

# System Admin Guide

Insurance RISKMASTER



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# Welcome to INSURANCE RISKMASTER

INSURANCE RISKMASTER is a powerful and flexible tool that maximizes your risk management operations. The software supports high-volume data entry, swift processing in multi-user environments, and provides a dynamic information interchange in network systems.

The tool has been developed and adapted after anticipating potential hazards and frail areas in industries' operation together with the behavior of numerous control variables.

INSURANCE RISKMASTER is a 100 % browser-based tool, leverages the latest Service Oriented Architecture based, contemporary client technology to cater to the divergent need of the industry.

This easy-to-use platform possesses all the high-class attributes and ability which are expected from a competent Internet application.

Using INSURANCE RISKMASTER, you can process, manage and analyze various claims data and risk impeccably with all your stakeholders anytime, anywhere across the world.

## Introduction

INSURANCE RISKMASTER, the most reliable and widely used risk & claims management software, is known to provide a wide range of powerful, scalable RMIS analysis and reporting capabilities available independently or as part of a comprehensive, integrated claims and risk management solution. It can help you evaluate injuries, control legal costs, identify potential fraud, automate policy administration and much more.

CSC's Risk Management Software is developed with an objective to cater to the need of all industries from transportation, manufacturing, healthcare, retail, energy, telecommunications, education, government entities to third-party administrators.

INSURANCE RISKMASTER components include:

- General Claims
- Workers' Compensation Claims
- Property & Liability
- Vehicle Accident
- Reporting
- Financial
- Workflow Management
- Policy
- Integrated Disability Management
- Legal Management
- Data Integration
- OFAC and MMSEA Compliance
- Rule Scripting Engine

## Key Features

INSURANCE RISKMASTER is a web enabled application that lets you:

- Share claims data and reports faster and at a lower cost through e-mail, browser, file and live feeds, whether you are a self-insured organization, third party adjuster, insurance pool, or an insurance company.
- Import and export data from and to external database sources and programs.
- Create supplemental data fields to hold extra information, your organization specifically needs.
- Attach multimedia documents to records. INSURANCE RISKMASTER also integrates with Microsoft Office programs.
- Record an event that precedes a claim or multiple claims. When you record claims, INSURANCE RISKMASTER uses the event information to complete some claim fields. This speeds up claim entry and maintains consistency in event information for all claims related to a single event. You can also track events and related claims by category.
- Work simultaneously on multiple claims.
- Generate actuarial, financial, statistical, and policy management reports, and export this data to third-party spreadsheets.
- Generate and e-mail reports in PDF to selected recipients.
- Monitor payments and collections, complaints, litigation and settlements, workers' compensation and OSHA compliance.
- Use a central calendar in diaries and e-mail to schedule and track meetings and appointments. You can also coordinate priorities and receive notification of critical events.
- Manage current and future legal costs.
- Create return-to-work programs.

## The User Interface

The INSURANCE RISKMASTER user interface is designed to emulate the paper methods used in the risk management industry. INSURANCE RISKMASTER follows standard Internet navigation conventions.

### Portal

is accessed from within a portal. You can use the portal tabs to switch between and other sites or applications in your portal.

### Navigation Tree and Bread Crumbs

You can open multiple records in multiple windows simultaneously. Every time you open a window, it is added to the navigation tree and to the bread crumbs at the top of the window.

Use the navigation tree to move between windows and to work with, open and close windows.

Use the bread crumbs to move to parent records for the open record.

## The Main Menu

The main menu gives you access to all INSURANCE RISKMASTER modules. Each item on the main menu gives you a drop down list that lets you open all the functions available in that module.

The table below lists the main menu items and the functions under each item. Select a function to open the help topic for that function.

Use this button	To open
Document	<ul style="list-style-type: none"> <li>Events</li> <li>General Claims</li> <li>Workers' Compensation Claims</li> <li>Vehicle Accident Claims</li> <li>Property Claims</li> <li>Non-occupational Claims</li> </ul>
Policy	<LOB> Policy
Diaries	<ul style="list-style-type: none"> <li>Diary List</li> <li>Diary Calendar</li> </ul>
User Documents	<ul style="list-style-type: none"> <li>Documents List</li> <li>Word Merge Setup</li> </ul>
Funds	<ul style="list-style-type: none"> <li>Transactions</li> <li>Approve Transactions</li> <li>Bank Accounts</li> <li>Deposits</li> <li>Void Checks</li> <li>Mark Checks Cleared</li> <li>Custom Payment Notification</li> <li>Payment Notification</li> <li>Print Checks</li> <li>Apply Payments to Coverage</li> <li>Automatic Checks</li> </ul>
Maintenance	<ul style="list-style-type: none"> <li>State Maintenance</li> <li>Org Hierarchy</li> <li>Table Maintenance</li> <li>Employee</li> <li>Entity</li> <li>People</li> </ul>















	Plan Management	
	Leave Plan Management	
	Policy Tracking	
	Policy Billing	
	Batches	
	Billing Scheduler	
	Physician	
	Medical Staff	
	Vehicles (Units)	
	Patient Tracking	
Reports		
	+ Executive Summary	
		Configurations
		Claim
		Event
	+ Std. Reports Queue	
		Available Reports
		Job Queue
		Delete Reports
		Scheduled Reports
		View Scheduled Reports
	Std. Reports Designers	
		SM Designer
		SM Draft Reports
		Post SM/World Reports
		Post SM Draft Reports
Search	Claim	
	Event	
	Employee	
	Entity	
	Vehicles	

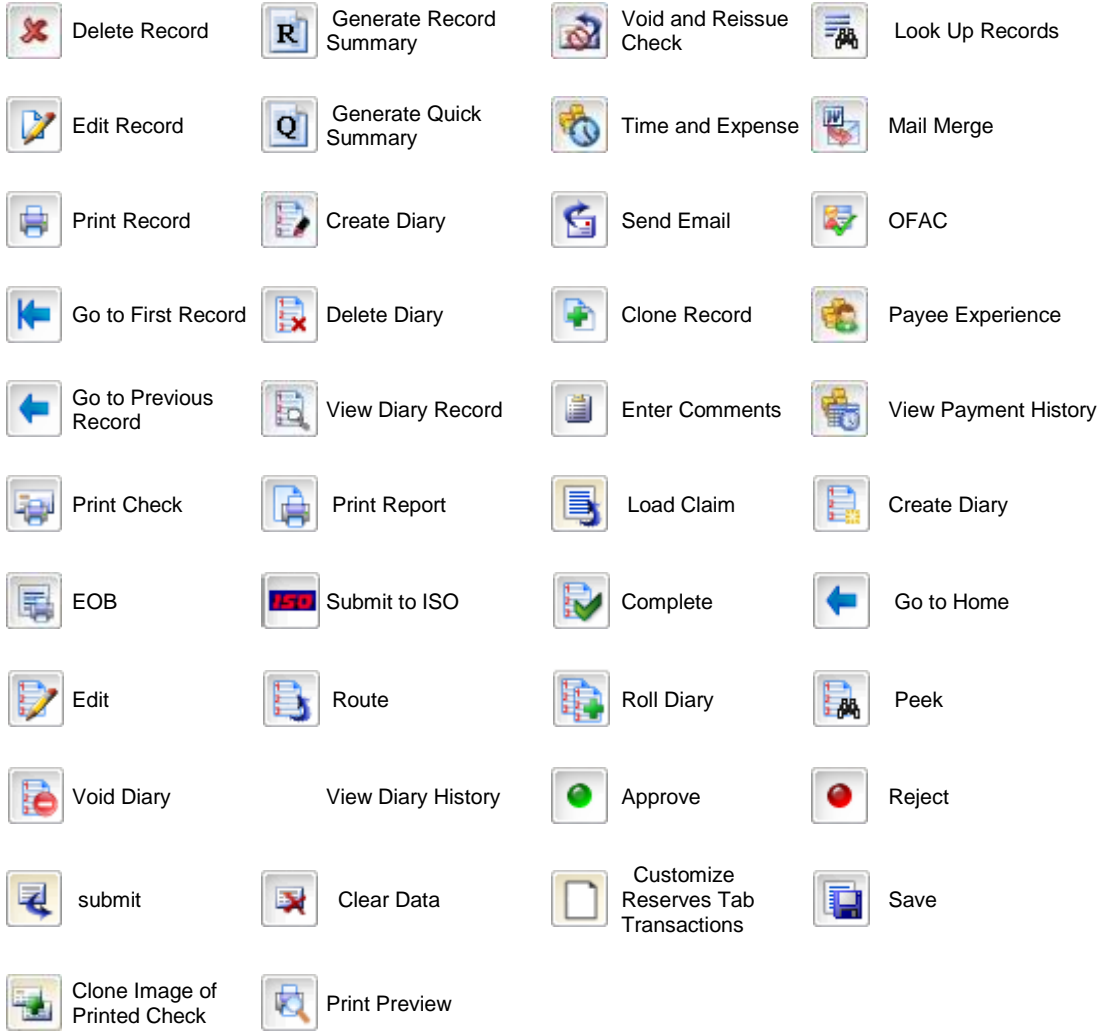
	Policy Management
	Funds
	Admin Tracking
	Patients
	Physician
	Med Staff
	Disability Plan
	Leave Plan
Security	Security Mgt System
	Change Database
	Change Password
	Business Entity Security
	User Privileges Setup
Utilities	Manager
	Technician
	Tools & Designers
	UI Admin
Help	Online Help
	User Manual
	Tutorials
	Business Analytics
	Data Analytics

**The INSURANCE RISKMASTER Toolbar**

Use the INSURANCE RISKMASTER toolbar to perform actions on open records.

To see what each button does, move your mouse cursor over an image.

 Add New Record	 Go to Next Record	 Copy Record	 Enhanced Notes
 Save Record	 Go to Last Record.	 Attach Document to Record	 FROI
 Search	 Generate Executive Summary	 Claim Comments	 Jurisdictional Rules



**Field Level Buttons**

Use the field level buttons to perform actions on data in fields within a window.

To see what each button does, move your mouse cursor over an image.



**What's New in**

Feature		INSURANCE RISKMASTER for Windows	INSURANCE RISKMASTER for Browser
	<i>Browser-based</i>	<i>Windows-based</i>	<i>Browser-based dependent on Windows install</i>

<b>All INSURANCE RISKMASTER 7.0 Base Functionality</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E X C E P T I O N S	Utilities Module	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Check Printing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Quick Entry Module	Uses Power Views	<input checked="" type="checkbox"/>	
	Power Views	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	Non Occupational	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Long Term Disability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	FMLA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	In-line Supplemental Fields	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	Choice of tabs or scrolling windows	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
N E W F E A T U R E S	Field Level Help	<input checked="" type="checkbox"/>		
	Portal	<input checked="" type="checkbox"/>		
	Memo INSURANCE RISKMASTER Editor	<input checked="" type="checkbox"/>		
	navigation tree	<input checked="" type="checkbox"/>		
	Single Sign On	<input checked="" type="checkbox"/>		
	Xtra Button	<input checked="" type="checkbox"/>		
	Enhanced Claim /Event Comments	<input checked="" type="checkbox"/>		
	Mail Merge Form Letter Sorting	<input checked="" type="checkbox"/>		
	Organizational Hierarchy Cloning	<input checked="" type="checkbox"/>		
100% Server Deployment	<input checked="" type="checkbox"/>			



# Getting Started

## To Log In and Log Out

When you open INSURANCE RISKMASTER, you have to log into a data source, which is the link between INSURANCE RISKMASTER and your database. You must have a user name and password before you can use INSURANCE RISKMASTER. Your system administrator defines the data source on the workstation during installation.

While setting up INSURANCE RISKMASTER, your system administrator uses INSURANCE RISKMASTER's Security Management System to create your user account and specify the data sources you can use.

**Note:** If you have questions about the data source or your user privileges, see your system administrator.

## To Log In

1. Do one of the following:
  - In your browser address bar, enter the INSURANCE RISKMASTER URL. Your system administrator can give you this URL.
  - If you have an icon set up on your desktop, double click the INSURANCE RISKMASTER icon.

The INSURANCE RISKMASTER Home window opens.

2. In the Login Name field, enter your user name.
3. In the Password field, enter your password.
4. Select Login.  
The INSURANCE RISKMASTER Database Login window opens.
5. From the Database drop down list, select a data source.  
INSURANCE RISKMASTER connects you to the data source you selected. You can select the menu items from the main menu, to open the required INSURANCE RISKMASTER window.

## To Log Out

When you close your browser, INSURANCE RISKMASTER automatically logs you out. You can also log out without closing your browser. This is helpful if you need to log in as a different user.

- From the INSURANCE RISKMASTER Home window, select the Logout link at the upper right hand corner.
- INSURANCE RISKMASTER logs you out and the INSURANCE RISKMASTER Home window opens.

## To Quit INSURANCE RISKMASTER

1. On any INSURANCE RISKMASTER window, select the Logout link in the upper right hand side corner. INSURANCE RISKMASTER logs you out and the INSURANCE RISKMASTER Home window opens.
2. Close your browser or navigate to a different web site.

## To Get Help

To help you use INSURANCE RISKMASTER optimally, CSC offers you:

### Online Help

This online help is designed to assist you in using INSURANCE RISKMASTER. The online help consists of three types of windows:

- **Conceptual information:** These topics have green headings and they help you understand the basics of INSURANCE RISKMASTER.
- **How to:** These topics have brown headings and they give you procedural instructions on how to use INSURANCE RISKMASTER.

- **Field help:** These topics have blue headings and they explain all the fields and buttons on each INSURANCE RISKMASTER window.

### **Printed Documentation**

A printed user guide is available. The user guide is also available in PDF format. To Download the PDF:

1. From the main menu, select Help.  
The Help menu opens.
2. From the Help menu, choose User Manual (PDF)

You can download the latest version of the printed guide from [http:// www.Insurance RISKMASTER.com/secure/ documentation.html](http://www.Insurance RISKMASTER.com/secure/ documentation.html).

You can either navigate through the PDF user guide using Acrobat Reader or print it.

### **Technical Support**

Your INSURANCE RISKMASTER service contract explains the conditions for obtaining technical support. To contact technical support, do one of the following:

- Go to <http:// Insurance RISKMASTER.com/>
- Call 877-275-3676.

Before you contact technical support have the following information available:

- Your INSURANCE RISKMASTER client number.
- Error message numbers for any errors you encountered and could not resolve.
- A list of the steps you performed just before a problem occurred.

To shorten the time you spend on a call, fax a description of your problem to 734-462-3151. This gives the technical support staff time to become familiar with your situation before you call.

### **Training**

CSC offers you two types of training when you purchase INSURANCE RISKMASTER:

- **Prototype setup training:** System administrators learn how to set up INSURANCE RISKMASTER, including setting up code lists, check stock , permissions, and so on.
- **End user training:** You learn how to use INSURANCE RISKMASTER optimally.

# Security Management

## Security Management System

### Security Management System Key Features

Security Management System is a thin-client, Internet application which gives you access to INSURANCE RISKMASTER Security module 's power, capabilities and features. Security Management System enables you to:

- Define permissions for each user based on individual requirements. This system allows you to restrict access to confidential information and prevent unauthorized access to Utilities , INSURANCE RISKMASTER Maintenance files, and critical processing functions (such as check printing). These controls can also help you control claims data and comply with audit criteria.
- Set up and use module security groups, you can determine the level of access for each user. Module security is designed to limit user access by feature and by field. You can grant full privileges or limit a user to partial privileges. For example, you might have an employee who processes only workers' compensation claims. You can assign that employee to a module group that can only use those features related to workers' compensation processing.
- Restrict access to data sources. If you are licensed to set up multiple databases for INSURANCE RISKMASTER and have multiple data sources defined, you can restrict access to these data sources for each user. For example, a third- party administrator ( TPA ) might maintain each client on a separate database, each using a different data source. You can assign permissions for individual users or module groups so that they can access all data sources or only some of them. Security can be set up so that users can only access the client data source for which they process claims.

### The Security Management System User Interface

The Security Management System user interface is divided into two frames. The left hand side frame displays a tree structure. You can select the + in the tree structure to display the nested users, data sources and module groups.

You can access most of the Security Management System functions from the toolbar. INSURANCE RISKMASTER follows standard Internet navigation conventions. Along with the navigation elements described here, you can use your browser's navigation buttons to go to the previous window, go to the next window, and so on.

#### *The INSURANCE RISKMASTER Security Management System Toolbar*



Select to refresh & cancel the entries.



Select an item to delete and then select this button to delete the selected item.



Select to open the User Settings window and add a new user.



Select to configure a new data source .



Select to open the Set E-mail Options window and set the email options.



Select to open the Add New Group window and add a new module group.



Select a module group and then select this button to open the Group Rename window and rename the module group you selected.



Select to define Multi-Language Date Format.





Select to grant the module access permission.



Select to assign permissions for users to access the selected INSURANCE RISKMASTER modules and sub-modules.

Note: The button is active only when you select a Module SecurityGroup.



Select to revoke access permissions for users to access the selected INSURANCE RISKMASTER modules and sub-modules.

Note: The button is active only when you select a Module SecurityGroup.



Select to save the entries.



Select to cancel the entries.

## To Change Database


You can switch over to another database while working in one database.

1. From the menu bar, select Security.  
The Security menu opens.
2. From the Security menu, choose Change Database.  
The INSURANCE RISKMASTER Database Selection window opens.
3. From the Database drop down list, select the database you want to log into.
4. Select the Login button.  
INSURANCE RISKMASTER logs you into the selected database.

## To Change the INSURANCE RISKMASTER Security Management System ID and Password

The built-in user ID and password enables you to start Security Manager. Change the built-in user ID and password the first time you start Security Management System.


*To change your ID and password*

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the toolbar, select the Change System Login Info button   
The Change System Login Parameters window opens.
4. In the Admin Login Name, enter the administrator log in name.
5. In the New Login Password, enter a new password.
6. In the Confirm New Password, enter the new password again.
7. Select OK.





## To Clear Workstation License History

1. From the Security Management System toolbar, select the Clear license History button . The Change Workstation license Info pop-up window opens.
2. In the field, enter the license code.

Note: To get the license code, contact CSC Technical Support.

3. Select Clear.

## Welcome to INSURANCE RISKMASTER Security Management System

Using INSURANCE RISKMASTER Security Management System, you can set up and implement security options for each **data source** connected to INSURANCE RISKMASTER using your web browser. Setting up security consists of setting up user accounts for each user and defining each user's access permissions to data sources and processing functions in INSURANCE RISKMASTER.

You must set up user accounts and data sources before users can log into INSURANCE RISKMASTER. Flexible security features enable you to define permissions for each user based on individual requirements. This system allows you to restrict access to confidential information and prevent unauthorized access to Utilities, INSURANCE RISKMASTER Maintenance files, and critical processing functions (such as check printing). These controls can also help you control claims data and comply with audit criteria.

You can also set up a number of module groups and assign permissions to each **module group**. You can restrict module and field-level access to users and module groups. Module Security is designed to limit user and group access by feature and field. You can grant full privileges or limit a user or group to partial privileges. For example, if you have an employee who processes only workers' compensation claims. You can assign that employee to a group that can only use those features related to workers' compensation processing.

If you are licensed to set up multiple databases for INSURANCE RISKMASTER and have multiple data sources defined, you can restrict access to these data sources for each user.

Note: All security tables are encrypted. The system can also detect unauthorized changes made to local and shared databases through third-party products.

## Password Policy

### How To

#### To Set Password Policy Parameters

Use the Password Policy Parameters window to set password general parameters and set password complexity for users in INSURANCE RISKMASTER.

Note: The Set Password Policy Params link is displayed only when you are logged in as system administrator or with a user name having system administrator rights.

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Set Password Policy Params.  
The Password Policy Parameters window opens.
3. Select and complete the fields on the Password General Settings tab, as shown below.

**Password Minimum Length** Enter the minimum number of characters you want in the password. For example, if you enter 6, INSURANCE RISKMASTER will not accept passwords with less than six characters.

**Password Maximum Length** Enter the maximum number of characters you want in the password. For example, if you enter 7, INSURANCE RISKMASTER will not accept passwords with more than seven characters.



<b>Password Minimum Age in days</b>	Enter the minimum number of days for which you need to use your password before you can change it.
<b>Password Maximum Age in days</b>	Enter the maximum number of days till when you can use your passwords.  RISKMASTER will notify you to change the password after the password maximum age you enter.
<b>Lockout Duration in Hours</b>	Enter the duration (in hours) for which your account will remain locked, if you enter an incorrect password for the maximum number of attempts.
<b>Days before Password Expire warning will start</b>	Enter the number of days before password expiration when you want to notify for expiration. For example, if you enter 5, INSURANCE RISKMASTER will notify you five days prior to your password expiration.
<b>No. of Previous Password to remember</b>	Enter the number of previous passwords you want INSURANCE RISKMASTER to store.
<b>No. of Password attempts allowed before account is locked</b>	Enter the number of attempts you can enter the password incorrectly before your account is locked.
<b>Allow user to set First Name and Last Name as passwords</b>	Select the check box if you want to set your first or last name as password.


4. Select and complete the fields on the Password General Settings tab, as shown below.

<b>All of the four literal types should be present in the password</b>	Select the option if you want to include all four literal types in your password.
<b>Any of the three literal types should be present in the password</b>	Select the option if you want to include any three literal types in your password.
<b>Any of the two literal types should be present in the password</b>	Select the option if you want to include any two literal types in your password.
<b>Any of the one literal type should be present in the password</b>	Select the option if you want to include any one literal type in your password.
<b>Following literal type should be present in the password</b>	Select the option if you want to include any or all of the following literal types in your password: English Uppercase letters (A to Z), English Lower-case letters (a to z), Numerals (0 to 9), and Non-alphanumeric chars (such as !, \$, #, %).  Select the appropriate check box to include that literal type in your password.
<b>English Uppercase letters (A to Z)</b>	Select the check box if you want to include English uppercase letters in your password.

---



<b>English Lower-case letters (a to z)</b>	Select the check box if you want to include English lowercase letters in your password.
<b>Numerals (0 to 9)</b>	Select the check box if you want to include numerals in your password.
<b>Non-alpha-numeric chars (such as !, \$, #, %)</b>	Select the check box if you want to include non-alphabetic characters in your password.

5. Select the  button.  
INSURANCE RISKMASTER saves your password settings.

## GUI

### Password Policy Parameters Window: Password Complexity Settings Tab

- To open**
- From the Security menu, choose Set Password Policy Params.
  - From the Password Policy Parameters window, select Password Complexity Settings tab.

#### Field definitions

<b>All of the four literal types should be present in the password</b>	Select the option if you want to include all four literal types in your password.
<b>Any of the three literal types should be present in the password</b>	Select the option if you want to include any three literal types in your password.
<b>Any of the two literal types should be present in the password</b>	Select the option if you want to include any two literal types in your password.
<b>Any of the one literal type should be present in the password</b>	Select the option if you want to include any one literal type in your password.
<b>Following literal type should be present in the password</b>	Select the option if you want to include any or all of the following literal types in your password: English Uppercase letters (A to Z), English Lower-case letters (a to z), Numerals (0 to 9), and Non-alpha-numeric chars (such as !, \$, #, %).

Note: Select the appropriate check box to include that literal type in your password.

### Password Policy Parameters Window: Password General Settings Tab

- To open**
- From the Security menu, choose Set Password Policy Params.
  - From the Password Policy Parameters window , select Password General Settings tab.

#### Field definitions

<b>Password Minimum Length</b>	Enter the minimum number of characters you want in the password. For example, if you enter 6, INSURANCE RISKMASTER will not accept passwords with less than six characters.
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<b>Password Maximum Length</b>	Enter the maximum number of characters you want in the password. For example, if you enter 7, INSURANCE RISKMASTER will not accept passwords with more than seven characters.
<b>Password Minimum Age in days</b>	Enter the minimum number of days for which you need to use your passwords before can change it.
<b>Password Maximum Age in days</b>	Enter the maximum number of days till when you can use your passwords. <div style="background-color: #e0e0e0; padding: 5px; text-align: center;">Note: INSURANCE RISKMASTER will notify you to change the password after the password maximum age you enter.</div>
<b>Lockout Duration in Hours</b>	Enter the duration (in hours) for which your account will remain locked, if you enter an incorrect password for the maximum number of attempts.
<b>Days before Password Expire warning will start</b>	Enter the number of days before password expiration when you want to notify for expiration. For example, if you enter 5, INSURANCE RISKMASTER will notify you five days prior to your password expiration.
<b>No. of Previous Password to remember</b>	Enter the number of previous passwords you want INSURANCE RISKMASTER to store.
<b>No. of Password attempts allowed before account is locked</b>	Enter the number of attempts you can enter the password incorrectly before your account is locked.
<b>Allow user to set First Name and Last Name as passwords</b>	Select the check box if you want to set your first or last name as password.


## LDAP

### How To

#### To Configure LDAP


1. From the main menu, select Security.  
The Security menu opens
2. From the Security menu, choose Security Management System  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame, select the required data source.
4. From the tool bar, select the .
5. Select the LDAP tab.
6. In the Please enter the LDAP Host Name field enter the LDAP host name.
7. From the Type of SSL Authentication drop down list, select the required security type.
8. In the Base LDAP distinguished name field, enter the organization in Domino LDAP under which your users are kept.
9. In the User Name field, enter the user name.
10. In the Distinguished Name field, enter the administrator level user name.
11. In the Password field, enter the administrator level password.
12. To enable the LDAP, select the Enabled check box.
13. To update the changes, select the  button,.

## To Configure Active Directory

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame, select the required data source.
4. From the tool bar, select the .
5. Select the Active Directory tab.
6. In the Active Directory Domain Name field, enter the qualified domain name of the active directory from which you want to authenticate.
7. From the Type of SSL Authentication drop down list, select the type of authentication for SSL.
8. From the Windows AD Credentials section, in the User ID field enter the administrator account user id.
9. In the Password field, enter the password for the administrator account.
10. Select the Enabled check box.
11. Select the Update button.

## Field Help


### Active Directory Window

- To open**
- From the main menu, select Security.
  - From the Security menu, choose Security Management System
  - From the left frame, select the required data source.
  - From the tool bar, select .
  - Select Active Directory tab.

### Field Definitions

<b>Enabled</b>	Select the check box to enable active directory.
<b>Active Directory Domain Name</b>	Enter the qualified domain name of the active directory from which you want to authenticate
<b>Windows Active Directory Options</b>	
<b>Type of SSL Authentication</b>	Select the type of authentication for SSL
<b>Windows AD Credentials</b>	
<b>User ID</b>	Enter the administrator account user ID.
<b>Password</b>	Enter the administrator level password.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to cancel changes.

## LDAP Window

- From the main menu, select Security.
  - From the Security menu, choose Security Management System
  - From the left frame, select the required data source.
- To open**
- From the tool bar, select the .
  - Select the LDAP tab.

## Field Definitions

<b>Enabled</b>	Select the check box to enable LDAP.
<b>Please enter the LDAP Host Name</b>	Enter the LDAP host name.
<b>Type of SSL Authentication</b>	From the drop down list, select the required security type.
<b>Base LDAP distinguished name</b>	Enter the organization in Domino LDAP under which your users are kept.
<b>LDAP Server Attributes Mapping</b>	
<b>User Name</b>	Enter the user name.
<b>Credentials required by the LDAP host</b>	
<b>Distinguished Name</b>	Enter the administrator level user name.
<b>Password</b>	Enter the administrator level password.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to cancel the changes.


## LDAP Overview

Using Security Management System you can configure LDAP and active directory for your system.

## Users

### How To

#### To Add Users

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the toolbar, select the Add New User button .
4. In the Last Name field, enter the user's last name.

5. In the First Name field, enter the user's first name.
6. In the Title field, enter the user's job title.
7. From the Language drop down list, select the language that the user will see and use with INSURANCE RISKMASTER.
8. In the Company field, enter the name of the company the user is employed by.
9. In the Address, City, State, Zip, and Country fields enter the user's mailing address.
10. In the Office Phone and Home Phone fields, enter the user's phone numbers.
11. In the E-mail field, enter the user's email address.
12. From the Manager drop down list, select the user's manager.
13. Select the Permit to access Security Mgt. System check box, if you want to give user the rights to access security management system.
14. In the Allow User To Login To section, from the Datasources drop down list, select data source the user can log in to.

Note: You can give a user access to multiple data sources. All the data sources the user has access to are displayed in the User Already Allowed to Login To field. To add multiple data sources, select the Save button each time you select a data source.



15. From the toolbar, select the Save button.  
The User Access Permissions for selected Data Source window opens. Enter user access details on this window.

## To Maintain User Account

INSURANCE RISKMASTER enables you to lock and unlock the account of users, if required.

Note: The Maintain User Account link is displayed only when you are logged in as system administrator or with a user name having system administrator rights.

### To lock user accounts

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Maintain User Account.  
The Maintain User Account window opens and displays the list of users and corresponding account status.
3. On the Maintain User Account window, select the check box for the users to lock their accounts.
4. To lock the selected accounts, select the Lock Selected User(s) button.

INSURANCE RISKMASTER locks the selected user accounts.

### To unlock user accounts

1. From the main, select Security.  
The Security menu opens.
2. From the Security menu, choose Maintain User Account.  
The Maintain User Account window opens and displays the list of users and corresponding account status.
3. On the Maintain User Account window, select the check box for the users to unlock their accounts.
4. To unlock the selected accounts, select the Unlock Selected User(s) button.

INSURANCE RISKMASTER unlocks the selected user accounts.

## GUI

### User Access Permissions for Selected Data Source Window

Use this window to specify details about the user's access to a **data source** and to assign a user to a **module group** .

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- To open**
- Under the INSURANCE RISKMASTER Security tree, select the + next to Data Sources.
  - Under the Data Sources, select the + next to the data source you want to specify access for.
  - Under the data source you select, select the + next to Permission To Login.
  - Under Permission To Login, select the user you want to set up permissions for.

### Field definitions

#### User Access Permissions for selected Data Source

**Login Name** Enter the login name you want the user to use to access the selected data source.

**Password** Enter the password you want the user to use to access the selected data source.

**Save Password** Select the button to change and save the current password.

**Permission Expires** Select the check box, if you want the permissions to expire after a certain date.

**Expiration Date** If you select the Permission Expires check box, enter the date on which you want the permission to expire.

#### Assign User To Group

**ModuleGroups** From the drop down list, select the module group you want to assign the user to. You can only assign a user to one module group under each data source. You must first give the user access to a data source before you can add the user to a module group under that data source.

**Allow Access in these times intervals** Select the check boxes for days on which you want the user to be able to access the data source. In the fields enter the times between which you want the user to be able to access the data source.

### Maintain User Account Window

**To open** From the Security menu, choose Maintain User Account.

Note: The Maintain User Account link is displayed only when you are logged in as system administrator or with a user name having system administrator rights.

### Field definitions

**User Name** Displays the names of all INSURANCE RISKMASTER users.

**Login Name** Displays the users' login names.

**Account Locked** Displays the user account status.

**Unlock Selected User(s)** Select the button to unlock accounts of the selected users.

**Lock Selected User(s)** Select the button to lock the account of the selected users.

## User Settings Window

Use the User Settings window to add a new user or to edit an existing user. You can give a user access to data sources using the User Settings window. You can also review the existing data sources the user has access to.

**Note:** For optimum security, CSC recommends that you assign a separate user account to each employee.

### To open

On the INSURANCE RISKMASTER Security window, from the toolbar, select the New User



button.

### Field definitions

<b>Last Name</b>	Enter the user's last name.
<b>First Name</b>	Enter the user's first name.
<b>Title</b>	Enter the user's job title.
<b>Language</b>	From the drop down list, select the language that the user will use with INSURANCE RISKMASTER.
<b>Company</b>	Enter the name of the company the user is employed by.
<b>Address</b>	Enter the user's address. Enter the City, State, Zip, and Country in the appropriate fields.
<b>Office Phone</b>	Enter the user's work phone number.
<b>Home Phone</b>	Enter the user's home phone number.
<b>E-mail</b>	Enter the user's email address.
<b>Permit to access Security Mgt. System</b>	Select the check box if you want to give user the rights to access Security Management System.
<b>Manager</b>	From the drop down list, select the user's manager.

### Allow User To Login To

<b>Datasources</b>	From the drop down list, select the data source you want to give the user access to. The user will be able to log into the data sources you select. You can select multiple data sources. Select one data source at a time and select the Save button from the toolbar each time you select a data source.
<b>User Already Allowed To Login To</b>	Displays all the data sources the user has access to.

## User Setup Overview

Before you can define user permissions, you must add users to the Security Management System and then set up user permissions for data sources and INSURANCE RISKMASTER modules. Each time you add a user, you must assign a user name, password, data source permissions and user group membership. You can set up all the user accounts at the same time, and then add, modify, or delete users as changes occur.

**Note:** You must have full permissions to the data source(s) to add, modify, or delete any information associated with user accounts.






You can set up individual accounts for each user or a general, one-time or temporary user account. The user record for this account can be a permanent record completed with a generic name, while the login permissions and password can be set to expire every 24 hours.

For optimum security, CSC recommends that you assign each employee a separate user account.

## Data Source


### How To

#### To Add a Data Source Using ODBC Drivers

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the toolbar, select the Add New Database Connection button .  
The DSN wizard opens.
4. Make sure the Use Predefined ODBC Datasource to Connect to Database check box is not checked.  
A list of ODBC drivers is displayed in the list.
5. From the list of ODBC drivers, select the ODBC driver you want to use.
6. Select Next.
7. In the Server Name field, enter the name of the server on which the database resides.
8. In the Database Name field, enter the database name.
9. In the Login User Name field, enter your user name.
10. In the Login Password field, enter a valid password.
11. Select the Add Additional Parameters check box if you want to include any other parameters required to make a successful connection to the database and then include the parameters in the box that displays.
12. Select Next.  
You get a message telling you that the Database Connection wizard will now try to connect and validate the database you have selected.
13. Select Next.
14. You get a message telling you that you are successfully connected to the specified database and that the Database displays to be a valid INSURANCE RISKMASTER database.
15. Select Next.  
If you are connecting this DSN to your security database for the first time, you will be asked to enter the code provided by product support to activate licenses.
16. In the code field, enter the code given to you by CSC Product Support.
17. Select Finish.


#### To Grant Users Permission to Log into a Data Source

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame tree structure, select the + next to the Users node.  
The Users branch expands.

4. Under Users, select the user you want to grant data source access to.  
The User Settings window opens in the right frame with the fields populated with the user's information.
5. In the Allow User To Login To field, from the Datasources drop down list, select the data source you want to give the user access to.
6. From the toolbar, select the  button.  
The data source you selected is added to the User Already Allowed to Login To field and the User Access Permissions for selected Data Source window opens. Enter user access details on this window. The user is also added to the tree structure under Data Sources, under the appropriate data source, under Permission to Login.

## To Add a Data Source Using an Existing DSN

To set up **DSN** to display on this wizard, use the **ODBC** Data Source Administrator (on your desktop, from the Start Menu, Settings > Control Panel > Administrative Tools > Data Sources (ODBC)).

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the toolbar, select the Add New Database Connection button .  
The DSN wizard opens.
4. Select the Use Predefined ODBC Datasource to Connect to Database check box.  
DSNs you previously defined display in the list.
5. From the list of DSNs, select the DSN you want to use.
6. Select Next.
7. In the Login User Name field, enter a valid login.
8. In the Login Password field, enter a valid password.
9. Select Next.  
A window opens and displays a message that the Database Connection wizard will now try to connect and validate the database you have selected.
10. Select Next.  
A window opens and displays a message that you are successfully connected to the specified database and it is a valid INSURANCE RISKMASTER database.
11. Select Next.  
If you are connecting this DSN to your security database for the first time, you have to enter the code product support [provided you to activate licenses.
12. In the code field, enter the code given to you by CSC Product Support.
13. Select Finish.

## Data Source Setup Overview

If you use multiple data sources with INSURANCE RISKMASTER or if you install a workstation using a shared database, you must create a link to the data source by configuring a database connection.

A default data source is defined for the Microsoft Access database and connected during installation. You can configure database connections using Open Data Base Connectivity ( ODBC ) drivers located in the Control Panel, which is located in the Settings submenu of the Start menu. This set of drivers provides access to the most popular databases and file formats. To configure an ODBC connection, specify an ODBC driver, match it to a database, and assign a data source name to the connection. If you need to customize an ODBC data source, you must modify an existing data source name.

When you add data sources, note that:

- If you use multiple data sources with INSURANCE RISKMASTER or use a shared database, you must create data links from each workstation to the database. On each workstation, you must add a data source name for each database.
- If you set up multiple workstations using the same database, add the identical data source name on each workstation. Some parameters, such as the logical drive name assigned to the data source, may vary among workstations.
- You must add a data source name for each database on workstations.

Once you connect the data sources, you must set up the users who can log into each data source. If you use multiple data sources, you must set up groups for each data source. When you assign a user to a group, group membership is only valid for the specific data source that you select. Users can only belong to one group for each data source.

## GUI

### Data Source Settings Window

Use this window to specify details about a **data source** .

- To open**
- Under the INSURANCE RISKMASTER Security tree, select the + next to Data Sources.
  - Under Data Sources, select the data source you want to specify details for.

#### Field definitions

##### Data Source Settings

**System Login Name** Enter the login name to use to access this data source.

**System Password** Enter the password to use with the login name you entered.

##### Document Path for this Data Source

**File Server** Select the option if you want to use the file server to save documents.

**Db server** Select the option if you want to use the database server to save documents.

Note: If you want to use the database server, you must set up your database so you can save documents to the database.

**Path/Data Source** If you selected the File Server option, enter the file path for the directory where you want documents to be saved.

If you selected the Database server option, either manually enter a connection string for the database, or select the button to use the wizard to enter a connection string.

##### License Information

**# Workstations** Enter the number of workstations that are licensed to run this data source.

**Save License info** Select  button to update the license information.

**Edit this Datasource** Select the  button to edit the datasource.




**Module Access  
Security Enabled**

Select the check box if you want to use the module access security settings you set up. If you do not select this check box, users will have access to all modules and INSURANCE RISKMASTER functions.

## Module Group

### How To

#### To Add a Module Group


1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame tree structure, select the + next to Data Sources node.  
The Data Sources branch expands.
4. In the tree structure, under Data Sources, expand the specific data source under which you want to add a module group.
5. Under the data source you expanded, expand the Module Security Groups node.  
Existing module groups for the data source display under Module Security Groups node.
6. From the toolbar, select the Add New Module group button .  
The Enter New Group pop-up window opens.
7. In the Please type name for new group field, enter a name for the new module group.
8. Select OK.
9. Select the ok button.  
The module group is added.

#### To Assign a User to a Module Group

Once you create a module group for a **data source** , you can assign users to the **module group** .

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame tree structure, select the + next to Data Sources node.  
The Data Sources branch expands.
4. In the tree structure, under Data Sources, expand the specific data source under which you want to add a user to a module group.
5. Under the data source you expanded, expand the Permission to Login node.  
The users who have permission to login to the data source you selected display under Permission To Login.
6. Select the user you want to assign to a module security group.  
The User Access Permissions for selected Data Source window opens in the right frame.
7. Complete the fields in the User Access Permissions for selected Data Source window as shown:  
**User Access Permissions for selected Data Source**


<b>Login Name</b>	Enter the login name you want the user to use to access the selected data source.
<b>Password</b>	Enter the password you want the user to use to access the selected data source.
<b>Update Password</b>	Select the button to change the current password.
<b>Permission Expires</b>	Select the check box, if you want the permissions to expire after a certain date.
<b>Expiration Date</b>	If you select the Permission Expires check box, enter the date on which you want the permission to expire.
<b>Use Document Path, overrides Data Source Document Path</b>	Enter the file path you want to use instead of the data source document path.
<b>Assign User To Group</b>	
<b>ModuleGroups</b>	From the drop down list, select the module group you want to assign the user to. You can only assign a user to one module group under each data source. You must first give the user access to a data source before you can add the user to a module group under that data source.
<b>Allow Access in these times intervals</b>	Select the check boxes for days on which you want the user to be able to access the data source. In the fields enter the times between which you want the user to be able to access the data source.

- 8.
9. Under the Assign User to Group tab, from the Module Groups drop down list, select the module group you want to assign the user to.
10. From the toolbar, select the Save button  .  
The user is added to module group.


### **To Add or Modify Group Privileges**

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame of the tree structure, select the + next to DataSources node.  
The Data Sources branch expands.
4. In the left frame of the tree structure, under Data Sources, select the data source to which the module group you want to assign privileges to, belongs.  
The Data Source Settings window opens.
5. Under License Information, select the Module Access Security Enabled check box.
6. From the toolbar, select the Save button.
7. In the left frame of the tree structure, under Data Sources, expand the data source with the module group you want to assign privileges to.
8. Under the data source you expanded, expand the Module Security Groups node.  
The existing module security groups display.
9. Select the module security group you want to add or modify privileges for.  
The Module Access Permissions window opens in the right frame.


10. Select the modules you want to give the selected module group permissions to.

11. From the toolbar, select the  button.

### To Rename a Module Group

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame tree structure, select the + next to Data Sources node.  
The Data Sources branch expands.
4. In the tree structure, under Data Sources, expand the specific data source which has the module group you want to rename.
5. Under the data source you expanded, expand the Module Security Groups node.  
Existing module groups display under that data source.
6. Select the module security group you want to rename.
7. From the toolbar, select the Rename Selected Module Group button .  
The Group Rename window opens.
8. In the field, enter a new name for the module group.
9. Select OK.  
The module group is renamed.

### To Clone a Module Group

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The INSURANCE RISKMASTER Security window opens.
3. From the left frame of the tree structure, select the + next to Data Sources node.  
The Data Sources branch expands.
4. In the left frame of the tree structure, under Data Sources, select the + next to the data source to which the module group you want to clone, belongs.  
The selected data source branch expands.
5. Select the + next to Module Security Groups.  
The Module Security groups branch expands.
6. Select the module security group you want to clone.
7. From the toolbar, select the  button.  
The Add New Module Group window opens.
8. In the Please type name for new group field, enter the name for the new module group.
9. Select the Clone check box to clone a module group.
10. From the drop down list, select the module group you want to clone.
11. Select the OK button.  
The selected module group gets cloned.

## Module Groups Overview

Once you add users and data sources, you can specify which users can access each data source . You can also create module groups consisting of multiple users and assign access to the data source for the entire module group. You can also restrict or grant access to these groups for using INSURANCE RISKMASTER features and fields.

By assigning users to groups and assigning access privileges to groups, you can control the access each user in a group has to risk management information in your system. For example, you can assign all users who work only on workers' compensation claims to a group and then assign access privileges that restrict this group from accessing any functions that are not related to workers' compensation claims.

**Note:** The default restricts access. You must manually grant groups permissions to access the various modules of the system. You can only grant or revoke permissions by group, not by individual user.



After you assign users to groups, you assign the groups access privileges. You can grant full or partial access privileges or revoke all privileges for the group. When you assign or revoke permissions, remember that:

- If you use multiple data sources, you must set up groups for each data source. The access privileges you assign to the group are only valid for the current data source. Users can only belong to one group for each data source.
- You can only assign or revoke permissions for an entire group. You cannot grant or revoke permissions for individual users within a module security group.
- You can modify or revoke access privileges for a group at any time.
- Privileges are toggle options you can turn on or off, as necessary.

