. Once a report has finished running it will move to a Completed status and the *Name* will be a blue hyperlink. Clicking this link will download the report according to the native settings of the browser.

NAME	STATUS	EXPIRES
Producer with Missing Information Report TYPE: Producer Licensing	Queued	
Producer Licensing TYPE: Producer Licensing	Completed 12/13/2018, 3:57 PM	01/12/2019

Completed reports are retained for 30 Days. Reports that are older than 30 days will no longer be available for download.

Scheduling a Report

Exports of Interactive reports can be scheduled by a user to run on a future date. There are two methods to Schedule an Interactive Report.

1. To Schedule a report from the Report Builder page, click on the *Action Dropdown* in the top right corner of the screen and select *Schedule Option*

Loading Template

Actions ▼

- REPORT ACTIONS
- Run Now
- Schedule
- TEMPLATE ACTIONS
- Edit Details
- Copy
- Delete

2. To schedule a report from Interactive Reporting Dashboard, click the “...” option for the template which would like to schedule in the *Templates* Widget. This will open a menu; select the *Schedule* option.

My Templates + New Template

Filter By ▼ Search... 🔍

NAME	CREATED BY	CREATION DATE ▼	
APPOINTMENTS			
> Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022	⋮
APPOINTMENTS			
> Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022	⋮
LICENSING			
> Producer Licensing - 06-15-2022 - Copy	Me	07/05/2022	⋮
LICENSING			
> Producer Licensing - 06-15-2022 - 07-05-2022	Me	07/05/2022	⋮
LICENSING			
> Producer Sales Auth Producer Sales AuthProducer	Me	07/05/2022	⋮

REPORT ACTIONS

- Run Now
- Schedule

TEMPLATE ACTIONS

- Open
- Edit Details
- Copy
- Delete

the
you

Selecting the Schedule option will open a dialog box. First, select the day which the report will be exported using the *Run On* calendar selection. Then choose whether to schedule the report once or whether to create a reoccurring schedule.

Selecting *repeat* to create a reoccurring schedule will expand the additional options for creating the schedule.

Next, choose the file format for the report export. After clicking *Save Schedule* the report will begin running the background and the Interactive Reporting Dashboard will open.

Schedule Report

TEMPLATE: Producers Demographics Information TYPE: Producer Licensing

Schedule Options

Run On: 01/25/2019

Run Once Repeat

Weekly

S M T W T F S

Ends: Never

Schedule Summary: Run weekly, starting on 01/25/2019

Select a data format

Excel

PDF

CSV
(Recommended for large data sets)

Cancel Save Schedule

To view the status of a scheduled report, use the *My Reports* widget on the Interactive Reporting Dashboard. Reports that are scheduled will appear with a Scheduled Status with the date they are scheduled to run below. The *Name* will appear in black text. At the scheduled time the report will move to a Queued or Running status. Once a scheduled report has finished running it will move to a Completed status and the *Name* will be a blue hyperlink. Clicking this link will download the report according to the native settings of the browser.

My Reports

Filter By Search...

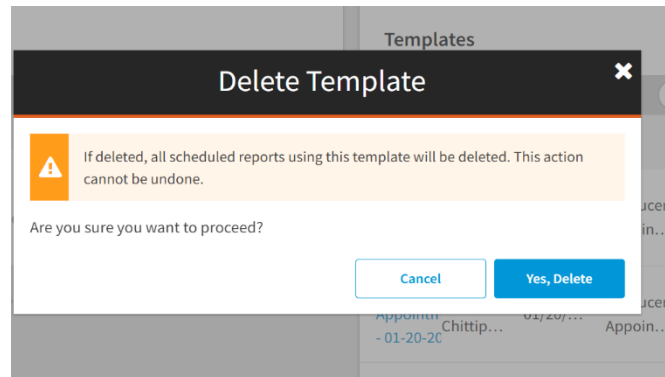
NAME	STATUS	EXPIRES
APPOINTMENTS XLSX Producers Appointments - 07-12-2022 - 07-14-2022	Completed 08/18/2022, 6:00 AM	09/17/2022
APPOINTMENTS XLSX Producers Appointments - 07-12-2022 - 07-14-2022	Completed 08/18/2022, 6:00 AM	
APPOINTMENTS XLSX Producers Appointments - 07-12-2022 - 07-14-2022	Completed 08/11/2022, 6:00 AM	09/10/2022
APPOINTMENTS XLSX Producers Appointments - 07-12-2022 - 07-14-2022	Completed 08/09/2022, 6:50 PM	09/08/2022
APPOINTMENTS XLSX Producers Appointments - 07-12-2022 - 07-14-2022	Scheduled 08/23/2022, recurs weekly...	