## Domain Authentication


### How To

#### To Delete an Existing Domain

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.
3. The Security Management System window opens.
4. From the left frame tree structure, select the + next to Users node.  
The Users branch expands.
5. To set the domain authentication for a user, from the Users branch, select the user.
6. From the toolbar, select the Domain Authentication Settings  button.  
The Set Domain Authentication Options window opens.
7. From the Domains List section, to delete an existing domain, select the domain and then select the  button.
8. Select the Save button.




## To Add a New Domain

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The Security Management System window opens.
3. From the left frame tree structure, select the + next to Users node.  
The Users branch expands.
4. To set the domain authentication for a user, from the Users branch, select the user.
5. From the toolbar, select the Domain Authentication Settings button.  
The Set Domain Authentication Options window opens.
6. To add a new domain, from the Domains List section, select the  button.  
The Add/edit Domain window opens.
7. Select and complete the fields on the Add/edit Domain window , as shown below:
 

<b>Domain Name</b>	Enter the domain name.
<b>Enabled</b>	Select the check box to authenticate the entered domain name.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to cancel the changes and close the Add/edit Domain window.
8. Select the Save button.

## To Modify an Existing Domain

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.
3. The Security Management System window opens.
4. From the left frame tree structure, select the + next to Users node.  
The Users branch expands.
5. To set the domain authentication for a user, from the Users branch, select the user.
6. From the toolbar, select the Domain Authentication Settings button.  
The Set Domain Authentication Options window opens.
7. To edit an existing domain, from the Domains List section, select the domain and then select the  button.
8. Select and complete the fields on the Add/edit Domain window , as shown below:
 

<b>Domain Name</b>	Enter the domain name.
<b>Enabled</b>	Select the check box to authenticate the entered domain name.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to cancel the changes and close the Add/edit Domain window.
9. Select the Save button.

## To Set Domain Authentication

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Security Management System.  
The Security Management System window opens.
3. From the left frame tree structure, select the + next to Users node.  
The Users branch expands.
4. To set the domain authentication for a user, from the Users branch, select the user.
5. From the toolbar, select the Domain Authentication Settings button.  
The Set Domain Authentication Options window opens.
6. Select the Enable Domain authentication check box to enable the domain authentication for the selected user.
7. Select the OK button.

## GUI

### Set Domain Authentication Options Window

Use this window to set domain authentication options.

#### To open

- From the Security menu, choose Security Management System.
- From the Security Management System window, select the button.

#### Field definitions

##### Enable Domain authentication

Select the check box to enable the domain authentication.

##### Domains List

##### Domain Name

Displays the domain name.

##### Status

Displays the domain status.



Select to open the Add/edit Domain window.



Select a record and then select to open the Add/edit Domain window.




Select to save the record.

### Add/Edit Domain Window

#### To open

- From the Set Domain Authentication Options window, do one of the following:

- Select the  button, to enter a new record.

- Select an existing record and then select the  button to edit an existing record

### Field definitions

<b>Domain Name</b>	Enter the domain name.
<b>Enabled</b>	Select the check box to authenticate the entered domain name.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to cancel the changes and close the Add/edit Domain window.

## BES



### How To

#### To Add Users to Groups

You have to first define entity security groups before you can add users to these groups. Each user can belong to only one group.

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Business Entity Security.  
The Business Entity Security module opens.
3. Select the Enable Confidential Record check box to display the Confidential Record check box on the Event window: Event Detail tab.




**Note:** If Business Entity Security (BES) is enabled, you need to disable and enable it again to activate or deactivate Confidential Record functionality. When you activate Confidential record a user in the supervisory chain of the assigned user of a confidential record will have access to the confidential record. A user who is not permitted to access confidential record will not be able to find the claim or event through search facility.

4. Select the BES Setup button.  
The Organizational Entity Security Setup opens.
5. Select the group to which you want to add a user.
6. Select the  button.  
The Edit Security Group wizard opens and displays the Data View Group Definition window.
7. Select the Next button.  
The Data View Adjuster Text Type Definitions window for the wizard opens.
8. Select the Next button.  
The Data View User Assignment window for the wizard opens.
9. Select the  button.  
The Code Selection window opens.
10. Select the users you want to add to the group.
11. On the wizard, select the Finish button.  
INSURANCE RISKMASTER adds the users to the group.



## To Define Entity Security Groups

You must first define entity security groups and assign permissions for the groups. You can then add users to these groups. Each user can belong to only one group.

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Business Entity Security.  
The Business Entity Security module opens.
3. Select the Enable Confidential Record check box to authorize a set of users to mark a record as confidential.  
**Note: If Business Entity Security (BES) is enabled, you need to disable and enable it again to activate or deactivate Confidential Record.**
4. Select the BES Setup button.  
If this is the first time you are using BES, a window opens and confirms if you want to prepare the database for using BES.
5. Select OK.  
The Organizational Entity Security Setup opens.
6. Select the  button.  
The New Security Group wizard opens and displays the Data View Group Definition window.
7. In the What do you want to call this security group?, enter a descriptive name for the group you are creating.
8. In the Which part of the organization should this group have access to? field, do one of the following:
  - If you want the group to have access to selected organizational entities, select the Select Organizational Entities option, then select the  button and from the organization hierarchy, select the organizational level you want.  
**Note: You can select multiple organization branches, but not multiple levels within the same branch.**
  - If you want the group to have access to all organizational entities, select the All Organizational Entities option.
9. Select the Next button.  
The Data View Adjuster Text Types Definition window for the wizard opens.
10. Select the type of adjuster dated text you want this group to have access to.
11. Select the Next button.  
The Data View User Assignment window for the wizard opens.
12. Select the  button.  
The Code Selection window opens.
13. Select the users you want to add to the group.  
The name of the selected users displays in the field on the Data View User Assignment window.
14. On the wizard, select the Finish button.  
INSURANCE RISKMASTER creates the group and adds it to the Organizational Entity Security Setup window.



## To Assign Adjuster Dated Text Permissions

You can assign permissions to a group to access the Adjuster Dated Text type, in order to hide sensitive patient/medical data from groups. You can assign adjuster dated text user permissions, when you use INSURANCE RISKMASTER, to comply with HIPAA.

Before you can assign or restrict access to Adjuster Dated Text, you must set up Dated Text Type codes and assign a code to each adjuster dated text entry in INSURANCE RISKMASTER.

1. From the main menu, select Security.  
The Security menu opens.
2. From the Security menu, choose Business Entity Security.  
The Business Entity Security module opens.
3. Select the Enable Confidential Record check box to authorize a set of users to mark a record as confidential.

Note: If Business Entity Security (BES) is enabled, you need to disable and enable it again to activate or deactivate Confidential Record functionality. When you activate Confidential record a user in the supervisory chain of the assigned user of a confidential record will have access to the confidential record. A user who is not permitted to access confidential record will not be able to find the claim or event through search facility.

4. Select the BES Setup button.  
The Organizational Entity Security Setup opens.
5. Select the group to which you want to assign adjuster dated text permissions.
6. Select the  button.  
The Edit Security Group wizard opens and displays the Data View Group Definition window.
7. Select the Select Organizational Entities option under Which parts of the organization should this group have access to?
8. Select the Next button.  
The Data View Adjuster Text Types Definition window for the wizard opens.
9. Do one of the following:
  - If you want the group to have access to all adjuster text types, select the All Adjuster Text Types option.
  - If you want the group to have access to only the adjuster text types you select, select the Only Selected Adjuster Text Types option, and then select the Add button. From the Code Selection window, select the Adjuster Text Type codes you want to include.
  - If you want the group to have access to all adjuster text types except the ones you select, select the All Types Except Selected Adjuster Text Types option, and then select the  button. From the Code Selection window, select the Adjuster Text Type codes you want to exclude.
  - Note: You can add specific Adjuster Text Type codes like PRIVATE or CONF (confidential) to help you screen sensitive records.
10. Select the Finish button.

## GUI

### Organizational Entity Security Setup Window

Use the Organizational Entity Security Setup to add new Business Entity Security ( BES) security groups and to edit existing groups. As you define security groups, you can add users to the groups and assign permissions to organization hierarchy entities for the groups. You can also assign permissions to the groups for the types of adjuster text they can access.

- To open**
- From the Security menu, choose the Business Entity Security.
  - From Business Entity Security module , select the BES Setup button.

## Field definitions

**Organizational Entity Security Setup** Displays the existing entity security groups.



Select to open the Edit Security Group wizard and add a new security group.



Select an existing group and then select this button to open the Edit Security Group wizard and edit the group you selected.



Select an existing group and then select this button to delete the group you selected.



Select to open Record Summary to view the list of Group Name, Group Entities and Group Users in the Entity Security Setup in Adobe PDF format.

## Business Entity Security Requirements

### Database Requirements

SEC\_DEPT\_EID: This column contains the department ID to which the data belong. SEC\_DEPT\_EID column is added to the following tables:

CLAIM CLAIMANT

EMPLOYEE ENTITY

EVENT FUNDS

PERSON\_INVOLVED RESERVE\_CURRENT

RESERVE\_HISTORY

The given tables represent the entry points for inquiries and reports. It is not necessary to add a filter to all tables in the database, because you cannot access many of the tables without first accessing one of the above mentioned tables. For the EVENT table and its descendants (CLAIM, CLAIMANT and so on) this field will contain the department that was specified in the event record. For tables that are not related to the EVENT table, this field will be populated with the user's default department ID.

### Configuration Requirements

In a large database with hundreds of different data views (groups) defined, BES can impact the performance. CSC recommends the scaling up of the server hardware for optimum utilization of BES. If you have less than 50 groups, BES will not impact the performance much. The more groups you create the more the performance can be negatively affected and you have to accordingly plan the server configurations.

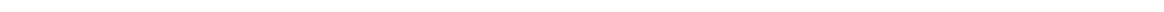
### Integration Requirements

BES only controls access to the data from within the INSURANCE RISKMASTER database. Consequently, any INSURANCE RISKMASTER applications that supply third party integration should disable those features. It is the responsibility of the customer of CSC to secure entry into the database. CSC secures the data, once entry is given to INSURANCE RISKMASTER.

## Business Entity Security Overview

Business Entity Security (BES) enables you to create and maintain separate data views (groups) within a single INSURANCE RISKMASTER database, based on selections from the organization hierarchy.

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BES is very useful in organizations which have multiple branches and locations and share the same database, but want to limit the access of the individual branches to specific areas of data. For example, Hospital A and Hospital B belong to the same organization and share the same database. However, if you do not want to grant Hospital A access to the data from Hospital B, you can set up BES so that each hospital only has access to its own data.

You can use BES to create a System Administrator's security group with access to the entire database.

After you assign all user securities you can activate BES.

## Tips for Using Business Entity Security

- Ensure that no users are logged on before you install the security setup.
- First create an administrator group, as without an administrator group membership, you can be locked out of the database, while installing the security setup.
- Set aside ample time for the initial database configuration. The setup process could run from five minutes on new databases, to several hours on large databases. Ensure that you set the truncate log on checkpoint, or monitor the transaction log and dump it, periodically.
- Ensure that the SQL Administrator is the database owner of the INSURANCE RISKMASTER ODBC data source. The BES setup creates global users and only the SQL Administrator has the privilege to create global users.
- When you change the organizational hierarchy or add departments, simultaneously update the security groups. New departments will not be a part of the database views initially created, and only administrators will have access to this part of the organizational hierarchy. The easiest way to update the groups is to select and edit them in the entity security window of the setup. On the entity security window, select the Finish button to update the database views. Run the update when no users are logged on to the database.
- Define your users and organizational hierarchy links prior to starting the setup.
- You can assign only one group to each user.
- Do not try to link different levels on the organization hierarchy to the same group. You will get a database error concerning duplicate row entry.
- The column in the major tables which pertains to entity security is called SEC\_DEPT\_EID. This column contains the default department as seen in the initially created table. If a department is updated on a parent table, a trigger will update the related tables with the new department. For example, when you update an event record, the parties involved table in all the parties involved records for the event, are updated.
- When you update the administrator's group, on the first window, in the entity box, "Selected Organizational Entities" can display with brackets "[ ]". Reselect "All Organizational Entities" before making any edits.
- If you update records in the database without entering any department in the column (0 entry), all users will be able to see the records.

## Example of Business Entity Security Usage

Alpha Corporation comprises of thirteen different companies. Each company has four regions and each region has multiple districts, which are usually ten in number. Each district has multiple stores which are also usually ten in number.

To implement security you have to separate the data at all levels within the organization. At Alpha Corporation you will have to set up:

- A global database view
  - Individual database views for each of the thirteen companies
  - A database view for each region within each company
  - A database view for each district within each region
  - A database view for each store within each district
-



Alpha Corporation can also decide to link users to different combination sets of companies, regions, districts, or stores. The steps to link such combinations sets are:

1. Identify the entities by which you want to group.
2. After you identify the groups, a mapping table will be populated with all the possible department level entity IDs and group IDs.
3. After you create the groups, you can give users access to data within a specific group. A user can only belong to one group.
4. When you add records to the database, the records are tagged with the department that was provided in the event record, or when the claim is entered. If the data you entered is not an event or a descendent of the event, it will be tagged with the default department ID for that user.
5. When you execute an inquiry on the data, the enquiry is linked to the mapping table in order to filter out the data to which you do not have access. These are the database views that are created.

## **Business Entity Security Key Features**

- You can use BES only on Microsoft SQL Server and Oracle database platforms.
- BES settings apply to INSURANCE RISKMASTER .
- You have to define BES groups separately. BES does not share groups with module or role security.
- You have to first apply BES permissions to groups and then add users to the groups.
- You grant permissions to groups to access one or more organization hierarchy levels and all the departments below that level.
- You can restrict a group's access to adjuster notes based on the Adjuster Text Type code assigned to the adjuster notes. This helps Third Party Administrators with HIPAA compliance.

# Utilities

## Introduction

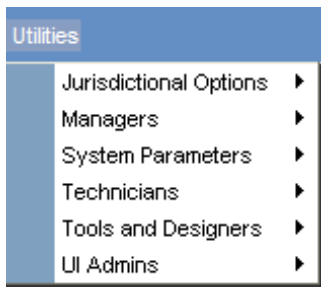
### The Utilities User Interface

Use the Utilities menu in the INSURANCE RISKMASTER main menu open the INSURANCE RISKMASTER Utilities windows. You can only access the INSURANCE RISKMASTER Utilities windows if you have system administrator privileges.

You can use the Utilities module to set up how your INSURANCE RISKMASTER system will look and work. The Utilities windows are designed to emulate the paper methods used in the risk management industry. You can open several forms and lists and work in several records simultaneously.

### The Utilities menu

On the main menu, select the Utilities to display the Utilities menu options. Select the menu options to display the items under that menu. For example, select Managers to open the Managers menu.



### The Jurisdictional Options menu

#### This menu item

Auto FROI ACORD Setup  
First Report of Injury Options  
FL Max Rate Setup  
FROI Batch Printing  
FROI Preparer Info  
Schedule Batch FROI  
Schedule Batch ACORD  
Jurisdictional Forms Options  
Jurisdictional Tables  
Juris Preparer Info  
WC State Agency Service Area Mappings  
WC Transaction Mappings

#### Opens this window

Auto FROI ACORD Settings window  
First Report Of Injury Options window  
FL Max Rate Setup window  
FROI Batch Printing Options  
FROIPreparer Info window  
Print Batch ACORD Options window  
Print Batch FROIs Options window  
Jurisdictional Forms Options window  
Jurisdictional Data window  
JurisPreparer Info window  
Agent Service Area window  
Workers' Compensation Transaction Type Setup window



## The Managers menu

This menu item	Opens this window	
Activity Log	Activity Log window	
Auto Assign Adjuster	Auto Assign Adjuster Setup window	
Administrative Tracking	Administrative Tracking window	
BRS Setup	Fee Schedule	Fee Tables window
	Import Fee Schedule	Fee Schedule Import wizard
Claim Setup	Claim Letter Setup	Acknowledgement (Ack) - Closed Claim Letter Settings window
	Claim Type Change Option Setup	Claim Type Change Options window
	Claim Type Verses ACORD Form Mapping	Claim Type Verses ACORD Form Setup window
Auto Discount Transaction- Reserve Mapping	Auto Discount Transaction-Reserve Mapping window	
Client Information Setup	Client Information Parameters window	
Check Stub Text Setup	Check Stub Text Setup window	
Fiscal Year Setup	Fiscal Years List window	
Holiday Setup	Holidays Setup window	
IAIABC Funds Mapping	IAIABC Funds Transaction Mapping window	
LSS Interface Log	LSS Interface Log	
Medical Info Setup	Medical Info Setup window	

Policy Setup	Policy Management Setup	Policy Management windows
	Billing System Setup	Billing Setup window
Tax and Offset Mapping	Tax and Offset Mapping window	
Time & Expense Rate Tables	Rate Tables window	
	Work Loss/Restriction Mapping window	
Work Loss/ Restrictions Mapping		

### System Parameters

General System Parameter Setup	System Setup Parameters window	
Line of Business Parameter Setup	Line of Business Parameters window	
Occurrence Parameter Setup	Occurrence/Event Parameters window	
Payment Parameter Setup	Payment Parameter Setup	

### The Technicians menu

This menu item	Performs this function
Rebuild SOUNDEX Values	Select the option if the "sound alike" function on the Search window is not working properly. This will synchronize the sound alike values and fix the sound alike function.
Rebuild Org. Hierarchy Lookup	Select the option if the organizational hierarchy lookup function is not working properly. This will synchronize the organizational hierarchy searches and fix the organizational hierarchy lookup function.
Rebuild Glossary Table Values	Select the option to update the glossary table. If another user makes changes to code tables in INSURANCE RISKMASTER/ World, and you make changes to the code tables in Utilities, rebuilding the glossary synchronizes the code tables.
Leave History and Record Update	Select the option to update leave history and records.

### The Tools and Designers Menu

This menu item	Opens this window
Query Designer	Query Designer window
Diary Utilities	WPA Diary Utilities window
Auto Diary Setup	WPA Auto Diary Setup
Adjuster Transfer	Current Adjuster Transfer window

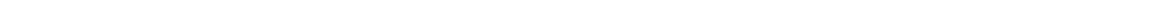
History Tracking	History Tracking Setup window
Transaction Type Change	Transaction Type Change Utility window
Task Manager	TM Job Views      TM Jobs View window  View Scheduled Tasks Tasks List window
MCM Prefill Folder Utility	MCM Prefill Folder Utility window
Script Editor	Script Editor window

**The UI Admins menu**

<b>This menu item</b>	<b>Opens this window</b>	
Power Views	Power Views Setup window	
Users	Assign Layouts	Assign Layout to User(s) window
	View Logged in Users	Grant Report Access Permissions window
	Grant Additional Report Access Rights	Current Report Access Permissions for All Users window
	Review/Remove Report Access Rights	Captions/Paths window
Admin Exec Summary Config	Executive Summary Configuration window	
Customization	Searches	System Customisation window
	Settings	Settings window
	Portal Settings	RMX Portal Settings window
	Reports	Reports window
Supplemental Setup	Supplemental Field Data	Supplemental Data window
	Supplemental Grid Parameters Setup	Supplemental Grid Parameters Setup window
Reports Administration	View all Reports in Queue	View all Reports in Queue
	View all Scheduled Reports	View all Scheduled Reports
	View the XML of an Available Report	View the XML of an Available Report

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## Welcome to INSURANCE RISKMASTER Utilities

INSURANCE RISKMASTER Utilities module enables you to choose many facets of how your set up your system will function. You can define such things as the numbering scheme for events and claims, the reserve types displayed for each line of business and/or claim, how checks will be printed, etc. You will set up mappings and options in Utilities based on your organization's requirements.

You can only access and make changes to the Utilities module if you have system administrator privileges.

Your set up in INSURANCE RISKMASTER Utilities defines how your INSURANCE RISKMASTER system modules display and function.

## VFK

### Variable Financial Key

#### Variable Financial Key

1. VFK (Variable Financial Key), a new feature introduced to 16.2 release, is designed with an objective to enhance flexibility and reduce the extra work of the users in a best way possible. Previously, it was an additional job for the users to change the DSN (environment) for each carrier and corporate claim. VFK allows existing as well as new users to create both carrier and corporate claims in the same database.

2. Prior, there was defined financial keys for corporate, carrier, integral, life or health claim clients. Now, users can set up financial keys as per their business implementation and other specific requirements.

3. A new setting has been introduced to 'Financial Key Setup' window that enables users to filter/ define financial keys either on the basis of 'Policy LOB' or 'Claim Type'. The user requires to set up a default financial key for processing a claim. If the user doesn't define a fresh financial key for the new claim, the default key set up will be accepted by the system for that particular claim.

4. A new label 'Reserve Sub Type' will be the part of financial key criteria for both corporate & Carrier Clients.

5. 'Reserve Type' field is mandatory for all carrier and corporate claims, therefore 'Reserve Type' financial key remains checked by default.

6. Conditions for Financial Key setting:

Since Reserve Type and Reserve Sub Type will be the part of financial key by default for all claims, users need to follow the conditions outline below while selecting other financial keys:

\* If the user selects 'Policy Coverage' as one financial key, it is mandatory to select Claimant as another financial key for claim processing.

\* If the user selects both 'Policy Coverage' and 'Loss/ Disability Type' as one financial key, it is mandatory to select Claimant as another financial key for claim processing.

\* If the user selects 'Loss/ Disability Type' as a financial key, it is mandatory to select 'Policy Coverage' as another financial key for claim processing.

7. For all the claim which have 'Policy Coverage' as the part of their financial key, Policy upload / download will be available.

**Please note:**

- Among the default financial key set up and the new financial key defined for a claim, the new financial key set up will take preference and will be used by system.
  - User cannot change the criteria after defining financial key in the system.
  - User cannot edit, delete or modify financial key for point, integral or policy system, once the upload has been done
-



## How To

### To Set Up Variable Financial Key

To Setup Financial Key for the Claim

1. From the main menu, select Utility.  
The Utility menu opens.
2. From the Utility menu list, select Managers.
3. From the Managers menu list, select Financial Key Set up.  
The Financial Key Filter Setting Window opens.
4. From the Financial Key Filter Setting window, select either 'Policy LOB' or 'Claim Type' as per the requirement.
5. Select 'New' button.  
The Financial Key Setup window opens.
6. Select the 'Line of Business' and 'Policy LOB'.
7. Define the Financial Key for the particular Claim.

## Field Help

<b>To open</b>	<ul style="list-style-type: none"><li>▪ From the Main menu, choose Utilities &gt; Managers</li><li>▪ From the Managers menu, Financial Key Setup window</li></ul>
<b>Financial Key Filter is based on</b>	<ul style="list-style-type: none"><li>▪ Policy LOB</li><li>▪ Claim Type</li></ul>

## Field definitions

<b>Claim Type</b>	Select to filter financial key.
<b>Policy LOB</b>	Select to filter financial key.
<b>LOB</b>	Select line of business for the claim.
<b>Claimant</b>	Select a claimant for the claim.
<b>Claimant</b>	Display whether claimant is the part of Financial Key.
<b>Policy/Unit Coverage</b>	Display whether Policy/Unit Coverage is the part of Financial Key.
<b>Loss Type</b>	Display whether Loss Type is the part of Financial Key.
<b>Reserve Type</b>	Display whether Reserve Type is the part of Financial Key.

**Reserve Sub Type**      Display whether Reserve Sub Type is the part of Financial Key.



Select the button to open the Financial Key Setup window and filter the financial key.



Select a claim and then select the button to modify the financial key for existing claim.



Select a claim and then select the button to delete an existing claim.

## Loss Code Mapping

### Field Help

#### Loss Code Mapping window: Loss Code Mapping tab

- To open**
- From the Main menu, choose Utilities > Managers
  - From the Managers menu, select Loss Code Mapping

#### Field definitions

- Policy System Names**      From the field, select the policy systems for which you want to define code mapping
- Policy LOB**      Select the line of business of the policies for which you want to map the codes
- Coverage Type**      Select the required coverage types
- Policy System Loss Codes**      Select the loss code from the policy system which you map to the rmA code. Policy system loss type codes and rma loss type codes dropdown will populate after user selects all the policy system names from listbox. Loss codes common in selected policy systems will be displayed
- RMA Loss Of Code**      Select the rmA loss code to which the above selected policy system loss code is to be mapped. Loss codes for which policy code mapping is defined and is common for all the selected policy systems will be displayed
- Add Mapping**      Select the button to save the mapping
- Remove Mapping**      Select the button to remove the mapping

#### Loss Code Mapping window: Import Loss Code Mapping tab

- To open**
- From the Main menu, choose Utilities > Managers
  - From the Managers menu, select Loss Code Mapping

### Field definitions

**Import To Policy System** From the field, select the policy system to which you want to import the code mapping.

**Select Import File Path** Select the Browse button to select the filename having code mapping.  
Note: Only .XLSX format is supported

**Import Mapping** Select the button to import the code mapping file.

### Loss Code Mapping window: Export Loss Code Mapping tab

- To open**
- From the Main menu, choose Utilities > Managers
  - From the Managers menu, select Loss Code Mapping

### Field definitions

**Export From Policy System** Select the policy system from which you want to export the code mapping file.

**Export Mapping** Select the button to export the file from selected policy system.

### Loss Code Mapping window: Replicate Loss Code Mapping tab

- To open**
- From the Main menu, choose Utilities > Managers
  - From the Managers menu, select Loss Code Mapping

### Field definitions

**Import From Policy System** Select the policy system to which you want to import the loss code mapping

**Import To Policy System** Select the policy system to which you want import the loss code mapping from the policy system selected above.

**Replicate Mapping** Select the button to replicate the mapping between selected policy systems.  
No deletion for existing loss code mapping, only validation based insertion is proposed; In case of logical duplicate mapping existing mapping is retained.

## TPA

### Overview

Using this feature you can restrict the Third Party Administrators (TPA) users from viewing, creating and searching claims and claims related information. The users can access information associated claims and can search/download a policy as per the policy data mapping set for them.

- This functionality only works when carrier claims with BES ON for all BES Groups.
- Claim restriction for TPA users is already implemented in RMA.
- Diary restriction for TPA users is already implemented in RMA.

- A user can be assigned only to one organization security group at a time.

#### *Claim access from Recent Claims when TPA access is on*

When TPA access is on, a user belonging to one department will be able to see only the claims he has access to; other claims will not be visible to that user.

#### *Diaries view when TPA access is on*

The logged in user will not be able to view the diaries for the claims to which the user does not have access. Also, the authorized user will be able to assign the diary to another user who belongs to the same security group as the logged-in user. This can be achieved by displaying the users of same group in the 'Assign Diary to' window.

#### *Policy search when TPA access is enabled*


The logged-in user will be able to search and download the policies for which the search information is mapped through the mapping window.

The mapping data will be a set of different row values created through the policy mapping window.

## How To

### To Setup Policy Search data Parameters

Use the window to enter the mapping data (the combination of policy data which will be used to search a policy when TPA access is enabled through BES. You cannot save more than ten search mapping having similar combination of fields in the Policy System and Security Group.

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select Managers.
3. From the Managers menu, select Policy Search data Mapping.
4. The Policy Search Data Mapping window opens.
5. On the Policy Search Data Mapping window select the  button.

The Policy Search Data Setup window opens.

6. Complete the fields on the window as shown in the table below.

<b>Policy System</b>	Select the name of the external policy system for which you want to set up the policy search data.
<b>Agent Code:</b>	Select the agent code for which for you want to set up the policy search data.
<b>MCO:</b>	Enter the master company code for the policy for which you want to set up policy search data.
<b>PCO:</b>	Enter the policy company code for the policy for which you want to set up policy search data.
<b>Business Unit</b>	Select the business unit.
<b>Business Segment:</b>	Select the business segment of the TPA.
<b>Org. Security Group:</b>	Enter the name of the security group created and setup in BES setup
<b>OK</b>	Select the button to save parameters.

**Cancel** Select the button to discard changes.

## Tools

### Dialog

#### ReserveBalance

##### Schedule a Reserve Balance Task Task: Periodically

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

##### *Field Descriptions*

###### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

###### **Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Cancel** Select the button to close the window without saving the changes.

**Save** Select the button to save the scheduled task.

**Update Current Reserve Amount For All Claims** Select this option to update the reserve amount for the all claims

**Update Current Reserve Amount For A Specific Claim** Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

**Update Current Reserve Amount Based On Claim Date** Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

##### Schedule a Task: One Time

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

##### *Field Descriptions*

###### **Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Cancel** Select the button to close the window without saving the changes.

**Save** Select the button to save the scheduled task.



**Reserve Balance Related Parameters:**

<b>Update Current Reserve Amount For All Claims</b>	Select this option to update the reserve amount for the all claims
<b>Update Current Reserve Amount For A Specific Claim</b>	Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.
<b>Update Current Reserve Amount Based On Claim Date</b>	Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

**Schedule a Reserve Balance Task: Monthly**

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions***Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Cancel</b>	Select the button to close the window without saving the changes.
<b>Save</b>	Select the button to save the scheduled task.

**Reserve Balance Related Parameters:**

<b>Update Current Reserve Amount For All Claims</b>	Select this option to update the reserve amount for the all claims
<b>Update Current Reserve Amount For A Specific Claim</b>	Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.
<b>Update Current Reserve Amount Based On Claim Date</b>	Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

**Schedule a Reserve Balance Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions***Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.
- Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.  
**Note:** You can select more than one day to run the scheduled task.
- Cancel** Select the button to close the window without saving the changes.
- Save** Select the button to save the scheduled task.

**Reserve Balance Related Parameters:**

- Update Current Reserve Amount For All Claims** Select this option to update the reserve amount for the all claims
- Update Current Reserve Amount For A Specific Claim** Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.
- Update Current Reserve Amount Based On Claim Date** Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

**Schedule a DIS Task: Yearly**

- To open** From the Schedule Type drop down list, select the schedule type as Yearly.

*Field Descriptions*

**Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.
- Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.  
**Note:** You can select more than one day to run the scheduled task.
- Cancel** Select the button to close the window without saving the changes.
- Save** Select the button to save the scheduled task.
- Update Current Reserve Amount For All Claims** Select this option to update the reserve amount for the all claims
- Update Current Reserve Amount For A Specific Claim** Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.


**Update Current Reserve Amount Based On Claim Date**

Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

**Table: <table name> Window**

Use the Table: <table name> window to modify the data fields on the window that opens when you select the Jurisdictionals tab on the Workers' Compensation window for each state, in INSURANCE RISKMASTER .

**To open**

From the Jurisdictional Data window, select the  button.

**Field definitions****Fields**

**#** Displays the serial number of the field. The serial number determines where the field is displayed on the window that opens when you select the Jurisdictionals tab on the Workers' Compensation window for each state, in INSURANCE RISKMASTER.

**Jurisdiction** Displays the jurisdiction.

**System Field Name** Displays the field name in the table as it is recorded in the database.

**User Prompt** Displays the field label that displays on the Jurisdictionals tab.

**Field Type** Displays the field type.

**Size** Displays the number of characters can enter in the field.

**Req.?** Displays as Yes or No, whether or not the field is a required field.

**Del.?** Displays as Yes or No, whether or not the field was deleted by a user.

**Pattern** Displays the format for the field input.

**Reposition** Select a field and then select the up and down buttons to move the field up or down.

**Modify Field** Select an existing field and then select this button to open the Modify Field window.

**Indexes**

**Index Names** Displays the index names.

**Index Fields** Displays the index fields associated with the index names.


**Unique?** Displays as Yes or No, whether or not the index is unique.

**Add Index** Select to open the Add Index window.

**Close** Select to close this window without saving your changes.

### Modify Field Window

Use the Modify Field window to modify the field you selected in the Table window. You can only modify existing Jurisdictional fields. You cannot create new Jurisdictional fields.

**To open** From the Table window, select the  button.

### Field definitions

**Field Type** From the drop down list, select the type of field.

**User Prompt** Enter the field caption for the Jurisdictional field.

**System Field Name** Enter the field name in the table as it is recorded in the database.

**Required Field** Select the check box, if you want to make the field a required field.

**Deleted** Select the check box, if you want to delete the required field.

**Input Format** This field is only available if you selected String as the Field Type.

- Select **Free- Form**, if you do not want to automatically format the string when the user enters the string in INSURANCE RISKMASTER.
- Select the option **Patterned**, and from the drop down list select a format if you want to automatically format the string when the user enters the string in INSURANCE RISKMASTER/ World.



Select to save your changes and close the window.


### View Scheduled Tasks Window

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Tools & Designers.
  - From the Tools & Designers menu, choose Task Manager.
  - From the Task Manager menu, choose View Scheduled Tasks.

### Field Descriptions

#### Task List

**Task Name** Displays the name of the task.

- Schedule Type**                      Displays the type of schedule for the task.
- Next Run Date/Time**              Displays the date and time when the task is scheduled to run next.
-                       Select a task and select the button to delete the task from the task list.
- Refresh**                              Select the button to refresh the task list.
- Schedule A New Task**              Select the button to open the Schedule a Task window.

**DIS**

**DIS Optionset**

*DIS Optionset Window*

**To open**                              From the View Scheduled Task window, select the Optionset button.

Field description

**Optionset Name**                      Enter the name of the option set.

**Do you wish to Verify the data before it is imported**      Select the check box to verify data before it is imported.

**Select Access Database to Import From**      Enter the file location or select the Browse button to navigate to the file.

**Select the areas you wish to import**

**Employee**                              Select the option for the areas that you want to be imported.

- **Import Supplemental Data**      Select to import Employee supplemental data.
- **Match Only on Employee ID**      Select to search Employee records using the Employee ID.
- **Update Even if Blank or Zero**      Select to import fields where the value is blank or zero.
- **Update Address Even if Blank or Zero**      Select to import address fields where the value is blank or zero.

**Organizational Hierarchy Section**      Select the option for the areas that you want to be imported.

- **Import Supplemental Data**      Select to import Organizational Hierarchy supplemental data.
- **Update Even if Blank or Zero**      Select to import fields where the value is blank or zero.  
  
Select to create new codes if they do not exist in .



- **Allow Creation of New Codes**

**Funds**

Select the option for the areas that you want to be imported.

- **Import Supplemental Data** Select to import Funds supplemental data.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .
- **Import Funds for Open Claims Only** Select to import Funds records for Claims with an Open claim status.
- **Match Payee by Name** Select to search Payee records using the Payee Name.
- **Match Payee by Tax ID** Select to search Payee records using the Payee Tax ID.
- **Match by Entity ID** Select to search Payee records using the Entity ID.
- **Check Duplicate Payments** Select to check before importing duplicate payments.
- **Accept Duplicate Checks** Select to import duplicate check numbers.
- **Import Cleared Payments too** Select to import payments with a Cleared status.

**Funds Deposit**

Select the option for the areas that you want to be imported.

- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

**Vehicles**

Select the option for the areas that you want to be imported.

- **Import Supplemental Data** Select to import Vehicle supplemental data.
- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

Select the option for the areas that you want to be imported.

- |                 |                                       |   |
|-----------------|---------------------------------------|---|
| <b>Entities</b> | ▪ <b>Import Supplemental Data</b>     | Select to import Entity supplemental data.                    |
|                 | ▪ <b>Update Even if Blank or Zero</b> | Select to import fields where the value is blank or zero.     |
|                 | ▪ <b>Allow Creation of New Codes</b>  | Select to create new codes if they do not exist in            |
|                 | ▪ <b>Match by Tax ID</b>              | Select to search Entity records using the Entity Tax ID       |
|                 | ▪ <b>Match by Name</b>                | Select to search Entity records using the Entity Name         |
|                 | ▪ <b>Match by Abbreviation</b>        | Select to search Entity records using the Entity Abbreviation |

Select the option for the areas that you want to be imported.

- |                 |                                    |  |
|-----------------|------------------------------------|--|
| <b>Policies</b> | <b>Import Supplemental Data</b>    | Select to import Policy supplemental data.           |
|                 | <b>Allow Creation of New Codes</b> | Select to create new codes if they do not exist in . |

Select the option for the areas that you want to be imported.

- |                 |                                    |  |
|-----------------|------------------------------------|--|
| <b>Reserves</b> | <b>Import Supplemental Data</b>    | Select to import Employee supplemental data.         |
|                 | <b>Allow Creation of New Codes</b> | Select to create new codes if they do not exist in . |
|                 | <b>Check Duplicate Reserves</b>    | Select to check before importing duplicate reserves. |

Select the option for the areas that you want to be imported.

- |                                |  |  |
|--------------------------------|--|--|
| <b>Organizational Exposure</b> | ▪ <b>Import Supplemental Data .</b>          | Select to import Organizational Exposure supplemental data |
|                                | ▪ <b>Update Even if Blank or Zero</b>        | Select to import fields where the value is blank or zero.  |
|                                | ▪ <b>Allow Creation of New Codes</b>         | Select to create new codes if they do not exist in .       |
|                                | ▪ <b>Assume New Records Only (no update)</b> | Select to import all records as new records.               |



Select the option for the areas that you want to be imported.

- Patients**
- **Import Supplemental Data** Select to import Patient supplemental data.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .
  - **Match Patient Number Only** Select to search Patient records using the Patient Number.
  - **Match Patient Account No** Select to search Patient records using the Patient Account Number.
  - **Match Medical Record No** Select to search Patient records using the Medical Record Number.
  - **Validate Data Only (no upload)** Select to only validate Patient data.

Select the option for the areas that you want to be imported.

- Physicians**
- **Import Supplemental Data** Select to import Physician supplemental data.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .
  - **Match Physician Number Only .** Select to search Physician records using the Physician Number
  - **Validate Data Only (no upload)** Select to only validate Physician data.

Select the option for the areas that you want to be imported.

- Medical Staff**
- **Import Supplemental Data** Select to import Medical Staff supplemental data.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .
  - **Validate Data Only (no upload)** Select to only validate Medical Staff data.

Select the option for the areas that you want to be imported.

	<ul style="list-style-type: none"> <li>▪ <b>Select Admin Tracking Table</b> From the drop down list,select the table to import.</li> <li>▪ <b>Always Add.</b> Select to import records from selected table</li> </ul>
<b>Administrative Tracking</b>	<ul style="list-style-type: none"> <li>▪ <b>Add or Update .</b> Select to update records based on the Match by Field and add records if a match is not found</li> <li>▪ <b>Match by Field</b> From the drop down list, select the field to use as search criteria for the Add or Update option.</li> <li>▪ <b>Allow Creation of New Codes</b> Select to create new codes if they do not exist in .</li> </ul>
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

### Schedule a DIS Task: Periodically

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

##### **Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

##### **Reserve Balance Related Parameters:**

**Update Current Reserve Amount For All Claims** Select this option to update the reserve amount for the all claims

**Update Current Reserve Amount For A Specific Claim** Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

**Update Current Reserve Amount Based On Claim Date** Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

### Schedule a DIS Task: Monthly

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions*

**Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a DIS Task: Yearly**

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

*Field Descriptions*

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

<b>Optionset</b>	Select the button to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a DIS Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

<b>Optionset</b>	Select the button to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

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**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

*Field Descriptions***Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**MMSEA****Schedule a Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions***Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the MMSEA Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**MMSEA Optionset***MMSEA Optionset Window*

**To open** From the View Scheduled Task window, select the Optionset button.

*Field Descriptions*

Import Optionset

Export Optionset

*MMSEA Optionset Window: Export Optionset Tab*

**To open**

- From the View Scheduled Task window, select the Optionset button.
- Select the Export Optionset tab.

*Field Descriptions*

**Optionset Name** Enter the name of the option set.

<b>RRE Id</b>	From the drop down list, select the medicare responsible reporting entity identification number.
<b>File Format</b>	From the drop down list, select the file format.
<b>Test Export</b>	Select the check box to check for test the MMSEA file before export.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

*MMSEA Optionset Window: Import Optionset Tab*

- To open**
- From the View Scheduled Task window, select the Optionset button.
  - Select the Import Optionset tab.

*Field Descriptions*

<b>Optionset Name</b>	Enter the name of the option set.
<b>RRE Id</b>	From the drop down list, select the medicare responsible reporting entity identification number.
<b>File Format</b>	From the drop down list, select the file format.
<b>Import File</b>	Enter the location of the import file or select the <b>Browse</b> button to navigate to the import file.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: Yearly**

- To open** From the Schedule Type drop down list, select the schedule type as Yearly.

*Field Descriptions*

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

<b>Optionset</b>	Select the button to open the MMSEA Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

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**Schedule a Task: Monthly**

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions***Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the MMSEA Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

*Field Descriptions***Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select the button to open the MMSEA Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: Periodically**

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions***Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Optionset</b>	Select the button to open the MMSEA Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.



## BES

### Schedule a Task: Yearly

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

##### **BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number.

**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

### Schedule a Task: Monthly

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

#### *Field Descriptions*

##### **Enter the start Month and other details:**

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

##### **BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number.

**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

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**Schedule a Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions***Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

**BES Scheduler Related Parameters**

**Admin User Id** Enter the Business Entity Security administrator user identification name.

**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Periodically**

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions***Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number.

**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

*Field Descriptions*

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.  
**Time** Enter the start time of the scheduled task.

**BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number  
**Admin Password** Enter the Business Entity Security administrator password.  
**Save** Select the button to save the changes.  
**Cancel** Select the button to close the window without saving the changes.

**DDS**

**DDS Optionset**

*DDS Optionset Window: Advanced Tab*

**To open** On the DDS Optionset window, select the Advanced tab.

Field Descriptions

**Employee Match by**

**Name** Select the check box if you want the employee name to match with the information that you set in the General tab.  
**Tax ID** Select the check box if you want the employee information to match with the Tax ID number, regardless of the employee name.  
**Employee Number** Select the check box if you want the employee information to match with the employee number.

**Non-Employee Entity Match by**

**Name Only** Select the option if you want the non-employee information to match by the name only.  
**Name and Tax ID** Select the option if you want the non-employee information to match by the name and the Tax ID.  
**Tax ID Only** Select the option if you want the non-employee information to match only by the Tax ID.  
**Maximum Validation Errors Allowed** Enter the maximum number of errors that you want DDS to ignore during data validation.  
**Date Field Validation Range** Enter the date range for which you want to validate data fields before upload.  
**Recalculate Reserve After Upload** Select the check box to automatically recalculate the total paid, total collected, reserve balance and total incurred for payments fields when the upload is complete.  
**Update Claimant Details on claims upload** Select the check box if you want the claimant details to be updated when the claims is uploaded.

<b>Save Settings</b>	Select the button to save the changes made on the DDS Optionset window.
<b>Close</b>	Select to close the DDS Optionset window.

*DDS Optionset Window*

**To open** From the Schedule a Task window, select the Option Set button.

## Field Descriptions

<b>Optionset Name</b>	Enter the name of option set for the scheduled DDS task.
<b>Available File</b>	
<b>Event</b>	Select this check box if events .csv file is available.
<b>Event CSV</b>	Select the Browse button next to the field to upload the comma separated value data file.
<b>Medwatch</b>	Select this check box if Med Watch .csv file are available.
<b>Medwatch CSV</b>	Select the Browse button next to the field to upload the comma separated value data file.
<b>Claim</b>	Select this check box if Mad Watch .csv file are available.
<b>Claim CSV</b>	Select the Browse button next to the field to upload the claim comma separated value data file.
<b>Short Term Disability</b>	Select this check box if Short Term Disability .csv file are available.
<b>ST Dis Plan CSV</b>	Select the Browse button next to the field to upload the disability plan comma separated value data file.
<b>ST Dis Class CSV</b>	Select the Browse button next to the field to upload the disability class comma separated value data file.
<b>Adjuster Notes</b>	Select this check box if Adjuster Notes .csv file are available.
<b>Adjuster Notes CSV</b>	Select the Browse button next to the field to upload the adjuster notes comma separated value data file.
<b>Payments</b>	Select this check box if Payments .csv file are available.
<b>Payments CSV</b>	Select the Browse button next to the field to upload the payments comma separated value data file.
<b>Payments Bank Account</b>	Select the Browse button next to the field to upload the payments bank account comma separated value data file.
<b>Enhanced Notes</b>	Select this check box if Enhanced Notes .csv file are available.
<b>Enhanced Notes CSV</b>	Select the Browse button next to the field to upload the enhanced notes comma separated value data file.
<b>- Global Options</b>	

**Allow Creation of New Claims** Select this check box if you want DDS to create claims that exist in the upload data but do not exist in the target INSURANCE RISKMASTER database.

**Note:** Select this check box for all historical/ one-time loads.

**Allow Creation of New Codes** Select this check box if you want DDS to create new codes within the INSURANCE RISKMASTER database, based on the old codes in the source data. DDS creates the same short code and description. For instance, if you have a cause code of 01 in the source data and you have select this check box, DDS creates a new code in the INSURANCE RISKMASTER database with a short code of 01 and a description of 01.

**Note:** CSC recommends that create new codes in RISKMASTER, for old codes in the legacy database, prior to upload. If you created new codes before upload you do not need to select this check box.

Select this check box to create new employee records, when you upload data.

**Note:** Do not select this check box if both of the following conditions are true:

**Allow Creation of New Employees**

- HR loads data to the INSURANCE RISKMASTER database, on a periodic basis, to maintain a mirror of the HR database.
- The DDS upload is not of a historical nature. Historical uploads generally contain records on employees no longer with the company, and whose details may not be contained in the most recent HR database.

**Allow Creation of New Department**

Select this check box if you want DDS to create new department records.

**Set Adjuster as Current Adjuster**

Select this check box if you want to set the adjuster as current adjuster.

**Don't Check Duplicate Payments**

Select this check box if you do not want DDS to check for duplicate payments.

**Attach Trans ID to Check Number**

Select this check box if you want to attach transaction ID to check number.

**Use Tax ID in Entity Matches** Select this check box if you want DDS to use tax id to search entity.

**GC/VA Options**

**Identify Claimants Based on Claimant Name**

Select this button if you want to update the claimant name after data upload. For example, if claimant Mary Jones marries and you want to update her last name to Smith, you can select this button.

**Identify Claimants Based on Claim Suffix**

Select this button to identify the claimant based on a specific claim suffix maintained within the source system. DDS will use this claim suffix for the assigned claimant when you load any updates.

**Note:** CSC recommends that you do not select this button since successive data uploads from the source system can contain transposed suffixes within the source data.

**Update Claimant Name**

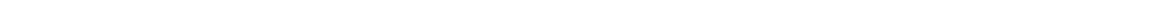
Select this check box if you want to update the claimant name on data upload. You can use this option for General and Vehicle Accident claims.

**Create New Entity if Tax ID is empty and Identify Claimants Based on Claim Suffix**

Select this check box if you want to create new entity in case tax id is empty and to identify claimants based on claim suffix.

**WC Options**

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<b>Update Claimant Name</b>	Select this check box if you want to update the claimant name on data upload. You can use this option for Workers' Compensations claims.
<b>Save Settings</b>	Select the button to save the settings for DDS task.
<b>Cancel</b>	Select the button to close the window without saving the settings.

#### *DDS Optionset Window: Reserve Mappings Tab*

To import the reserves, you must map them to one of the reserve buckets:

**To open** On the DDS Optionset window, select the Reserve Mappings tab.

#### Field definitions

<b>Line Of Business</b>	From the drop down list select the line of business for which you want to import the reserves.
<b>Bucket</b>	Set the reserve buckets.
<b>Mapped</b>	Select the check box for each of the four buckets/ transactions that you want to activate.
<b>Reserve Type</b>	From the drop down list, select the range of reserve types to which you want to map the reserve buckets/ transactions.
<b>Save Settings</b>	Select the button to save the changes on the DDS Optionset window: Reserve Mappings tab.
<b>Close</b>	Select the button to close the DDS Optionset window: Reserve Mappings tab.

#### **Schedule a DDS Task: Yearly**

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.  
**Note:** You can select more than one month to schedule the task to run.

**Optionset** Select the button to open the DDS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

#### **Schedule a DDS Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

#### *Field Descriptions*



**Enter the Date and Time you would like to Run the Task on:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.
- Optionset** Select the button to open the DDS Optionset window.
- Cancel** Select the button to close the window without saving the changes.

**Schedule a DDS Task: Periodically**

- To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions*

**Enter the start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

- Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.
- Interval** Enter the interval after which you want to repeat the task.
- Optionset** Select the button to open the DDS Optionset window.
- Cancel** Select the button to close the window without saving the changes.

**Schedule a DDS Task: Monthly**

- To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions*

**Enter the start Month and other details:**

- Month** From the drop down list, select the month in which you want to schedule the task.
- Day of Month** Enter the date on which you want to schedule the task in the selected month.
- Time** Enter the start time of the scheduled task.
- Optionset** Select to open the DDS Optionset window.
- Cancel** Select the button to close the window without saving the changes.

**Schedule a DDS Task: Weekly**

- To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*

**Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.

<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task. <div style="border: 1px solid gray; background-color: #e0e0e0; padding: 2px; margin-top: 5px;">Note: You can select more than one day to run the scheduled task.</div>
<b>Optionset</b>	Select the button to open the DDS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

## Positive Pay

### Positive Pay Optionset

#### *Positive Pay Optionset Window: Import*

<b>To open</b>	From the View Scheduled Task window, select the Optionset button.
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#### Field Descriptions

<b>Optionset Name</b>	Enter the name of the option set.
<b>File Format</b>	From the drop down list, select the file format.
<b>File To Process</b>	Enter the file location or select the <b>Browse</b> button to navigate to the file.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

#### *Positive Pay Optionset Window: Export*

<b>To open</b>	From the View Scheduled Task window, select the Optionset button.
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#### Field Descriptions

<b>Optionset Name</b>	Enter the name of the option set.
<b>Bank Format</b>	From the drop down list, select the month in which you want to schedule the task.
<b>Check Range From Date</b>	Select the button to select the check date range from the calendar.
<b>Target File Name</b>	Enter file name of the target file.
<b>Bank Account</b>	From the drop down list, select a bank account to extract the file to.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

### Schedule a Task: Monthly

<b>To open</b>	From the Schedule Type drop down list, select the schedule type as Monthly.
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#### *Field Descriptions*

**Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: Yearly**

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

*Field Descriptions*

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

<b>Optionset</b>	Select the button to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as One Time.

*Field Descriptions*

**Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select the button to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

**Schedule a Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*

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**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

**Note:** You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the Positive Pay Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Periodically**

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions***Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the Positive Pay Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**FROI Preparer Info Window**

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Jurisdictional Options.
  - From the Jurisdictional Options menu, choose FROIPreparerInfo.

**Field Descriptions**

**Preparer Name** Enter your name if you are preparing the report. You can also enter the name of any other person as the preparer.

**Preparer Title** Enter the title of the person who is preparing the report, such as Mr, Miss, Mrs, M/s, and so on.

**Preparer Phone** Enter the contact number for the person who is preparing the report.

**Remember this information and don't prompt me again**

Select the check box to save the preparer information for all other forms you will use in the future.

Note: After you select the check box, the Form will open directly without displaying the Preparer Info window.

**Save**

Select to save the preparer info for the form and open the form in Adobe Reader (\*.pdf format)

**TM Jobs View Window**

**To open**

- From the main menu, select Utilities.
- From the Utilities menu, choose Tools & Designers.
- From the Tools & Designers menu, choose Task Manager.
- From the Task Manager menu, choose TM Jobs View.

**Field Descriptions**

<b>Job Name</b>	Displays the name of the job.
<b>Description</b>	Displays the job description.
<b>Job State</b>	Select the link to open the TM Job Status Details window.
<b>Start Date/Time</b>	Displays the job start date and time.
<b>End Date/Time</b>	Displays the job end date and time.
<b>Abort</b>	From the Job list, select a job and then select the button to abort the running process.
<b>Refresh</b>	Select the button to refresh the job list.

**Jurisdictional Forms Options Window**

**To open**

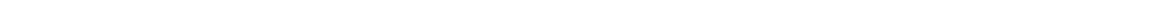
- From the main menu, select Utilities.
- From the Utilities menu, choose the Tools & Designers.
- From the Tools & Designers menu, choose Jurisdictional Forms Options.

**Field definitions**

**Criteria Settings tab**

<b>Selected Entity</b>	From the table, select an option to select the entity for which you want to set the criteria.
<b>New</b>	Select the button to open the Add New Settings window and select a new entity for which you want to set the FROI criteria.
<b>Delete</b>	Select the button to delete a selected entity.

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**Select Which Description Will Appear On The Report (Where Applicable)**

- Select the **OSHA Description** option, if you want the OSHA details to display in the FROI.
- Select the **Event Description** option, if you want the Event details to display in the FROI.


**Claims Administrator (Where Applicable)**

Select the option to set the claims administrator, such as client, company, third party etc.

Note: You can select the  button to open the Standard Entity Search window and select the required claims administrator.

**Carrier**

Select the option to select the carrier , such as client, company, or whether linked by policy number.

Note: You can select the  button to open the Standard Entity Search window and select the required carrier.


**Source of Preparer Information**

Select the option to chose the source of preparer information that you want to display in the FROI.

**Select The Organization Hierarchy Level for Employer Information**

From the drop down list, select the organization hierarchy level for the employer.

**TPA**

Select the  button to open the Standard Entity Search window and select the required Third Party Administrator.



Select to save the options.

**JurisPreparer Info Window****To open**

- From the main menu, select Utilities.
- From the Utilities menu, choose Jurisdictional Options
- From the Jurisdictional Options menu, select Juris Preparer Info.

**Field Descriptions****Preparer Name**

Enter your name if you are preparing the report. You can also enter the name of any other person as the preparer.

**Preparer Title**

Enter the title of the person who is preparing the report, such as Mr, Miss, Mrs, M/s, and so on.

**Preparer Phone**

Enter the contact number for the person who is preparing the report.

**Remember this information and don't prompt me again**

Select the check box to save the preparer information for all other forms you will use in the future.

Note: After you select the check box, the Form will open directly without displaying the Preparer Info window.





**Save** Select to save the preparer info for the form and open the form in Adobe Reader (\*.pdf format)

### First Report Of Injury Options Window

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Jurisdictional Options.
  - From the Jurisdictional Options menu, choose First Report of Injury Options.

### Field definitions

#### Criteria Settings tab


**Selected Entity** From the table, select an option to select the entity for which you want to set the criteria.

**New** Select the button to open the Add New Settings window and select a new entity for which you want to set the FROI criteria.


**Delete** Select the button to delete a selected entity.

- Select Which Description Will Appear On The Report (Where Applicable)**
- Select the **OSHA Description** option, if you want the OSHA details to display in the FROI.
  - Select the **Event Description** option, if you want the Event details to display in the FROI.

**Claims Administrator (Where Applicable)** Select the option to set the claims administrator, such as client, company, third party etc.

Note: You can select the  button to open the Standard Entity Search window and select the required claims administrator.

**Carrier** Select the option to select the carrier , such as client, company, or whether linked by policy number.

Note: You can select the  button to open the Standard Entity Search window and select the required carrier.

**Contact Information** Select the option to chose the fields from which you want to use the contact information.

**Use Title or Position Code** Select the option to use the title or the position code in the FROI.

**Source of Preparer Information** Select the option to chose the source of preparer information that you want to display in the FROI.

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<b>Attach To Claim By Default</b>	Select the Yes or No option to chose if you want to attach the claim to the FROI.
<b>Claim Number Options</b>	Select the option to choose the type of claim number you want to use in the FROI.
<b>Print Claim Number At Top Of window</b>	Select the Yes or No option to chose if you want to print the window number at the top of the window.
<b>Force Printing of NCCI Nodes</b>	Select the Yes or No option to chose if you want to force printing of NCCI nodes.
<b>Select The Organization Hierarchy Level for Employer Information</b>	From the drop down list, select the organization hierarchy level for the employer.
<b>Work Loss</b>	Select the option to chose the comments related to work loss that you want to print on the FROI.
<b>Jurisdiction of <i>state</i>: Insured or Parent Corporation</b>	Select the option to select the jurisdiction specific details, such as parent company, or linked by policy for the insured or patent corporation.

#### First Report of Injury Forms tab

*Form List* Select the option to chose the jurisdictional form that you want to use.

**Print History** Select the button to print the details of FROI forms used.



Select to save the options.

## MBR

### Schedule a Task: One Time

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

#### *Field Descriptions*

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Monthly**

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions*

**Enter the start Month and other details:**

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select to close the window without saving the changes.

**MBR Settings**

*1099 Optionset Window*

**To open** From the View Scheduled Task window, select the Optionset button.

*Field Descriptions*

**Optionset Name** Enter he name of the option set.

**Tax Year to Export** Enter the tax year of the data you want to export.

**Specify Date Range** Select the check box to limit the period of time included on the 1099. If you select the check box, From and To date fields are displayed. Enter the start and end dates for the time period for which you want to export 1099 data.

**Payers to Export Data for** Select the Org Hier button to open the Org. Hierarchy window and select department to export data for.

**Export Specific Bank Accounts** Select the check box to export data associated with only the accounts that you select. When you select this option, you must also select the bank accounts that you want to include from the list box.

**Export Printed Payments Only** Select the check box to export only printed payments for the given tax year. The payments are reported at the organizational level that you select. Otherwise, all payments are exported.

**Export Payments without Claim link** Select the check box to export all payments. The payments are reported at the organizational level that you select. If you do not select the check box, payments not associated with a claim are not exported.

Note: Processing multiple payees at once may produce inaccurate results.

**Exclude Payments to Org Hierarchy** Select the check box to export payments made to departments contained in the INSURANCE RISKMASTER hierarchy that are not associated with a claim. The payments are reported at the organizational level that you select. If you do not select the check box, payments not associated with a claim are not exported.

**Exclude Payments to Claimants** Select the check box to export payments made to claimants.

**Exclude Deleted Entities** Select the check box to exclude from the export payments made to payees who have been deleted from the database.

<b>Export Payees with Total Paid</b>	This option is active only if you selected the Rollup Payments on Export check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter.
<b>Ignore Tax ID errors</b>	Select the check box to ignore formatting errors in tax identification numbers. Before extracting, INSURANCE RISKMASTER validates the tax ID format, payer address, and payer city. You can choose to ignore these errors at your own risk.
<b>Exclude Payees based on 1099 Reportable Flag</b>	Select the check box to export only payments made to payees, if the 1099 Reportable check box is checked for the payee in INSURANCE RISKMASTER.
<b>Roll Up Payments on Export</b>	Select the check box to roll up checks of same payee.
<b>Include EntityID in Payee File</b>	Select the check box to include the entity identification in the payee file.
<b>Please make a selection:</b>	
<b>Export All Payments For Tax Year</b>	Select the option to export all payments that were made in INSURANCE RISKMASTER for the previously defined tax year and for claims that are linked to the departments under the chosen Payer in the organizational hierarchy.
<b>Export Specific Transaction Types</b>	Select the option to export all payments that have the chosen transaction type codes that you select. Once you select this option, then you need to select the transaction types that you want to include.
<b>Export Specific Reserve Types</b>	Select the option to export all payments that have only reserve types that you select. Once you select this option, then you must select the transaction types that you want to include.
<b>Export Specific LOB</b>	Select the option to export all payments for specific lines of business. To select the lines of business to export payments for, select the search button and then select the lines of business you want from the Codes List.
<b>Box 13 Transaction Type</b>	Select the search button to open the codes list and select the transaction types to include in Box 13 (Excess Golden Parachute Payments) on the 1099 MISC form.
<b>Box 14 Transaction Type</b>	Select the search button to open the codes list and select the transaction types to include in Box 14 (Gross Proceeds paid to an attorney) on the 1099 MISC form.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

*MBR Settings Window: Import Setting Tab*

**To open** From the View Scheduled Task, select the Optionset button.

Field Descriptions

<b>OptionSet Name</b>	Enter the name of the option set.
<b>File Setting</b>	From the drop down list, select the month in which you want to schedule the task.
<b>Interface Preference</b>	
<b>Generate Process Log</b>	Select the check box to generate an additional process log for each import.

<b>Generate Exception File</b>	Select the check box to generate an exception file that contains identifying information for the transaction and the reason for the import failure.
<b>Exclude Invoice Number</b>	Select the check box to exclude invoice number in the duplicate payment search.
<b>Include Voids in Search</b>	Select the check box to include voids in the search.
<b>Use Service Dates not Trans Date</b>	Select the check box to use the date on which the service was rendered in place of the date on which the transaction was made.
<b>Data Import Setting</b>	
<b>Allow Payments on Closed Claims</b>	Select the check box to allow payments on closed claims, with the reserves auto adjusted to meet the payment amount.
<b>Check Encl. Flag for MBI Fee Pmnts true</b>	Select the check box if you want to include enclosures attached with checks in the fee payments.
<b>No Payments on Frozen Claims</b>	Select the check box to halt payments for frozen claims.
<b>Import Reason</b>	Select the check box to import Explanation of Benefits reason code.
<b>Notify\Reject if Insufficient Reserves</b>	Select the check box if you want the MBR utility to notify or reject the payments from insufficient reserves.
<b>Use Suffix code to identify Entities</b>	Select the check box if you want to use Suffix code for the identification of entities.
<b>Import Printed Checks</b>	Select the check box if you want to import the printed checks.
<b>Import Provider's Invoice Number</b>	Select the check box if you want to import provider's invoice number.
<b>Medical Reserve</b>	<ul style="list-style-type: none"><li>▪ <b>Transaction Type:</b> Select the button and select a medical reserve transaction type.</li><li>▪ <b>Payment Date:</b> Select the button and select a medical reserve payment date.</li><li>▪ <b>Identifier:</b> Enter the medical reserve identifier number.</li><li>▪ <b>Printed Status:</b> Select the check box if you want print checks for the medical reserve fee.</li><li>▪ <b>Jurisdiction:</b> Select the button to open the State for Fee pay to medical reserve window and select a jurisdiction for fee paid from medical reserve.</li></ul>
<b>Other Reserves</b>	<ul style="list-style-type: none"><li>▪ <b>Transaction Type:</b> Select the button and select the transaction type for other reserves.</li><li>▪ <b>Payment Date:</b> Select the button and select the payment date for other reserves.</li><li>▪ <b>Identifier:</b> Enter the medical reserve identifier number.</li><li>▪ <b>Printed Status:</b> Select the check box if you want to track the incoming MBR fee on claims, and not print checks for this fee.</li><li>▪ <b>Jurisdiction:</b> Select the button to open the State for Fee pay to medical reserve window and select a jurisdiction for fee paid from other reserves.</li></ul>

<b>Jurisdiction Medical Reserve</b>	From the drop down list, select the jurisdiction for the medical reserve.
<b>Jurisdiction Other Reserve</b>	From the drop down list, select the jurisdiction for other reserve.
<b>Import Document Location</b>	Select the Browse button to navigate to the location of the document you want to import.
<b>Payee Search Criteria</b>	
<b>Use First Entity Listed in RM</b>	Select the check box to use the first entity entered in INSURANCE RISKMASTER for the entity search.
<b>Search by SSN only</b>	Select the check box to use the character stripped tax ID or SSN for the entity search.
<b>Use Zip Code For Payee Lookup</b>	Select the check box to use the zip codes during payee search.
<b>Do not add new Payees</b>	Select the check box if you do not want to add new payees to the medical bill.
<b>Use Import Payee Info For Payment</b>	Select the check box if you do not want to use payee information in the supplied import file.
<b>Apply</b>	Select the button to apply the changes.
<b>Cancel</b>	Select the button to cancel the process.

*MBR Settings Window: Export Setting Tab*

- To open**
- From the View Scheduled Task, select the Optionset button.
  - From the MBR Settings window, select Export Setting tab.

Field Descriptions

<b>OptionSet Name</b>	Enter the name of the option set.
<b>Export Information</b>	
<b>Current Export From date</b>	Enter the date from which you want to extract claims.
<b>Export File Path</b>	Displays the location of the file where you want to save the export result. Select the <b>Browse</b> button to change the location of current export file.
<b>Over ride export date for extract</b>	Select the button to select the date to temporarily override the systems last extract date.
<b>Update Entity Suffix Data</b>	
<b>Use source file for Suffix Updates</b>	Select the check box to use the source file for suffix updates.
<b>Update Entity Suffix for All Entities</b>	Select the check box to update entity suffix for all entities.
<p>Note: This file is displayed only when the Use source file for Suffix Updates check box is selected.</p>	
<b>Export Type</b>	From the drop down list select the type of export.
<b>Apply</b>	Select the button to apply the changes.





**Cancel** Select the button to cancel the process.

### Schedule a Task: Yearly

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

### Schedule a Task: Weekly

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

### Schedule a Task: Periodically

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**



<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Optionset</b>	Select the button to open the MBR Settings window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

## ISO

### Schedule a Task: Yearly

<b>To open</b>	From the Schedule Type drop down list, select the schedule type as Yearly.
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#### *Field Descriptions*

##### **Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

<b>Optionset</b>	Select the button to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

### Schedule a Task: Monthly

<b>To open</b>	From the Schedule Type drop down list, select the schedule type as Monthly.
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#### *Field Descriptions*

##### **Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

### Schedule a Task: One Time

<b>To open</b>	From the Schedule Type drop down list, select the schedule type as OneTime.
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#### *Field Descriptions*

##### **Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
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<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select the button to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

### Schedule a Task: Weekly

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

#### Field Descriptions

##### Enter Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the ISO Optionset window.

**Cancel** Select the button to close the window without saving the changes.

### Schedule a Task: Periodically

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

#### Field Descriptions

##### Enter Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

##### Enter the interval after which to repeat the task:

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the ISO Optionset window.

**Cancel** Select the button to close the window without saving the changes.

### Optionset

#### ISO Optionset Window: ISO Loss Type Mappings Tab

- To open**
- From the ISO window, select the Optionset button.
  - From the ISO Optionset window, select ISO Loss Type Mappings tab

#### Field Descriptions

<b>Line Of Business</b>	Displays the type of task selected.
<b>Claim Type</b>	Displays the claim type based on the Line of business selected.
<b>Current Setting:</b>	
<b>ISO Policy Type</b>	Displays the current ISO policy type selected.
<b>ISO Coverage Type</b>	Displays the current ISO coverage type selected.
<b>ISO Loss Type</b>	Displays the current ISO loss type selected.
<b>Modify Settings:</b>	
<b>ISO Policy Type</b>	From the drop down list select to modify the selected ISO policy type.
<b>ISO Coverage Type</b>	From the drop down list select to modify the selected ISO coverage type.
<b>ISO Loss Type</b>	From the drop down list select to modify the selected ISO loss type.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

*ISO Optionset Window: Reset Options Tab*

<b>To open</b>	<ul style="list-style-type: none"> <li>▪ From the ISO window, select the Optionset button.</li> <li>▪ From the ISO Optionset window, select the Reset Options tab.</li> </ul>
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Field Descriptions

**Set Claim As Previously Submitted**

<b>Claim Number to be Set</b>	Enter the claim number and select the <b>Set</b> button to select the claim number.
<b>Reset Claim for Initial Submit:</b>	
<b>Claim Number to be Reset</b>	Enter the claim number and select the <b>Reset</b> button to reset the claim number.
<b>Update ISO Code Tables</b>	Select the button to update the ISO code tables.
<b>Cancel</b>	Select to close the window without saving the changes.

*ISO Optionset Window: ISO Settings Tab*

<b>To open</b>	<ul style="list-style-type: none"> <li>▪ From the ISO window, select the Optionset button.</li> <li>▪ From the ISO Optionset window, select the ISO Settings tab.</li> </ul>
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Field Descriptions

<b>Optionset Name</b>	Enter the name of the option set.
<b>Report Preparation:</b>	
<b>ISO Assigned Customer Code</b>	Enter the customer code assigned by ISO.
<b>Preparing Company Name</b>	Enter the name of the company preparing the report.

<b>Use Default Insured Name</b>	Select the check box to use the default insured.
<b>Address</b>	Enter the address, city and state of the insured.
<b>Select Reporting Action:</b>	
<b>Initial Reporting</b>	Select the check box if you want initial reporting.
<b>Supplemental Reporting (Replacement)</b>	Select the check box if you want the supplemental reporting.
<b>Claim Status Criteria</b>	Select the check box to select the claim status criteria.
<b>To Report Loss or Injuries Use Event Description In</b>	Select the check box against the line of business to use their event description to report loss or injuries.
<b>Would Like To Process Single Claim Only</b>	Select the check box if you want to process only a single claim and enter the claim number.
<b>To Report Policy Number:</b>	
<b>Substitute Claim Number for Policy</b>	Select the check box to substitute the claim number for policy number.
<b>Claim Criteria:</b>	
<b>Use Date of Claim Range</b>	Select the check box to use the claim range date and select the From and To dates.

*ISO Optionset Window: Claimant Type Mappings Tab*

- To open**
- From the ISO window, select the Optionset button.
  - From the ISO Optionset window, select the Claimant Type Mappings tab.

**Field Descriptions**

<b>Claimant Type</b>	Displays the type of claimant.
<b>Current Setting</b>	Displays the current claimant type mapping.
<b>Modify Settings</b>	<ul style="list-style-type: none"><li>▪ Use the <b>UnMapped</b> option, if you want the mapping type for the claimant as Unmapped.</li><li>▪ Use the <b>Business</b> option, if you want the mapping type for the claimant as Business.</li><li>▪ Use the <b>Individual</b> option, if you want the mapping type for the claimant as Individual.</li></ul>
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

**1099-Misc**

**Schedule a Task: Yearly**

- To open** From the Schedule Type drop down list, select the schedule type as Yearly.

*Field Descriptions*



**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

**Optionset** Select the button to open the 1099 Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Monthly**

**To open** From the Schedule Type drop down list, select the schedule type as Monthly.

*Field Descriptions***Enter the start Month and other details:**

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

**Optionset** Select to open the1099 Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as One Time.

*Field Descriptions***Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the 1099 Optionset window.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*



**Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.
- Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled task.

- Optionset** Select the button to open the 1099 Optionset window.
- Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Periodically**

- To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions*

**Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

- Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.
- Interval** Enter the interval after which you want to repeat the task.
- Optionset** Select the button to open the 1099 Optionset window.
- Cancel** Select the button to close the window without saving the changes.

**1099 Optionset**

*1099 Optionset Window*

- To open** From the View Scheduled Task window, select the Optionset button.

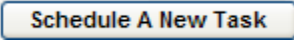
*Field Descriptions*

- Optionset Name** Enter the name of the option set.
- Tax Year to Export** Enter the tax year of the data you want to export.
- Specify Date Range** Select the check box to limit the period of time included on the 1099. If you select the check box, From and To date fields are displayed. Enter the start and end dates for the time period for which you want to export 1099 data.
- Payers to Export Data for** Select the Org Hier button to open the Org. Hierarchy window and select department to export data for.

<b>Export Specific Bank Accounts</b>	Select the check box to export data associated with only the accounts that you select. When you select this option, you must also select the bank accounts that you want to include from the list box.
<b>Export Printed Payments Only</b>	Select the check box to export only printed payments for the given tax year. The payments are reported at the organizational level that you select. Otherwise, all payments are exported.
<b>Export Payments without Claim link</b>	Select the check box to export all payments. The payments are reported at the organizational level that you select. If you do not select the check box, payments not associated with a claim are not exported.
<b>Note:</b> Processing multiple payees at once may produce inaccurate results.	
<b>Exclude Payments to Org Hierarchy</b>	Select the check box to export payments made to departments contained in the INSURANCE RISKMASTER hierarchy that are not associated with a claim. The payments are reported at the organizational level that you select. If you do not select the check box, payments not associated with a claim are not exported.
<b>Exclude Payments to Claimants</b>	Select the check box to export payments made to claimants.
<b>Exclude Deleted Entities</b>	Select the check box to exclude from the export payments made to payees who have been deleted from the database.
<b>Export Payees with Total Paid</b>	This option is active only if you selected the Rollup Payments on Export check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter.
<b>Ignore Tax ID errors</b>	Select the check box to ignore formatting errors in tax identification numbers. Before extracting, INSURANCE RISKMASTER validates the tax ID format, payer address, and payer city. You can choose to ignore these errors at your own risk.
<b>Exclude Payees based on 1099 Reportable Flag</b>	Select the check box to export only payments made to payees, if the 1099 Reportable check box is checked for the payee in INSURANCE RISKMASTER.
<b>Roll Up Payments on Export</b>	Select the check box to roll up checks of same payee.
<b>Include EntityID in Payee File</b>	Select the check box to include the entity identification in the payee file.
<b>Please make a selection:</b>	
<b>Export All Payments For Tax Year</b>	Select the option to export all payments that were made in INSURANCE RISKMASTER for the previously defined tax year and for claims that are linked to the departments under the chosen Payer in the organizational hierarchy.
<b>Export Specific Transaction Types</b>	Select the option to export all payments that have the chosen transaction type codes that you select. Once you select this option, then you need to select the transaction types that you want to include.
<b>Export Specific Reserve Types</b>	Select the option to export all payments that have only reserve types that you select. Once you select this option, then you must select the transaction types that you want to include.
<b>Export Specific LOB</b>	Select the option to export all payments for specific lines of business. To select the lines of business to export payments for, select the search button and then select the lines of business you want from the Codes List.
<b>Box 13 Transaction Type</b>	Select the search button to open the codes list and select the transaction types to include in Box 13 (Excess Golden Parachute Payments) on the 1099 MISC form.

- Box 14 Transaction Type** Select the search button to open the codes list and select the transaction types to include in Box 14 (Gross Proceeds paid to an attorney) on the 1099 MISC form.
- Save** Select the button to save the changes.
- Cancel** Select the button to close the window without saving the changes.

### Schedule a Task Window

- To open** From the View Scheduled Task window, select the  button.

#### Field Descriptions

- Task Type** From the drop down list, select the type of task you want to schedule.
- Schedule Type** From the drop down list, select the type of schedule for the task.
- Cancel** Select to close the window without saving the changes.

### WPA Diaries

#### Schedule a Task: Yearly

- To open** From the Schedule Type drop down list, select the schedule type as Yearly.

#### Field Descriptions

##### Enter Start Date and Time:

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.
- Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

- Save** Select to save the changes.
- Cancel** Select to close the window without saving the changes.

#### Schedule a Task: Monthly

- To open** From the Schedule Type drop down list, select the schedule type as Monthly.

#### Field Descriptions

##### Enter the start Month and other details:

- Month** From the drop down list, select the month in which you want to schedule the task.
- Day of Month** Enter the date on which you want to schedule the task in the selected month.



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<b>Time</b>	Enter the start time of the scheduled task.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

### Schedule a Task: One Time

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

#### *Field Descriptions*

##### **Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

### Schedule a Task: Periodically

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

##### **Enter the interval after which to repeat the task:**

<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

### Schedule a Task: Weekly

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on**

Select the check box for a day of the week on which you want to run the scheduled task.

Note: You can select more than one day to run the scheduled the task.

**Save**

Select to save the changes.

**Cancel**

Select to close the window without saving the changes.

## Billing Scheduler

### Schedule a Task: Yearly

**To open**

From the Schedule Type drop down list, select the schedule type as Yearly.

#### *Field Descriptions*

**Enter Start Date and Time:**

**Date**

Enter the start date of the scheduled task or select the date from the calendar.

**Time**

Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:**

Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

**Save**

Select to save the changes.

**Cancel**

Select to close the window without saving the changes.

### Schedule a Task: Monthly

**To open**

From the Schedule Type drop down list, select the schedule type as Monthly.

#### *Field Descriptions*

**Enter the start Month and other details:**

**Month**

From the drop down list,select the month in which you want to schedule the task.

**Day of Month**

Enter the date on which you want to schedule the task in the selected month.

**Time**

Enter the start time of the scheduled task.

**Billing Scheduler Related Parameter:**

**Generate**

From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.

**Save**

Select to save the changes.

**Cancel**

Select to close the window without saving the changes.

---





**Schedule a Task: One Time**

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

*Field Descriptions***Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Billing Scheduler Related Parameter:**

**Generate** From the drop down list, select to generate either the Installation, Invoice or notice file.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

**Schedule a Task: Periodically**

**To open** From the Schedule Type drop down list, select the schedule type as Periodically.

*Field Descriptions*

**Task Type** Displays the type of task selected.

**Schedule Type** Displays the type of schedule for the task.

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Billing Scheduler Related Parameter:**

**Generate** From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.

**Save** Select to save the changes.

**Cancel** Select to close the window without saving the changes.

**Schedule a Task: Weekly**

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

**Note:** You can select more than one day to run the scheduled task.

**Save** Select to save the changes.

**Cancel** Select the button to close the window without saving the changes.

## Financial History

### Schedule a Task: One Time

**To open** From the Schedule Type drop down list, select the schedule type as OneTime.

*Field Descriptions*

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Financial History Related Parameters:** The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields display only when from the Task Type drop down list, task type is selected as Financial History Processing.

**Create Zero-Based Financial History** Select the check box and do one of the following:

- Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.
- Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.

**Recreate Financial History** Select the check box to recreate the financial history report.

**Save** Select to save the changes.

**Cancel** Select to close the window without saving the changes.

### Schedule a Task: Weekly

**To open** From the Schedule Type drop down list, select the schedule type as Weekly.

*Field Descriptions*

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

---

<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task.  <div style="background-color: #e0e0e0; padding: 5px; text-align: center;">Note: You can select more than one day to run the scheduled the task.</div>
<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields will display only when from the Task Type drop down list, task type is selected as Financial History Processing.
<b>Create Zero-Based Financial History</b>	Select the check box and do one of the following: <ul style="list-style-type: none"><li>▪ Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.</li><li>▪ Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.</li></ul>
<b>Recreate Financial History</b>	Select the check box to recreate the financial history report.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

### Schedule a Task: Yearly

**To open** From the Schedule Type drop down list, select the schedule type as Yearly.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.  <div style="background-color: #e0e0e0; padding: 5px; text-align: center;">Note: You can select more than one month to schedule the task to run.</div>

<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields will display only when from the Task Type drop down list, task type is selected as Financial History Processing.
<b>Create Zero-Based Financial History</b>	Select the checkbox and do one of the following: <ul style="list-style-type: none"><li>▪ Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.</li><li>▪ Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.</li></ul>
<b>Recreate Financial History</b>	Select the check box to recreate the financial history report.

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- Save** Select to save the changes.
- Cancel** Select to close the window without saving the changes.

### Schedule a Task: Monthly

- To open** From the Schedule Type drop down list, select the schedule type as Monthly.

#### *Field Descriptions*

##### **Enter the start Month and other details:**

- Month** From the drop down list,select the month in which you want to schedule the task.
- Day of Month** Enter the date on which you want to schedule the task in the selected month.
- Time** Enter the start time of the scheduled task.

##### **Financial History Related Parameter:**

- Create Zero-Based Financial History** Select the checkbox and do one of the following:
  - Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.
  - Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.
- Recreate Financial History** Select the check box to recreate the financial history report.

- Save** Select to save the changes.
- Cancel** Select to close the window without saving the changes.

### Schedule a Task: Periodically

- To open** From the Schedule Type drop down list, select the schedule type as Periodically.

#### *Field Descriptions*

##### **Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.

##### **Enter the interval after which to repeat the task:**

- Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.
- Interval** Enter the interval after which you want to repeat the task.

<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields will display only when from the Task Type drop down list, task type is selected as Financial History Processing.
<b>Create Zero-Based Financial History</b>	Select the check box and do one of the following: <ul style="list-style-type: none"> <li>▪ Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.</li> <li>▪ Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.</li> </ul>
<b>Recreate Financial History</b>	Select the check box to recreate the financial history report.
<b>Save</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window without saving the changes.

### Jurisdictional Data Window

Use the Jurisdictional Data window to add fields to the Jurisdictionals tab on the Workers' Compensation window for each state, in INSURANCE RISKMASTER .

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Jurisdictional Options.
  - From the Jurisdictional Options menu, select Jurisdictional Tables.

### Field definitions

- Table Name** Displays the table name as it displays to the user.
- System Table Name** Displays the table name as it is recorded in the database .

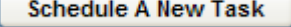


Select a table and then select this button to open the Table window and modify the table.

## How To

### Reserve Balance

#### To Schedule a Reserve Balance Task: Periodically

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Reserve Balance.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Reserve Balance Task: Periodically , as shown below: .

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Enter the interval after which to repeat the task:</b>	
<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Cancel</b>	Select the button to close the window without saving the changes.
<b>Save</b>	Select the button to save the scheduled task.
<b>Reserve Balance Related Parameters:</b>	
<b>Update Current Reserve Amount For All Claims</b>	Select this option to update the reserve amount for the all claims



**Update Current Reserve Amount For A Specific Claim**

Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

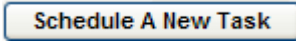
**Update Current Reserve Amount Based On Claim Date**

Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To fields displays. Enter the date range for the claims for which you want to update the reserve amount.

Select the Save button.

The task is scheduled to run periodically based on the defined interval.

**To Schedule a Reserve Balance Task: Weekly**

1. From the View Scheduled Tasks window, select the  button. The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Reserve Balance.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Reserve Balance Task: Weekly , as shown below: .

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

You can select more than one day to run the scheduled task.

**Cancel** Select the button to close the window without saving the changes.

**Save** Select the button to save the scheduled task.

**Reserve Balance Related Parameters:**

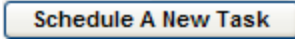
**Update Current Reserve Amount For All Claims**      Select this option to update the reserve amount for the all claims

**Update Current Reserve Amount For A Specific Claim**      Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

**Update Current Reserve Amount Based On Claim Date**      Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

**To Schedule a Reserve Balance Task: Monthly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Reserve Balance Task: Monthly , as shown below: .

**Enter the start Month and other details:**

**Month**      From the drop down list,select the month in which you want to schedule the task.

**Day of Month**      Enter the date on which you want to schedule the task in the selected month.

**Time**      Enter the start time of the scheduled task.

**Cancel**      Select the button to close the window without saving the changes.

**Save**      Select the button to save the scheduled task.

**Reserve Balance Related Parameters:**

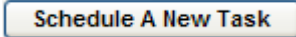
**Update Current Reserve Amount For All Claims**      Select this option to update the reserve amount for the all claims

**Update Current Reserve Amount For A Specific Claim**      Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

**Update Current Reserve Amount Based On Claim Date**      Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

6. Select the Optionset button.
7. Select the Save button.  
The task is scheduled to run monthly.

**To Schedule a DIS Task: Yearly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a DIS Task: Yearly , as shown below: .

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.

**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

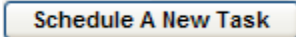
**Update Current Reserve Amount For All Claims** Select this option to update the reserve amount for the all claims

**Update Current Reserve Amount For A Specific Claim** Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.

**Update Current Reserve Amount Based On Claim Date** Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

6. Select the Save button.  
The task is scheduled to run yearly.

**To Schedule a Reserve Balance Task: One Time**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Reserve Balance.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Reserve Balance Task: One Time , as shown below: .

**Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Cancel</b>	Select the button to close the window without saving the changes.
<b>Save</b>	Select the button to save the scheduled task.

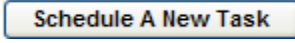
**Reserve Balance Related Parameters:**

<b>Update Current Reserve Amount For All Claims</b>	Select this option to update the reserve amount for the all claims
<b>Update Current Reserve Amount For A Specific Claim</b>	Select this option to update the reserve amount for the specified claim. When you select this option, the Claim Number field displays. Enter the claim number for which you want to update the reserve amount.
<b>Update Current Reserve Amount Based On Claim Date</b>	Select this option to update the reserve amount for the claims within the specified date range. When you select this option, the From and To date fields displays. Enter the date range for the claims for which you want to update the reserve amount.

6. Select the Save button.  
The task is scheduled to run once.

**DIS**

**To Schedule a DIS Task: Weekly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a DIS Task: Weekly , as shown below: .

**Enter Start Date and Time:**


<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task. <div style="background-color: #e0e0e0; padding: 2px;">You can select more than one day to run the scheduled task.</div>
<b>Optionset</b>	Select the button to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DIS Optionset window opens.
  7. Complete the fields on the DIS Optionset window.
  8. Select the Save button.
-



The task is scheduled to run weekly on the days selected.

### To Schedule a DIS Task: Periodically

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a DIS Task: Periodically , as shown below: .

#### Enter the Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

#### Enter the interval after which to repeat the task:

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

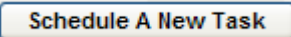
**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DIS Optionset window opens.
7. Complete the fields on the DIS Optionset window.
8. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a DIS Task: Monthly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a DIS Task: Monthly , as shown below: .

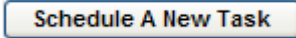
#### Enter the start Month and other details:

**Month** From the drop down list,select the month in which you want to schedule the task.

<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DIS Optionset window opens.
7. Complete the fields on the DIS Optionset window.
8. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule a DIS Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a DIS Task: Yearly , as shown below: .

**Enter Start Date and Time:**

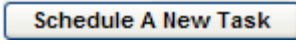
<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.

<b>Optionset</b>	Select the button to open the DIS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DIS Optionset window opens.
7. Complete the fields on the DIS Optionset window.
8. Select the Save button.  
The task is scheduled to run yearly.

## To Schedule a DIS Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DDS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a DIS Task: One Time , as shown below: .

### Enter the Date and Time you would like to Run the Task on:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DIS Optionset window opens.
7. Complete the fields on the DIS Optionset window as shown below.

**Optionset Name** Enter the name of the option set.

**Do you wish to Verify the data before it is imported** Select the check box to verify data before it is imported.

**Select Access Database to Import From** Enter the file location or select the Browse button to navigate to the file.

### Select the areas you wish to import

**Employee** Select the option for the areas that you want to be imported.

- **Import Supplemental Data** Select to import Employee supplemental data.
- **Match Only on Employee ID** Select to search Employee records using the Employee ID.
- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Update Address Even if Blank or Zero** Select to import address fields where the value is blank or zero.

**Organizational Hierarchy Section** Select the option for the areas that you want to be imported.



- **Import Supplemental Data** Select to import Organizational Hierarchy supplemental data.
- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

**Funds**

Select the option for the areas that you want to be imported.

- **Import Supplemental Data** Select to import Funds supplemental data.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .
- **Import Funds for Open Claims Only** Select to import Funds records for Claims with an Open claim status.
- **Match Payee by Name** Select to search Payee records using the Payee Name.
- **Match Payee by Tax ID** Select to search Payee records using the Payee Tax ID.
- **Match by Entity ID** Select to search Payee records using the Entity ID.
- **Check Duplicate Payments** Select to check before importing duplicate payments.
- **Accept Duplicate Checks** Select to import duplicate check numbers.
- **Import Cleared Payments too** Select to import payments with a Cleared status.

**Funds Deposit**

Select the option for the areas that you want to be imported.

- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

**Vehicles**

Select the option for the areas that you want to be imported.

- **Import Supplemental Data** Select to import Vehicle supplemental data.
- **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

Select the option for the areas that you want to be imported.

- Entities**
- **Import Supplemental Data** Select to import Entity supplemental data.
  - **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in RISKMASTER X
  - **Match by Tax ID** Select to search Entity records using the Entity Tax ID
  - **Match by Name** Select to search Entity records using the Entity Name
  - **Match by Abbreviation** Select to search Entity records using the Entity Abbreviation

Select the option for the areas that you want to be imported.