Show: 10 1 - 5 of 5

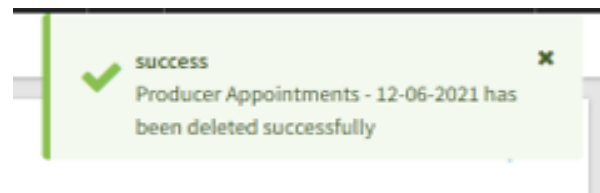
Deleting a Template

To Delete existing template from the Interactive Reporting Dashboard, click the “...” option for the template which you would like to *Delete* in the *Templates* Widget. Note that only the original creator can delete a template. This will open a menu; select the *Delete* option.

This will open a modal which displays a warning about the Deleting template action resulting in both the deletion of the template and the deletion of any associated scheduled Reports or completed Reports.



Once Creator clicks on “Yes” the Template is deleted and the creator receives a message confirming the template has been deleted.



Copying a Template

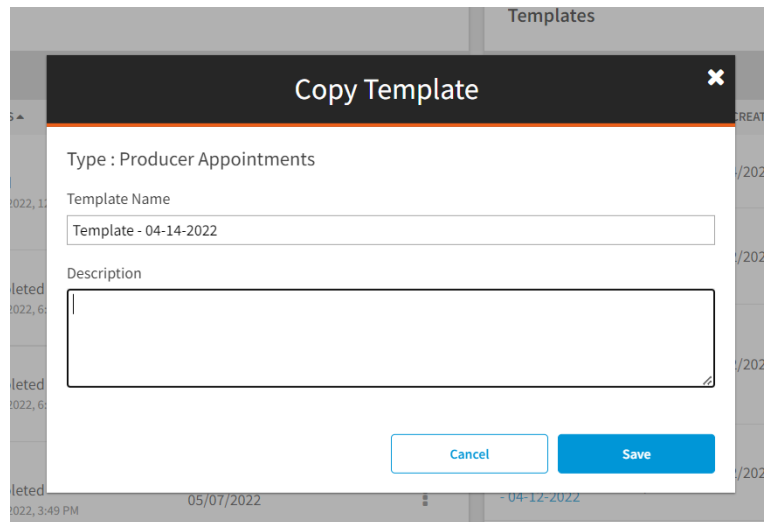
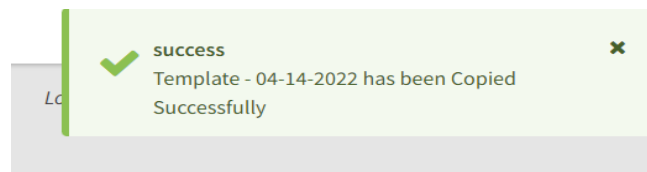
Copying the saved template by creator can be achieved through “Copy” functionality in Interactive Reporting Dashboard.

To Copy template from the Interactive Reporting Dashboard, click the “...” option for the template which you would like to Copy in the *Templates* Widget. This will open a menu; select the Copy option.

This will open a modal which display type of copied template and allows user to modify the template name and template description.

The name of the template is prepopulated based on name of copied template and Create Date. *Template Name* is required field which can be updated and must be unique.

The *Description* is an optional free-form field that can be used to display additional information or instructions for the template.

A screenshot of a web application modal titled "Copy Template". The modal has a dark header with a close button (X). Below the header, it displays "Type : Producer Appointments". There are two input fields: "Template Name" with the value "Template - 04-14-2022" and "Description" which is empty. At the bottom right, there are two buttons: "Cancel" and "Save". The background shows a blurred view of a "Templates" page with a table.

Once creator clicks Save, Template is copied, and a new version is created. the creator receives a message describing the update.


Sharing a Template

Sharing a saved template to other users in the same account can be achieved through "Share" Functionality in the Interactive Reporting Dashboard.

The creator can share a template to other users using the Share Option on the my templates tab, report designer page action items.

To share a template from the Interactive Reporting Dashboard, click the "..." option for the template which you would like to Share in the *My Templates* Widget.

This will open a modal which displays Information about sharing the template.