- Policies**
- **Import Supplemental Data** Select to import Policy supplemental data.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in INSURANCE RISKMASTER X.

Select the option for the areas that you want to be imported.

- Reserves**
- **Import Supplemental Data** Select to import Employee supplemental data.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .
  - **Check Duplicate Reserves** Select to check before importing duplicate reserves.

Select the option for the areas that you want to be imported.

- Organizational Exposure**
- **Import Supplemental Data .** Select to import Organizational Exposure supplemental data
  - **Update Even if Blank or Zero** Select to import fields where the value is blank or zero.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .

- **Assume New Records Only (no update)** Select to import all records as new records.

Select the option for the areas that you want to be imported.

**Patients**

- **Import Supplemental Data** Select to import Patient supplemental data.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in RISKMASTER X.
- **Match Patient Number Only** Select to search Patient records using the Patient Number.
- **Match Patient Account No** Select to search Patient records using the Patient Account Number.
- **Match Medical Record No** Select to search Patient records using the Medical Record Number.
- **Validate Data Only (no upload)** Select to only validate Patient data.

Select the option for the areas that you want to be imported.

**Physicians**

- **Import Supplemental Data** Select to import Physician supplemental data.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .
- **Match Physician Number Only .** Select to search Physician records using the Physician Number
- **Validate Data Only (no upload)** Select to only validate Physician data.

Select the option for the areas that you want to be imported.

**Medical Staff**

- **Import Supplemental Data** Select to import Medical Staff supplemental data.
- **Allow Creation of New Codes** Select to create new codes if they do not exist in .

- **Validate Data Only (no upload)** Select to only validate Medical Staff data.

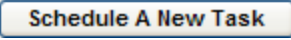
Select the option for the areas that you want to be imported.

- **Select Admin Tracking Table** From the drop down list,select the table to import.
  - **Always Add.** Select to import records from selected table
  - **Add or Update .** Select to update records based on the Match by Field and add records if a match is not found
  - **Match by Field** From the drop down list, select the field to use as search criteria for the Add or Update option.
  - **Allow Creation of New Codes** Select to create new codes if they do not exist in .
- Administrative Tracking**
- Save** Select to save the changes.
- Cancel** Select the button to close the window without saving the changes.

8. Select the Save button.  
The task is scheduled to run once.

**MMSEA**

**To Schedule an MMSEA Task: Weekly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MMSEA.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly ., as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

You can select more than one day to run the scheduled task.

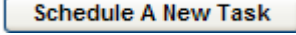
**Optionset** Select the button to open the MMSEA Optionset window.



**Cancel** Select the button to close the window without saving the changes.

- 6.
7. Select the Save button.  
The task is scheduled to run weekly on the days selected.

### To Schedule an MMSEA Task: Periodically

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MMSEA.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

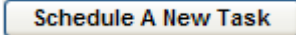
**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the MMSEA Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule an MMSEA Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MMSEA.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

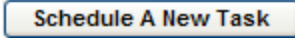
**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the MMSEA Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

### To Schedule an MMSEA Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MMSEA.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

#### Enter Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

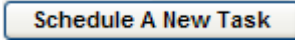
You can select more than one month to schedule the task to run.

**Optionset** Select the button to open the MMSEA Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

### To Schedule an MMSEA Task: Monthly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type as MMSEA.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:

#### Enter the start Month and other details:

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

**Optionset** Select to open the MMSEA Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run monthly.

## BES

### To Schedule a BES Task

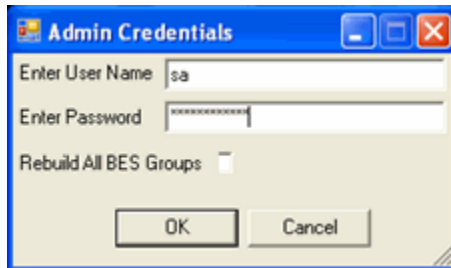
You can schedule Business Entity Security tasks directly through the BES Scheduler utility or through Task Manager in INSURANCE RISKMASTER X. When you schedule BES tasks through the Task Manager you have variety of options to schedule tasks monthly, daily, one time etc. However when you choose to use the BES Scheduler utility independently, the tasks can be scheduled only for the specific instance.

*From BES Scheduler Utility*

1. From the Start menu, choose Programs > CSC > > Launch BES Scheduler.  
The Login window opens.



2. In the User field, enter your user name.
3. In the Password field, enter the INSURANCE RISKMASTER X login password.
4. From the Database drop down list, select the database you want to connect to.
5. Select the OK button.  
The Admin Credentials window opens.



6. In the Enter User Name field, enter the database login name.
7. In the Enter Password field, enter the database login password.
8. Select the Rebuild All BES Groups check box to rebuild the existing Business Entity Security groups.
9. Select the OK button.  
The BES scheduler is executed and the details are displayed in the Command prompt window.

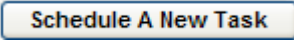


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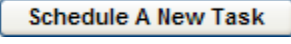
file:///D:/R5 Source/Tools/BES Scheduler/BESScheduler/bin/Debug/BESScheduler.EXE
0 ^*^*^* Running procedure USP_ENABLE_BES
0 ^*^*^* procedure USP_ENABLE_BES executed successfully
0 ^*^*^* Running procedure USP_CREATE_BES_ROLE
0 ^*^*^* procedure USP_CREATE_BES_ROLE executed successfully
0 ^*^*^* Running procedure USP_BUILD_ENTITY_MAP for group bes2 AND GROUP_ID 3
0 ^*^*^* executed USP_BUILD_ENTITY_MAP for group bes2 AND GROUP_ID 3 successful
ly

```

From Task Manager in

1. From main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Task Manager.  
The Task Manager menu opens.
4. From the Task Manager menu, choose View Scheduled Tasks.  
The View Scheduled Task window opens.
5. On the View Scheduled Tasks window, select the  button.
6. From the Task Type drop down list, select the type as BES.
7. In the Task Name field, enter the name of the task.  
From the Schedule Type drop down list, select the required type of schedule.

### To Schedule a BES Task: Weekly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as BES.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly ., as shown below:

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task.

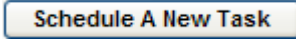
Note: You can select more than one day to run the scheduled task.

**BES Scheduler Related Parameters**

<b>Admin User Id</b>	Enter the Business Entity Security administrator user identification number.
<b>Admin Password</b>	Enter the Business Entity Security administrator password.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

**To Schedule a BES Task: Monthly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type as BES.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:

**Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.

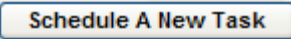
**BES Scheduler Related Parameters:**

<b>Admin User Id</b>	Enter the Business Entity Security administrator user identification number
<b>Admin Password</b>	Enter the Business Entity Security administrator password.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run monthly.
-



**To Schedule a BES Task: Yearly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as BES.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

Note: You can select more than one month to schedule the task to run.

**BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number

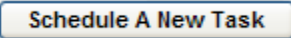
**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

**To Schedule a BES Task: Periodically**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as BES.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.



**Interval** Enter the interval after which you want to repeat the task.

**BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user id.

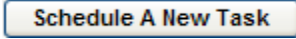
**Admin Password** Enter the Business Entity Security administrator password.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

**To Schedule a BES Task: One Time**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as BES.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**BES Scheduler Related Parameters:**

**Admin User Id** Enter the Business Entity Security administrator user identification number

**Admin Password** Enter the Business Entity Security administrator password.

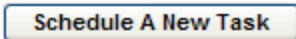
**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

**DDS**

**To Schedule a DDS Task: One Time**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DDS.
3. In the Task Name field, enter the name of the task.

4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a DDS Task: One Time , as shown below:

**Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select the button to open the DDS Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DDS Optionset window opens.
7. Complete the fields on the DDS Optionset window: General tab , as shown below .

6.

<b>Optionset Name</b>	Enter the name of option set for the scheduled DDS task.
<b>Available File</b>	
<b>Event</b>	Select this check box if events .csv file are available.
<b>Event CSV:</b>	Select the Browse button next to the field to upload the comma separated value data file.
<b>Medwatch</b>	Select this check box if Med Watch .csv file are available.
<b>Medwatch CSV:</b>	Select the Browse button next to the field to upload the comma separated value data file.
<b>Claim</b>	Select this check box if Mad Watch .csv file are available.
<b>Claim CSV:</b>	Select the Browse button next to the field to upload the claim comma separated value data file.
<b>Short Term Disability</b>	Select this check box if Short Term Disability .csv file are available.
<b>ST Dis Plan CSV:</b>	Select the Browse button next to the field to upload the disability plan comma separated value data file.
<b>ST Dis Class CSV:</b>	Select the Browse button next to the field to upload the disability class comma separated value data file.
<b>Adjuster Notes</b>	Select this check box if Adjuster Notes .csv file are available.
<b>Adjuster Notes CSV:</b>	Select the Browse button next to the field to upload the adjuster notes comma separated value data file.
<b>Payments</b>	Select this check box if Payments .csv file are available.
<b>Payments CSV:</b>	Select the Browse button next to the field to upload the payments comma separated value data file.
<b>Payments Bank Account</b>	Select the Browse button next to the field to upload the payments bank account comma separated value data file.
<b>Enhanced Notes</b>	Select this check box if Enhanced Notes .csv file are available.

**Enhanced Notes CSV:** Select the Browse button next to the field to upload the enhanced notes comma separated value data file.

**- Global Options**

**Allow Creation of New Claims** Select this check box if you want DDS to create claims that exist in the upload data but do not exist in the target INSURANCE RISKMASTER database.

Select this check box for all historical/ one-time loads.

**Allow Creation of New Codes** Select this check box if you want DDS to create new codes within the INSURANCE RISKMASTER database, based on the old codes in the source data. DDS creates the same short code and description. For instance, if you have a cause code of 01 in the source data and you have select this check box, DDS creates a new code in the INSURANCE RISKMASTER database with a short code of 01 and a description of 01.

SC recommends that create new codes in RISKMASTER, for old codes in the legacy database, prior to upload. If you created new codes before upload you do not need to select this check box.

Select this check box to create new employee records, when you upload data.

Do not select this check box if both of the following conditions are true:

**Allow Creation of New Employees**

- HR loads data to the INSURANCE RISKMASTER database, on a periodic basis, to maintain a mirror of the HR database.
- The DDS upload is not of a historical nature. Historical uploads generally contain records on employees no longer with the company, and whose details may not be contained in the most recent HR database.

**Allow Creation of New Department**

Select this check box if you want DDS to create new department records.

**Set Adjuster as Current Adjuster**

Select this check box if you want to set the adjuster as current adjuster.

**Don't Check Duplicate Payments**

Select this check box if you do not want DDS to check for duplicate payments.

**Attach Trans ID to Check Number**

Select this check box if you want to attach transaction ID to check number.

**Use Tax ID in Entity Matches**

Select the check box if you want DDS to use tax id to search entity.

**- GC/VA Options**

**Identify Claimants Based on Claimant Name** Select this button if you want to update the claimant name after data upload. For example, if claimant Mary Jones marries and you want to update her last name to Smith, you can select this button.

**Identify Claimants Based on Claim Suffix** Select this button to identify the claimant based on a specific claim suffix maintained within the source system. DDS will use this claim suffix for the assigned claimant when you load any updates.

SC recommends that you do not select this button since successive data uploads from the source system can contain transposed suffixes within the source data.

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**Update Claimant Name** Select this check box if you want to update the claimant name on data upload. You can use this option for General and Vehicle Accident claims.

**Create New Entity if Tax ID is empty and Identify Claimants Based on Claim Suffix** Select the check box if you want to create new entity in case tax id is empty and to identify claimants based on claim suffix.

#### WC Options

**Update Claimant Name** Select this check box if you want to update the claimant name on data upload. You can use this option for Workers' Compensations claims.

**Save Settings** Select the button to save the settings for DDS task.

**Cancel** Select the button to close the window without saving the settings.

7.

8. Complete the fields on the DDS Optionset window: Advanced tab , as shown below

#### Employee Match by:

**Name** Select the check box if you want the employee name to match with the information that you set in the General tab.

**Tax ID** Select the check box if you want the employee information to match with the Tax ID number, regardless of the employee name.

**Employee Number** Select the check box if you want the employee information to match with your internal employee number.

#### Non-Employee Entity Match by:

**Name Only** Select the option if you want the non-employee information to match by the name only.

**Name and Tax ID** Select the option if you want the non-employee information to match by the name and the Tax ID.

**Tax ID Only** Select the option if you want the non-employee information to match only by the Tax ID.

**Maximum Validation Errors Allowed** Enter the number of errors that you want DDS to ignore during data validation.

**Date Field Validation Range** Enter the date range for which you want to validate data fields before upload.

**Recalculate Reserve After Upload** Select the check box to automatically recalculate the total\_paid, total\_collected, reserve\_balance and total\_incurred for payments fields when the upload is complete.

**Update Claimant Details on claims upload** Select the check box if you want the claimant details to be updated on claims upload.

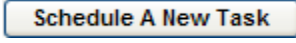
**Save Settings** Select the button to save the DDS task setting.

**Close** Select to close window.

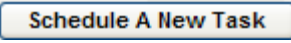
9.

10. Complete the fields on the DDS Optionset window: Reserve Mappings tab as shown below.
- |                         |  |
|-------------------------|--|
| <b>Line Of Business</b> | From the drop down list select the line of business for which you want to import the reserves.                     |
| <b>Bucket</b>           | Defines the reserve buckets: A, B, C and D.  |
| <b>Mapped</b>           | Select the check box for each of the four buckets/ transactions that you want to activate.                         |
| <b>Reserve Type</b>     | From the drop down list, select the range of reserve types to w you want to map the reserve buckets/ transactions. |
| <b>Save Settings</b>    | Select the button to save the setting.   |
| <b>Close</b>            | Select to close the Options for Job Id window.   |
- 11.
12. Select the Save button.  
The task is scheduled to run once.

**To Schedule a DDS Task: Periodically**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DDS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a DDS Task: Periodically , as shown below: .
- Enter the start Date and Time:**
- |             |  |
|-------------|--|
| <b>Date</b> | Enter the start date of the scheduled task or select the date from the calendar. |
| <b>Time</b> | Enter the start time of the scheduled task.                                      |
- Enter the interval after which to repeat the task:**
- |                      |   |
|----------------------|---|
| <b>Interval Type</b> | From the drop down list, select the type of interval after which you want to repeat the task. |
| <b>Interval</b>      | Enter the interval after which you want to repeat the task.                                   |
| <b>Optionset</b>     | Select the button to open the DDS Optionset window.   |
| <b>Cancel</b>        | Select the button to close the window without saving the changes.                             |
6. Select the Optionset button.  
The DDS Optionset window: General tab opens.
7. Complete the fields on the DDS Optionset window: General tab.
8. Complete the fields on the DDS Optionset window: Advanced tab.
9. Complete the fields on the DDS Optionset window: Reserve Mappings tab.
10. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a DDS Task: Weekly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DDS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a DDS Task: Weekly , as shown below: .

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.


You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the DDS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DDS Optionset window: General tab opens.
7. Complete the fields on the DDS Optionset window: General tab.
8. Complete the fields on the DDS Optionset window: Advanced tab.
9. Complete the fields on the DDS Optionset window: Reserve Mappings tab.
10. Select the Save button.  
The task is scheduled to run weekly on the days selected.

### To Schedule a DDS Task: Monthly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DDS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a DDS Task: Monthly , as shown below: .

**Enter the start Month and other details:**

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

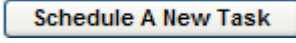
**Time** Enter the start time of the scheduled task.

**Optionset** Select to open the DDS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DDS Optionset window: General tab opens.
7. Complete the fields on the DDS Optionset window: General tab.
8. Complete the fields on the DDS Optionset window: Advanced tab.
9. Complete the fields on the DDS Optionset window: Reserve Mappings tab.
10. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule a DDS Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as DIS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a DDS Task: Yearly , as shown below: .

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.



**Optionset** Select the button to open the DIS Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Optionset button.  
The DDS Optionset window: General tab opens.
7. Complete the fields on the DDS Optionset window: General tab.
8. Complete the fields on the DDS Optionset window: Advanced tab.
9. Complete the fields on the DDS Optionset window: Reserve Mappings tab.
10. Select the Save button.  
The task is scheduled to run yearly.

### To Add New Entity

1. From the main menu, select Utilities.  
The Utilities menu opens.

2. From the Utilities menu, choose Jurisdictional Options.  
The Jurisdictional Options menu opens.
3. From the Jurisdictional Options menu, choose First Report Of Injury Options  
The First Report Of Injury Options window opens and a First Report of Injury node displays in the left navigation tree.
4. To add a new entity, select the New button.  
The Add New Setting window opens.
5. To select the entity, From the Do you want to use all Org-Hierarchy Entities? field, do one of the following:
  - Select the All option if you want to use the FROI for all entities.
  - Select the Select Entity option and select the  button to open the organizational hierarchy and select the entity you want to use.
6. To select the form based on jurisdiction , from the Do you want to use all Jurisdictions? field, do one of the following:
  - Select the All option if you want to use the FROI for jurisdictions.
  - Select the Select Entity option and select the  button to open the Code Selection window and select the state you want to use.
7. Select OK.  
The new entity displays on the First Report Of Injury Options window.


### To View Jobs in Task Manager

Use the TM Jobs View window to view jobs that are completed or are running.


1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Task Manager.  
The Task Manager menu opens.
4. From the Task Manager menu, choose TM Jobs View.  
The TM Jobs View window opens.

**Note:** When the scheduled task fails, a dairy notification is sent to the user that created the task.

### To Set Jurisdictional Form Options

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities navigation tree, choose the Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, select Jurisdictional Forms Options.  
The Jurisdictional Forms Options window opens.
4. Select the options to set the criteria for the jurisdictional forms.
5. Select the  button.
6. To enter FROI Preparer Info, from the Tools navigation tree, select FROI Preparer Info.

The JurisPreparer Info window opens.


7. In the Preparer Name field, enter your name if you are preparing the report. You can also enter the name of any other person as the preparer.
8. In the Preparer Title field, enter the title of the person who is preparing the report, such as Mr, Miss, Mrs, M/s, and so on.
9. In the Preparer phone fields, enter the contact number for the person who is preparing the report.
10. Select the Remember this information and don't prompt me again check box, to save the preparer information for all other forms you will use in the future.
11. Select the  button.

## **To View Scheduled Tasks**

Use the View Scheduled Tasks window to view jobs that are scheduled to run.

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Task Manager.  
The Task Manager menu opens.
4. From the Task Manager menu, choose View Scheduled Tasks.  
The View Schedule Task window opens.


## **To Set First Report of Injury Options**

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, , choose Jurisdictional Options.  
The Jurisdictional Options menu opens.
3. From the Jurisdictional Options menu, choose First Report of Injury Options  
The First Report Of Injury Options window opens and a First Report of Injury Options node displays in the left navigation tree.
4. On the Criteria Settings tab, select the options to set the criteria for the FROI .
5. Select the  button.
6. On the First Report of Injury Forms tab, select the jurisdictional state form you want to use.
7. To enter FROI Preparer Info, from the Jurisdiction Options menu, chooset FROI Preparer Info.  
The FROIPreparer Info window opens.
8. In the Preparer Name field, enter your name if you are preparing the report. You can also enter the name of any other person as the preparer.
9. In the Preparer Title field, enter the title of the person who is preparing the report, such as Mr, Miss, Mrs, M/s, and so on.
10. In the Preparer phone fields, enter the contact number for the person who is preparing the report.
11. Select the Remember this information and don't prompt me again check box, to save the preparer information for all other forms you will use in the future.

12. Select the  button.

## MBR

### To Schedule a MBR Task: Periodically

- From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
- From the Task Type drop down list, select the type of task as MBR.
- In the Task Name field, enter the task name.
- From the Schedule Type drop down list, select the type of schedule as Periodically.
- Complete the fields on the Schedule a Task: Periodically . as shown below:

#### Enter Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

#### Enter the interval after which to repeat the task:

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

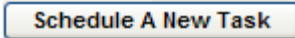
**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

- Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a MBR Task: Monthly

- From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
- From the Task Type drop down list, select the type of task as MBR.
- In the Task Name field, enter the task name.
- From the Schedule Type drop down list, select the type of schedule as Monthly.
- Complete the fields on the Schedule a Task: Monthly , as shown below:

#### Enter the start Month and other details:

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

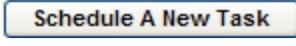
**Optionset** Select the button to open the MBR Settings window.



**Cancel** Select to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule a MBR Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MBR.
3. In the Task Name field, enter the task name..
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

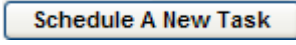
**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

### To Schedule a MBR Task: Weekly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MBR.
3. In the Task Name field, enter the task name.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly ., as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.


You can select more than one day to run the scheduled task.

**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

### To Schedule a MBR Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as MBR.
3. In the Task Name field, enter the task name.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.

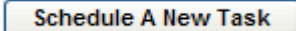
**Optionset** Select the button to open the MBR Settings window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

### ISO

#### To Schedule an ISO Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as ISO.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

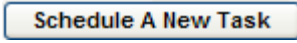
**Optionset** Select the button to open the ISO Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

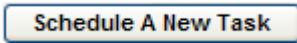


### To Schedule an ISO Task: Monthly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as ISO.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:  
**Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.
6. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule an ISO Task: Periodically

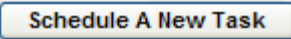
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as ISO.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:  
**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

  
**Enter the interval after which to repeat the task:**

<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Optionset</b>	Select the button to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.
6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

**To Schedule an ISO Task: Yearly**

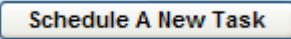
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as ISO.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run.  You can select more than one month to schedule the task to run.
<b>Optionset</b>	Select the button to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

**To Schedule an ISO Task: Weekly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as ISO.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly , as shown below:

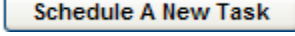
**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task.  You can select more than one day to run the scheduled task.
<b>Optionset</b>	Select the button to open the ISO Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

## WPA Diaries

### To Schedule a WPA Diaries Task: Yearly

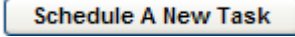
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Process WPA Diaries.
3. In the Task name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task window: Yearly , as shown below:

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the months you would like to Run the Task in:</b>	Select the check box for the month in which you want to schedule the task to run. <div style="background-color: #e0e0e0; padding: 2px;">You can select more than one month to schedule the task to run.</div>
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

### To Schedule a WPA Diaries Task: Periodically

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Process WPA Diaries.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task window: Periodically . as shown below:

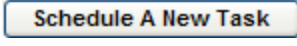
**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Enter the interval after which to repeat the task:</b>	
<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Save</b>	Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a WPA Diaries Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Process WPA Diaries
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task window: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

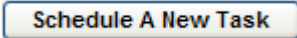
**Time** Enter the start time of the scheduled task.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

### To Schedule a WPA Diaries Task: Weekly

1. From the View Scheduled a Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Process WPA Diaries.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task window: Weekly ., as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

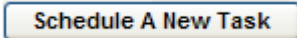
You can select more than one day to run the scheduled task.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

**To Schedule a WPA Diaries Task: Monthly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Process WPA Diaries.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a WPA Diaries Task window: Monthly , as shown below:

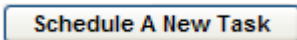
**Enter the start Month and other details:**

- |                     |  |
|---------------------|--|
| <b>Month</b>        | From the drop down list,select the month in which you want to schedule the task. |
| <b>Day of Month</b> | Enter the date on which you want to schedule the task in the selected month.     |
| <b>Time</b>         | Enter the start time of the scheduled task.                                      |
| <b>Save</b>         | Select the button to save the changes.   |
| <b>Cancel</b>       | Select the button to close the window without saving the changes.                |

6. Select the Save button.  
The task is scheduled to run monthly.

**1099-Misc**

**To Schedule a 1099 Misc. Task: Monthly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as 1099-MISC.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:

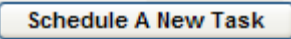
**Enter the start Month and other details:**

- |                     |  |
|---------------------|--|
| <b>Month</b>        | From the drop down list,select the month in which you want to schedule the task. |
| <b>Day of Month</b> | Enter the date on which you want to schedule the task in the selected month.     |
| <b>Time</b>         | Enter the start time of the scheduled task.                                      |
| <b>Optionset</b>    | Select to open the1099 Optionset window.   |
| <b>Cancel</b>       | Select the button to close the window without saving the changes.                |

6. Select the Save button.  
The task is scheduled to run monthly.



### To Schedule a Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as 1099-MISC.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

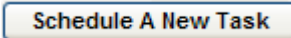
**Time** Enter the start time of the scheduled task.

**Optionset** Select the button to open the 1099 Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

### To Schedule a 1099 Misc. Task: Periodically

1. From the View Scheduled a Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as 1099-MISC.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

**Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

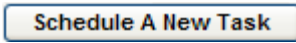
**Interval** Enter the interval after which you want to repeat the task.

**Optionset** Select the button to open the 1099 Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a 1099 Misc. Task: Weekly

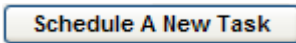
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as 1099-MISC.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly ., as shown below:

**Enter Start Date and Time:**

- |  |  |
|--|--|
| <b>Date</b>  | Enter the start date of the scheduled task or select the date from the calendar.   |
| <b>Time</b>  | Enter the start time of the scheduled task.  |
| <b>Select the days you would like to Run the Task on</b> | Select the check box for a day of the week on which you want to run the scheduled task.<br><br><div style="background-color: #e0e0e0; padding: 2px;">You can select more than one day to run the scheduled task.</div> |
| <b>Optionset</b>   | Select the button to open the 1099 Optionset window.   |
| <b>Cancel</b>  | Select the button to close the window without saving the changes.  |

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

### To Schedule a 1099 Misc. Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as 1099-MISC.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:


**Enter Start Date and Time:**

- |   |  |
|---|--|
| <b>Date</b>   | Enter the start date of the scheduled task or select the date from the calendar.   |
| <b>Time</b>   | Enter the start time of the scheduled task.  |
| <b>Select the months you would like to Run the Task in:</b> | Select the check box for the month in which you want to schedule the task to run.<br><br><div style="background-color: #e0e0e0; padding: 2px;">You can select more than one month to schedule the task to run.</div> |
| <b>Optionset</b>  | Select the button to open the 1099 Optionset window.   |
| <b>Cancel</b>   | Select the button to close the window without saving the changes.  |

6. Select the Save button.  
The task is scheduled to run yearly.

## Positive Pay

### To Schedule a Positive Pay Task: Monthly

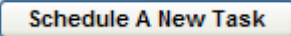
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type as PositivePay.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:

**Enter the start Month and other details:**

<b>Month</b>	From the drop down list,select the month in which you want to schedule the task.
<b>Day of Month</b>	Enter the date on which you want to schedule the task in the selected month.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule a Positive Pay Task: One Time

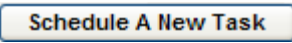
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as PositivePay.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Optionset</b>	Select the button to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

### To Schedule a Positive Pay Task: Periodically

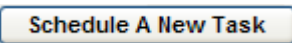
1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as PositivePay.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:  
**Enter Start Date and Time:**  

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

  
**Enter the interval after which to repeat the task:**  

<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Optionset</b>	Select the button to open the Positive Pay Optionset window.
<b>Cancel</b>	Select the button to close the window without saving the changes.
6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule a Positive Pay Task: Weekly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as PositivePay.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly ., as shown below:  
**Enter Start Date and Time:**  

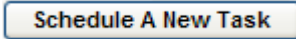
<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

  
**Select the days you would like to Run the Task on**  
Select the check box for a day of the week on which you want to run the scheduled task.  

You can select more than one day to run the scheduled task.
6. **Optionset**  
Select the button to open the Positive Pay Optionset window.
7. **Cancel**  
Select the button to close the window without saving the changes.
6. Select the Save button.
7. Select the Save button.

The task is scheduled to run weekly on the days selected.

### To Schedule a Positive Pay Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as PositivePay.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

#### Enter Start Date and Time:

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.

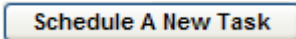
**Optionset** Select the button to open the Positive Pay Optionset window.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run yearly.

### Billing Scheduler

#### To Schedule a Billing Task: Monthly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Billing Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly , as shown below:

#### Enter the start Month and other details:

**Month** From the drop down list,select the month in which you want to schedule the task.

**Day of Month** Enter the date on which you want to schedule the task in the selected month.

**Time** Enter the start time of the scheduled task.

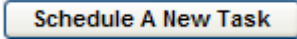
#### Billing Scheduler Related Parameter:

**Generate** From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.

- Save** Select the button to save the changes.
- Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run monthly.

**To Schedule a Billing Task: One Time**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Billing Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
5. Complete the fields on the Schedule a Billing Task: One Time as shown below:

**Enter the Date and Time you would like to Run the Task on:**

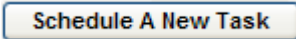
- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.

**Billing Scheduler Related Parameter:**

- Generate** From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.
- Save** Select the button to save the changes.
- Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run one time.

**To Schedule a Billing Task: Periodically**

1. From the View Scheduled a Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Billing Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically . as shown below:

**Enter Start Date and Time:**

- Date** Enter the start date of the scheduled task or select the date from the calendar.
- Time** Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

- Interval Type** From the drop down list, select the type of interval after which you want to repeat the task.

**Interval** Enter the interval after which you want to repeat the task.

**Billing Scheduler Related Parameter:**

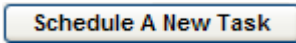
**Generate** From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

### To Schedule Billing Task: Weekly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Billing Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly , as shown below:

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the days you would like to Run the Task on** Select the check box for a day of the week on which you want to run the scheduled task.

You can select more than one day to run the scheduled task.

**Billing Scheduler Related Parameter:**

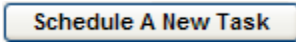
**Generate** From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule.

**Save** Select the button to save the changes.

**Cancel** Select the button to close the window without saving the changes.

6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

### To Schedule a Billing Task: Yearly

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Billing Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly , as shown below:

**Enter Start Date and Time:**

- |   |   |
|---|---|
| <b>Date</b>   | Enter the start date of the scheduled task or select the date from the calendar.  |
| <b>Time</b>   | Enter the start time of the scheduled task.   |
| <b>Select the months you would like to Run the Task in:</b> | Select the check box for the month in which you want to schedule the task to run.<br><div style="border: 1px solid gray; padding: 2px;">You can select more than one month to schedule the task to run.</div> |

**Billing Scheduler Related Parameter:**

- |                 |   |
|-----------------|---|
| <b>Generate</b> | From the drop down list, select to generate either the Installation, Invoice or notice file for the billing schedule. |
| <b>Save</b>     | Select the button to save the changes.  |
| <b>Cancel</b>   | Select the button to close the window without saving the changes.   |

6. Select the Save button.  
The task is scheduled to run yearly.

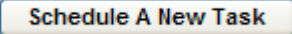
## Financial History

### To Schedule a Currency Exchange Task

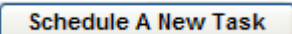
You can now upload currency information from a file in CSV format. Using the Task Manager, a task can be scheduled as 'Currency Exchange', through which on a specified time currency information can be uploaded to INSURANCE RISKMASTER table. The file can be uploaded using two options.

**Shared File Path:** If this option is selected user can enter the file path and if in SMS the document path as File Path then the same address is copied here.

**FTP:** provide the FTP server, port, username, and password, and file name.

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
2. From the Task Type drop down list, select the type of task as Currency Exchange Interface.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as needed.
5. Complete the fields on the Schedule a Currency Exchange Interface window: Monthly
6. **Shared File Path:** If this option is selected user can enter the file path and if in SMS the document path as File Path then the same address is copied here.
7. **FTP:** provide the FTP server, port, username, and password, and file name.
8. Select the Save button.  
The task is scheduled to run monthly.

### To Schedule a Financial History Task: One Time

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
  2. From the Task Type drop down list, select the type of task as Financial History Processing.
  3. In the Task Name field, enter the name of the task.
-





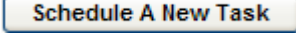
4. From the Schedule Type drop down list, select the type of schedule as OneTime.
  5. Complete the fields on the Schedule a Task window: One Time as shown below:
- 4.

**Enter the Date and Time you would like to Run the Task on:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields display only when from the Task Type drop down list, task type is selected as Financial History Processing.
<b>Create Zero-Based Financial History</b>	Select the checkbox and do one of the following: <ul style="list-style-type: none"> <li>• Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.</li> <li>• Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.</li> </ul>
<b>Recreate Financial History</b>	Select the check box to recreate the financial history report.
<b>Generate Log in user's temp directory</b>	Select the check box to generate the process log file in user's temporary directory.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

- 5.
6. Select the Save button.  
The task is scheduled to run one time.

**To Schedule a Financial History Task: Periodically**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
  2. From the Task Type drop down list, select the type of task as Financial History Processing.
  3. In the Task Name field, enter the name of the task.
  4. From the Schedule Type drop down list, select the type of schedule as Periodically.
  5. Complete the fields on the Schedule a Task window: Periodically. as shown below:
- 4.

**Enter Start Date and Time:**

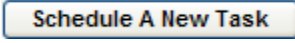
<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.

**Enter the interval after which to repeat the task:**

<b>Interval Type</b>	From the drop down list, select the type of interval after which you want to repeat the task.
<b>Interval</b>	Enter the interval after which you want to repeat the task.
<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields display only when from the Task Type drop down list, task type is selected as Financial History Processing.
<b>Create Zero-Based Financial History</b>	Select the checkbox and do one of the following: <ul style="list-style-type: none"> <li>• Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.</li> <li>• Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.</li> </ul>
<b>Recreate Financial History</b>	Select the check box to recreate the financial history report.
<b>Generate Log in user's temp directory</b>	Select the check box to generate the process log file in user's temporary directory.
<b>Save</b>	Select the button to save the changes.
<b>Cancel</b>	Select the button to close the window without saving the changes.

- 5.
6. Select the Save button.  
The task is scheduled to run periodically based on the defined interval.

**To Schedule a Financial History Task: Weekly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
  2. From the Task Type drop down list, select the type of task as Financial History Processing.
  3. In the Task Name field, enter the name of the task.
  4. From the Schedule Type drop down list, select the type of schedule as Weekly.
  5. Complete the fields on the Schedule a Task window: Weekly ., as shown below:
- 4.

**Enter Start Date and Time:**

<b>Date</b>	Enter the start date of the scheduled task or select the date from the calendar.
<b>Time</b>	Enter the start time of the scheduled task.
<b>Select the days you would like to Run the Task on</b>	Select the check box for a day of the week on which you want to run the scheduled task.

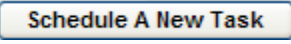
You can select more than one day to run the scheduled task.

<b>Financial History Related Parameters:</b>	The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields display only when from the Task Type drop down list, task type is selected as Financial History Processing.
--	---

- Create Zero-Based Financial History** Select the checkbox and do one of the following:
  - Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.
  - Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.
- Recreate Financial History** Select the check box to recreate the financial history report.
- Generate Log in user's temp directory** Select the check box to generate the process log file in user's temporary directory.
- Save** Select the button to save the changes.
- Cancel** Select the button to close the window without saving the changes.

- 5.
- 6. Select the Save button.  
The task is scheduled to run weekly on the days selected.

**To Schedule a Financial History Task: Yearly**

- 1. From the View Scheduled Tasks window, select the  button. The View Scheduled Task window opens.
  - 2. From the Task Type drop down list, select the type of task as Financial History Processing.
  - 3. In the Task Name field, enter the name of the task.
  - 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
  - 5. Complete the fields on the Schedule a Task window: Yearly , as shown below:
- 4.

**Enter Start Date and Time:**

**Date** Enter the start date of the scheduled task or select the date from the calendar.

**Time** Enter the start time of the scheduled task.

**Select the months you would like to Run the Task in:** Select the check box for the month in which you want to schedule the task to run.

You can select more than one month to schedule the task to run.

**Financial History Related Parameters:** The Create Zero Based Financial History, Recreate Financial History, and Generate Log in user's temp directory fields will display only when from the Task Type drop down list, task type is selected as Financial History Processing.

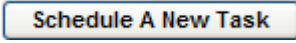
- Create Zero-Based Financial History** Select the checkbox and do one of the following:
  - Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.
  - Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.

**Recreate Financial History** Select the check box to recreate the financial history report.

- Generate Log in user's temp directory**      Select the check box to generate the process log file in user's temporary directory.
- Save**      Select the button to save the changes.
- Cancel**      Select the button to close the window without saving the changes.

- 5.
6.      Select the Save button.  
The task is scheduled to run yearly.

**To Schedule a Financial History Task: Monthly**

1. From the View Scheduled Tasks window, select the  button.  
The View Scheduled Task window opens.
  2. From the Task Type drop down list, select the type of task as Financial History Processing.
  3. In the Task Name field, enter the name of the task.
  4. From the Schedule Type drop down list, select the type of schedule as Monthly.
  5. Complete the fields on the Schedule a Financial History Task window: Monthly , as shown below:
- 4.

**Enter the start Month and other details:**

- Month**      From the drop down list,select the month in which you want to schedule the task.
- Day of Month**      Enter the date on which you want to schedule the task in the selected month.
- Time**      Enter the start time of the scheduled task.
- Financial History Related Parameters:**      The Create Zero Based Financial History, Recreate Financial History,and Generate Log in user's temp directory fields display only when from the Task Type drop down list, task type is selected as Financial History Processing.
- Create Zero-Based Financial History**      Select the checkbox and do one of the following:
  - Select the Based On Date Of Claim option, to create a zero based financial history report based on the date of claim.
  - Select the Based On Date Of Event option, to create a zero based financial history report based on the date of event.
- Recreate Financial History**      Select the check box to recreate the financial history report.
- Generate Log in user's temp directory**      Select the check box to generate the process log file in user's temporary directory.
- Save**      Select the button to save the changes.
- Cancel**      Select the button to close the window without saving the changes.

- 5.
6.      Select the Save button.  
The task is scheduled to run monthly.

## **Task Manager**

### **Task Manager Overview**

INSURANCE RISKMASTER task manager lets you schedule tasks for various categories. You can automatically schedule tasks of variety of types. You have option to run tasks for different time periods based on your requirement.

### **Data Analytics**

INSURANCE RISKMASTER Data Analytics is a complete automates Self-Insurance import/export extract processing. It brings together several standalone extract modules in INSURANCE RISKMASTER and combines them together under one umbrella. You can use the INSURANCE RISKMASTER Task Manager to schedule any of the extracts included in the Data Analytics system.

Data Analytics allows organizations to easily explore, extract, transform and deliver data anywhere and at any frequency. As a result you can ensure the integrity of data, maximize productivity and accelerate performance of your day to day operations.

### **1099 Miscellaneous Tasks Overview**

Using Task Manager you can schedule 1099 Miscellaneous tasks for specified intervals.

### **Medical Bill Review Overview**

Using Task manager you can schedule MBR tasks for specific intervals.

### **WPA Diaries Overview**

Using Task Manager you can schedule WPA Diaries tasks for specified intervals

### **Billing Scheduler Overview**

Using Task Manager you can schedule Billing Scheduler tasks for specified intervals.

### **Positive Pay Overview**

Using Task Manager you can schedule Positive Pay tasks for specified intervals.

### **Financial History Overview**

Using Task Manager you can schedule WPA Diaries tasks for specified intervals.

### **Business Entity Security Overview**

Using Task Manager you can schedule BES tasks for specified intervals.

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## Data Information System Overview

Using Task manager you can schedule DIS tasks for specific intervals.

## Data Director System Overview

Using Task manager you can schedule DDS tasks for specific intervals.

## Automatically Scheduling Executive Summary Tasks

The Executive Summary Scheduler for Executive Summary and Enhanced Notes helps handle large amounts of data in Executive Summary and Enhanced Notes reports. You can specify a threshold value in the WCFService\appSettings.config file deployed on the server.

```
<add key="ExecSummaryOfflineThreshold" value="10"/> <!--Number of Pages
```

```
<add key="ExecSummaryOfflineHours" value="20:00"/> <!--24 hr format time. If blank value it gets executed immediately
```

If the threshold value you set for executive summary PDF is exceeded the Task Manager Windows service launches the Executive Summary Scheduler Console application which builds the executive summary PDF file offline.

Job Name	Description	Job State	Start Date/Time	End Date/Time	Job Files
ExecutiveSummary	Generate Executive Summary Report	Completed	8/1/2011 4:28 PM	8/1/2011 4:30 PM	
ExecutiveSummary	Generate Executive Summary Report	Completed	8/1/2011 4:11 PM	8/1/2011 4:12 PM	

Once the PDF file is built, it is sent to INSURANCE RISKMASTER X Document Management system and a diary entry is also created to let you know that the executive summary is available for viewing.

If there is any entry of "Singleton='true'" for a task type in the TM\_TASK\_TYPE table in the Task Manager database, the Task Manager Windows service runs it one at a time. The service is capable of running multiple copies/threads of an executable simultaneously. However, in case of a long running or a heavy executable that uses a lot of CPU/processor resources, running multiple threads may put stress on the system. In which case it should have the singleton value set to True.

### CONFIG File

Following entries in the WcfService\Bin\ExecutiveSummaryScheduler.exe.config file will need to be provided. The entries in the ExecSummarySchedulerSettings section control the ExecSummaryScheduler operation (description provided in comments along the config switches)