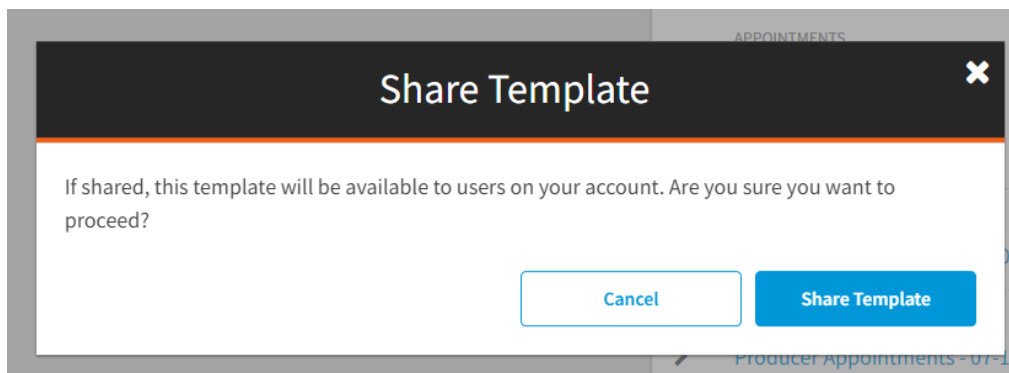
My Templates		Shared Templates		+ New Template	
Filter By		Search...			
NAME	CREATED BY	CREATION DATE			
> LICENSING Sprint-Demo-Template - 09-09-2022	Me	09/09/2022			
> APPOINTMENTS Producer Appointment	Me	09/01/2022			
> APPOINTMENTS Producer Appointments - 09-01-2022	Me	09/01/2022			
> APPOINTMENTS  Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022			
> APPOINTMENTS Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022			

REPORT ACTIONS

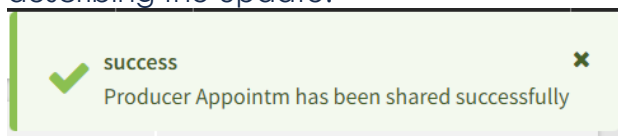
- Run Now
- Schedule

TEMPLATE ACTIONS

- Open
- Edit Details
- Copy
- Share
- Delete



When creator clicks Share Template, the template is shared to all the other users in the account. Once shared, the template is marked with a share icon in the My Templates tab and Share Action name will be changed to "Unshare". The template is displayed in Shared Template Tab of all users in the account and the creator receives a message describing the update.



My Templates		Shared Templates		+ New Template
Filter By ▾		Search... <input type="text"/>		
NAME	CREATED BY	CREATION DATE ▾		
> APPOINTMENTS Producer Appointment	Me	09/01/2022		
> APPOINTMENTS Producer Appointments - 09-01-2022	Me	09/01/2022		
> APPOINTMENTS Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022		
> APPOINTMENTS Producer Appointments - 07-12-2022 - 07-14-2022	Me	07/14/2022		

REPORT ACTIONS

[Run Now](#)

[Schedule](#)

TEMPLATE ACTIONS

[Open](#)

[Edit Details](#)

[Copy](#)

[Unshare](#)

[Delete](#)

Copying a Shared Template

Users can view all the shared templates from the Shared Template tab. Other users in account will have the ability to view the template and copy the template shared by creator from the Shared Templates tab.

To Copy a shared template from the Interactive Reporting Dashboard, click the “...” option for the template which you would like to Copy in the Shared Template *Templates* Widget. This will open a menu; select the *Copy* option.

> LICENSING Sprint-Demo-Template	Testing Purpose	07/22/2022	⋮
> APPOINTMENTS Producer Appointments - 07-21-2022	u day u day	07/21/2022	⋮
APPOINTMENTS			

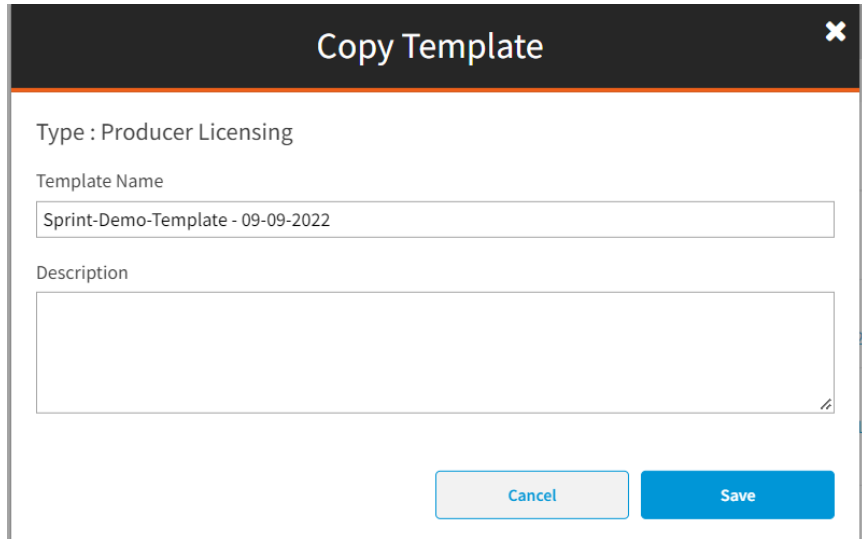
TEMPLATE ACTIONS

[View](#)

[Copy](#)

This will open a modal which displays the type of copied template and allows the user to modify the template name and template description. The name of the template is prepopulated based on the name of the copied template and the create date. *Template Name* is a required field which can be updated and must be unique.

The *Description* is an optional free-form field that can be used to display additional information or instructions for the template.