```
<connectionStrings configSource="connectionStrings.config"/>
```

```
<ExecSummarySchedulerSettings>
```

```
<!--Email the file to the user creating the request-->
```

```
<add key="EmailFile" value="true" />
```

```
<!--Upload the pdf to RMX ( or to MCM if enabled)-->
```

```
<add key="UploadFile" value="true" />
```

```
<!--create diary once the process is completed-->
```



```
<add key="CreateDiary" value="true" />
<!--deletes the file from the temporary location after the Upload/email/create-diary operation-->
<add key="DeleteFileAfterUpload" value="true" /> </ExecSummarySchedulerSettings>
<Messages>
  <add key="DEF_RMCAPTION" value="INSURANCE RISKMASTER" />
  <add key="DEF_NOTE" value="Note" />
  <add key="DEF_NAME" value="INSURANCE RISKMASTER" />
  <add key="DEF_RMPROPRIETARY" value="Proprietary & Confidential Data" />
  <add key="DEF_RMCOPYRIGHT" value="Copyright 2010, Computer Sciences Corporation" />
  <add key="DEF_RMRIGHTSRESERVED" value="All Rights Reserved Worldwide" />
</Messages>
<appSettings configSource="appSettings.config" />
<ExecutiveSummary>
  <add key="CharactersPerLine" value="115" />
</ExecutiveSummary>
<Acrosoft>
  <add name="AcrosoftAttachmentsTypeKey" value="Insurance RISKMASTER"/>
  <add name="AcrosoftGeneralStorageTypeKey" value="Insurance RISKMASTERGeneral"/>
  <add name="AcrosoftPolicyTypeKey" value="Insurance RISKMASTERPolicy"/>
  <add name="AcrosoftSkin" value="AAPos"/>
  <add name="AcrosoftUsersTypeKey" value="Insurance RISKMASTERUser"/>
  <add name="AsAnywhereLink" value="http://akumar59-3/AsAnywhere/default.aspx"/>
  <add name="ASBaseWebService" value="http://akumar59-3/ASWebServices/ASBaseWebService.asmx"/>
  <add name="ASObjectWebService" value="http://akumar59-3/ASWebServices/ASObjectWebService.asmx"/>
  <add name="AuthService" value="http://akumar59-3/ASWebServices/AuthService.asmx"/>
  <add name="ClaimFolderFriendlyName" value="ClaimNbr"/>
  <add name="EventFolderFriendlyName" value="EventNbr"/>
  <add name="GeneralFolderFriendlyName" value="Type"/>
  <add name="IndexService" value="http://akumar59-3/ASWebServices/IndexService.asmx"/>
  <add name="PolicyFolderFriendlyName" value="PolicyNbr"/>
  <add name="UsersFolderFriendlyName" value="User"/>
  <add name="UseCommonAcrosoftUser" value="true"/>
  <add name="AcrosoftUsername" value="asadmin"/>
  <add name="AcrosoftUserPassword" value="password"/>
```

</Acrosoft>

<UserMapList configSource="RmxAcrosoftUserMappingList.config" />

## Tables

### Tables Overview

INSURANCE RISKMASTER has several kinds of tables you can work with :


- **Administrative Tables:** Enable you to track a variety of information that may or may not be associated with claims or events. You can add or remove fields from these tables. There are eight administrative tables that help you manage information about abstract bonds, certificates of insurance, complaints, contracts, internal projects, contacts, hazardous materials, and property. Each table is structured with common fields associated with the topic, and a primary index for sorting records added to the table. The Administrative Tables are defined with a variety of fields related to the type of information you want to collect and uses a primary index for sorting the records. Depending on your requirements, you can modify the table to display only those fields for which you want to collect data. You can add new fields, modify or delete existing fields, and rearrange the order of the fields in any table. You can also modify current indexes or add indexes to the table.
- **Supplemental Tables:** Associated with the supplemental tabs on various windows. You can add or remove fields from these tables.
- **Defined Tables:** INSURANCE RISKMASTER tables that enable you to add additional entities tables. You cannot add or delete fields from the tables.

## GUI

### Table Window

Use the Table window to set up fields and indexes when you create custom administrative tracking tables . After you create the fields, you can rearrange the fields in the required order.

To open

From the Administrative Tracking window, select the  button.

### Field definitions

<b>#</b>	Displays the serial number of the field. The serial number determines where the field displays on the Administrative Tracking window.
<b>System Field name</b>	Displays the field name in the system table as it displays in the database .
<b>User Prompt</b>	Displays the field label that displays on the Administrative Tracking window.
<b>Field Type</b>	Displays the field type.
<b>Size</b>	Displays the number of characters you can enter in the field.
<b>Req.?</b>	Displays as Yes or No whether or not the field is a required field.
<b>Del.?</b>	Displays as Yes or No whether or not a user deleted the field.
<b>Pattern</b>	Displays the format for the field input.
<b>Reposition</b>	Select a field and then select the up and down buttons to move the field up or down.



Select to open the Add Index window.



Select an existing field and then select this button to open the Modify Field window.

**Group Association**

Displays the group association of the fields.

**Index Names**

Displays the index names.

**Index Fields**

Displays the index fields associated with the index names.

**Unique?**

Displays as Yes or No, whether or not the field is unique.



Select to open the Add Index window.

**Table List Window**

Use the Table List window to add tables to the database and to review existing system tables. You can add several types of tables such as User Code tables, Entity Code tables, People tables, Admin. Tracking tables and Industry Standard Codes.

**Menu**

Manager > Table Maintenance

**Field definitions**

*Drop down list*

From the drop down list select the type of table you want to add or review.

➔ **System Tables**

➔ **User Code Tables**

➔ **Entity Code Tables**

➔ **People Tables**

➔ **Administrative Tracking Tables**

➔ **Industry Standard Codes**

**Table Name**

Displays all the existing tables for the table type you selected from the drop down list.

**New**

Select to open the New Tables window.


**Edit**

Select to open the Edit Tables window

## Add Index Window

Use the Add Index window to assign indexes to fields. Indexes help the system retrieve information from the database faster. This is helpful for reporting. However, the more indexes you add, the longer it takes for INSURANCE RISKMASTER to save your changes.

### To open

From the Table window, select the  button.

## Field definitions

### Index Name

Enter a field name.

### Fields in Table

Select a field and then select the Add button to add the field to the index. You can add multiple fields to an index.

### Fields in Index

Displays the fields in the index. Select a field and then select the Remove button to remove the field from the index.

### Add

From the Fields in Table field, select a field and then select this button to add the field to the index.

### Remove

From the Fields in Index field, select a field and then select this button to remove the field from the index.

### OK

Select to save your changes and close the window.

### Cancel

Select to close the window without saving your changes.

## Administrative Tracking Window

Use the Administrative Tracking window to create custom administrative tracking tables. INSURANCE RISKMASTER provides several administrative tracking tables. You can also use this window to modify the existing administrative tracking tables.

### To open

- From the main menu, select Utilities.
- From the Utilities menu, select Managers.
- From the Managers menu, select Administrative Tracking.

## Field definitions

### Table Name

Displays the table name as it will display in INSURANCE RISKMASTER.

### System Table Name

Displays the table name as it is recorded in the database.


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Select to open the New Table window.

In the New Table window:

- In the **User Table Name** field, enter a table name as you want it to display in INSURANCE RISKMASTER. You will see this table name in INSURANCE RISKMASTER when you access the administrative tracking table window.
- In the **System Table Name** field, enter the table name as you want it to display in the database.
- Select .



Select the table you want to edit and then select the button to open the Table window.



Select a table and then select this button to delete the selected table.

## Tables Window

Use the Tables window to create or edit User Code tables, Entity Code tables, People tables, Administrative Tracking tables and Industry Standard Codes.

Note: You cannot create or edit System tables as System table properties can only be displayed.

### From the Table List window

Select the New or Edit button

## Field definitions

### System Table Name

Enter the System Table with which you want to associate the table you are creating.

### User Table Name

Enter a name for the table you are creating.



When you use this table in RISKMASTER, the name you enter here is displayed. For example, when you create a User Code Table, on the Code Selection window in RISKMASTER/ World, the name you enter in this field is displayed in the drop down list.

### Parent Table

From the drop down list, select the parent table you want to associate with the table you are creating. The table you create will be a subset of the parent table.

### Required Parent

Select the check box if you want the user to complete fields in the parent table before completing this table.

### Tree Display

Select the check box if you want to display the new table in a tree view in relation with the parent table.

### Industry Standard Table

From the drop down list, select the appropriate Industry Standard table if the table you are creating uses NCCI or CS codes.

### Industry Standard Table Required

Select the check box if you want the user to complete fields in the associated industry standard table before completing this table.



**Allow Attachments**      Select the check box if you want to allow attachments.

**Line of Business Parent Required**      Select the check box if you want the user to select a line of business before completing this table.

### Add/Modify Field Window

Use the Add Field window to add a field to a custom administrative tracking table you are creating or to modify fields in a custom administrative tracking table.

**To open**

From the Table window, select the  button, or the  button.

### Field definitions

**Field Type**      From the drop down list select a field type.

**User Prompt**      Enter a field caption for the field to be displayed in INSURANCE RISKMASTER .

**System Field name**      Enter the field name as it is recorded in the database .

**Required Field**      Select the check box if you want this field to be a required field.

**Deleted**      Select the check box, if you do not want to display the field.

**Lookup Field**      Select the check box if you want to display the Code Selection window from this field, or if you want to display the Search window from this field.

Note: If you also selected a Code File, RISKMASTER displays the Code Selection window when you select the Search button next to this field, else RISKMASTER displays a Search window when you select the Search button next to the field.

**Input Format**      This field is only available if you selected String as the Field Type.

- Select **Free-Form** option, if you do not want to automatically format the string when the user enters it in INSURANCE RISKMASTER.
- Select **Patterned** option, and then from the drop down list select a format if you want to automatically format the string when the user enters it in INSURANCE RISKMASTER.

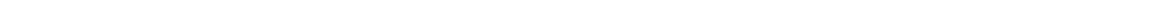
## Tips for Working with Fields in Administrative and Supplemental Tables

You can modify a Administrative or Supplemental tables so that they display only those fields for which you want to collect data. You can also add new fields or modify existing fields, or rearrange the order of the fields in any table. You can also modify current indexes or add indexes to the table.

When working with fields in Administrative and Supplemental tables, keep the following in mind:

- You cannot link a field to more than one existing code table.
  - You can link a field to a code table only if it is not already linked using Table Maintenance in Utilities .
-







- You can limit the clients to those for whom you are currently administering claims. From INSURANCE RISKMASTER, select a code and then select Edit in the Code Selection window. Complete the Effective Date Trigger and Effective Date Range fields. If this code is effective for a specific level of the organization hierarchy, complete the Effective For (Only) field. Save the information.

## How To

### To Add Supplemental Fields

1. From the main menu, select Utilities.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Supplemental Setup.
4. The Supplemental Setup menu opens.
5. From the Supplemental Setup menu, choose Supplemental Field Data.  
The Supplemental Data window opens
6. Select a table.
7. Select the  button.  
The Table Supplemental window opens.
8. To add a field, select the  button.  
The Add Field window opens.
9. From the Field Type drop down list select the type of field you want to create.
10. In the User Prompt field, enter the field caption as you want it to display on window which opens when you select the supplemental tab in INSURANCE RISKMASTER.
11. In the System Field Name field, enter the field name as it will display in the database.
12. Based on the kind of field you want, complete the Add Field window, as shown below.

#### Add Field

##### Field Type

From the drop down list, select the type of field.

Multi-Code, Multi-State, and Multi-Entity field types allow multiple values to be selected for a single supplemental field and yet store each value in a separate record. This allows for enhanced searching and reporting features in the future. The Multi-Text field stores all selected values in a single field.

##### Deleted

Select the check box, if you want to delete the field. This check box is only available in the Modify Field window.

##### User Prompt

Enter the field caption for the supplemental field.

##### System Field Name

Enter the field name in the system table.

##### Required Field

Select the check box, if you want to make the field a required field.


##### Input Format


If you selected a certain Field Type like String, then you can specify a format for user input into the supplemental field.

**Group Association**

**Source Field** From the drop down list, select the source field.


**Codes/Entities**

Displays the code/entities for the source field. Select the  button to open the Code Selection window and select the code/entity combinations for the source field.

To remove a code/entity, select the record and select the  button.




Select to save your changes and close the window.

13. Select the  button.  
INSURANCE RISKMASTER adds the field to the table.

**To Add Administrative Tracking Tables**


1. From the main menu, select Utilities.
2. From the Utilities menu, choose Managers.  
The Managers menu opens.
3. From the Manager menu, select Administrative Tracking.  
The Administrative Tracking window opens and an Administrative Tracking link displays under the Utilities node in the left navigation tree.



4. Select the  button.  
The New Table window opens.

5. In the User Table Name field, enter a name for the table.
6. In the System Table Name field, enter a table name as you want it to be recorded in the database.

**Note:** The system table name must be all upper case with no spaces. Use underscores to separate words.

7. Select the  button.

8. To add a field, from the Administrative Tracking window, select the  button.  
The Table window opens.

9. From the Tables window, select the  or the  button.  
The Add/Modify Field window opens.


10. From the Field Type drop down list select the type of field you want to create.
11. In the User Prompt field, enter the field caption as you want it to display on the administrative tracking window in INSURANCE RISKMASTER.
12. In the System Field Name field, enter the field name as it will display in the database.
13. Based on what kind of field you want, complete the rest of the Add/Modify Field window.

14. Select the  button.




INSURANCE RISKMASTER adds the field to the table.

### To Delete an Existing Table

You can delete tables that your organization no longer uses. When you delete a table, you also delete all the records in the table from the database.

1. From the main menu, select Utilities.
2. From the Utilities menu, choose Managers.  
The Manager menu opens.
3. From the Manager menu, choose Administrative Tracking.  
The Administrative Tracking window opens and a Administrative Tracking link displays under the Utilities node in the left navigation tree.
4. Select the table you want to delete.
5. Select the  button.  
A Confirm Delete window opens.
6. Select OK.  
INSURANCE RISKMASTER deletes the table and all records in the table from the database.

### To Modify Jurisdictional Tables

1. From the main menu, select Utilities.
2. From the Utilities menu, choose Jurisdictional Options.  
The Jurisdictional Options menu opens.
3. From the Jurisdictional menu, choose Jurisdictional Tables.  
The Jurisdictional Data window opens and a Jurisdictional Data link displays under the Utilities node in the left navigation tree.
4. From the table list, select a table and select the  button.  
The Table window opens.
5. From the fields list, select the field you want to modify.
6. Select the  button.  
The Modify Field window opens.
7. In the User Prompt field, enter the field caption as you want it to display on the administrative tracking window in INSURANCE RISKMASTER / World.
8. Based on the kind of field you want, make changes to the fields in the Modify Field window.
9. Select  button.  
INSURANCE RISKMASTER modifies the field in the table.

### To Map INSURANCE RISKMASTER Code Tables to Industry Standard Tables

1. From the main menu, select Maintenance.  
The Maintenance menu opens.
2. From the Maintenance menu, choose Table Maintenance.  
The Table Maintenance window opens.

3. From the drop down list, select User Code Tables.  
The Table List window displays a list of User Code Table names.
4. From the list of tables displayed, select the table you want to map.
5. On the Table List window, select the Edit button.  
The Enter Table Detail window opens.
6. From the Industry Standard table drop down list, select the matching table.
7. Select Save.  
INSURANCE RISKMASTER maps the existing code table to the Industry standard code table.


## **Power Views**


### **How To**

#### **To Create a New Power View**

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Power View Editor.  
The Power Views Setup window opens.
4. Select the Create New button.  
The Create New View window opens.
5. In the View Name field, enter a name for the view.
6. In the View Description field, enter a description for the view.
7. From the Home window drop down list, select the window you want to open first when a user selects this view.
8. In the Home window URL field, enter the home window URL.
9. Select Save.  
INSURANCE RISKMASTER creates and adds the power view to the list of views on the Power Views Setup window.

#### **To Set Up Windows for Power Views**

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Power View Editor.  
The Power Views Setup window opens.
4. From the Power Views Setup window, select an existing power view name.  
The View Definition for : <Power View name>window opens.
5. On the View Definition For window, From the Available Forms list, select a window name.
6. With the window name highlighted, select the edit button .  
The form for the selected window opens for editing.
7. Review the fields listed under the Form Fields drop down list.



8. To add a field not already included, from the Form Fields drop down list, select the field you want to include on this window.
9. Select the Add button.
10. To delete an included field, from the list of included fields, select the field you want to delete.
11. Select the Delete Button .
12. Similarly, add or remove Command Buttons.
13. If you want the buttons you selected to display at the top of the window, select the Show on Top for Top-Down Layout only check box.
14. Similarly, add or remove Toolbar Buttons.
15. If this window is an Administrative Tracking window, select the Admin Tracking "Go" Button check box to include a Go field on the window. This field lets you enter a record ID directly on an administrative tracking window and open that record ID.
16. Select the Form is Read-only check box if you want to make this window read only.
17. Select Save.

### To Add Windows to Power Views

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Power Views.  
The Power Views Setup window opens and a Power Views Setup link displays under the Utilities node in left navigation tree.
4. On Power Views Setup window, from the list of Views, select the link for the power view you want to set up.  
The View Definition For window opens with the power view you selected.
5. From the Available Forms drop down list, select a window you want to include in the view.
6. Select the Add button to add the window you selected to this custom view.
7. Select and add all the windows you want to include in the view.
8. From the Available User/Groups drop down list, select the user groups you want to give access to this view.
9. Select the Add button.
10. Select and add all the users you want to have access to this view.
11. Select Save.

### To Enter Field Level Help for a Field

1. From the main menu, select Utilities.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Powerview Editor.  
The Power Views Setup window opens.
4. From the Power Views Setup window, select an existing power view name.  
The View Definition for window opens.
5. On the View Definition for window, from the Available Forms list, select the window that contains the field you want to enter help for.

6. With the window name highlighted, select the edit button  .  
The form for the selected window opens for editing.
7. From the fields listed under the Form Fields drop down list, select the field you want to add help for.
8. With the field name highlighted, select the edit button  .  
The Form Editor window opens.
9. In the Help Message field, enter help for the field (enter a description of the field which will help users use the field).
10. Select the OK button.
11. On the Power Views Setup window, select Save.  
INSURANCE RISKMASTER adds the field level help button to the field. You can only see the Field Level help button when you log into this power view.

## Power Views Overview


You can create customized views in INSURANCE RISKMASTER. A customized view can contain only those windows that specifically meet your organization's needs. In custom views, you can set INSURANCE RISKMASTER windows up to include only the fields you need arranged in any order you choose.

When you login to INSURANCE RISKMASTER, you can select a custom view from a list of custom views. When you select a custom view, you will see only selected data entry windows with selected fields.

## Dialog

### Form Editor window

Use the Customize Views window to create a customized view of INSURANCE RISKMASTER.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu , choose Powerview Editor.
  - From the Power Views Setup window, select an existing power view name.
  - On the View Definition for window, from the Available Forms list, select a window for which you want to edit a field
  - With the window name highlighted, select the edit button  .  
The form for the selected window opens for editing.

### Field definitions

Form: Fields	Displays the list of fields available on the selected form. Select the field you want to modify.
Command/ Buttons/ Navigation Tree	Displays the list of controls on available the selected form. Select the controls you want to include in the powerview and then select the Add/ Edit button.
Tool bar buttons	Displays the list of toolbar buttons available on the selected form. Select the controls you want to include in the powerview and then select the Add/ Edit button.
Form is Read Only	Select the checkbox if you want the form to be not editable in a powerview.
Top- Down Layout	Select the checkbox to have the form in the top-down layout in a powerview.

Save	Select the button to save the form settings for powerview.
Reset	Select the button to reset the data in the fields.
Cancel	Select the button to cancel the changes.
Tab View	Select the button to view how the customized form looks in the application.

## Power Views Setup Window

Use the Customize Views window to create a customized view of INSURANCE RISKMASTER.


- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, select the Powerview Editor.

### Field definitions


<i>View Name links</i>	Lists existing custom views of data entry windows.  Select a view name link to open the View Definition For window.
<b>Edit</b>	Select to open the Edit View window and enter a new name for the view, or a new description for the view, or a new INSURANCE RISKMASTER home window for the view.
<b>Delete</b>	Select to delete the view.
<b>Clone</b>	Select to create and add a copy of this view to the list of views. To rename a cloned view, select Edit and rename the view.
<b>Create New</b>	Select to open the Create New View window.

## Edit Field Window

Use the Customize Views window to create a customized view of INSURANCE RISKMASTER.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu , choose Powerview Editor.
  - From the Power Views Setup window, select an existing power view name.
  - On the View Definition for window, from the Available Forms list, select a window for which you want to edit a field
  - With the window name highlighted, select the edit button  .  
The form for the selected window opens for editing.



- From the fields listed under the Form Fields drop down list, select the field you want to edit.
- With the field name highlighted, select the edit button . The Form Editor window opens.

### Field definitions

<b>Caption</b>	Enter the text that displays as the field label in the form.
<b>Help Message</b>	Enter the text that displays as help or information at the field level.
<b>Required</b>	Select the checkbox, if you want to mark the field as mandatory on the selected form in a powerview. The form/ window will not be saved until data is entered in the field.
<b>Read Only</b>	Select the checkbox if you want to make the field as read only on the selected form/ window.  You cannot make the readonly fields as mandatory in default view. Also in case there are some fields in the system which are dependent on other fields, and business requirement are such that one field derives/ effects value in other fields then the system administrator should make both parent and child field as read only.

### View Definition for Window

Use the View Definition for window to include only the fields you want on each window you include in a **power view** . You can also rearrange fields on windows.

When you login to INSURANCE RISKMASTER you can select a custom view from a list of power views. When you select a power view, the contents of windows in the view depend on how you set the windows up on the View Definition For window.



<b>To open</b>	<ul style="list-style-type: none"><li>▪ From the main menu, select Utilities</li><li>▪ From the Utilities menu, choose UI Admin.</li><li>▪ From the UI Admin menu, choose Powerview Editor.</li><li>▪ From the Power Views Setup window, select a view name.</li></ul>
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### Field definitions

<b>Available Forms</b>	From the drop down list, select a window to customize.
<b>Add</b>	Select to add the window you selected in the Available Forms field to the power view.
<b>Available User/Groups</b>	From the drop down list, select the users who will have access to this power view.
<b>Add</b>	Select to add the users you selected in the Available Users/Groups field to the power view.

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<i>List</i>	The available forms list displays the windows included in this view. The Available User/Groups list displays the users who can access this view.
	From the list of Available Forms, select this button to edit and customize the window for this view.
	From a list select a window or user/group and then select this button to delete the window or user from this view.
<b>Save</b>	Select to save the view.
<b>Back to Views</b>	Select to return to the System Administration window.

## Supplemental


### GUI

#### Supplemental Data Window

Use the Supplemental Data window to create supplemental data fields for windows in INSURANCE RISKMASTER. You can access these supplemental fields by selecting the Supplementals tab on most INSURANCE RISKMASTER windows. Once you create the fields, you can rearrange them in the order you want.


- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, choose Supplemental Setup.
  - From the Supplemental Setup menu, choose Supplemental Field Data.

#### Field definitions

<b>Table Name</b>	Displays the name for the table into which you will enter the supplemental data.
<b>System Table Name</b>	Displays the system name for the table into which you will enter the supplemental data.
	Select a table and then select this button to open the Table window and design the table.

#### Table: <table name> Window

The window name will display based on the table you selected in the Supplemental Data window.

- To open**
- From the Supplemental Data window, select a table and then select the  button.

#### Field definitions

<b>#</b>	Displays the serial number of the field. The serial number determines where the field will display on the window, which opens when you select the Supplementals tab.
<b>System Field Name</b>	Displays the field name in the table as it is recorded in the database.

<b>User Prompt</b>	Displays the field label that will display on the window, which opens when you select the Supplementals tab.
<b>Field Type</b>	Displays the field type.
<b>Size</b>	Displays the number of characters you can enter in the field.
<b>Req.?</b>	Displays as Yes or No, whether or not the field is required.
<b>Del.?</b>	Displays as Yes or No, whether or not the field was deleted by the user.

Note: When you delete a field, RISKMASTER hides the field from users but does not remove the field from the database.

<b>Pattern</b>	Displays the format for the field input.
<b>Group Association</b>	Displays the group associated with the field.
<b>Reposition</b>	Select a field and then select the up and down buttons to move the field up or down.



Select to open the Add Field window.



Select an existing field and then select this button to open the Modify Field window.

<b>Index Names</b>	Displays the index name.
<b>Index Fields</b>	Displays the index fields associated with the index names.
<b>Unique?</b>	Displays as Yes or No, whether or not the index is unique.



Select to open the Add Index window.

<b>Close</b>	Select to close this window without saving your changes.
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### Add/Modify Field Window




Use the Add/Modify Field window to add a field to the window which opens when you select the supplemental tab for a table on the Table Supplemental window in INSURANCE RISKMASTER. The Modify Field window and the Add Field window have the same fields. When you open the Modify window, you cannot modify the fields populated in gray.

#### To open

From the Table: Employee Supplemental window, select the  button.

### Field definitions

#### Add Field

<b>Field Type</b>	From the drop down list, select the type of field.
	<p>Note: Multi-Code, Multi-State, and Multi-Entity field types allow multiple values to be selected for a single supplemental field and yet store each value in a separate record. This allows for enhanced searching and reporting features in the future. The Multi-Text field stores all selected values in a single field. You can also create HTML Text Type supplemental field which can store HTML content. Also you can create User Lookup supplemental type field that enables to select users and groups . The users and groups available in RISKMASTER Security Management System are available in such fields for selection as data,</p>
<b>Deleted</b>	Select the check box, if you want to delete the field. This check box is only available in the Modify Field window.
<b>User Prompt</b>	Enter the field caption for the supplemental field.
<b>System Field Name</b>	Enter the field name in the system table.
<b>Required Field</b>	Select the check box, if you want to make the field a required field.
<b>Input Format</b>	If you selected a certain Field Type like String, then you can specify a format for user input into the supplemental field.
<b>Group Association</b>	
<b>Source Field</b>	From the drop down list, select the source field.
<b>Codes/Entities</b>	Displays the code/entities for the source field. Select the  button to open the Code Selection window and select the code/entity combinations for the source field.
	<p>Note: To remove a code/entity, select the record and select the  button.</p>
	Select to save your changes and close the window.

### Supplemental Grid Parameters Setup Window

Use the Supplemental Grid Parameters Setup to specify the maximum and minimum number of rows and columns to be displayed in the grids on the supplemental tab in INSURANCE RISKMASTER. You can access the supplemental fields by selecting the Supplementals tab on most INSURANCE RISKMASTER windows.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, choose Supplemental Setup.
  - From the Supplemental Setup menu, choose Supplemental GridParameters Setup.

### Field definitions

- Minimum Rows Allowed** Use the up arrow or the down arrow button in the field to set the minimum number of rows that may be displayed on a supplemental grid.

<b>Minimum Columns Allowed</b>	Use the up arrow or the down arrow button in the field to set the minimum number of columns that may be displayed on a supplemental grid.
<b>Maximum Rows Allowed</b>	Use the up arrow or the down arrow button in the field to set the maximum number of rows that may be displayed on a supplemental grid.
<b>Maximum Columns Allowed</b>	Use the up arrow or the down arrow button in the field to set the maximum number of columns that may be displayed on a supplemental grid.
<b>Save</b>	Select to save the changes and close the window.
<b>Close</b>	Select to close the window without saving the changes.

### Add Group Association Window

Use the Add Group Association window to add/edit a Group Association for supplemental fields. You can use Group Association to set filter conditions for displaying a supplemental field. Using the window, you can create multiple associations and assign priority to each association.

<b>On the Add Field window</b>	Group Associations frame   
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### Field definitions

#### Group Association

**Source Field** From the drop down list, select the source field.

**Codes/Entities** Displays the code/entities for the source field.



Select the button to select the code/entity combinations for the source field.


**Priority** Select the priority level you want to assign.

**OK** Select to save your changes and close the window.

**Cancel** Select to close the window without saving your changes.

### Add Index Window

Use the Supplemental Data window to create supplemental data fields for windows in INSURANCE RISKMASTER. You can access these supplemental fields by selecting the Supplementals tab on most INSURANCE RISKMASTER windows.

<b>To open</b>	
	From the Table: Employee Supplemental window, select the button.

### Field definitions

**Index Name** Displays the name of the index.

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<b>Fields in Table</b>	Displays the name of the fields in the table.
<b>Fields in Index</b>	Displays the name of the fields in the index.
<b>Add</b>	From the list select the field in Tables and then select the Add button to include the fields in the Fields in Index.
<b>Remove</b>	Select a field from the Fields in Index and then select the button to remove the field from the Fields in Index.
<b>OK</b>	Select to save your changes and close the window.
<b>Cancel</b>	Select to close the window without saving your changes.

## System Admin

### Dialog

#### Create/Edit New View Window

Use the Create/Edit New View window to create or edit new power views.

- To open**
- From the main menu, select Utilities
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, choose Powerview Editor.
  - From the Power Views Setup window, select the Create New button or the Edit link.

#### Field definitions

<b>View Name</b>	Enter a name for the power view . This name is displayed in the Views list on the Customize Views window.
<b>View Description</b>	Enter a description for the power view.
<b>Home window</b>	From the drop down list, select a INSURANCE RISKMASTER window to display when a user opens this view.
<b>Home window URL</b>	Enter the home window URL.
<b>Save</b>	Select to save and add this view to the Views list on the Customize Views window.
<b>Cancel</b>	Select to return to the Customize Views window without saving the new view.

#### Assign Layout to Users Window

Use the Assign Layout to Users window to assign top-down or tabbed layout format to users. Users can choose to view INSURANCE RISKMASTER windows either in tabbed format or in top-down scrolling format.



- To open**
- From the main menu, select Utilities
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, choose Users.
  - From the Users menu, choose Assign Layouts.

**Field definitions**

- Top Down Layout** Displays the list of users who will view INSURANCE RISKMASTER windows in top-down format.
- Add** Select a user form the Top-down Layout field and then select this button to move the user to the Tab Layout field.
- Add All** Select the button to move all the users from the Top-down Layout field to the Tab Layout field.
- Remove** Select a user form the Tab Layout field and then select this button to move the user to the Top-down Layout field.
- Remove All** Select the button to move all the users from the Tab Layout field to the Top-down Layout field.
- Tab Layout** Displays the list of users who will view INSURANCE RISKMASTER windows in tabbed format.
- Save** Select to save your changes.
- Back** Select to move to the previous window.

**Current Report Access Permissions for All Users Window**

Use the Current Report Access Permissions for All Users window to remove user permissions from an already existing posted report.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu,choose UI Admin.
  - From the UI Admin menu, choose Users.
  - From the Users menu, choose Review\ Remove Report Access Rights.

**Field definitions**

- User** Displays the users who can log into the selected INSURANCE RISKMASTER database .
- Report Name** Displays the list of reports to which you have granted access permissions to the users.
- Report Description** Displays a description for the reports.

<b>Remove Access</b>	Select a check box and select the button to remove the user access permissions to the corresponding report.
<b>Select All</b>	Select the button to select all the check boxes.
<b>Un-Select All</b>	Select the button to de-select all the check boxes.
<b>Refresh List</b>	Select to refresh the window view with information from the database. You must save your changes before you refresh.
<b>Cancel</b>	Select to close the window without saving the changes.
<b>Filter Display for User</b>	From the drop down list, select a user if you want to view the reports assigned only to the selected user. Select the Refresh List button after you select the filter display for users.

### Grant Report Access Permissions Window

Use The Grant Report Access Permissions window to grant additional users access to a posted report.

**Note:** If you want a specific selection of reports individualized for each user, use this window once for each user.

<b>To open</b>	<ul style="list-style-type: none"> <li>▪ From the main menu, select Utilities.</li> <li>▪ From the Utilities menu, choose UI Admin.</li> <li>▪ From the UI Admin menu, choose Users.</li> <li>▪ From the Users menu, choose the Grant Additional Reports Access Rights.</li> </ul>
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### Field definitions

<b>Users</b>	Displays the users who can log into the selected INSURANCE RISKMASTER database.
<b>Reports</b>	Displays the list of reports you can access in the selected INSURANCE RISKMASTER database.
<b>Grant Access</b>	Select the button to grant selected users additional access rights to selected reports.
<b>Refresh</b>	Select to refresh the window view with information from the database. You must save your changes before you refresh.
<b>Cancel</b>	Select to close the window without saving the changes.

### Users Currently Logged into the Wizard Window

Use the Users Currently Logged in window to review all the users currently logged into INSURANCE RISKMASTER across all data sources. You can also see the users' email addresses, the data sources they are logged into, the last time they accessed INSURANCE RISKMASTER, and the user's phone numbers. You can also logout users one at a time.

<b>To open</b>	<ul style="list-style-type: none"> <li>▪ From the main menu, select Utilities</li> <li>▪ From the Utilities menu, choose UI Admin.</li> </ul>
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- From the UI Admin menu, choose the Users.
- From the Users menu, choose the View Logged in Users.

### Field definitions

<b>User Name</b>	Displays the User Names or users logged in.
<b>Email Address</b>	Displays the email address of the user.
<b>Database</b>	Displays the database the user is logged into.
<b>Last Access</b>	Displays the last time the user logged in.
<b>Phone Number</b>	Displays the user's phone number.
<b>Logout</b>	Select to log out a user.

### Codes Import Window

Use the Codes Import window to import code tables in the form of SQL text files. Importing code table files can save you the trouble of having to create code tables and adding code values to the tables.

**To open** From the Table Maintenance window, in the Code Texts tab, select the Import Codes button.

### Field definitions

<b>Import</b>	Select to import the code table from the code table file.
<b>Cancel</b>	Select to close the window without importing.
<b>File</b>	Select the Browse button to open a file browser and then select the code table file you want to import.
<b>Code Type</b>	Select the code table type you want to import the code table as.
<b>Edit Description</b>	Select the check box if you want to edit the codes in the code table after importing the file.

### Users Administration Window

Use the Users Administration window to perform functions that need system administrator privileges.

Click on a link on the Users Administration window to open the appropriate window and perform a function.

- To open**
- From the navigation bar, select . The Admin window opens.
  - From the Administration menu, select Users.

## Field definitions

<b>Assign Layouts</b>	Select to enable all the users to assign a top-down or tabbing layout to view INSURANCE RISKMASTER windows. Users can choose either of the layouts to view the windows.
<b>View who is logged in</b>	Select to review all the users currently logged into INSURANCE RISKMASTER across all data sources. You can also see the users' email addresses, the data sources they are logged into, the last time they accessed INSURANCE RISKMASTER, and the user's phone numbers. You can also logout users one at a time.
<b>Logout all users</b>	Select to logout all users logged into INSURANCE RISKMASTER.
<b>Password Update</b>	Select to open the Password Update window, and change your INSURANCE RISKMASTER password.
<b>Grant Additional Access Rights</b>	<b>Report</b> Select to add user permissions for reports. These permissions are set up when users post reports. Once users post a report, these permissions can only be changed from the System Administration window.
<b>Review/Remove Report Access Rights</b>	Select to review or remove user permissions for reports. These permissions are set up when users post reports. Once users post a report, these permissions can only be changed from the System Administration window.

## How To

### To Review or Remove the Report Access Rights

You can remove user permissions from an already existing posted report.

1. From the main menu, select Utilities
2. From the Utilities menu, select UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Users.  
The Users menu opens.
4. From the Users menu, select the Review\ Remove Report Access Rights.  
The Current Report Access Permissions for All Users window opens and a Review\Remove Report Access Rights node displays in the left navigation tree.
5. To remove the user access permissions to the corresponding report, select a check box and select the Remove Access button.
6. Select the Refresh button.

### To Add Code Tables

1. From the main menu, select Maintenance.
  2. From the Maintenance menu, select Table Maintenance.  
The Table Maintenance window opens.
  3. Complete the fields on the Table Maintenance window .
- 2.

*Drop down list* From the drop down list select the type of table you want to add or review.

- **1- System Tables:** Select System Tables to display a list of all the system tables.
- **3- User Code Tables:** Select User Code Tables to display a list of existing code tables (also called codes lists). You can create new code tables or edit existing code tables. Once you create a code table, you can add codes to the code table in the Code Text tab on this window.
- **4- Entity Code Tables:** Select Entity Code Tables to display a list of existing entity type tables. You can create new entity type tables or edit existing entity type tables. Once you create an entity type table, you can add entities to the entity type table on the Entity window.
- **7- People Tables:** Select People Tables to display a list of existing people type tables. You can create new people type tables or edit existing people type tables. Once you create a people type table, you can add persons to the people type table using the People Maintenance window.
- **8- Administrative Tracking Tables:** Select Administrative Tracking Tables to display a list of existing Administrative Tracking tables. Administrative Tracking Tables are customized tables you create to track specific information within INSURANCE RISKMASTER.
- **10- Industry Standard Codes:** Select Industry Standard Codes to display a list of existing Industry Standard Code tables. Industry Standard Codes are NCCI or CS code tables.

*Table Names* Displays all the existing tables for the table type you selected from the drop down list.

- 3.
4. From the drop down list, select the table type.
5. Select the Add Table button.  
The Enter Table Detail window opens.
6. Complete the Enter Table Detail window.

**System Table Name** Enter the System Table with which you want to associate the table you are creating.

**User Table Name** Enter a name for the table you are creating.

When you try to add codes to this table in RISKMASTER or RISKMASTER, the name you enter here is displayed. For example, when you create a User Code Table, on the Codes List dialog in RISKMASTER, the name you enter in this field is displayed in the drop down list.

**Parent Name** From the drop down list, select the parent table you want to associate with the table you are creating . The table you create will be a subset of the parent table.

**Parent Table Required** Select the check box if you want the user to complete fields in the parent table before completing this table.

**Industry Standard Table** From the drop down list, select the appropriate Industry Standard table if the table you are creating uses NCCI or CS codes.

**Line of Business Parent Required** Select the check box if you want the user to select a line of business before completing this table.

7. In the System Table Name field, enter a table name as you want it to appear in the database.
  8. In the User Table Name field, enter a name for the table.
-



9. Complete the other fields.
10. Select the Save button.  
INSURANCE RISKMASTER adds the table to the database.

### To View Users Currently Logged In

1. From the main menu, select Utilities.
2. From the Utilities menu, choose the UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Users.  
The Users menu opens.
4. From the Users menu, choose the View Logged in Users.  
The Users Currently Logged into the Wizard window opens.
5. To log out a user from the database, select the user and select the Logout button.

### To Grant Report Access Permissions

You can grant additional users access to a posted report.

1. From the main menu, select Utilities
2. From the Utilities menu, choose the UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose the Users.  
The Users menu opens.
4. From the Users menu, choose Grant Additional Report Access Rights.  
The Grant Report Access Permissions window opens.
5. From the Users field, select the user to whom you want to grant report access.
6. From the Reports field, select the reports to grant access to the selected users.


**Note:** To select multiple users or reports, hold down the CTRL key and select the users or reports.

7. Select the Grant Access button.
8. Select the Refresh button to refresh the window view with information from the database.

### To Assign Layout to Users

You can assign top-down or tabbed layout format to users. Users can choose to view INSURANCE RISKMASTER windows either in tabbed format or in top-down scrolling format.

1. From the main menu, select Utilities.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Powerview Editor.  
The Power Views Setup window opens.

4. From the Power Views Setup window, select an existing power view name.  
The View Definition for window opens.
5. From the Available Users/ Groups field select the user or group to whom you want to assign the layout.
6. On the View Definition for window, from the Available Forms list, select the window for which you want to assign the layout to the user.
7. With the window name highlighted, select the edit button 

The form for the selected window opens for editing.

8. From the fields listed under the Form Fields drop down list, select the field for which you want to set the layout.
9. Select the Top-Down Layout check box, to assign Top-Down layout for the selected user and form .
10. Select the Save button.

## System Administration Overview

In INSURANCE RISKMASTER, a system administrator is a user who can access and make changes in the INSURANCE RISKMASTER Utilities module.

There are some functions in INSURANCE RISKMASTER that can be performed only by a system administrator. System administrators can access these functions from the System Administration window.

You can access the System Administration window using the Admin. window button on the navigation bar. The Admin. window button is only visible if the login ID you use to login to INSURANCE RISKMASTER has system administration privileges.

Using the System Administration window you can run and post OSHA reports, manage user permissions, set up mail merge documents, customize your windows, set session timeout, review other users who are currently logged in, and change your password.

## User Privileges

### GUI

#### User Privileges Setup Window

Use the User Privileges Setup window to set up the fiscal year for your organization.

- To open**
- From the menu bar, select Security
  - From the Security menu, choose User Privileges Setup.

#### Field definitions

**Line of Business** From the drop down list, select the line of business for which you want to set options.

Note:

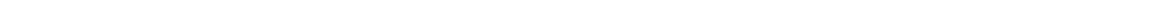
- Only those lines of business are visible in the drop down list which are selected in the General System Parameter Setup: System Settings tab.
- When you select the Use Carrier Claims check box in the General System Parameter Setup: Carrier Claim Settings tab, then in the drop down list only two lines of business i.e. General Claims and Workers' Compensation are visible.

**Additional Settings** Select to open the LOB/Top Level Approval window.

Note:

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- Only those lines of business are visible on the Line of Business Top Level Approval window which are selected in the General System Parameter Setup: System Settings tab.
- When you select the Use Carrier Claims check box in the General System Parameter Setup: Carrier Claim Settings tab, then on the Line of Business Top Level Approval window only two lines of business i.e. General Claims and Workers' Compensation are visible.

Reserve Limits tab

Print Check Limits tab

Payment Limits tab

Pay Detail Limits tab

Claim Limits tab

Event Type Limits tab

Per Claim Pay Limits tab


Incurred Limits tab

### User Privileges Setup Window: Payment Limits Tab

Use the Payment Limits tab to display the fields to specify the maximum amount in dollars for payments that each user or group of users can make.

**To open** From the User Privileges Setup, select the Payment Limits tab

### Field definitions

<b>Users</b>	Select the option to set payment limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign payment limits.
<b>Groups</b>	Select the option to set payment limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign payment limits.
<b>Max Amount</b>	Enter the maximum payment amount for which the user or user group can make payments.
<b>Add</b>	After you select the user or group from the list and entered a maximum amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the payment limits for that user or group.
<b>Enable Payment Limits</b>	Select the check box if you want the payment limits you set up to come into effect in INSURANCE RISKMASTER/ World.
<i>Table area</i>	Displays existing payment limits for users and groups.
<b>Claim Type</b>	Enter the code that best describes the Claim Type or select the  button to select from the Code Selection window.

Note: The Claim Type field is visible only when the Use Carrier Claims check box on the General System Parameter Setup is selected. When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.

### User Privileges Setup Window: Claim Limits Tab

Use the Claim Limits tab to display the fields to set up user access to claims . You can designate the users who can access claims of a certain type or of a particular status.

**To open** From the User Privileges Setup window, select the Claim Limits tab

#### Field definitions

**Users** Select the option to set claim limits for an individual user. INSURANCE RISKMASTER displays a list of users to whom you can assign claim limits.

**Groups** Select the option to set claim limits for a group of users. INSURANCE RISKMASTER displays a list of user groups to whom you can assign claim limits.

**Claim Type** From the drop down list, select the claim type for which you are setting user privileges.  
Note: When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.

**Claim Status** From the drop down list, select the claim status for which you are setting user privileges.

**Allow Create** Select the check box if you want to allow the selected user or user group to create claims of the type and status you selected.

**Allow Access** Select the check box if you want to allow the selected user or user group to open claims of the type and status you selected.

**Add** After you select the user or group from the list, the claim type and the claim status, select the Add button to enter your selections into the table area.

**Remove** Select an existing group or user from the table area and then select this button to delete the claim limits for that user or group.

**Enable Claim Limits** Select the check box if you want the claim limits you set up to come into effect in INSURANCE RISKMASTER/ World.


*Table area* Displays existing claim limits for users and groups.

### User Privileges Setup Window: Pay Detail Limits Tab

Use the Pay Detail Limits tab to display the fields to set up the maximum dollar amount per reserve type, which a user or user group can put on a single check. For example, you can allow a user to include only \$50 dollars from Expense reserve but include \$500 from Medical reserve.

**To open** From the User Privileges Setup, select the Pay Detail Limits tab

## Field definitions

<b>Users</b>	Select the option to set pay detail limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign reserve limits.
<b>Groups</b>	Select the option to set pay detail limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign reserve limits.
<b>Reserve Type</b>	From the drop down list, select a reserve category.
<b>Max Amount</b>	Enter the maximum amount the user or user group you selected can put on one check for the selected reserve type.
<b>Add</b>	After you select the user or group from the list and the reserve type and entered a maximum amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the pay detail limits for that user or group.
<b>Enable Payment Detail Limits</b>	Select the check box if you want the pay detail limits you set up to come into effect in INSURANCE RISKMASTER/ World.
<i>Table area</i>	Displays existing pay detail limits for users and groups.
<b>Claim Type</b>	Enter the code that best describes the Claim Type or select the  button to select from the Code Selection window.

Note: The Claim Type field is visible only when the Use Carrier Claims check box on the General System Parameter Setup is selected. When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.

## LOB/Top Level Approval Window

Use the LOB/Top Level Approval window to set the maximum reserve amount and maximum payment amount in dollars that the top level supervisor for each line of business can approve. When you try to make a payment over the limit allowed to you, INSURANCE RISKMASTER sends a diary to your supervisor asking for payment approval. If your supervisor does not process the payment within a week, the diary is sent to the supervisor who is one level above your supervisor on the supervisory chain.

<b>To open</b>	From the User Privileges Setup window, select the Additional Settings button
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## Field definitions

<b>User Name</b>	Select the Search button to open the System Users window and select the user you want to assign as the top level supervisor for this line of business.
<b>Reserve Max</b>	Enter the maximum reserve amount the top level supervisor for this line of business can approve.
<b>Payment Max</b>	Enter the maximum payment amount the top level supervisor for this line of business can approve.

**Top Level: User Name** Select the Search button to open the System Users window and select the user you want to assign as the top level supervisor for this all lines of business. This person can approve payments and reserves for all lines of business.



Select to save your changes and close the window.

### User Privileges Setup Window: Print Check Limits Tab

Use the Print Check Limits tab to display the fields to specify the type and maximum check amount in dollars for which each user or group of users can print checks.

Note: Print Check Limits does not restrict the amount in dollars of a single check that a user can issue. To set payment limits, use the Payment Limits tab.

**To open** From the User Privileges Setup, select the Print Check Limits tab

### Field definitions

**Users** Select the option to set check limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign check limits.

**Groups** Select the option to set check limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign check limits.


**Max Amount** Enter the maximum amount in dollars for which the user or user group can print checks.

**Add** After you select the user or group from the list and entered a maximum amount, select the Add button to enter your selections into the table area.

**Remove** Select an existing group or user from the table area and then select this button to delete the check limits for that user or group.

**Enable Print Check Limits** Select the check box if you want the check limits you set up to come into effect in INSURANCE RISKMASTER.

**Table area** Displays existing check amount limits for users and groups.

**Claim Type** Enter the code that best describes the Claim Type or select the  button to select from the Code Selection window.

Note: The Claim Type field is visible only when the Use Carrier Claims check box on the General System Parameter Setup is selected. When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.


### User Privileges Setup Window Reserve Limits Tab

Use the Reserve Limits tab to display the fields to set up reserve limits for users or groups of users. Reserve Limits determine amount to which a user can set a reserve. For example, if the limit is \$5000 for the Expense reserve type, a user cannot adjust the expense reserve amount to more than \$5000 for a claim . You can also use Reserve Limits to control the amount of funds that may be allocated to various expenses allocated with the Time and Expense module . You can specify the maximum reserve amounts by reserve category that each user or group of users can assign.

Note: INSURANCE RISKMASTER uses the assigned limits along with the supervisory approval chain for payments.

**To open** From the User Privileges Setup, select the Reserve Limits tab

### Field definitions

<b>Users</b>	Select the option to set reserve limits for an individual user. INSURANCE RISKMASTER displays a list of users you can assign reserve limits for.
<b>Groups</b>	Select the option to set reserve limits for a group of users. INSURANCE RISKMASTER displays a list of user groups you can assign reserve limits for.
<b>Reserve Type</b>	From the drop down list, select a reserve category.
<b>Max Amount</b>	Enter the maximum reserve amount for the user or user group you selected.
<b>Add</b>	After you select the user or group from the list and the reserve type and entered a maximum reserve amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the reserve limits for that user or group.
<b>Enable Reserve Limits</b>	Select the check box if you want the reserve limits you set up to come into effect in INSURANCE RISKMASTER.
<i>Table area</i>	Displays existing reserve limits for users and groups.
<b>Claim Type</b>	Enter the code that best describes the Claim Type or select the  button to select from the Code Selection window.

Note: The Claim Type field is visible only when the Use Carrier Claims check box on the General System Parameter Setup is selected. When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.

### User Privileges Setup Window: Per Claim Pay Limits Tab

Use the Per Claim Pay Limits tab to display the fields to set up reserve limits for users or groups of users and specify the maximum amount in dollars for payments that each user or group of users can make.

Note: The Per Claim Pay Limits tab is visible only when the Use Carrier Claims check box is unchecked.

**To open** From the User Privileges Setup window, select the Per Claim Pay Limits tab

### Field definitions

<b>Users</b>	Select the option to set per claim pay limits for an individual user. INSURANCE RISKMASTER displays a list of users you can assign per claim pay limits for.
<b>Groups</b>	Select the option to set per claim pay limits for a group of users. INSURANCE RISKMASTER displays a list of user groups you can assign per claim pay limits for.
<b>Reserve Type</b>	From the drop down list, select a reserve category.

<b>Max Amount</b>	Enter the maximum reserve amount for the user or user group you selected.
<b>Claim Type</b>	From the drop down list, select the claim type for which you are setting user privileges.
<b>Add</b>	After you select the user or group from the list and the reserve type and entered a maximum reserve amount,  select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the per claim pay limits  for that user or group.
<b>Has OverRide Authority</b>	Select the check box if you want to allow the user to override and save or approve payments which exceed the limits you set up to come into effect in INSURANCE RISKMASTER.  <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin: 5px 0;">Note: You can apply override authority to the claim only when the payment is approved and the override authority amount should not be greater than the user who is approving the payments.</div>
<b>Enable Per Claim Pay Limits</b>	Select the check box if you want the per claim pay limits you set up to come into effect in INSURANCE RISKMASTER.
<b>Prevent Payments Above Limits:</b>	Select the check box if you do not want to allow the user to make payments above the limits. You can choose to apply the limit only for a particular reserve or for all the reserves for a claim.

*Table area* Displays existing per claim pay limits for users and groups.

### User Privileges Setup Window: Event Type Limits Tab

Use the Event Type Limits tab to display the fields to set up user access to events. You can designate the users who can access events of a certain type. You can also decide if users can only access the events or also create events.

**To open** From the User Privileges Setup, select Event Type Limits tab

### Field definitions

<b>Users</b>	Select the option to set event type limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign event type limits.
<b>Groups</b>	Select the option to set event type limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign event type limits.
<b>Event Type</b>	Select the Search button to open a codes list and select the event type for which you are setting user privileges.
<b>Allow Create</b>	Select the check box if you want to allow the selected user or user group to create events of the type you selected.
<b>Allow Access</b>	Select the check box if you want to allow the selected user or user group to open events of the type you selected.
<b>Add</b>	After you select the user or group from the list and the event type, select the Add button to enter your selections into the table area.

---





<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the event type limits for that user or group.
<b>Enable Event Type Limits</b>	Select the check box if you want the event type limits you set up to come into effect in INSURANCE RISKMASTER.
<i>Table area</i>	Displays existing event type limits for users and groups.

### User Privileges Setup Window: Incurred Limits

Note: The Incurred Limits tab is visible only when the Use Carrier Claims on the General System Parameter Setup is selected. The Per Claim Pay Limits tab is replaced by the Incurred Limits tab when the Use Carrier Claims check box is checked.

**To open** From the User Privileges Setup window, select the Incurred Limits tab

### Field definitions

<b>Users</b>	Select the option to set per claim pay limits for an individual user. INSURANCE RISKMASTER displays a list of users you can assign per claim pay limits for.
<b>Groups</b>	Select the option to set per claim pay limits for a group of users. INSURANCE RISKMASTER displays a list of user groups you can assign per claim pay limits for.

**Reserve Type** From the drop down list, select a reserve category.

**Max Amount** Enter the maximum reserve amount for the user or user group you selected.

From the drop down list, select the claim type for which you are setting user privileges.

**Claim Type** Note: The Claim Type field is visible only when the Use Carrier Claims check box on the General System Parameter Setup is selected. When no Claim Type is selected then by default limit is set for all claim types for the selected LOB.

**Add** After you select the user or group from the list and the reserve type and entered a maximum reserve amount,

select the Add button to enter your selections into the table area.

**Remove** Select an existing group or user from the table area and then select this button to delete the per claim pay limits

for that user or group.

Select the check box if you want to allow the user to override and save or approve payments which exceed the limits you set up to come into effect in INSURANCE RISKMASTER.

**Has OverRide Authority**

Note: You can apply override authority to the claim only when the payment is approved and the override authority amount should not be greater than the user who is approving the payments.

**Enable Incurred Limits** Select the check box if you want the incurred limits you set up to come into effect in INSURANCE RISKMASTER.

*Table area* Displays existing per claim pay limits for users and groups.



## How To

### To Set Up User Privileges

1. From the main menu, select Security.
2. From the Security menu, choose User Privileges Setup.  
The User Privileges Setup window opens.
3. From the Line of Business drop down list, select the line of business for which you want to set up user privileges.
4. Select and complete the fields on the Reserve Limits tab, as shown below:

<b>Users</b>	Select the option to set reserve limits for an individual user. INSURANCE RISKMASTER displays a list of users you can assign reserve limits for.
<b>Groups</b>	Select the option to set reserve limits for a group of users. INSURANCE RISKMASTER displays a list of user groups you can assign reserve limits for.
<b>Reserve Type</b>	From the drop down list, select a reserve category.
<b>Max Amount</b>	Enter the maximum reserve amount for the user or user group you selected.
<b>Add</b>	After you select the user or group from the list and the reserve type and entered a maximum reserve amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the reserve limits for that user or group.
<b>Enable Reserve Limits</b>	Select the check box if you want the reserve limits you set up to come into effect in INSURANCE RISKMASTER/ World.
<i>Table area</i>	Displays existing reserve limits for users and groups.
5. Select and complete the fields on the Print Check Limits tab, as shown below:

<b>Users</b>	Select the option to set check limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign check limits.
<b>Groups</b>	Select the option to set check limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign check limits.
<b>Max Amount</b>	Enter the maximum amount in dollars for which the user or user group can print checks.
<b>Add</b>	After you select the user or group from the list and entered a maximum amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the check limits for that user or group.
<b>Enable Print Check Limits</b>	Select the check box if you want the check limits you set up to come into effect in INSURANCE RISKMASTER/ World.

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*Table area* Displays existing check amount limits for users and groups.

6. Select and complete the fields on the Payment Limits tab, as shown below:

**Users** Select the option to set payment limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign payment limits.

**Groups** Select the option to set payment limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign payment limits.

**Max Amount** Enter the maximum payment amount for which the user or user group can make payments.

**Add** After you select the user or group from the list and entered a maximum amount, select the Add button to enter your selections into the table area.

**Remove** Select an existing group or user from the table area and then select this button to delete the payment limits for that user or group.

**Enable Payment Limits** Select the check box if you want the payment limits you set up to come into effect in INSURANCE RISKMASTER/ World.

*Table area* Displays existing payment limits for users and groups.

7. Select and complete the fields on the Pay Detail Limits tab, as shown below:

**Users** Select the option to set pay detail limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign reserve limits.

**Groups** Select the option to set pay detail limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign reserve limits.

**Reserve Type** From the drop down list, select a reserve category.

**Max Amount** Enter the maximum amount the user or user group you selected can put on one check for the selected reserve type.

**Add** After you select the user or group from the list and the reserve type and entered a maximum amount, select the Add button to enter your selections into the table area.

**Remove** Select an existing group or user from the table area and then select this button to delete the pay detail limits for that user or group.

**Enable Payment Detail Limits** Select the check box if you want the pay detail limits you set up to come into effect in INSURANCE RISKMASTER/ World.

*Table area* Displays existing pay detail limits for users and groups.

8. Select and complete the fields on the Claim Limits tab, as shown below:

**Users** Select the option to set claim limits for an individual user. INSURANCE RISKMASTER displays a list of users to whom you can assign claim limits.

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<b>Groups</b>	Select the option to set claim limits for a group of users. INSURANCE RISKMASTER displays a list of user groups to whom you can assign claim limits.
<b>Claim Type</b>	From the drop down list, select the claim type for which you are setting user privileges.
<b>Claim Status</b>	From the drop down list, select the claim status for which you are setting user privileges.
<b>Allow Create</b>	Select the check box if you want to allow the selected user or user group to create claims of the type and status you selected.
<b>Allow Access</b>	Select the check box if you want to allow the selected user or user group to open claims of the type and status you selected.
<b>Add</b>	After you select the user or group from the list, the claim type and the claim status, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the claim limits for that user or group.
<b>Enable Claim Limits</b>	Select the check box if you want the claim limits you set up to come into effect in INSURANCE RISKMASTER/ World.
<i>Table area</i>	Displays existing claim limits for users and groups.

9. Select and complete the fields on the Event Type Limits tab, as shown below:


<b>Users</b>	Select the option to set event type limits for an individual user. INSURANCE RISKMASTER displays a list of users for whom you can assign event type limits.
<b>Groups</b>	Select the option to set event type limits for a group of users. INSURANCE RISKMASTER displays a list of user groups for whom you can assign event type limits.
<b>Event Type</b>	Select the Search button to open a codes list and select the event type for which you are setting user privileges.
<b>Allow Create</b>	Select the check box if you want to allow the selected user or user group to create events of the type you selected.
<b>Allow Access</b>	Select the check box if you want to allow the selected user or user group to open events of the type you selected.
<b>Add</b>	After you select the user or group from the list and the event type, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the event type limits for that user or group.
<b>Enable Event Type Limits</b>	Select the check box if you want the event type limits you set up to come into effect in INSURANCE RISKMASTER.

*Table area* Displays existing event type limits for users and groups.

10. Select and complete the fields on the Per Claim Pay Limits tab , as shown below

<b>Users</b>	Select the option to set per claim pay limits for an individual user. INSURANCE RISKMASTER displays a list of users you can assign per claim pay limits for
<b>Groups</b>	Select the option to set per claim pay limits for a group of users. INSURANCE RISKMASTER displays a list of user groups you can assign per claim pay limits for.
<b>Reserve Type</b>	From the drop down list, select a reserve category.
<b>Max Amount</b>	Enter the maximum reserve amount for the user or user group you selected.
<b>Claim Type</b>	From the drop down list, select the claim type for which you are setting user privileges.
<b>Add</b>	After you select the user or group from the list and the reserve type and entered a maximum reserve amount, select the Add button to enter your selections into the table area.
<b>Remove</b>	Select an existing group or user from the table area and then select this button to delete the per claim pay limits for that user or group.
<b>Has OverRide Authority</b>	Select the check box if you want to allow the user to override and save or approve payments which exceed the limits you set up to come into effect in INSURANCE RISKMASTER.  Note: You can apply override authority to the claim only when the payment is approved and the override authority amount should not be greater than the user who is approving the payments.
<b>Enable Per Claim Pay Limits</b>	Select the check box to payment limit on per claim basis.
<b>Prevent Payments Above Limits:</b>	Select the check box if you do not want to allow the user to make payments above the limits. You can choose to apply the limit only for a particular reserve or for all the reserves for a claim.

*Table area* Displays existing per claim pay limits for users and groups.


11. To set up the top level supervisors for all lines of business, select the Additional Settings button.
12. The LOB/Top Level Approval window opens.
13. Complete the fields on the LOB/Top Level Approval window.
14. Select the Save  button.

### To Set Up Top Level Supervisory Approval

1. From the main menu, select Security.
2. From the Security menu, select User Privileges Setup.  
The User Privileges Setup window opens.
3. From the Line of Business drop down list, select the line of business for which you want to set up user privileges.
4. To set up the top level supervisors for all lines of business, select the Additional Settings button.  
The LOB/Top Level Approval window opens.

5. Complete the fields on the LOB/Top Level Approval window , as shown below .

<b>User Name</b>	Select the Search button to open the System Users window and select the user you want to assign as the top level supervisor for this line of business.
<b>Reserve Max</b>	Enter the maximum reserve amount the top level supervisor for this line of business can approve.
<b>Payment Max</b>	Enter the maximum payment amount the top level supervisor for this line of business can approve.
<b>Top Level: User Name</b>	Select the Search button to open the System Users window and select the user you want to assign as the top level supervisor for this all lines of business. This person can approve payments and reserves for all lines of business.

6. Select the Save  button.

## User Privileges Overview

All User Privileges are granted according to group level. You define group privileges in the Security Management System . Groups are the base level of security in INSURANCE RISKMASTER and provide a way to combine tasks for employees within similar job grades. You can also set up privileges for individual users. If a user is assigned permissions more than once, the least restrictive condition determines the limit that will apply.

You can set up the top level supervisors for each line of business. You can then set the maximum reserve amount and maximum payment amount that the top level supervisor for each line of business can approve. When you try to make a payment over the limit allowed to you, INSURANCE RISKMASTER sends a diary to your supervisor asking for payment approval. If your supervisor does not process the payment within a week, the diary is sent to the supervisor who is one level above your supervisor on the supervisory chain.

## Auto Discount transaction

### howto

#### To Map an Auto Discount Transaction Type with Reserve Type

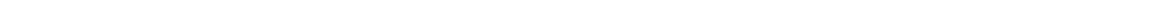
1. From the Utilities menu, choose Managers.  
The Managers menu opens.
2. From the Managers menu, select Auto Discount Transaction-Reserve Mapping.  
The Auto Discount Transaction-Reserve Mapping window opens.
3. To map an auto discount transaction type, from the Transaction Type drop down list select a transaction type.
4. From the Reserve type drop down list, select the reserve type whom you want to map the selected transaction type.
5. Select the Save Mapping button.  
The transaction type field gets mapped to the reserve type field.

### gui

#### Auto Discount Transaction-Reserve Mapping Window

- From the main menu select Utilities.
- To open**
- From the Utilities menu, choose Managers.
  - From the Managers menu, choose Auto Discount Transaction-Reserve Mapping.
-





## Field definitions

### Transaction Type - Reserve Type Mapping

Note: You can only map single Reserve type to single Transaction Type and a Transaction Type should be used only a single time.

<b>Transaction Type</b>	From the drop down list, select the transaction type whom you want to map with the reserve type.
<b>Reserve Type</b>	From the drop down list, select the reserve type whom you want to map with the transaction type.
<b>Save Mapping</b>	Select the button to save the transaction and reserve type mapping.
<b>Delete Mapping</b>	Select the check box against a transaction and reserve mapping and then select the button to delete the transaction type mapping.

## Customization

### Customization Overview

INSURANCE RISKMASTER User Interface Customization helps you to setup various display option of the applications and customize the way various Reports window is displayed.

## How To

### To Set Search Links

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities main menu, select UI Admin.  
The UI Admin sub-menu opens.
3. From the UI Admin sub-menu, select Customization.  
The Customization sub-menu opens.
4. From the Customization sub-menu, select Searches.  
The System Customization: Search window opens.
5. Select the check box for the link that you want to display under the Search navigation tree.
6. Select Save.

### To Customize the Reports Window

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Customization.

The Customization menu opens.

4. From the Customization menu, select Reports.  
The System Customization: Reports window opens.
5. Complete the fields on the System Customization: Reports window , as shown below .

#### **Report Email Settings**

**Override From** Select the link to open the Edit Value window and enter the sender's name you want to use when e-mailing reports. Select the Submit New Value button.

When you email reports from INSURANCE RISKMASTER, the name you enter here is displayed as the sender.

**Override From Address** Select the link to open the Edit Value window and enter the sender's address you want to use when e-mailing reports. Select the Submit New Value button.

When you email reports from INSURANCE RISKMASTER, the email address you enter here displays as the sender's email address and not the email address you actually use.

**Report Menu Links** Select the check boxes for the items you want to include on the Reports navigation tree.

**Exec. Summary** Select the check boxes for the items you want to include on the Reports navigation tree, in the Executive Summary section.

**Other Reports** Select the check boxes for the items you want to include on the Reports navigation tree, in the Other Reports section.

**Report Queue Buttons** Select the check boxes for the buttons you want to include on the Job Queue window .

**Save** Select to save the changes.

**Refresh** Select to refresh the window view with information from the database. You must save your changes before you refresh.

6. Select the Save button.
7. To refresh the window view with information from the database, after you save the information, select the Refresh button.

### **To Set Display Options**

1. From the main menu, select Utilities  
The Utilities menu opens.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Settings.  
The System Customization: Settings window opens.

System Customization		
Text Area Size		
<b>TextMI</b>	Width(Cols): <u>30</u>	Height(Rows): <u>5</u>
<b>FreeCode</b>	Width(Cols): <u>30</u>	Height(Rows): <u>30</u>
<b>Readonly Memo</b>	Width(Cols): <u>30</u>	Height(Rows): <u>5</u>
<b>Memo</b>	Width(Cols): <u>30</u>	Height(Rows): <u>10</u>

Buttons	
	<i>Show</i>
Claims & Events	<input checked="" type="checkbox"/>
Search	<input checked="" type="checkbox"/>
Document Management	<input checked="" type="checkbox"/>
Diaries	<input checked="" type="checkbox"/>
Reports	<input checked="" type="checkbox"/>

Other Settings
<input checked="" type="checkbox"/> Choose Soundex on Searches
<input checked="" type="checkbox"/> Show User Name on Menu
<input checked="" type="checkbox"/> Show Login on Menu
<input checked="" type="checkbox"/> Save Show Active Diary Settings

Funds Page Settings
<i>Show</i>
OFAC Check: <input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Refresh"/>

5. In the Buttons section, select the check boxes for the buttons, you want to display.

**Buttons**

**Claims & Events** Select the check box if you want to display Claim & Events on navigation tree.

**Search** Select the check box if you want to display Search on navigation tree.

**Document Management** Select the check box if you want to display Document Management on navigation tree.

**Reports** Select the check box if you want to display Reports on navigation tree.

**Diaries** Select the check box if you want to display Diaries on navigation tree.

**Other Settings**

**Choose Soundex Searches** Select the check box if you want the Use Sound-Alike (Soundex) Match on Last Names check box to be selected by default when you open the Search window.

**Show User Name on Menu** Select the check box if you want to display your login user name on the navigation tree.

**Show Login on Menu** Select the check box if you want to display your login user name on the navigation tree.

### **Funds window Settings**

- |                   |  |
|-------------------|--|
| <b>OFAC Check</b> | Select the Show check box to display the OFAC Check check box on the Funds window.                                   |
| <b>Save</b>       | Select to save the changes.  |
| <b>Refresh</b>    | Select to refresh the window view with information from the database. You must save your changes before you refresh. |

6. In the Other Settings, select the check boxes for other settings that you want to apply.
7. In the Funds window Settings select, select the OFAC Check check box to display the OFAC Check check box on the Funds window.
8. Select the Save button.
9. To refresh the window view with information from the database, after you save the information, select the Refresh button.

### **To Customize the Auto Assign Adjuster Window**

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Customization.  
The Customization menu opens.
4. From the Customization menu, select Auto Assign Adjuster.  
The Auto Assign Adjuster Customization window opens.
5. Complete the fields on the Auto Assign Adjuster Customization window.
6. Select check boxes for each of the column headers you want to display on the Auto Assign Adjuster window:
  - LOB
  - Department
  - Claim Type
  - Jurisdiction
  - Force Work Items
  - Work Items
  - Skip Work Items
  - Currently Available
  - Same Criteria in Separate Parts
7. Select the Save button.
8. To refresh the window view with information from the database, after you save the information, select the Refresh button.

## To Configure Recent Claims Header

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select UI Admins.  
The UI Admins menu opens.
3. From the UI Admins menu, select Customization.  
The Customization menu opens.
4. From the Customization menu, select Recent Claim Configuration.  
The Recent Claim Configuration window opens.
5. Select the check box for the column headers that you want to display on the Recent Saved Claims window.  
Note: In the respective text boxes, the label for the column headers displays.
6. To modify the column name, change the text in the respective text box field.
7. To restore default column name, select the Default button against the respective text box.
8. Select the Select All button, if you want to display all the columns on the Recent Saved Claims window.
9. Select the Unselect All button, if you do not want to display any column on the Recent Saved Claims window.
10. Select the Save Configuration button.

## Dialog

### System Customization: Settings Window

Use the System Customization: Settings window to specify text area sizes for text areas and other display options in INSURANCE RISKMASTER.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose the UI Admin.
  - From the UI Admin menu, choose Customization.
  - From the Customization menu, choose Settings

### Field definitions

#### Text Area Size

<b>TextML</b>	Select the width and height links to open the Edit Value window and enter width and height for a Text ML text area (for example, the Adjuster Dated Text field is a TextML text area). Select the Submit New Value button.
<b>Freecode</b>	Select the width and height links to open the Edit Value window and enter width and height for a Free code text area (for example, Multi text/codes fields are TextML text areas). Select the Submit New Value button.
<b>Readonly Memo</b>	Select the width and height links to open the Edit Value window and enter width and height for a Read only text area. Select the Submit New Value button.
<b>Memo</b>	Select on the width and height links to open the Edit Value window and enter width and height for a Memo text area (for example, the Event Description field is a memo text area). Select the Submit New Value button.

### Buttons

**Show** Select the check box for a button to display that button in the navigation frame. Clear a check box to remove the button from the navigation frame.

### Other Settings

**Choose Soundex Searches** Select the check box if you want the Use Sound-Alike (Soundex) Match on Last Names check box to be selected by default when you open the Search window.

**Show User Name on Menu** Select the check box if you want to display your login user name on the navigation tree.

**Show Login on Menu** Select the check box if you want to display your login user name on the navigation tree.

### Funds window Settings

**OFAC Check** Select the Show check box to display the OFAC Check check box on the Funds window.

**Save** Select to save the changes.

**Refresh** Select to refresh the window view with information from the database. You must save your changes before you refresh.

## System Customization: Reports Window

Use the System Customization: Reports window to customize report display options.

### To open

- From the main menu, select Utilities.
- From the Utilities menu, choose the UI Admin.
- From the UI Admin menu, choose Customization.
- From the Customization menu, choose Reports.

## Field definitions

### Report Email Settings

**Override From** Select the link to open the Edit Value window and enter the sender's name you want to use when e-mailing reports. Select the Submit New Value button.

When you email reports from INSURANCE RISKMASTER, the name you enter here is displayed as the sender.

**Override From Address** Select the link to open the Edit Value window and enter the sender's address you want to use when e-mailing reports. Select the Submit New Value button.

When you email reports from INSURANCE RISKMASTER, the email address you enter here displays as the sender's email address and not the email address you actually use.

**Report Menu Links** Select the check boxes for the items you want to include on the Reports navigation tree.

<b>Exec. Summary</b>	Select the check boxes for the items you want to include on the Reports navigation tree, in the Executive Summary section.
<b>Other Reports</b>	Select the check boxes for the items you want to include on the Reports navigation tree, in the Other Reports section.
<b>Report Queue Buttons</b>	Select the check boxes for the buttons you want to include on the Job Queue window.
<b>Save</b>	Select to save the changes.
<b>Refresh</b>	Select to refresh the window view with information from the database. You must save your changes before you refresh.

## Custom Window

Use the Custom window to create and manage custom windows in your INSURANCE RISKMASTER system.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose the UI Admin.
  - From the UI Admin menu, choose Customization.
  - From the Customization menu, choose Custom.

## Field definitions

### Caption/Messages Custom For

<b>Executive Summary Report Name</b>	Select the link to open the Edit Value window and enter executive summary report name.
<b>Reserves Settings Custom For</b>	Select the check box for the reserve settings you want to display on the Reserves window.
<b>Document Management Settings Custom For</b>	Select the check box for the document properties and file and attachment settings that you want to display on the Document Management window.

### Report Email Options Custom For

<b>Send Email with Link to Report Outputs1</b>	Select the check box to activate the Selected option. Select the Send Email with Link to Report Output1 option to include it in Report Email Options Custom For section.
<b>Send Email with Report Output Attached</b>	Select the check box to activate the Selected option. Select the Send Email with Report Output Attached option to include it in Report Email Options Custom For section.
<b>Send Email Only (no report output attached or linked)</b>	Select the check box to activate the Selected option. Select the Send Email Only (no report output attached or linked) option to include it in Report Email Options Custom For section.



**None** Select the option if you do not want to include anything in the Report Email Options Custom For section.

**Report Run Options Custom For**

**Immediately** Select the check box to activate the Selected option. Select the option to include Immediately in the Report Run Options Custom For section.

**At Specific Date/Time -** Select the check box to activate the Selected option. Select the option to include At Specific Date/Time in Report Run Options Custom For section.

**Special Settings Custom For**

**Show Adjuster List** Select the check box to display the Adjuster list.

**View Only BES for Oracle** Select the check box to view BES only for oracle.

**Enhance BES for Oracle** Select the check box if you want to enhance BES for oracle.

**Adjuster Dated Text Type Filter** Enter short codes for the adjuster note types that you can select to create a new adjuster dated text.

**Save** Select to save the settings you selected.

**Refresh** Select the button to restore the default settings.

**Auto Assign Adjuster Customization Window**

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, select the UI Admin.
  - From the UI Admin menu, select Customization.
  - From the Customization menu, select Auto Assign Adjuster.

**Field definitions**

**Auto Assign Adjuster Customization**

*Check box* Select check boxes for each of the column headers you want to display on the Auto Assign Adjuster window:

- LOB
- Department
- Claim Type
- Jurisdiction
- Force Work Items
- Work Items

Skip Work Items  
Currently Available

Same Criteria in Separate Parts

**Save** From the toolbar, select the save button to save the settings you selected.

## Update Files Window

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, select the + next to UI Admin.
  - From the UI Admin navigation tree, select the + next to Customization.
  - From the Customization tree, select Update Files.

## Field definitions

*File List* Lists all the customization files in your system.


**Change** Select the Change button next to a file you want to change to open the Upload File window and choose a file to overwrite the file you want to change.

**Add New** Select to open the Upload File window and choose a new customization file you want to add to INSURANCE RISKMASTER.

**Refresh** Select to refresh the window view with information from the database . You must save your changes before you refresh.

## System Customization: Images Window

Use the System Customization window to specify captions and messages you want to display in INSURANCE RISKMASTER.

- To open**
- From the navigation bar, select  .
  - From the Administration menu, select Customization.
  - From the Customization menu, select images.

## Field definitions

### images for Top frame

- Left** Displays the image INSURANCE RISKMASTER is currently using for the top left image.
- Select **Change** to open the Upload File window and enter the path to the image you want to use.
  - Select **Restore Default** to use the default image.

**Middle** Displays the image INSURANCE RISKMASTER is currently using for the top middle image.

- Select **Change** to open the Upload File window and enter the path to the image you want to use.
- Select **Restore Default** to use the default image.

**Right** Displays the image INSURANCE RISKMASTER is currently using for the top right image.

- Select **Change** to open the Upload File window and enter the path to the image you want to use.
- Select **Restore Default** to use the default image.

#### images for Top Admin frame

**Left** Displays the image INSURANCE RISKMASTER is currently using for the top left image on the System Administration windows.

- Select **Change** to open the Upload File window and enter the path to the image you want to use.
- Select **Restore Default** to use the default image.

**Middle** Displays the image INSURANCE RISKMASTER is currently using for the top middle image on the System Administration windows.

- Select **Change** to open the Upload File window and enter the path to the image you want to use.
- Select **Restore Default** to use the default image.

**Right** Displays the image INSURANCE RISKMASTER is currently using for the top right image on the System Administration windows.

- Select **Change** to open the Upload File window and enter the path to the image you want to use.
- Select **Restore Default** to use the default image.

**Submit** Select to save the changes you made on this window to the database. You must select the Submit button for your changes to take effect.

**Refresh** Select to refresh the window view with information from the database. You must save your changes before you refresh.

## System Customization: Search Window

Use the System Customization: Settings window to display the search link under the Search navigation tree.

**To open**

- From the main menu, select Utilities.
- From the Utilities menu, choose the UI Admin.
- From the UI Admin menu, choose Customization.
- From the Customization menu, choose Searches.


## Field definitions

### Search Links

<i>Check box</i>	Select the check box for each of the search links you want to display under the Search navigation tree.
<b>Save</b>	Select to save the settings you selected.
<b>Refresh</b>	Select to refresh the window view with information from the database . You must save your changes before you refresh.

## System Customization: Custom Window

Use the System Customization: Custom window if you have custom windows in your INSURANCE RISKMASTER system. You can customize your custom windows using this window.

	From the navigation bar, select  .
<b>To open</b>	From the Administration menu, select Customization.  From the Customization menu, select Custom for <company name>.

## Field definitions

<b>Submit</b>	Select to save the changes you made on this window to the database. You must select the Submit button for your changes to take effect.
<b>Refresh</b>	Select to refresh the window view with information from the database. You must save your changes before you refresh.

## System Customization: Captions/Paths Window

Use the System Customization: Captions/Paths window to specify captions and messages you want to display in INSURANCE RISKMASTER .

	<ul style="list-style-type: none"> <li>▪ From the main menu, select Utilities.</li> </ul>
	<ul style="list-style-type: none"> <li>▪ From the Utilities menu, choose UI Admin.</li> </ul>
<b>To open</b>	<ul style="list-style-type: none"> <li>▪ From the UI Admin menu, choose Customization.</li> <li>▪ From the Customization tree, select Captions/Paths.</li> </ul>

## Field definitions

### System Customization

<b>Company Name</b>	Select the link to open the Edit Value window and enter a company name, and select the Submit New Value button.  INSURANCE RISKMASTER displays the company name on the Customization menu in the Custom link.
<b>Application Title</b>	Select the link to open the Edit Value window and enter an application title, and select the Submit New Value button.  INSURANCE RISKMASTER displays the application title on your browser's title bar.

**Report Application Title** Select the link to open the Edit Value window and enter a report application title, and select the Submit New Value button.

INSURANCE RISKMASTER replaces instances of the word "SORTMASTER " with the report application title you enter here. For example, when you email a SORTMASTER report INSURANCE RISKMASTER replaces SORTMASTER with the title you enter here in the subject of the email.

**Contact on Error** Select the link to open the Edit Value window and enter a message on whom the user can contact for assistance, and select the Submit New Value button.

**Copyright Message** Select the link to open the Edit Value window and enter copyright information, and select the Submit New Value button.

INSURANCE RISKMASTER displays copyright information when you log in.

**Alert Existing Record Required** Select the link to open the Edit Value window and enter the error message you want to display when users try to make changes to a new record that can only be made to existing records. Select the Submit New Value button.

#### **Paths**

**Override Document Path** If you use file system storage instead of database storage, you can enter a file path where you want to save your data in INSURANCE RISKMASTER.

Select on the link to open the Edit Value window and enter the file path, and select the Submit New Value button.

Note: The path you enter here overrides the path you entered in the RISKMASTER Security module .

**Save** Select to save the changes.

**Refresh** Select to refresh the window view with information from the database. You must save your changes before you refresh.

### **System Customization: Recent Claim Configuration Window**

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, select the UI Admins.
  - From the UI Admins menu, select Customization.
  - From the Customization menu, select Recent Claim Configuration.

#### **Field definitions**

##### **Recent Claim Config**

*Check box* Select check boxes for each of the column headers you want to display on the Recent Saved Claims window:

Claim Number

Event Number

Date of Claim

---



Claim Type  
Line of Business  
Date of Event  
Claimant  
Claim Status

<text boxes>

Enter the label of each of the respective column header .

**Default** Select the Default button to restore the default column header name.

**Save Configuration** Select the Save Configuration button to save the settings.

**Select All** Select the Select All button if you want to display all the columns on the Recent Saved Claims window.

**Unselect All** Select the Unselect All button if you do not want to display any column on the Recent Saved Claims window.

**Color Code Configuration Window**

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, select the UI Admin.
  - From the UI Admin menu, select Customization.
  - From the Customization menu, select Color Code configuration window.

**Field definitions**

**Color Code Configuration**

 **Add Color Code Configuration**

From the toolbar, select the Color Code Configuration button to add color code to the user.

 **Delete**

Select 'Delete' button to delete a record in the color coding configuration grid.

 **Edit**

Select 'Edit' button to edit a record in the color coding configuration grid.

 **Edit Column**

Select 'Edit Column' button to edit a column in the color coding configuration grid.

 **Save State**

Select 'Edit Column' button to save the state of the record in color coding configuration grid.



**Restore State**

Select 'Restore State' button to save the state of the record in color coding configuration grid.



**Export to PDF**

Select 'Export to PDF' button to download the Color Code Configuration records in PDF format.




**Export to Excel**

Select 'Export to Excel' button to download the Color Code Configuration records in excel format.

## Work loss restriction mapping setting

### How To

#### To Setup Work Loss/Restriction Mapping

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Managers.  
The Managers menu opens.
3. From the Managers menu, select Work Loss/Restrictions Mapping.  
The WorkLoss-Restriction Mapping window opens.
4. From the Line of Business field, select the required option for the line of business for which you want to create work loss.
5. From the Record Type field, select desired record type option.
6. From the Transaction Type field, select the  button to open the Code Selection window and select transaction type code.
7. Select the Add button to add the mapping.
8. Select the record type and then select the Remove button to delete mapping.
9. Select the Save button to save the record.

### GUI

#### Work Loss/Restriction Mapping Window

- To open**
- From the main menu, select Utilities
  - From the Utilities menu, choose Managers.
  - From the Managers menu, select Work Loss/Restrictions Mapping.

#### Field definitions

**Line of Business** Select the desired line of business for which you want to create work loss.

**Record Type** Select the desired record type option.

**Transaction Type** Select the  button to open the Code Selection window and select transaction type code.




- Add** Select the button to add the mapping.
- Remove** Select the record type and then select the button to delete mapping.


## Auto Adjuster


### Field Help

#### Auto Assign Adjuster Setup Window

- To open**
- From the Utilities menu, choose Managers.
  - From the Manager menu, select Auto Assign Adjuster Setup.
  - From the Auto Assign Adjuster window select the New button .


#### Field definitions

- Adjuster** Enter the name of the adjuster you want to enter criteria for or select the  button to search for an existing adjuster.

- Department** Enter the  button to open the organizational hierarchy and select the department you want to map to the adjuster.

When a new claim is created with the departments entered here and the line of business in the LOBs column, this adjuster will be considered for automatic assignment to the claim.

**Note:** This is not a required field. If you do not make a selection, then claims for all departments with the selected LOB will be assigned to the adjuster.

- LOBs** Enter the  button to select the lines of business you want to map to the adjuster.

When a new claim is created with the LOBs entered here and the departments in the Department field, this adjuster will be considered for automatic assignment to the claim.

**Note:** This is not a required field. If you do not make a selection, then claims for all LOBs with the selected departments will be assigned to the adjuster.

- Skip Work Items** Enter the number of times you want the adjuster to be skipped during assignment. Each time an adjuster is skipped, the next available adjuster who satisfies the criteria will be assigned to the claim.

- OK** Select the button to save the mappings for the adjuster.

- Cancel** Select the button to close the Auto Assign Adjuster Setup window.

- Non Availability Plan**

**Start Date Time** Displays the date and time after which the adjuster will not be available for automatic assignment.

**End Date Time** Displays the date and time after which the adjuster will be available for automatic assignment.



Select the button to open the Non Availability Plan window and add information about the non availability plans for adjusters.



Select a plan and then select the button to modify the existing plan.



Select a plan and then select the button to delete an existing plan.

### **Auto Assign Adjuster Window**

You can set up your system so an adjuster is automatically assigned to a new claim based on the LOB, Department, Claim Type and Jurisdiction selected for that adjuster. Use the Auto Assign Adjuster window to set up the criteria for automatically assigning adjusters to claims. You can click on a column header to sort the Auto Assign Adjuster by that column.

You can set the system up to skip an adjuster for a few rounds of assignments if you want to control an adjuster's workload. You can also enter a date range during which an adjuster will be unavailable for assignment. This can be useful in case of vacation or other absence.

In case more than one adjuster matches the department and LOB of the claim, the next available adjuster is used. The last assigned date for each adjuster is used to determine the next available adjuster.

- To open**
- From the Utilities menu, select Managers.
  - From the Manager menu, select Auto Assign Adjuster.

### **Field definitions**

**Adjuster** Displays the name of the adjuster.

**LOBs** Displays the lines of business that are assigned to the adjuster. When a new claim is created with this line of business and the department in the Department column this adjuster will be considered for automatic assignment.

**Departments** Displays the departments in the organizational hierarchy that are assigned to the adjuster.  
When a new claim is created with this department and the line of business in the LOBs column this adjuster will be considered for automatic assignment.

**Claim Type** Displays the code that best describes the claim type assigned to the adjuster.

**Jurisdiction** Displays the code that best describes the jurisdiction or state assigned to the adjuster.

**Force Work Items** Displays the number of times the adjuster will be forced during assignment. Each time an adjuster is forced, the next available adjuster who satisfies the criteria is skipped and another adjuster is assigned to the claim.

**Work Items** Displays the number of claims already assigned to the adjuster that match the criteria defined here for that adjuster.

**Skip Work Items** Displays the number of times the adjuster will be skipped during assignment. Each time an adjuster is skipped, the next available adjuster who satisfies the criteria is assigned to the claim.

**Currently Available** Displays the current availability based on the non-availability plan set up for the adjuster in the Non Availability Plan window.



Select the button to open the Auto Assign Adjuster Setup window and create a new auto adjuster mapping.



Select an adjuster and select this button to modify the existing mapping for the adjuster.



Select an adjuster and then select this button to delete the existing mapping for the adjuster.

## Non Availability Plan Window

You can set up a Non Availability Plan for an adjuster to mark a period during which the adjuster will not be automatically assigned to claims. Use the Non Availability Plan window to set up the Non Availability Plan. The information entered on this window will be used to populate the Current Availability column in the Auto Assign Adjuster window.

**To open** From the Auto Assign Adjuster Setup window, under the Non Availability Plan section, select the

New button .

### Field definitions

**Start Date** Enter the first date on which the adjuster will not be available for automatic assignment or select the date from the calendar.

**Start Time** Enter the time when the adjuster will not be available for automatic assignment.

**End Date** Enter the last date on which the adjuster will not be available for automatic assignment or select the date from the calendar.

**End Time** Enter the time when the adjuster will be available for automatic assignment.

**OK** Select the button to save the non availability plan information and close the Non Availability Plan window.

**Cancel** Select the button to close the Non Availability Plan window without saving.

## How To

### To Configure Auto Assign Adjuster

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select UI Admins.  
The UI Admins menu opens.
3. From the UI Admins menu, select Customization.  
The Customization menu opens.
4. From the Customization menu, select Auto Assign Adjuster.  
The Auto Assign Adjuster Customization window opens.
5. Select check boxes for each of the column headers that you want to display on the Auto Assign Adjuster window.
6. Select the Save button.

### To Automatically Assign Adjuster to New Claims


You can set up your system so an adjuster is automatically assigned to a new claim based on the LOB, Department, Claim Type and Jurisdiction selected for that adjuster in the Auto Assign Adjuster window.

You can set the system up to skip an adjuster for a few rounds of assignments if you want to control an adjuster's workload. You can also enter a date range during which an adjuster will be unavailable for assignment. This can be useful in case of vacation or other absence.


In case more than one adjuster matches the department and LOB of the claim, the next available adjuster is used. The last assigned date for each adjuster is used to determine the next available adjuster.

1. From the Utilities main menu, select Managers.  
The Managers menu opens.
2. From the Managers menu, select Auto Assign Adjuster.  
The Auto Assign Adjuster window opens.
3. Select the New button to assign an adjuster with a department.  
The Auto Assign Adjuster Setup window opens.
4. Complete fields on the Auto Assign Adjuster Setup window.

#### Adjuster

Enter the name of the adjuster you want to enter criteria for or select  button to search for an existing adjuster.


#### Departments

Enter the  button to open the organizational hierarchy and select the department you want to map to the adjuster.

When a new claim is created with the departments entered here and the line of business in the LOBs column, this adjuster will be considered for automatic assignment to the claim.

**Note:** This is not a required field. If you do not make a selection, then claims for all departments with the selected LOB will be assigned to the adjuster. If organizational hierarchy is used then the selected entity for all adjusters must be in the same level of organizational hierarchy. You can select multiple Organization Hierarchies in one time setup for an adjuster.

**LOBs**

Enter the  button to select the lines of business you want to map to the adjuster.

When a new claim is created with the LOBs entered here and the departments in the Department field, this adjuster will be considered for automatic assignment to the claim.

**Note:** This is not a required field. If you do not make a selection, then claims for all LOBs with the selected departments will be assigned to the adjuster. You can select multiple LOBs in one time setup for an adjuster.

**Claim Type**

Select the  button to open the Code Selection window and select the Claim Type you want to map to the adjuster.

Note: You can select multiple claim types in one time setup for an adjuster. If you do not select any record in this field then all the available claim types will be assigned to the claim.

**Jurisdiction**

Select the  button to open the Code Selection window and select the state you want to map to the adjuster.

Note: You can select multiple Jurisdictions (State) in one time setup for an adjuster. If you do not select any record in this field then all the available jurisdiction will be assigned to the claim.

**Skip Work Items**

Enter the number of times you want the adjuster to be skipped during assignment. Each time an adjuster is skipped, the next available adjuster who satisfies the criteria will be assigned to the claim.

**Force Work Items**

Enter the number of times you want the adjuster to be forced during assignment. Each time an adjuster is forced, the next available adjuster who satisfies the criteria is skipped and another adjuster is assigned to the claim.

**OK**

Select the button to save the mappings for the adjuster.

**Cancel**




Select the button to close the Auto Assign Adjuster Setup window.

**Non Availability Plan**

**Start Date Time**

Displays the date and time after which the adjuster will not be available for automatic assignment.




<b>End Date Time</b>	Displays the date and time after which the adjuster will be available for automatic assignment.
	Select the button to open the Non Availability Plan window and add information about the non availability plans for adjusters.
	Select a plan and then select the button to modify the existing plan.
	Select a plan and then select the button to delete an existing plan.

## System

### GUI

#### Regional Formats window

- From the System Setup Parameters window, select the Globalization Settings tab.
- To Open**
- On the Globalization Settings tab, from the Regional Configuration section, select the  button

#### Field Definitions

<b>Country</b>	Select the Country for which you want to setup the format of Zip Code, Date, Phone and SSN.
<b>Zip Code Format</b>	From the drop down select the desired format of the Zip Code. The user will need to enter Zip Code in the selected format here when they work on various INSURANCE RISKMASTER windows for selected country.
<b>Phone Format</b>	From the drop down select the desired format of the Phone number. The user will need to enter phone number in the selected format here when they work on various INSURANCE RISKMASTER windows for selected country.
<b>SSN Format</b>	From the drop down select the desired format of the SSN. The user will need to enter SSN in the selected format here when they work on various INSURANCE RISKMASTER windows for selected country.
<b>Is SSN Numeric?</b>	Select the checkbox if the SSN of the selected country is only numeric and does not accept alphabetic characters.

#### Print Batch FROIs Options Window

- To Open**
- From the main menu, choose Reports.
  - From the Reports menu select FROI/ACORD batch printing.
  - From the FROI/ACORD batch printing menu, select Schedule Batch FROIs.

## Field Definitions

<b>Select Claim by Date of Claim</b>	Select option to choose claim for printing as per claim date
<b>Select Claim by Date Created'</b>	Select the option to choose claim for printing as per date claim was created.
<b>From' and 'To</b>	From the respective calenders select the date.
<b>Printed Claims to Include</b>	From the drop down list select if you want to include batch, single claim or both on the printed FROI.
<b>Refresh</b>	Select the button to refresh the list of records.

## General System Parameter Setup Window: Carrier Claim Settings Tab

- To open**
- From the Utilities menu, select System Parameters > General System Parameters Setup.
  - The General System Parameter Setup window opens.
  - Select the Carrier Claim Settings tab.

## Field definitions

<b>Use Carrier Claims</b>	Select the check box, to activate the Carrier Claims feature.  An activation code required window opens, enter the activation code to turn on this feature.
<b>Use Unit Stat</b>	Select the check box to add the Unit Stat tab to the Workers Compensation claim window.
<b>Use FNOL Reserve</b>	Select the checkbox if you want to use the FNOL reserves for carrier claims.
<b>Auto Populate Department</b>	Select this check box to auto populate the department field on the Event window and claim windows.
<b>Department for Auto Population</b>	Enter the default department, or select the lookup button to select from the Org. Hierarchy.

Note: The Department field on the Event and Claims windows will not be a required field and you will be able to save events and claims without entering a department. The department you selected here will automatically be used on Event and Claims windows when you save

## Policy Interface Settings

<b>Use Policy System Interface</b>	Select the checkbox to use the policy system interface feature.
<b>Fetch Records on policy search</b>	Enter the number of records you want to retrieve in policy search.

---





**Search External Policies Based on Claim Date**

Select the option to send the claim date in the policy search request

**Search External Policies Based on Event Date:**

Select the option to send the event date in the policy search request

**Use Code Mapping**

Select the checkbox to use the loss codes mapping in the policy system interface.

**Show Media View Button :**

Select the checkbox to display the Media View button on the window.

**Open External Policy in Point**

Select the check if you want to open the external downloaded policies in POINT system .

### Print Batch FROIs Options Window

**To Open**

- From the main menu, choose Reports.
- From the Reports menu select FROI/ACORD batch printing.
- From the FROI/ACORD batch printing menu, select Schedule Batch Acords.

### Field Definitions

**Select Claim by Date of Claim**

Select option to choose claim for printing as per claim date

**Select Claim by Date Created'**

Select the option to choose claim for printing as per date claim was created.

**From' and 'To**

From the respective calenders select the date.

**Printed Claims to Include**

From the drop down list select if you want to include batch, single claim or both on the printed ACORD.

**Refresh**

Select the button to refresh the list of records.

### FROI Batch Printing Options Window

Use the FROI Batch Printing Options window to set up the levels of the organizational hierarchy which INSURANCE RISKMASTER will display on the FROI Batch Printing window.



In INSURANCE RISKMASTER, on the FROI Batch Printing window (Print Forms window), the organizational hierarchy levels you selected in the FROI Batch Printing Options window in Utilities will display as columns. You can sort the list of FROI by these organization levels.

- To open**
- From the main menu, select Reports.
  - From the Reports menu, choose FROI/ACORD batch Printing.
  - From the FROI/ACORD batch printing menu, choose FROI Batch Printing Options.

### Field definitions

- High Level** From the drop down list, select an organization level to display in the FROI Batch Printing window (Print Forms window).
- Low Level** From the drop down list, select an organization level to display in the FROI Batch Printing window (Print Forms window). This level has to be lower than the level you selected in the High Level field.
- Exclude Master Status Closed Claims** Select the check box, if you do not want to include claims with a closed status on the FROI Batch Printing window (Print Forms window).



Select to save the options you selected and close the window.

### General System Setup Parameter Window

Use the System Setup Parameters window to set up work shifts, work days, and a number of defaults for how your organization handles event and claim records.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose System Parameters.
  - From the System Parameters menu, select General System Parameter Setup.

### Field definitions

System Settings tab

Diaries/Text Field Settings tab

Employee Settings tab

Funds Settings tab

### Client Information Setup Window: Client Information Tab

Use the Client Information Parameters window to enter detailed information about your organization. Your organization refers to the organization or company who owns and uses this copy of INSURANCE RISKMASTER software.

Use the Client Information tab to open the window, where you can enter organizational contact information and system details.

In INSURANCE RISKMASTER eXpress, you can set up your name and address during implementation only. You cannot make changes to the client information after implementation is completed.



In RISKMASTER, on the Check Stocks window, select the Advanced Options tab. From the Payer Level for Checks drop down list, select SysParm Client to use the information you enter on the Client Information Parameters window as the payer information on checks.

- To open**
- From the main menu, select Utilities.

- From the Utilities menu, choose Managers.
- From the Managers menu, choose the Client Information Setup.
- From the Client Information Setup window, select the Client Information tab.

## **Field definitions**

<b>Client Name</b>	Enter the name of your organization. This name will appear in several places in the INSURANCE RISKMASTER system, such as at the top of any Executive Summary.
<b>ESSP #</b>	Enter the ESSP number of your organization. The ESSP number is the extended service and support plan number (also called the client number) that the CSC INSURANCE RISKMASTER group uses to keep track of your organization's support and services. If you do not yet have this number or do not know it, please contact INSURANCE RISKMASTER Support at 877-275- 3676.
<b>Address</b>	Enter the organization address. Enter the city, state and zip in the appropriate fields.
<b>Product</b>	Enter the INSURANCE RISKMASTER products your organization has purchased and installed.
<b>Printer</b>	Enter the printer type you use.
<b>Tax ID</b>	Enter the organization Tax ID.
<b>Hardware</b>	Enter the brand, processor and memory for the computers on which your organization runs INSURANCE RISKMASTER.
<b>Installation Date</b>	Enter the date on which CSC installed INSURANCE RISKMASTER in your organization.
<b>Phone</b>	Enter your organization's phone number.
<b>Fax</b>	Enter your organization's fax number.
<b>Distribution Media</b>	Enter the diskette size for the computers on which your organization runs INSURANCE RISKMASTER or select the button to search from the Code Selection window.
<b>Client Status</b>	Enter the client status.
<b>Version</b>	Enter the latest INSURANCE RISKMASTER release number that your organization uses.
<b>CSC Support #</b>	Enter the phone number your organization uses to call INSURANCE RISKMASTER Customer Support.


## **Check Stub Text Setup Window**

- |                |   |
|----------------|---|
| <b>To open</b> | <ul style="list-style-type: none"><li>▪ From the Utilities menu, choose Managers.</li><li>▪ From the Managers menu, choose the Check Stub Text Setup.</li></ul> |
|----------------|---|
-




## Field definitions

### Jurisdiction

Select the  button to open the Code Selection window and select the State ID for which you want to setup the check stub text.

### Transaction Type

Select the  button to open Code Selection window and select the transaction type for which you want to setup the check stub text.

**Check Stub text** Enter the specific text to be printed on the check.

**Add new** Select the button to add the check stub text.

Note: If a jurisdiction and a transaction type is mentioned in the Jurisdiction and Transaction Type field respectively, then the check stub text is printed for the specified jurisdiction and the transaction type.

**Edit** From the table, select the check stub text record that you want to modify and then select the button to modify the check stub text.

**Remove** From the table, select the check stub text record that you want to delete and then select the button to delete the check stub text.

*Table* Displays the check stub text details.

## Holidays Setup Window

Use the Holidays Setup window to set up holidays that you do not want to include in the workers' compensation calculations.

Note: If you want RISKMASTER to exclude holidays from the workers' compensation calculations, select the Exclude Holidays from Work Loss check box on the System Setup Parameters window.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Managers.
  - From the Managers menu, choose Holidays Setup.

## Field definitions


**Date** Displays the holiday date in the format yyyyymmdd.

**Description** Displays a description of the holiday.

**Org. Hierarchy** Displays the organization hierarchy levels entitled to this holiday.



Select to open the new Holiday Setup window. On the Holiday Setup window:

- In the **Date** fields, enter the holiday date.
- In the **Description** field, enter a description of the holiday.
- In the **Organization** field, select the Search button to open the organizational hierarchy and select the organizational level entitled to this holiday.
- Select  to save your changes.



Select an existing holiday and then select this button to open the edit Holiday Setup window and make changes to the holiday you selected.





Select an existing holiday and then select this button to delete the holiday you selected.

### Fiscal Years List Window

Use the Fiscal Years List window to define the fiscal calendar for your organization. Use this window to specify the beginning and the end dates for each fiscal quarter and the beginning and the end dates for each fiscal period.

- To open**
- From the main menu, select Utilities.
  - From the Utilities menu, choose Managers.
  - From the Managers menu, choose the Fiscal Year Setup.

### Field definitions

- Line of Business** Enter the code for the line of business for which you want to use the fiscal year on this window, or select the  button to select from the Code Selection window. If the fiscal year applies to all lines of business, simply leave this field blank.
- All LOB** Select to use the fiscal years on this window for all lines of business.
- Organization** Select the  button to open the Org. Hierarchy window and select the organization level for which you want to use the fiscal year. If the fiscal year applies to all areas of your organization, simply leave this field blank.
- All Org** Select to use the fiscal years on this window for your entire organization.
- Fiscal Year** Displays existing fiscal years.
- Start Date** Displays the date from which the fiscal year begins.
- End Date** Displays the date on which the fiscal year ends.
- Periods** If the Fiscal year is divided into periods, displays the periods.

<b>Line of Business</b>	Displays the line of business to which this fiscal year applies.
<b>Organization</b>	Displays the organizations to which this fiscal year applies.
<b>Lob/Org</b>	Select to display the list of lines of business and organizations and the fiscal years associated with these.
<b>Refresh List</b>	Select to refresh the Fiscal Years List.
<b>New</b>	Select to open the Fiscal Year Setup wizard and define a new fiscal year.
<b>Edit</b>	Select an existing fiscal year and then select this button to open the Fiscal Year Setup wizard to edit the fiscal year you selected.
<b>Delete</b>	Select an existing fiscal year and then select this button to delete the fiscal year you selected.
<b>Copy</b>	Select to open the Copy Fiscal Year window.
<b>Print</b>	Select to print the fiscal years list to your default printer.

### Copy Fiscal Year Window

Use the Copy Fiscal Year window to copy an existing fiscal year to all years or to a selected year.



**From the Fiscal Years List window**



### Field definitions

<b>From Line of Business and Organization</b>	Displays the line of business and the organization from which to copy the existing fiscal year data.
<b>All Years</b>	Select to copy fiscal year data for all existing fiscal years.
<b>Only &lt;year&gt;</b>	Select to copy fiscal year data for only the year specified.
<b>To Line of Business and Organization</b>	Enter the line of business and the organization to which you want to copy the selected fiscal year data.
<b>Copy</b>	Select to copy the fiscal year data and create a new fiscal year.
<b>Close</b>	Select to close the window without copying.

### System Setup Parameter Window: Employee Settings Tab

Use the Employee Settings tab to display the fields for setting up work shifts and employment options.

<b>To open</b>	From the System Setup Parameters window, select the Employee Settings tab
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## Field definitions

### Settings

#### WC Employee Number Prefix

Enter the prefix with which all employee numbers generated by INSURANCE RISKMASTER will start. The prefix can be a maximum of 8 characters long. INSURANCE RISKMASTER adds the prefix only if you also select the Autonumber Blank WC Employee Numbers check box.

For example, if you enter EMP, then all employee numbers will start with EMP (EMP0001, EMP0002 and so forth).

#### Exclude Holidays from Work Loss/Restricted Days Calculation

Select the check box if you want to exclude holidays you entered in the Holidays Setup window from the Work Loss/Restricted Days Calculation.

#### Autonumber Blank WC Employee Numbers (new employee entry only)

Select the check box if you want INSURANCE RISKMASTER to automatically generate employee numbers when you enter a new employee into the database .



On the Employee window, select the Employee tab. INSURANCE RISKMASTER populates the Employee Number field when you create a new employee record. To open the Employee window, from the INSURANCE RISKMASTER main menu, choose Documents > Employee Maintenance.

#### Allow Edit of WC Employee Numbers

Select the check box if you want to enable a change in the employee number after you have created a record.

### Work Shifts

#### Shift 1

In the **Name** field, either accept the default name or enter a name for the first work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

#### Shift 2

In the **Name** field, either accept the default name or enter a name for the second work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

#### Shift 3

In the **Name** field, either accept the default name or enter a name for the third work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

### Work Days

Select the check boxes for the days of the week you want to assign as work days. The check boxes you select here will display as selected on the Claims windows when you open the claims windows in INSURANCE RISKMASTER.

## System Setup Parameters Window: System Settings Tab

Use the System Settings tab to define the general event and claim system parameters.

#### To open

From the System Setup Parameters window, select the System Settings tab.

## Field definitions

### General Parameters

#### Event Number Prefix

Enter the prefix with which you want to start all automatically generated event numbers. The prefix can have a maximum of three characters.

For example, if you enter EV, then all event numbers will start with EV (EV0001, EV0002 and so on).

#### Org. Level for Event Caption

From the drop down list, select the organization hierarchy level that you want to include in the title bar of the Event window. The title bar is the blue bar displayed at the top of each Event. This bar includes the Event Number, the selected piece of the Organization associated with the Event, and the name of the first Person Involved for the Event.

#### Include Year In Event Number

Select the check box if you want to use the year of the Event Date (the accident/incident date) in the event number. If you enter a prefix, then the event number will start with the prefix, followed by the year and then a six digit sequential number. For example, EV20030001.

#### Autoselect Policy on Claim

Select the Auto select Policy on Claim check box if you want INSURANCE RISKMASTER to automatically attempt to select a policy when you enter a claim. INSURANCE RISKMASTER will attempt to select the policy, based on the department you select, and the date of claim or event, and the type of claim.

#### Autonumber Vehicle ID (VIN)

Select the check box if you want INSURANCE RISKMASTER to automatically generate Vehicle IDs when you enter a new vehicle into the database.



On the Vehicle window and Involved Unit window, RISKMASTER populates the Vehicle ID field when you create a new vehicle record. To open the Vehicle window, from the RISKMASTER main menu, choose Documents > Vehicle Maintenance. To open the Involved Unit window, on the Vehicle Accident Claims window, select the Vehicle Accident tab.

#### Limit SORTMASTER Directories

Select the check box if you want users to open SORTMASTER reports saved only in the document directory that you enter in the security management system.

Note: This setting only applies to those customers upgrading to RMX from earlier version of RISKMASTER. New customers do not need to address this setting.

#### Default Employment Dept. to Claim Dept for NEW WC Claims

Select the check box if you want INSURANCE RISKMASTER to automatically default the department noted on an employee's information as the department in which the employee works to be the same department noted on the claim as the owning/responsible department for the claim itself.

#### Auto Populate Claim Date Reported

Select the check box to automatically populate the claim date reported based on the required option. When this checkbox is selected the Populate Claim Date Reported with System Date and the Populate Claim Date Reported with Date of Claim fields are enabled.

#### Populate Claim Date Reported with System Date

Select the check box if you want the claim date reported field to be populated with current system date. User can manually override it as appropriate.



<b>Populate Claim Date Reported with Date of Claim</b>	Select the check box if you want the Claim Date Reported field to be populated by default with date of claim.
<b>Don't Default Time Fields</b>	Select the 'Don't Default Time Fields' check box if you do not want time fields in INSURANCE RISKMASTER to be defaulted to 12:00 AM when a user leaves time fields blank. Note that this means users will be forced to enter a time for required time fields. If you do not select this check box, the user may leave time fields blank – even required time fields – and INSURANCE RISKMASTER will default the time to 12:00 AM.
<b>Use Billing System</b>	Select the check box to enable Policy Billing module to use along with the Policy Management system.
<b>Use Case Management</b>	Select the check box to enable the Medical Case Management module. The Medical Case Management module is an optional module that requires a key code from CSC to activate.
<b>Multiple Insurers for Policy</b>	Select the check box to display the Insurer button on the Policy Maintenance window and enter multiple insurers on a policy.
<b>Use MCM Interface</b>	Select the check box to enable Media Content Management module. The Media Content Management module is an optional module that requires a key code from CSC to activate.
<b>Multiple Re-Insurers for Policy</b>	Select the check box to enable adding of multiple reinsurers for a policy.
<b>Use PaperVision Document System</b>	Select the check box to activate the Paper Vision Document Management System.. <b>Note:</b> You can use only one third-party document management system at a time. Therefore, if you activate the PaperVision system then MCM, Media View, and any other document management system will no longer be usable.
<b>Use Media View Interface</b>	Select the check box to activate the Media Management Interface document management system. <b>Note:</b> You can use only one third-party document management system at a time. Therefore, if you activate the Media View system then MCM, PaperVision, and any other document management system will no longer be usable.
<b>Use Script Editor</b>	Select the check box to enable the Script Editor module. The Script Editor module is an optional module that requires a key code from CSC to activate.
<b>Broker Firm in BES</b>	Select the check box to enable adding of broker firms in Business Entity Security (BES).
<b>Program Type in Policy Tracking</b>	Select the check box to use the program type in policy tracking.
<b>Include Collections in Coverages</b>	Select the check box to include collections when you use the Funds > Apply Payments to Coverages to recalculate payments for claims based on applicable insurance policies.

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<b>Use 1st/3rd Party Claimant Processing</b>	Select the check box to use the 1/3rd party claimant processing. This is an optional interface that supplies claimant information to ISO. If purchased, you will also need to complete the configuration area.
<b>Configure..</b>	Select the button to open the Claimant Processing Credentials window. <ul style="list-style-type: none"><li>▪ In the <b>Claimant Processing Web Service URL</b> field, enter the URL to access the first or third party claimant's web service.</li><li>▪ In the <b>User ID</b> field, enter the user ID that the Claimant Processing Service has assigned to you.</li><li>▪ In the <b>Password</b> field, enter the password that the Claimant Processing Service has assigned to you.</li><li>▪ Select OK.</li></ul>
<b>BRS 2nd Fee Table</b>	Select the check box to include a second BRS fee table.
<b>Acknowledgement/Closed Claim Letter</b>	Select the check box to acknowledge or close claim letter.
<b>Use FL WC Max Rate</b>	Select the check box to define workers' compensation benefit rates for Florida jurisdiction.
<b>Auto FROI ACORD</b>	Select the check box to use the auto First Report Of Injury (FROI) ACORD.
<b>Auto Assign Adjuster</b>	Select the check box to automatically assign adjusters to claims.
<b>Date/Time Assigned</b>	Select the option to assign adjusters based on the date or time.  Note: The default option selected is "Date/Time Assigned". You can select another option, either adjuster having the oldest last Date/Time assigned to address vacation concerns or the lowest total number of Work Items to address manual assignments concern.
<b>Work Items</b>	Select the option to assign adjusters based on the work items.  Note: The default option selected is "Date/Time Assigned". You can select any one option either adjuster having the oldest last Date/Time assigned to address vacation concern or the lowest total number of Work Items to address manual assignments concern. The adjuster having the lowest total number of Work Items to address manual assignments concern.
<b>Use Entity Payment Approval</b>	Select the check box to enable entity payment approval.  <div style="background-color: #e0e0e0; padding: 5px;">Note: When you select the check box, the Entity Payment Approval Status and Payment Approval/Rejected Reason fields are displayed on different entities window.</div>
<b>Show Jurisdiction in Policy Tracking</b>	Select the check box to display Jurisdiction field in Policy Tracking.

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<b>Autonumber Property ID (PIN)</b>	Select the check box if you want INSURANCE RISKMASTER to automatically generate Property IDs when you enter a new property into the database .
<b>Include Physician Med. and Employee in Physician Search</b>	Select the check box to include the physician medicare and employee in Physician search.