Once user clicks Save, the template is copied, and a new version is created. Now the user who copied the template is the creator for copied template, the new creator receives a message describing the update.

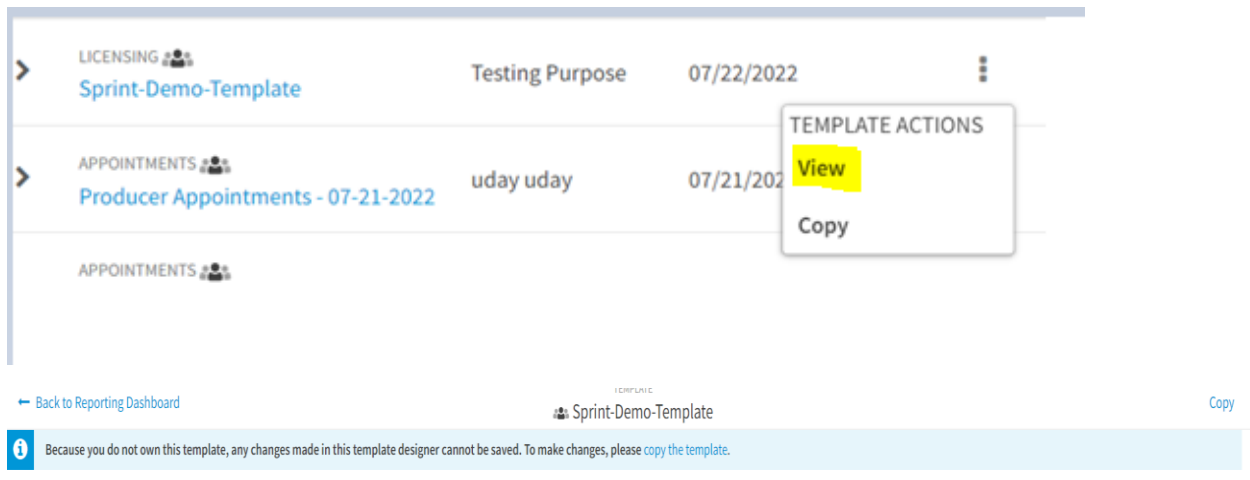


Viewing a Shared Template

To View a shared template from the Interactive Reporting Dashboard, click the "..." option for the template which you would like to view in the Shared Template Widget. This will open a menu; select the View option.

Once user clicks on View, the report designer page opens in a read only mode. User can view the information of the fields and filters.

Users have the ability to copy the template by clicking on the Copy option on the top right corner of the information bar.

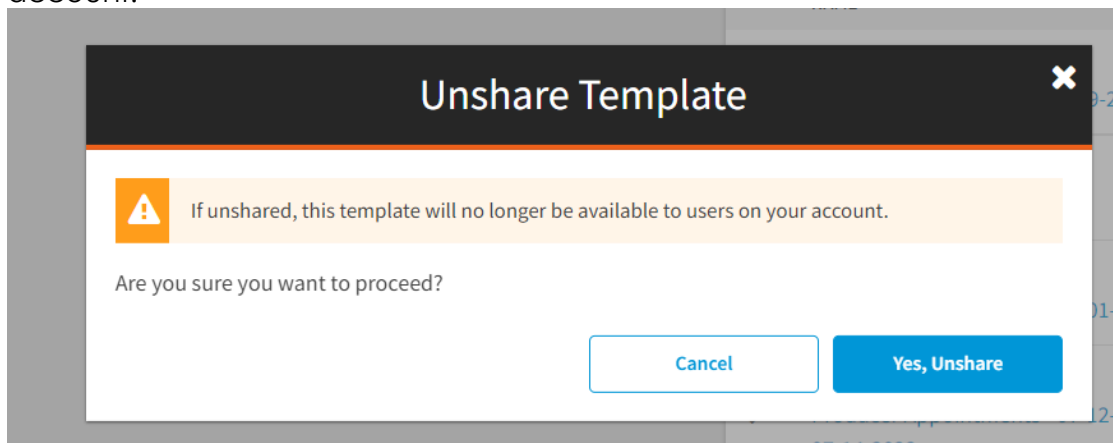


Unshare a Template

The creator can Unshare a template using the Unshare Option. This option will be available for the creator in different places like My templates tab, report designer page and also shared template tab action items.

To Unshare a shared template from the Interactive Reporting Dashboard, click the “...” option for the template which you would like to Unshare in the Shared Template Widget, My Templates Widget, or from Report Designer page. This will open a menu; select the *Unshare* option.

Once User clicks on Unshare, a modal will open which displays information about Unsharing template actions resulting in not sharing Template to other user in carrier account.



Once the creator clicks on “Yes, Unshare” the template is unshared, the `_share` icon is removed for that template and the Unshare Action name will be changed to “Share”.

The creator receives a message confirming the template has been Unshared.