<b>Org. Level For Time Zone Validation</b>	From the drop down list, select the organization level to which you want to apply the time zone validation. Here the date and time of claim/event is checked against a Time Zone of an Org. Hierarchy associated with the claim/event.  <p style="text-align: center;">Note: The validation applies to the organizational level you selected.</p>
<b>Enable Multiple Addresses for Entities</b>	Select the check box to enable adding of multiple addresses for all entities.
<b>Use Outlook To Send Emails</b>	Select this check box to use Outlook to send e-mails from INSURANCE RISKMASTER.
<b>Filter Policy based on LOB</b>	Select the check box if you want to filter policy based on the Line of Business.
<b>Use Bill Review System (BRS)</b>	Select the check box if you want to use the Bill Review System in INSURANCE RISKMASTER.
<b>Use General Claim</b>	Select the check box if you want to use the General claim in INSURANCE RISKMASTER.
<b>Use Non-occupational Claim</b>	Select the check box if you want to use the Non-Occupational claim in INSURANCE RISKMASTER.
<b>Use Property Claim</b>	Select the check box if you want to use the Property claim in INSURANCE RISKMASTER.
<b>Use Vehicle Accident Claim</b>	Select the check box if you want to use the Workers' Compensation claim in INSURANCE RISKMASTER.
<b>Use Worker's Compensation Claim</b>	Select the check box if you want to use the vehicle accident claim in INSURANCE RISKMASTER.
<b>Maximum No of Discount Tiers for a State and LOB</b>	Enter the maximum no of discount tiers for a state and LOB.



<b>Maximum No of Discounts Associated For a State and LOB</b>	Enter the maximum no of discounts associated for a state and LOB.
<b>Display Claimant Name in MDI</b>	Select the check box if you want to view the Claimant Name along with the LOB and Claim Number in the navigation tree.
<b>Enable Activity Log</b>	Select the check box if you want to enable the activity log.
<b>Filter Entity by Effective Date</b>	Select the check box if you want the entities to be filtered by effective date
<b>Add Claimant as Person Involved</b>	When the option is selected, the claimant gets automatically attached as a Person Involved at event level.
<b>Financial History Evaluation Date</b>	
<b>Transaction Date</b>	Select the option to use the transaction date for the Financial History Evaluation.
<b>Date of Check</b>	Select the option to use the check date for the Financial History Evaluation.
<b>System Settings</b>	
<b>SMTP Mail Server</b>	Enter the e-mail server you want to use to send messages and diaries.
<b>OFAC Check for Payees and Entities</b>	Select the check box if you want to view the OFAC Check button on the funds window to view if the payee is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
<b>Patriot Protector Web Service URL</b>	Enter the CSC's Patriot Protector web service URL.
<b>Patriot Protector Web Service Login</b>	Select the Modify button to login to CSC's Patriot Protector and use the Patriot Protector services with the Time and Expense module in INSURANCE RISKMASTER.
<b>Modify...</b>	<ul style="list-style-type: none"> <li>▪ In the <b>User ID</b> field, enter the user ID assigned to you.</li> <li>▪ In the <b>Password</b> field, enter the password assigned to you.</li> <li>▪ Select OK</li> </ul>
<b>Size Limit(in MB) for Files that can be emailed using Outlook :</b>	Enter the maximum file size in Megabyte (MB) that you can e-mail using Outlook.
	Note: The maximum file size limit that you can upload using Outlook is 35 MB.

**Use Quality Management for Events** Select the check box to use the Quality Management tab on the Events window.

### **Time and Expense Module**

**Use Time and Expense** Select the check box to activate the Time and Expense module.

**Note:** You will need a password to activate the Time and Expense module.

**Rate Org Level** From the drop down list, select the organization level to which the rate tables will apply.

**Note:** When you add a new rate table in the Time and Expense module you can only apply the rate table to the organizational level you specify in this field. Rates apply to the organizational level you select and all the levels below this level.

**Bank Account** From the drop down list, select the bank account you want to use to make Time and Expense payments.

**Show All Transaction Types for Invoice Detail** Select the check box to show all transaction types for invoice detail.

### **Privacy Settings**

**Jurisdictions Implementing SSN Privacy (Comma separated State Codes)** Enter the jurisdictions for which you want INSURANCE RISKMASTER to display only the last four digits of the employees social security number (SSN).

**Note:** Separate multiple jurisdictions with comma.

**Mask TaxId/SSN** Select the check box if you want to mask TaxId/SSN.

**Note:** After you save a record with 9 digit TaxId/SSN, the TaxId/SSN gets masked.

### **Number of Records Per window**

**Code List** Enter the maximum number of codes you want to display on a code list window. You can enter any number between 10 and 10,000.

**Search Results and Look Ups** Enter the maximum number of search results you want to display on the search result window or lookup result window. You can enter any number between 10 and 10,000.

**Enhanced Notes** Enter the maximum number of records per page you want to display on the Enhanced Notes window. You can enter any number between 10 and 100.


**Quick Look Ups** Enter the maximum number of records per page you want to display on the Quick lookup result window. You can enter any number between 10 and 10,000.

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- Payee Check Review** Enter the maximum number of Payee(s) on Freeze, Batch(es)/Auto-Check(s) on Freeze, and Check(s) on Hold by Background OFAC check per page you want to display on the Payee Check Review window.
- Document Attachment List** Enter the maximum number of attachments per page you want to display on the Attachments window. You can enter any number between 10 and 10,000.
- Payment History Limit** Enter the maximum number of payment records you want to display on the Payment History window.

### Multi-Currency Settings


- Source Currency** Enter the code that best describes the currency type or select the  button to select from the Code Selection window.

- Exchange Rate** Enter the Exchange Rate with which you want to convert the currency of a source country to another country's currency.

### Holiday Setup Window

- To open** From the Holidays Setup window, select the  button.

### Field definitions

- Date** Enter the holiday date in the format yyymmdd.
- Description** Enter a description of the holiday.
- Org. Hierarchy** Select the  button to open the Org. Hierarchy window and select the organization levels entitled to this holiday.



Select to save your changes and close the window.


### System Setup Parameter Window: Diaries/Text Fields Tab

Use the Diaries/Text Field Settings tab to display the fields for setting up **diary** and text field options.

- To open** From the System Setup Parameters window, select the Diaries/Text Fields tab.

### Field definitions

- Diary Settings**


- Attached Diaries Globally Visible** Select the check box if you want to allow all users to view all diaries attached to a claim. If you do not select this option, users can only view diaries that are assigned to them.
- Allow Global Peek for Diaries** Select the check box if want to allow all users to view diaries by all other users. If you do not select the check box, users can only view diaries for other users below them in the supervisory chain.
- Auto Launch Diary (Non-Powerview)** Select the check box to launch the diary automatically in a non powerview.
- Use Current Date for Completed Diaries** Select the check box to use the current date for diaries with completed status. When this option is selected, the Diary Task Completion window does not open. Also the Void Diary by Date window does not display when multiple Void tasks have been selected on the Diary List window.
- Notify Task Assigner of Completion** Select the check box if you want a notification to be sent to the user who assigned the task when the task is completed.
- Default "Assigned to" in Create Diary to Current User** Select the check box to make the 'Assigned to' field as a default field when you create a new diary for the current user.
- Delete All diaries Related to Claim when Claim is closed** Select the check box if you want INSURANCE RISKMASTER to automatically delete associated diaries when you close a claim.
- Level of Org. Hierarchy displayed in Diary List** From the drop down list, select the organization hierarchy level you want to display on the Diary window in INSURANCE RISKMASTER .
-  On the Diary window, a column for the organization hierarchy level you selected displays.
- Allow Task Description Filter** Select the check box to use the task description filter while creating diaries.
- Free Text Settings**
- Date Stamp Free Text** Select the check box to add the date to the line above the free text you type.
- Freeze Free Text Entries** Select the check box if you do not want to allow users to change the existing text entries.
- Don't Allow Edit of Date Stamp In Free Text Areas** Select the check box if you do not want to allow users to change the date INSURANCE RISKMASTER enters.
- Freeze Event Description** Select the check box if you do not want to allow users to change the text in the Event Description field.
- Date Stamp Event/Location Description** Select the check box to add the date to the line above the event description text you type.

**Freeze Location Description** Select the check box if you do not want to allow users to change the text in the Location Description field.

**Use Legacy Comments** Select the check box to use the legacy comments in diaries.

**Adjuster Text Settings**

**Don't Allow Edit Of Adjuster Text Date** Select the check box if you do not want to allow adjusters to change the date when adjusters enter adjuster dated text. This prevents back dating of adjuster text.

 If you select the check box, on the Adjuster Dated Text window, the Date/Time Entered fields are inactive.

**Enhanced Notes Settings**

**Freeze Existing Notes** Select the check box if you want INSURANCE RISKMASTER to freeze existing Enhanced Notes and add a date time stamp every time an Enhanced note is edited to keep a track of users editing Enhanced Notes.

**Sort First** From the drop down list, select the option to specify the first sort order of Enhanced notes.

**Sort Second** From the drop down list, select the option to specify the second sort order of Enhanced notes.

**Sort Third** From the drop down list, select the option to specify the third sort order of Enhanced notes.

**Task Manager Auto Diary** Select the check box to send an auto diary to user and his supervisor in case task manager task fails or task manager stops abruptly and task is in running state.

Note: Existing customers can also map scheduled job with data source and users. A window pops up when you select the check box where you can select scheduled task and map it with selected user DSN.

**Hours for which Enhanced Notes are editable** Enter the number of hours within which you can modify the Enhanced notes.

**Give editing rights only to the user who has created the note** Select the check box if you want to grant modifying rights only to the user who created the Enhanced note.

**Allow Notes at the Claimant Level** Select the check box if you want to allow users to create and enter enhanced notes from the Claimant window.

**Client Information Parameters Window: Contact Information Tab**

Use the Client Information Parameters window to enter detailed information about your organization. Your organization

refers to the organization or company who owns and uses this copy of INSURANCE RISKMASTER software.



Use the Contact Information tab to open the window, where you can enter contact information about the people responsible for INSURANCE RISKMASTER in your organization.

- To open**
- From the main menu, select Utilities
  - From the Utilities menu, choose Managers.
  - From the Managers menu, choose the Client Information Setup Parameters.
  - From the Client Information Setup window, select the Contact Information tab.

**Field definitions**

- Name**
- Primary** Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER.
- Secondary** Enter the name of the person in your organization to contact if the primary contact is not available.
- Data Entry** Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER Data Entry.
- Reporting** Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER reporting.
- Dept. Mgr** Enter the name of the manager responsible for INSURANCE RISKMASTER.
- Accounting** Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER accounting.
- Title** In the fields in the Title frame, enter the organizational title of the person whose name you entered in each of the fields in the Name fields.

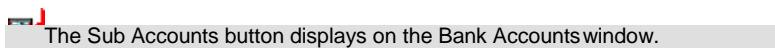
**System Setup Parameter Window: Funds Settings Tab**

Use the Funds Settings tab to display the fields to define funds parameters.


- To open** From the System Setup Parameters window, select the Funds Settings tab.

**Field definitions**

- Funds Parameters**
- Use Account Owner for Funds** Select the check box if you will assign owners to bank accounts when you set up check stocks, and you want the bank account owner to display in the Bank Account drop down list on the Claims window. The owner can be a department and any claim for that department will have this bank account in the drop list.
- Use Sub Bank Accounts** Select the Sub Bank Accounts check box if you want to use sub bank accounts to track funds.





<b>Assign Check Stock to Sub Accounts</b>	Select the check box to assign check stock to sub bank accounts.
	Note: This check box is active only when the Use Sub Bank Accounts check box is selected.
<b>Do Not Check Sub Account Deposit Balances</b>	<p>If you use sub bank accounts, select this check box if you do not want INSURANCE RISKMASTER to check for insufficient funds in sub bank accounts.</p> <p>When you select this check box INSURANCE RISKMASTER will not change the status of payments from "Released" to "Insufficient Funds" if the payment exceeds the reserve amount when you use sub bank accounts.</p>
<b>Filter 'Other People' from Funds Entity Search</b>	Select the check box if you do not want INSURANCE RISKMASTER to include entities of the type "Other People" when you search for an entity in Funds Management.
<b>Show Orphaned Reserve Records (i.e. reserve types not defined in Line of Business Setup)</b>	If your organization defined reserve types in the past that it no longer uses, select this check box to display on the window which opens when you select the Financials tab, the reserve types you do not use anymore.
<b>Prevent Back-Dating of Reserves</b>	Select the check box, if you do not users to back date reserves in INSURANCE RISKMASTER.
<b>Prevent Modifying Reserves to Zero</b>	Select the check box, if you do not want users to set reserves to zero in INSURANCE RISKMASTER.
<b>Prevent Modifying Reserves Less than Paid</b>	<p>Select the check box, if you want a warning message stating that a negative reserve balance will be created, when a user enters a reserve amount less than the total paid amount.</p> <p>Select the check box to decrease the instances of negative reserve balances set in error.</p>
<b>Don't Recalc Reserves on Load</b>	Select the check box, if you do not want INSURANCE RISKMASTER to recalculate reserves when you log in.
<b>Use Master Bank Accounts</b>	Select the check box, if you want to use master bank accounts for the next check number.
<b>Create Work Loss and Restriction Records From Funds From/To Dates</b>	Select the check box, if you want to enable auto creation of work loss or restriction records.
<b>Use Res Type to Filter Trans Type</b>	<p>Select the check box if you want the transaction type codes to be auto filtered based on the selected reserve type code.</p> <p> When you enter a transaction detail on the Funds Split detail window, the Reserve Type field becomes editable when you select this check box and you can look up the Reserve Type.</p>
<b>Show LSS Invoice Link</b>	Select the check box if you want LSS Invoice to be displayed on the Funds window: Transaction tab and on the Approve Transactions window.
<b>Order Bank Accounts</b>	

- None (No Order)** Select this option if you want bank account lists to be displayed in the order in which they were extracted from the database.
- Priority** Select this option if you want bank account lists to be displayed in order of their assigned priority.
- Account Name (Default)** Select this option if you want bank account lists to be displayed in alphabetical order based on the account name.
- Account Number** Select this option if you want bank account lists to be displayed in order of account numbers.
- Enable Bill Review Fee** Select the check box to activate bill review fee feature and create queued medical/hospital payments.
- Org. Level for Bill Review Fee** Select the required level for which you want to use the bill review fee and setup the medical/hospital fee amount for creating queued payments.

Note: The Bill Review fields: Hospital Bill Review Amount per line item, Min # of lines, Medical Bill Review Amount per line item, Min # of lines display on the Org. Hierarchy level window, for the org level selected in this field.

Example: If you select XYZ entity, then the claim for which queued payment is to be created should have a department belonging to client XYZ. The payment will only be created for the selected Bill Review fee when the selected Org Level and Org Entity Name are associated with the transaction.

- Org Entity Name** Enter the name of the entity or select the Ellipses button to select the entity for which you want to use bill review fee feature.

### **System Setup Parameters Window: Globalization Settings**

Use the Globalization Settings tab to create payments to currencies other than the Base Currency.

Note: There will be an extra charge to use Multi-Currency. Existing customers must use USD or CAD as base currency, only new clients can use alternate currencies for Base Currency.

- To open** From the System Setup Parameters window, select the Globalization Settings tab.

### **Field definitions**

- Use Multiple Currency** Select the check box to activate Multiple Currency.
- Select Base Currency** Enter the Base Currency with which you want to make the payment, or select the button to select from the Code Selection window.

**Regional Configuration** Displays the regional settings for the selected country. The Zip Code, SSN etc formats differ for various countries. You can setup the desired format here.

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## howto

### To Set Up a Fiscal Year


The Fiscal Year setup defines the fiscal calendar for your organization. It also permits you to designate the beginning and end dates for each fiscal quarter and the beginning and end dates for each period.

If your organization follows a calendar year as its fiscal year, you do not need to complete this area. You may leave it blank. However, if your organization's fiscal year does not follow the calendar year, CSC recommends completing the Fiscal Year Setup. Doing so will make creating reports based on your fiscal year easier.




1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Managers.  
The Managers menu opens.
3. From the Managers menu, choose Fiscal Year Setup.  
The Fiscal Years Setup window opens and a Fiscal Year Setup link displays under the Utilities node in the left navigation tree.
4. From the Line of Business field, select the  button to open the Code Selection window and then select the line of business for which you are setting up the fiscal year. If the fiscal year applies to all lines of business, simply leave this field blank.
5. From the Organization field, select the  button to open the Org. Hierarchy window and then select the organization for which you are setting up the fiscal year. If the fiscal year applies to all areas of your organization, simply leave this field blank.
6. Select the New button.  
The Fiscal Year Setup wizard opens.
7. Enter the required information into the fields on the various windows of the Fiscal Year Setup wizard. CSC recommends entering the number of Periods as twelve (12) so as to create monthly periods. However, you may create another number of Periods if desired.
8. To move from one window to the next, select the Next button.
9. After you enter all the required information in the various fields on the Fiscal Year Setup wizard, select the Finish button.  
A window opens and displays the message that the Fiscal year setup is saved successfully.
10. On the Fiscal Years List window, select the Refresh List button.

### To Set Up FROI Batch Printing Options

1. From the main menu, select Reports.  
The Reports menu opens.
2. From the Reports menu, select FROI/ACORD batch printing.  
The FROI/ACORD batch printing menu opens.
3. From the FROI/ACORD batch printing menu, select FROI Batch Printing Options.  
The FROI Batch Printing Options window opens and link displays under the Utilities node in the left navigation tree.
4. From the High Level drop down list, select the higher organization level you want to include on the FROI Batch Printing window in INSURANCE RISKMASTER .

5. From the Low Level drop down list, select the lower organization level you want to include on the FROI Batch Printing window in INSURANCE RISKMASTER.
6. If you want to exclude closed claims on the FROI Batch Printing window in INSURANCE RISKMASTER, select the Exclude Master Status Closed Claims check box.
7. Select the  button.

### To Set Up Holidays for Workers' Compensation Calculations

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu opens, choose Managers.  
The Managers menu opens.
3. From the managers menu, choose Holidays Setup.  
The Holidays Setup window opens and a Holiday Setup link displays under the Utilities node in the left navigation tree.
4. Select the  button.  
The Holiday Setup window opens.
5. In the Date field, enter the date you want to assign as a holiday and exclude from workers' compensation calculations.
6. In the Description field, enter a description for the holiday.
7. From the Organization field, select the  button.  
The Org. Hierarchy window opens.
8. Select the organization to which you want to apply the holiday.
9. Close the Organization Hierarchy window.
10. From the Holiday Setup window, select the  button.

### To Define General System Parameters

Use the General System Setup Parameters Setup window to set up numerous options in INSURANCE RISKMASTER.

1. From the main menu, select Utilities.
2. From the Utilities menu, choose System Parameters.  
The System Parameters menu opens.
3. From the System Parameters menu, select General System Parameter Setup.  
The System Setup Parameters window opens and a General System Parameters Setup link displays under the Utilities node in the left navigation tree.
4. Complete the fields on the System Settings tab, as shown below.

#### **General Parameters**

**Event Number Prefix** Enter the prefix with which you want to start all automatically generated event numbers. The prefix can have a maximum of three characters.

For example, if you enter EV, then all event numbers will start with EV (EV0001, EV0002 and so on).

**Org. Level for Event Caption** From the drop down list, select the organization hierarchy level that you want to include in the title bar of the Event window. The title bar is the blue bar displayed at the top of each Event. This bar includes the Event Number, the selected piece of the Organization associated with the Event, and the name of the first Person Involved for the Event.

**Include Year In Event Number** Select the check box if you want to use the year of the Event Date (the accident/incident date) in the event number. If you enter a prefix, then the event number will start with the prefix, followed by the year and then a six digit sequential number. For example, EV20030001.

**Autoselect Policy on Claim** Select the Auto select Policy on Claim check box if you want INSURANCE RISKMASTER to automatically attempt to select a policy when you enter a claim. INSURANCE RISKMASTER will attempt to select the policy, based on the department you select, and the date of claim or event, and the type of claim.

**Autonumber Vehicle ID (VIN)** Select the check box if you want INSURANCE RISKMASTER to automatically generate Vehicle IDs when you enter a new vehicle into the database.



On the Vehicle window and Involved Unit window, RISKMASTER populates the Vehicle ID field when you create a new vehicle record. To open the Vehicle window, from the RISKMASTER main menu, choose Documents > Vehicle Maintenance. To open the Involved Unit window, on the Vehicle Accident Claims window, select the Vehicle Accident tab.

**Limit SORTMASTER Directories** Select the check box if you want users to open SORTMASTER reports saved only in the document directory that you enter in the security management system.

Note: This setting only applies to those customers upgrading to RMX from earlier version of RISKMASTER. New customers do not need to address this setting.

**Default Employment Dept. to Claim Dept for NEW WC Claims** Select the check box if you want INSURANCE RISKMASTER to automatically default the department noted on an employee's information as the department in which the employee works to be the same department noted on the claim as the owning/responsible department for the claim itself.

**Don't Default Time Fields** Select the 'Don't Default Time Fields' check box if you do not want time fields in INSURANCE RISKMASTER to be defaulted to 12:00 AM when a user leaves time fields blank. Note that this means users will be forced to enter a time for required time fields. If you do not select this check box, the user may leave time fields blank – even required time fields – and INSURANCE RISKMASTER will default the time to 12:00 AM.

**Use Billing System** Select the check box to enable Policy Billing module to use along with the Policy Management system.

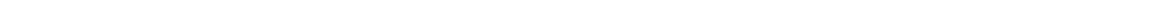
**Use Case Management** Select the check box to enable the Medical Case Management module. The Medical Case Management module is an optional module that requires a key code from CSC to activate.



<b>Multiple Insurers for Policy</b>	Select the check box to display the Insurer button on the Policy Maintenance window and enter multiple insurers on a policy.
<b>Use MCM Interface</b>	Select the check box to enable Media Content Management module. The Media Content Management module is an optional module that requires a key code from CSC to activate.
<b>Multiple Re-Insurers for Policy</b>	Select the check box to enable adding of multiple reinsurers for a policy.
<b>Use PaperVision Document System</b>	Select the check box to activate the Paper Vision Document Management System..  <b>Note:</b> You can use only one third-party document management system at a time. Therefor, if you activate the PaperVision system then MCM, Media View, and any other document management system will no longer be usable.
<b>Use Media View Interface</b>	Select the check box to activate the Media Management Interface document management system.  <b>Note:</b> You can use only one third-party document management system at a time. Therefor, if you activate the Media View system then MCM, PaperVision, and any other document management system will no longer be usable.
<b>Use Script Editor</b>	Select the check box to enable the Script Editor module. The Script Editor module is an optional module that requires a key code from CSC to activate.
<b>Broker Firm in BES</b>	Select the check box to enable adding of broker firms in Business Entity Security (BES).
<b>Program Type in Policy Tracking</b>	Select the check box to use the program type in policy tracking.
<b>Include Collections in Coverages</b>	Select the check box to include collections when you use the Funds > Apply Payments to Coverages to recalculate payments for claims based on applicable insurance policies.
<b>Use 1st/3rd Party Claimant Processing</b>	Select the check box to use the 1/3rd party claimant processing. This is an optional interface that supplies claimant information to ISO. If purchased, you will also need to complete the configuration area.
<b>Configure..</b>	Select the button to open the Claimant Processing Credentials window. <ul style="list-style-type: none"><li>• In the <b>Claimant Processing Web Service URL</b> field, enter the URL to access the first or third party claimant's web service.</li><li>• In the <b>User ID</b> field, enter the user ID that the Claimant Processing Service has assigned to you.</li><li>• In the <b>Password</b> field, enter the password that the Claimant Processing Service has assigned to you.</li><li>• Select OK.</li></ul>

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<b>BRS 2nd Fee Table</b>	Select the check box to include a second BRS fee table.
<b>Acknowledgement/Closed Claim Letter</b>	Select the check box to acknowledge or close claim letter.
<b>Use FL WC Max Rate</b>	Select the check box to define workers' compensation benefit rates for Florida jurisdiction.
<b>Auto FROI ACORD</b>	Select the check box to use the auto First Report Of Injury (FROI) ACORD.
<b>Auto Assign Adjuster</b>	Select the check box to automatically assign adjusters to claims.
<b>Date/Time Assigned</b>	Select the option to assign adjusters based on the date or time.  Note: The default option selected is "Date/Time Assigned". You can select another option, either adjuster having the oldest last Date/Time assigned to address vacation concerns or the lowest total number of Work Items to address manual assignments concern.
<b>Work Items</b>	Select the option to assign adjusters based on the work items.  Note: The default option selected is "Date/Time Assigned". You can select any one option either adjuster having the oldest last Date/Time assigned to address vacation concern or the lowest total number of Work Items to address manual assignments concern.  the adjuster having the lowest total number of Work Items to address manual assignments concern.
<b>Use Entity Payment Approval</b>	Select the check box to enable entity payment approval.  Note: When you select the check box, the Entity Payment Approval Status and Payment Approval/Rejected Reason fields are displayed on different entities window.
<b>Show Jurisdiction in Policy Tracking</b>	Select the check box to display Jurisdiction field in Policy Tracking.
<b>Autonumber Property ID (PIN)</b>	Select the check box if you want INSURANCE RISKMASTER to automatically generate Property IDs when you enter a new property into the database.
<b>Include Physician Med. and Employee in Physician Search</b>	Select the check box to include the physician medicare and employee in Physician search.
<b>Org. Level For Time Zone Validation</b>	From the drop down list, select the organization level to which you want to apply the time zone validation. Here the date and time of claim/event is checked against a Time Zone of an Org. Hierarchy associated with the claim/event.  Note: The validation applies to the organizational level you selected.

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<b>Enable Multiple Addresses for Entities</b>	Select the check box to enable adding of multiple addresses for all entities.
<b>Use Outlook To Send Emails</b>	Select this check box to use Outlook to send e-mails from INSURANCE RISKMASTER.
<b>Filter Policy based on LOB</b>	Select the check box if you want to filter policy based on the Line of Business.
<b>Use Bill Review System (BRS)</b>	Select the check box if you want to use the Bill Review System in INSURANCE RISKMASTER.
<b>Use General Claim</b>	Select the check box if you want to use the General claim in INSURANCE RISKMASTER.
<b>Use Non-occupational Claim</b>	Select the check box if you want to use the Non-Occupational claim in INSURANCE RISKMASTER.
<b>Use Property Claim</b>	Select the check box if you want to use the Property claim in INSURANCE RISKMASTER.
<b>Use Vehicle Accident Claim</b>	Select the check box if you want to use the Workers' Compensation claim in INSURANCE RISKMASTER.
<b>Use Worker's Compensation Claim</b>	Select the check box if you want to use the vehicle accident claim in INSURANCE RISKMASTER.
<b>Maximum No of Discount Tiers for a State and LOB</b>	Enter the maximum no of discount tiers for a state and LOB.
<b>Maximum No of Discounts Associated For a State and LOB</b>	Enter the maximum no of discounts associated for a state and LOB.
<b>Display Claimant Name in MDI</b>	Select the check box if you want to view the Claimant Name along with the LOB and Claim Number in the navigation tree.
<b>Enable Activity Log</b>	Select the check box if you want to enable the activity log.
<b>Financial History Evaluation Date</b>	
<b>Transaction Date</b>	Select the option to use the transaction date for the Financial History Evaluation.

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<b>Date of Check</b>	Select the option to use the check date for the Financial History Evaluation.
<b>System Settings</b>	
<b>SMTP Mail Server</b>	Enter the e-mail server you want to use to send messages and diaries.
<b>OFAC Check for Payees and Entities</b>	Select the check box if you want to view the OFAC Check button on the funds window to view if the payee is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
<b>Patriot Protector Web Service URL</b>	Enter the CSC's Patriot Protector web service URL.
<b>Patriot Protector Web Service Login</b>	Select the Modify button to login to CSC's Patriot Protector and use the Patriot Protector services with the Time and Expense module in INSURANCE RISKMASTER.
<b>Modify...</b>	<ul style="list-style-type: none"><li>• In the <b>User ID</b> field, enter the user ID assigned to you.</li><li>• In the <b>Password</b> field, enter the password assigned to you.</li><li>• Select OK</li></ul>
<b>Size Limit(in MB) for Files that can be emailed using Outlook :</b>	Enter the maximum file size in Megabyte (MB) that you can e-mail using Outlook. <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin-top: 10px;">Note: The maximum file size limit that you can upload using Outlook is 35 MB.</div>
<b>Use Quality Management for Events</b>	Select the check box to use the Quality Management tab on the Events window.
<b>Time and Expense Module</b>	
<b>Use Time and Expense</b>	Select the check box to activate the Time and Expense module. <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin-top: 10px;">Note: You will need a password to activate the Time and Expense module.</div>
<b>Rate Org Level</b>	From the drop down list, select the organization level to which the rate tables will apply. <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin-top: 10px;">Note: When you add a new rate table in the Time and Expense module you can only apply the rate table to the organizational level you specify in this field. Rates apply to the organizational level you select and all the levels below this level.</div>
<b>Bank Account</b>	From the drop down list, select the bank account you want to use to make Time and Expense payments.

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**Show All Transaction Types for Invoice Detail**

Select the check box to show all transaction types for invoice detail.

**Privacy Settings**

**Jurisdictions Implementing SSN Privacy (Comma separated State Codes)**

Enter the jurisdictions for which you want INSURANCE RISKMASTER to display only the last four digits of the employees social security number (SSN).

Note: Separate multiple jurisdictions with comma.

**Mask TaxId/SSN**

Select the check box if you want to mask TaxId/SSN.

Note: After you save a record with 9 digit TaxId/SSN, the TaxId/SSN gets masked.

**Number of Records Per window**

**Code List**

Enter the maximum number of codes you want to display on a code list window. You can enter any number between 10 and 10,000.

**Search Results and Look Ups**

Enter the maximum number of search results you want to display on the search result window or lookup result window. You can enter any number between 10 and 10,000.

**Enhanced Notes**

Enter the maximum number of records per page you want to display on the Enhanced Notes window. You can enter any number between 10 and 100.

**Quick Look Ups**

Enter the maximum number of records per page you want to display on the Quick lookup result window. You can enter any number between 10 and 10,000.

**Payee Check Review**


Enter the maximum number of Payee(s) on Freeze, Batch(es)/Auto-Check(s) on Freeze, and Check(s) on Hold by Background OFAC check per page you want to display on the Payee Check Review window.

**Document Attachment List**

Enter the maximum number of attachments per page you want to display on the Attachments window. You can enter any number between 10 and 10,000.

**Multi-Currency Settings**

**Source Currency**

Enter the code that best describes the currency type or select the  button to select from the Code Selection window.

**Exchange Rate**

Enter the Exchange Rate with which you want to convert the currency of a source country to another country's currency.

5. Complete the fields on the Funds Settings tab, as shown below.
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## Funds Parameters

### Use Account Owner for Funds

Select the check box if you will assign owners to bank accounts when you set up check stocks, and you want the bank account owner to display in the Bank Account drop down list on the Claims window. The owner can be a department and any claim for that department will have this bank account in the drop list.

### Use Sub Bank Accounts

Select the Sub Bank Accounts check box if you want to use sub bank accounts to track funds.

The Sub Accounts button displays on the Bank Accounts window.

### Assign Check Stock to Sub Accounts

Select the check box to assign check stock to sub bank accounts.

Note: This check box is active only when the Use Sub Bank Accounts check box is selected.

### Do Not Check Sub Account Deposit Balances

If you use sub bank accounts, select this check box if you do not want INSURANCE RISKMASTER to check for insufficient funds in sub bank accounts.

When you select this check box INSURANCE RISKMASTER will not change the status of payments from "Released" to "Insufficient Funds" if the payment exceeds the reserve amount when you use sub bank accounts.

### Filter 'Other People' from Funds Entity Search

Select the check box if you do not want INSURANCE RISKMASTER to include entities of the type "Other People" when you search for an entity in Funds Management.

### Show Orphaned Reserve Records (i.e. reserve types not defined in Line of Business Setup)

If your organization defined reserve types in the past that it no longer uses, select this check box to display on the window which opens when you select the Financials tab, the reserve types you do not use anymore.

### Prevent Back-Dating of Reserves

Select the check box, if you do not users to back date reserves in INSURANCE RISKMASTER.

### Prevent Modifying Reserves to Zero

Select the check box, if you do not want users to set reserves to zero in INSURANCE RISKMASTER.

### Prevent Modifying Reserves Less than Paid

Select the check box, if you want a warning message stating that a negative reserve balance will be created, when a user enters a reserve amount less than the total paid amount.

Select the check box to decrease the instances of negative reserve balances set in error.

### Don't Recalc Reserves on Load

Select the check box, if you do not want INSURANCE RISKMASTER to recalculate reserves when you log in.


### Use Master Bank Accounts

Select the check box, if you want to use master bank accounts for the next check number.

### Create Work Loss and Restriction Records From Funds From/To Dates

Select the check box, if you want to enable auto creation of work loss or restriction records.

**Use Res Type to Filter Trans Type** Select the check box if you want the transaction type codes to be auto filtered based on the selected reserve type code.

 When you enter a transaction detail on the Funds Split detail window, the Reserve Type field becomes editable when you select this check box and you can look up the Reserve Type.

**Show LSS Invoice Link** Select the check box if you want LSS Invoice to be displayed on the Funds window: Transaction tab and on the Approve Transactions window.

**Order Bank Accounts**

**None (No Order)** Select this option if you want bank account lists to be displayed in the order in which they were extracted from the database.

**Priority** Select this option if you want bank account lists to be displayed in order of their assigned priority.

**Account Name (Default)** Select this option if you want bank account lists to be displayed in alphabetical order based on the account name.

**Account Number** Select this option if you want bank account lists to be displayed in order of account numbers.

**Enable Bill Review Fee** Select the check box to activate bill review fee feature and create queued medical/hospital payments.

**Org. Level for Bill Review Fee** Select the required level for which you want to use the bill review fee and setup the medical/hospital fee amount for creating queued payments.

Note: The Bill Review fields: Hospital Bill Review Amount per line item, Min # of lines, Medical Bill Review Amount per line item, Min # of lines display on the Org. Hierarchy level window, for the org level selected in this field.

Example: If you select XYZ entity, then the claim for which queued payment is to be created should have a department belonging to client XYZ. The payment will only be created for the selected Bill Review fee when the selected Org Level and Org Entity Name are associated with the transaction.

**Org Entity Name** Enter the name of the entity or select the Ellipses button to select the entity for which you want to use bill review fee feature.

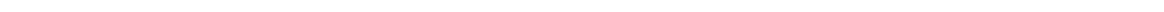
6. Complete the fields on the Employee Settings tab, as shown below.

**Settings**

**WC Employee Number Prefix** Enter the prefix with which all employee numbers generated by INSURANCE RISKMASTER will start. The prefix can be a maximum of 8 characters long. INSURANCE RISKMASTER adds the prefix only if you also select the Autonumber Blank WC Employee Numbers check box.

For example, if you enter EMP, then all employee numbers will start with EMP (EMP0001, EMP0002 and so forth).

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**Exclude Holidays from Work Loss/Restricted Days Calculation** Select the check box if you want to exclude holidays you entered in the Holidays Setup window from the Work Loss/Restricted Days Calculation.

**Autonumber Blank WC Employee Numbers (new employee entry only)** Select the check box if you want INSURANCE RISKMASTER to automatically generate employee numbers when you enter a new employee into the database .

In the Employee window, select the Employee tab. INSURANCE RISKMASTER populates the Employee Number field when you create a new employee record. To open the Employee window, from the INSURANCE RISKMASTER main menu, choose Documents > Employee Maintenance.

**Allow Edit of WC Employee Numbers** Select the check box if you want to enable a change in the employee number after you have created a record.

### Work Shifts

**Shift 1** In the **Name** field, either accept the default name or enter a name for the first work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

**Shift 2** In the **Name** field, either accept the default name or enter a name for the second work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

**Shift 3** In the **Name** field, either accept the default name or enter a name for the third work shift of the day.

In the **Start** and **End** fields, either accept the default start and end times for the shift or enter a new start and end time.

**Work Days** Select the check boxes for the days of the week you want to assign as work days. The check boxes you select here will display as selected on the Claims windows when you open the claims windows in INSURANCE RISKMASTER.

7. Complete the fields on the Diaries/Text Fields tab , as shown below.

### Diary Settings

**Attached Diaries Globally Visible** Select the check box if you want to allow all users to view all diaries attached to a claim. If you do not select this option, users can only view diaries that are assigned to them.

**Allow Global Peek for Diaries** Select the check box if want to allow all users to view diaries by all other users. If you do not select the check box, users can only view diaries for other users below them in the supervisory chain.

**Auto Launch Diary (Non-Powerview)** Select the check box to launch the diary automatically in a non powerview.

<b>Default "Assigned to" in Create Diary to Current User</b>	Select the check box to make the 'Assigned to' field as a default field when you create a new diary for the current user.
<b>Use Current Date for Completed Diaries:</b>	Select the check box to use the current date for diaries with completed status. When this option is selected The Diary Task Completion window does not open. Also the Void Diary by Date window does not display when multiple Void tasks have been selected on the Diary List window.
<b>Notify Task Assigner of Completion</b>	Select the check box if you want a notification to be sent to the user who assigned the task when the task is completed.
<b>Delete All diaries Related to Claim when Claim is closed</b>	Select the check box if you want INSURANCE RISKMASTER to automatically delete associated diaries when you close a claim.
<b>Level of Org. Hierarchy displayed in Diary List</b>	From the drop down list, select the organization hierarchy level you want to display on the Diary window in INSURANCE RISKMASTER .  In the Diary window, a column for the organization hierarchy level you selected displays.
<b>Allow Task Description Filter</b>	Select the check box to use the task description filter while creating diaries.
<b>Free Text Settings</b>	
<b>Date Stamp Free Text</b>	Select the check box to add the date to the line above the free text you type.
<b>Freeze Free Text Entries</b>	Select the check box if you do not want to allow users to change the existing text entries.
<b>Don't Allow Edit of Date Stamp In Free Text Areas</b>	Select the check box if you do not want to allow users to change the date INSURANCE RISKMASTER enters.
<b>Freeze Event Description</b>	Select the check box if you do not want to allow users to change the text in the Event Description field.
<b>Date Stamp Event/Location Description</b>	Select the check box to add the date to the line above the event description text you type.
<b>Freeze Location Description</b>	Select the check box if you do not want to allow users to change the text in the Location Description field.
<b>Task Manager Auto Diary</b>	Select the check box to send an auto diary to the user and his supervisor in case task manager task fails or task manager stops abruptly and task is in running state.  Note: Existing customers can also map scheduled job with data source and users. A window pops up when you select the check box where you can select scheduled task and map it with selected user DSN.

**Use Legacy Comments** Select the check box to use the legacy comments in diaries.

### Adjuster Text Settings

**Don't Allow Edit Of Adjuster Text Date** Select the check box if you do not want to allow adjusters to change the date when adjusters enter adjuster dated text. This prevents back dating of adjuster text.

you select the check box, on the Adjuster Dated Text window, the Date/Time Entered fields are inactive.

### Enhanced Notes Settings

**Freeze Existing Notes** Select the check box if you want INSURANCE RISKMASTER to freeze existing EnhancedNotes and add a date time stamp every time an Enhanced note is edited to keep a track of users editing Enhanced Notes.


**Sort First** From the drop down list, select the option to specify the first sort order of Enhanced notes.

**Sort Second** From the drop down list, select the option to specify the second sort order of Enhanced notes.

**Sort Third** the drop down list, select the option to specify the third sort order of Enhanced notes.


**Hours for which Enhanced Notes are editable** Enter the number of hours within which you can modify the Enhanced notes.

**Give editing rights only to the user who has created the note** Select the check box if you want to grant modifying rights only to the user who created the Enhanced note.




8. Select the  button.

## To Copy Fiscal Year Information

You can copy fiscal year details from an existing fiscal year to a fiscal year for a different line of business or organization.

- From the main menu, select Utilities.  
The Utilities menu opens.
- From the Utilities menu, choose Managers.  
The Managers menu opens.
- From the Managers menu, select the Fiscal Year Setup.  
The Fiscal Years Setup window opens and Fiscal Years Setup link displays under the Utilities node in the left navigation tree.
- From the Line of Business field, select the  button to open the Code Selection window and then select the line of business from which you want to copy the fiscal year.




5. From the Organization field, select the  button to open the Org. Hierarchy window and then select the organization from which you want to copy the fiscal year .
6. Select the Copy button.  
The Fiscal Copy window opens.
7. Do one of the following:
  - Select the All Years option to copy this fiscal year information to all years. You can do this only if you have not already set up fiscal years for the selected organization and line of business.
  - Select the Only <year> option to copy this fiscal year information to a specific year, and then enter the year you want.
8. From the To Line of Business field, select the  button to open the Code Selection window and then select the line of business for which you want to set up the fiscal year.
9. From the To Organization field, select the  button to open the organization hierarchy list and then select the organization for which you want to set up the fiscal year.
10. Select the Copy button.


**To Schedule Batch FROI Options**

1. From the main menu, select Reports.  
The Reports menu opens.
2. From the Reports menu, select FROI/ACORD batch printing.  
The FROI/ACORD batch printing menu opens.
3. From the FROI/ACORD batch printing menu, select Schedule Batch FROIs.  
The Print Batch FROIs Options window opens.

**Print Batch FROIs Options**

Select Claim by Date of Claim      From:   To:  

Select Claim by Date Created

Printed Claims to include: No Item Selected 

Claim Number	Claim Date	Claimant Name	Jurisdiction
<div style="display: flex; justify-content: space-between; margin: 0;"> <input type="button" value="Select All"/> <input type="button" value="UnSelect All"/> <input type="button" value="Process Selected"/> <input type="button" value="Cancel"/> </div>			

4. On the Print Batch FROIs Options window do one of the following.
5. Select the 'Select Claim by Date of Claim' option to chose claim for printing as per claim date and then select date range.
6. Select the ' Select Claim by Date Created' option to chose claim for printing as per date claim was created.
7. From the 'From' and 'To' fields select the date range.
8. From the Printed Claims to Include drop down list select if you want to include batch, single claim or both on the printed FROI.
9. Select the Refresh button to refresh the list of records.

**To Schedule Batch ACORD Options**

1. From the main menu, select Reports.  
The Reports menu opens.



- From the Reports menu, select FROI/ACORD batch printing.  
The FROI/ACORD batch printing menu opens.
- From the FROI/ACORD batch printing menu, select Schedule Batch Acords.  
The Print Batch Acords Options window opens.

- On the Print Batch Acords Options window do one of the following.
- Select the 'Select Claim by Date of Claim' option to chose claim for printing as per claim date and then select date range.
- Select the ' Select Claim by Date Created' option to chose claim for printing as per date claim was created.
- From the 'From' and 'To' fields select the date range.
- From the Printed Claims to Include drop down list select if you want to include batch, single claim or both on the printed ACORD.
- Select the Refresh button to refresh the list of records.


## To Setup Check Stub Text

You can associate multiple Jurisdictions and multiple Transaction Types with a check stub text wording.

- From the main menu, select Utilities.  
The Utilities menu opens.
- From the Utilities menu, choose Managers.  
The Managers menu opens.
- From the Managers menu, choose Check Stub Text Setup.  
The Check Stub Text Setup window opens.


### Jurisdiction



Select the  button to open the Code Selection window and select the State ID for which you want to setup the check stub text.

### Transaction Type



Select the  button to open Code Selection window and select the transactiontype for which you want to setup the check stub text.

**Check Stub text** Enter the specific text to be printed on the check.

**Add new** Select the button to add the check stub text.

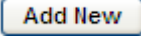
Note: If a jurisdiction and a transaction type is mentioned in the Jurisdiction and Transaction Type field, then the check stub text is printed for the specified jurisdiction and the transaction type.

**Edit** From the table, select the check stub text record that you want to modify and then select the button to modify the check stub text.

**Remove** From the table, select the check stub text record that you want to delete and then select the button to delete the check stub text.

**Table** Displays the check stub text details.

4. In the Check Stub text field, enter the text that you want to print on the check.

5. Select the  button.

Note: If a jurisdiction and a transaction type is selected in the Jurisdiction and Transaction Type field respectively, then the check stub text is printed for the specified jurisdiction and the transaction type.

The check stub text displays in the table.

Note: On the Funds window, when you create a transaction with Jurisdiction and Transaction type the system checks for any defined check stub text and prints the associated text on the checks. Also while creating payments if you do not select a Jurisdiction however the check stub text is defined for the selected Transaction type then a message displays. If you select the associated jurisdiction from the State field then the text is printed on the check.

## To Define Client Information

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Managers.  
The Managers menu opens.
3. From the Managers, choose the Client Information Setup.  
The Client Information Setup window opens and a Client Information Setup link displays under the Utilities node in the left navigation tree.
4. Complete the fields on the Client Information tab , as shown below.

**Client Name** Enter the name of your organization. This name will appear in several places in the INSURANCE RISKMASTER system, such as at the top of any Executive Summary.

**ESSP #** Enter the ESSP number of your organization. The ESSP number is the extended service and support plan number (also called the client number) that the CSC INSURANCE RISKMASTER group uses to keep track of your organization's support and services. If you do not yet have this number or do not know it, please contact INSURANCE RISKMASTER Support at 877-275- 3676.

**Address** Enter the organization address. Enter the city, state and zip in the appropriate fields.

<b>Product</b>	Enter the INSURANCE RISKMASTER products your organization has purchased and installed.
<b>Printer</b>	Enter the printer type you use.
<b>Hardware</b>	Enter the brand, processor and memory for the computers on which your organization runs INSURANCE RISKMASTER.
<b>Installation Date</b>	Enter the date on which CSC installed INSURANCE RISKMASTER in your organization.
<b>Phone</b>	Enter your organization's phone number.
<b>Fax</b>	Enter your organization's fax number.
<b>Distribution Media</b>	Enter the diskette size for the computers on which your organization runs INSURANCE RISKMASTER or select the button to search from the Code Selection window.
<b>Client Status</b>	Enter the client status.
<b>Version</b>	Enter the latest INSURANCE RISKMASTER release number that your organization uses.
<b>CSC Support #</b>	Enter the phone number your organization uses to call INSURANCE RISKMASTER Customer Support.

5. Complete the fields on the Contact information tab , as shown below.

<b>Name</b>	
<b>Primary</b>	Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER.
<b>Secondary</b>	Enter the name of the person in your organization to contact if the primary contact is not available.
<b>Data Entry</b>	Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER Data Entry.
<b>Reporting</b>	Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER reporting.
<b>Dept. Mgr</b>	Enter the name of the manager responsible for INSURANCE RISKMASTER.
<b>Accounting</b>	Enter the name of the person in your organization who is responsible for INSURANCE RISKMASTER accounting.
<b>Title</b>	In the fields in the Title frame, enter the organizational title of the person whose name you entered in each of the fields in the Name fields.

6. Complete the fields on the MMSEA Medicare tab , as shown below.

<b>Doing Business As</b>	Enter the name on which the user is carrying out it's operations.
--------------------------	---

**Legal Name, if no Doing Business** Enter the legal name of the user if there is no business name.

**MMSEA DATA**

**Line of Business** Displays the line of business for the client.

**Reporter ID** Displays the reporter Identification number.

**Office Code/Site ID** Displays the code of the office or the site identification number for the client.

**Medicare Filing Schedule** Displays the schedule of filing the Medicare.



Select the button to create a new MMSEA data record for the client.



Select the button to edit the MMSEA data record.



Select the button to delete the MMSEA data record.

7. Select the  button.

**To Set Up Searches**

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Query Designer .  
The Query Designer window opens and a Query Designer link displays under the Utilities node in the left navigation tree.
4. Select the Create New Search View button.  
The Search Query wizard opens.
5. Enter the required information into the fields on the various windows of the Search Query wizard.
6. To move from one window to the next, select the Next button.
7. After you enter all the required information in the various fields on the Search Query wizard, select the Finish button.  
The new search displays under the search type you selected on the Query Designer window.

**To Set Up Exchange Rate**

1. From the main menu, select Utilities.
2. From the Utilities menu, select Managers.
3. From the Managers menu, select Exchange Rate Setup.

The Exchange Rate Setup window opens.

**Exchange Rate Setup**

	Source Currency	Destination Currency	Exchange Rate
	USD \$	USD \$	1
	GBP £	USD \$	1.6
	EUR €	USD \$	1.3378
	USD \$	EUR €	0.747468
	EUR €	GBP £	0.8385309
	GBP £	EUR €	1.192561
	GBP £	GBP £	1
	EUR €	EUR €	1
	CAD \$	CAD \$	1
	USD \$	GBP £	0.8

- 4. To setup a new currency exchange rate, select the New button.

The Add/Modify Currency window open

**Multi Currency**

**Source Currency:**

**Destination Currency:**

**Exchange Rate:**




- 5. From the Source Currency field, select the lookup button to choose the required source currency for which you want to specify the exchange rate.
- 6. From the Destination Currency field, select the lookup button to choose the required destination currency to which you want to convert the source currency.
- 7. In the Exchange Rate field, enter the rate at which the source currency is converted to destination currency.
- 8. Select the Save button.
- 9. From the list of currency exchange rates specified, select the option for the currency you want to modify. Select the button. On the Add/Modify Currency window enter the modified rate.
- 10. From the list of currency exchange rates specified, select the option for the currency you want to delete. Select the button.

# Acknowledgement Closed Claim letter

## gui

### To Setup Acknowledgement Closed Claim Letter

Note: This feature is available only when on the General System Parameters Setup window: System Setup tab, the Acknowledgement/Closed Claim Letter check box is selected.

1. From the main menu,select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Managers.  
The Managers menu opens.
3. From the Managers menu, choose Claim Setup.  
The Claim Setup menu opens.
4. From the Claim Setup menu, choose Claim Letter Setup.  
The Acknowledgement (Ack) - Closed Claim Letter Settings window opens.  
  
The Excluded Adjusters field, by default displays all the adjusters present in .
5. Select an adjuster and then select the Add button to add adjusters to Included Adjusters field..  
The selected adjusters displays in the Included Adjuster field.
6. To remove an adjuster from the Included Adjuster field, select the adjuster and then select the Remove button.
7. From the Excluded Claim Type/s field, select the  button to open Code Selection window and select the claim type which you want to exclude from the Acknowledgement and Closed Letter Process.
8. From the Template for Ack Claim Letter drop down list, select the template for the acknowledgement claim letter.
9. From the Template for Closed Claim Letter drop down list, select the template for the closed claim letter.
10. From the Claim Status field, select the  to open Code Selection window to select the claim status for which you want to generate closed claim letter.
11. Complete the field and then select the  button to save the changes.

## Field Help

### Claim Letter Setup Window

- From the main menu,select Utilities.



#### To open

- From the Utilities menu, choose Managers.
- From the Managers menu, choose Claim Setup.
- From the Claim Setup menu, choose Claim Letter Setup.

### Field Definitions

#### Acknowledgement (Ack) - Closed Claim Letter Settings

<b>Excluded Adjusters</b>	By default, displays all the adjusters present in .
<b>Add</b>	Select an adjuster and then select the Add button to add adjusters to Included Adjusters field.
<b>Remove</b>	Select an adjuster and then select the Remove button to remove adjusters from the Included Adjusters field.

<b>Included Adjusters</b>	Displays the adjusters to which when a claim is assigned, an Acknowledgement letter is sent to the clients.
<b>Excluded Claim Type/s</b>	Select the  button to open Code Selection window to select the claim type which you want to exclude from the Acknowledgement and Closed Letter Process.
<b>Template for Ack Claim Letter</b>	From the drop down list, select the template for the acknowledgement claim letter.
<b>Template for Closed Claim Letter:</b>	From the drop down list, select the template for the closed claim letter.
<b>Closed Claim Letter (Specific)</b>	
<b>Claim Status</b>	Select the  to open Code Selection window to select the claim status for which you want to generate closed claim letter.


## Auto FROI ACORD

### gui

#### Auto FROI ACORD Settings Window

- From the main menu select Utilities.
- To open**
- From the Utilities menu, choose Jurisdictional Options.
  - From the Jurisdictional Options menu, choose Auto FROI ACORD Setup.

#### Field Definitions

<b>Excluded Adjusters</b>	By default, it displays all adjusters present in .
<b>Included Adjusters</b>	Displays the adjusters which receives the auto FROI/ ACORD email notification.
<b>Add</b>	Select an adjuster from the Excluded Adjuster field and then select the Add button to add the adjuster to the Included Adjuster field.
<b>Remove</b>	Select an adjuster and then select the Remove button to remove the selected adjuster from Included Adjuster field.
<b>Sender's Email Address</b>	Enter the email address of the sender.
	Select the button to save the settings.


### howto

#### To Setup Auto FROI/ ACORD Generation

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Jurisdictional Options.  
The Jurisdictional Options menu opens.

3. From the Jurisdictional Options menu, choose Auto FROI ACORD Setup  
The Auto FROI ACORD Settings window opens.

**Note:** The Excluded Adjuster field displays all the adjusters present in the by default.

4. From the Excluded Adjuster field, select the adjuster to which when a claim is assigned an FROI/ ACORD email is sent to contact and then select the Add button.  
The selected adjuster displays in the Include Adjuster field.
5. To remove the adjuster from the Include Adjuster field, select the adjuster and then select the Remove button.
6. In the Sender Email Address field, enter the email address of the sender.
7. From the toolbar select the  button.

## Script Editor

### Gui

#### Script Editor Window

- To open**
- From the Tools & Designers menu, choose Script Editor .
  - From the Script Editor, under the script type branch, select the object.

#### Field definitions

- Properties tab** Displays the properties for an object that you select from the Script Editor tree.
- Author** Displays the name of the user who created the object and corresponding source code.
- Created On** Displays the date on which the user created the object and corresponding source code.
- Modified By** Enter the name of the user who edited the object and corresponding source code.
- Modified Date** Enter the date on which the user edited the object and corresponding source code, or select the date from the calendar.
- SourceCode tab** Select to view and edit the source code for an object that you select from the Script Editor tree.

#### Script Editor User Interface

- To open**
- From the Utilities menu, select the Tools & Designers.
  - From the Tools & Designers menu, select Script Editor .

#### Field definitions

- Toolbar** Displays the buttons to save, delete, add new and reload scripts and objects.



*Left frame* Displays the Script Editor navigation tree. Select the + next to Script Editor to expand the script type node. Select the + next to the script type to open the objects node.


*Right frame* Displays the details for the object that you select from the Script Editor tree.

**Properties tab** Select to view and edit the properties for an object that you select from the Script Editor tree.

**SourceCode tab** Select to view and edit the source code for an object that you select from the Script Editor tree.

## Add New Script Window

**To open**

On the Script Editor window, from the toolbar, select the  button.

## Field definitions

**Script Type** From the drop down list, select the script type.

**Object Type** From the scroll down list, select the object type.

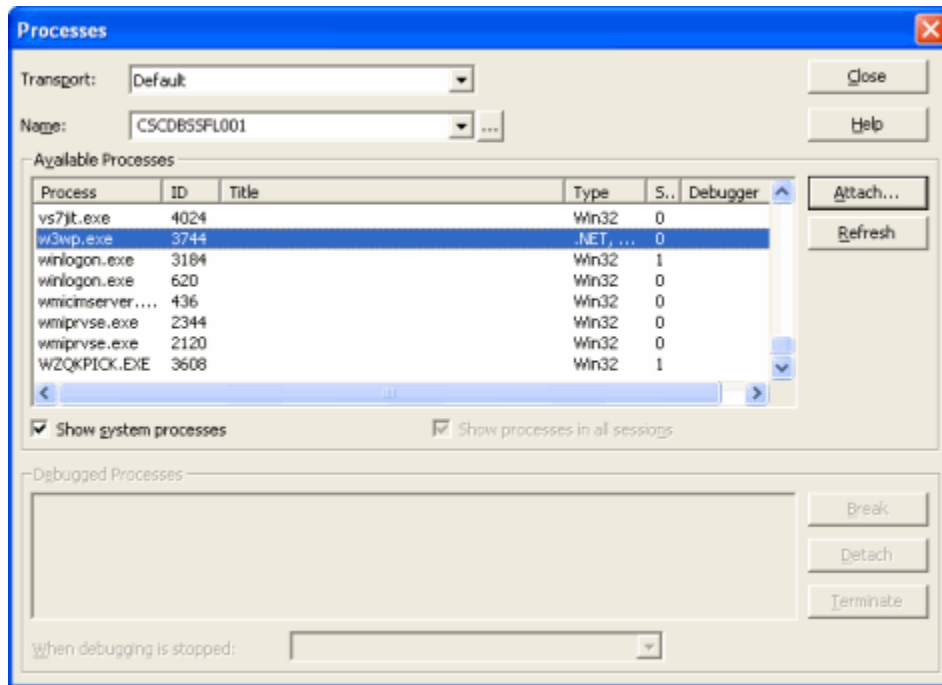
**OK** Select to add the new script.

## How To

### To Work with Processes

You can use Visual Studio IDE to attach to the W3WP.EXE process on the test server. You can access the web application from the web browser before you can attach to W3WP.exe from the IDE. The process does not exist until you request a window from the web application.

1. In Microsoft Visual Studio .NET, from the main menu, choose Debug > Processes.  
The Processes window opens.



2. In the Name field, enter the name of the machine on which the process is running (your test server).
3. From the Available Processes frame, select w3wp.exe.
4. Select Attach.

You can now set break points, investigate variable contents and so on/


Note: When you are in break mode, all processing of web requests to the test server is blocked and waiting for you to finish and allow execution to resume. Execution stops on break-points in your code and allows you to step through and debug the logic.


#### Tips

### To Edit Object Property

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Script Editor .  
The Script Editor window opens and displays two frames.
4. On the Script Editor window, from the left frame, select the + next to Script Editor.  
The Script Editor tree expands and displays the available script types, such as Validation, Calculation, and so on.
5. Select the + next to the script type to view the available objects.
6. From the Script Type tree, select the object.  
The right frame of the Script Editor window displays the Properties window.
7. In the Author field, enter your user name.
8. In the Created On field, enter the date on which you created the object.
9. In the Modified By field, enter the name of the person who edited the property or source code.

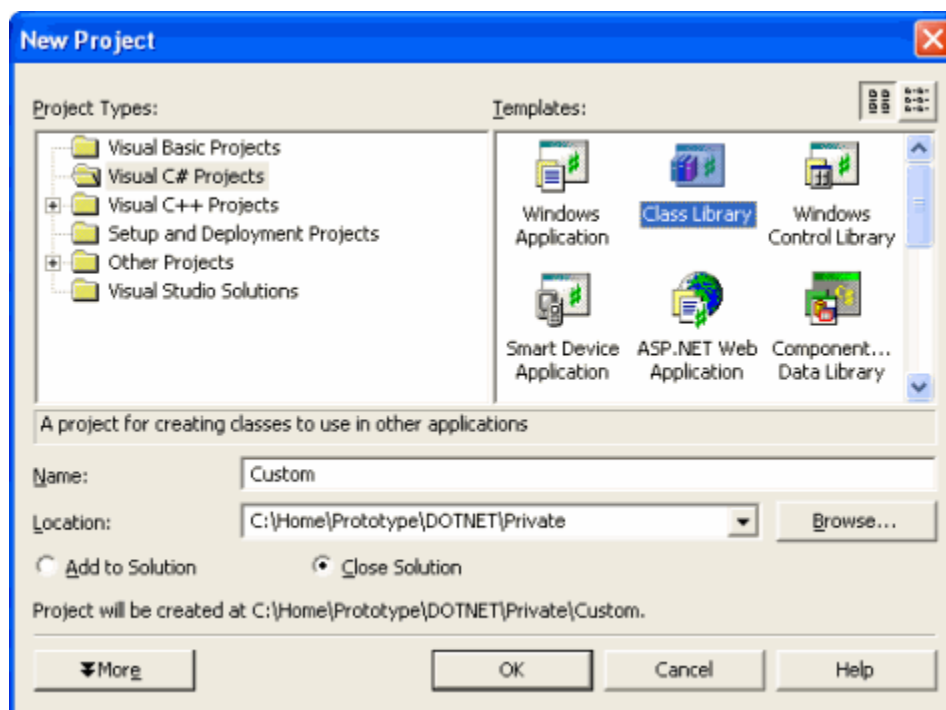
10. In the Modified On field, enter the date on which you edited the property or source code.

11. From the toolbar, select the  button.  
The fields display the edited information.

12. From the toolbar, select the  button.

## To Create a Custom Assembly

1. Open Microsoft Visual Studio .NET, and from the main menu, choose File > New> Project.  
A New Project window opens.



2. From the Templates frame, select the Class Library template.
3. In the Name field, enter a name for the class library, such as Custom.
4. From the Location field, select Browse and navigate to the directory and folder path where you want to save the class library.

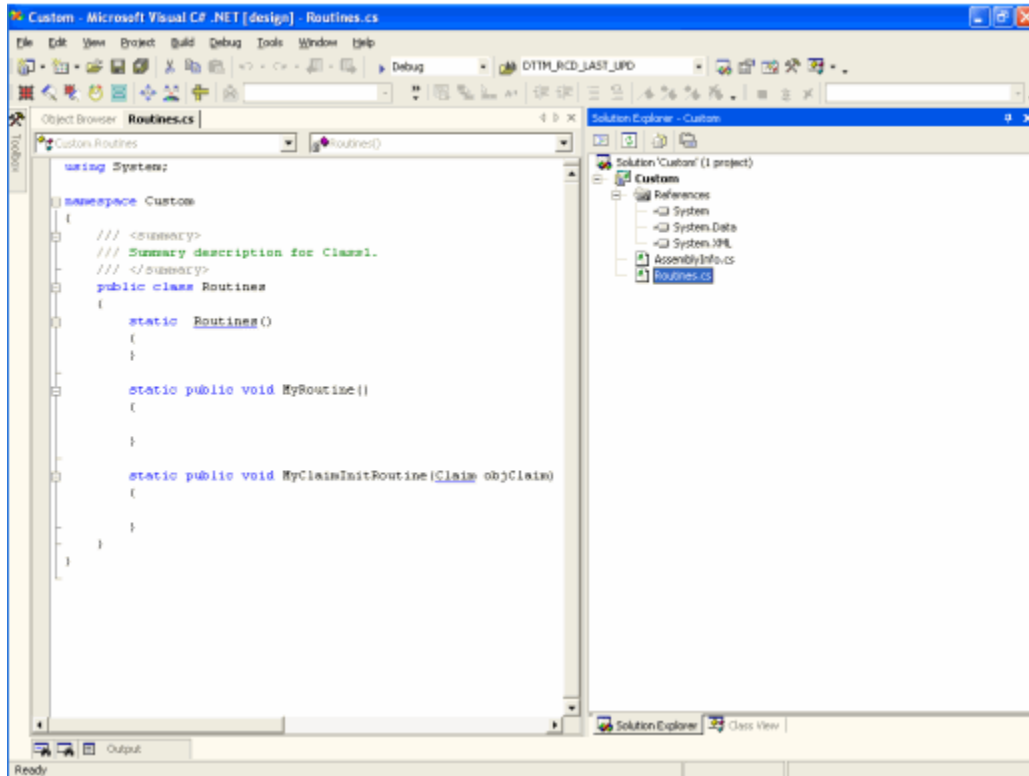
**Note:** You can also select existing locations from the drop-down list.

The path you select displays in the Location field.

5. Select OK.  
The Custom class library opens in Microsoft Visual Studio.

**Note:** You can use a single project for all scripts and add classes and functions as needed.



6. Configure the code namespace and class and file names.
7. Add static routines to the class as your scripts require.





Note: Arrange the behaviors into routines so that you can mix and match calls to these routines in any order from the script. For example you may have a couple of simple routines that you need to call frequently, in addition to one or more longer more specific routines for particular situations.

### Tips

#### To Delete an Object

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose the Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers menu, select Script Editor.  
The Script Editor window opens and displays two frames.
4. On the Script Editor window, from the left frame, select the Script Editor.  
The Script Editor tree expands and displays the available script types, such as Validation, Calculation, and so on.
5. Select the + next to the script type to view the available objects.
6. From the Script Type tree, select the object that you want to delete.
7. From the toolbar, select the  button.  
INSURANCE RISKMASTER removes the deleted object from the Script Editor tree.
8. From the toolbar, select the  button.

## To Add a New Script

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select the Tools & Designers.  
The Tools & Designers menu opens.
3. From the Tools & Designers, choose Script Editor .  
The Script Editor window opens and displays two frames.
4. On the Script Editor window, from the left frame, select the + next to Script Editor.  
The Script Editor tree expands and displays the available script types, such as Validation, Calculation, and so on.
5. Double click the script type you want to add a new script to.
6. With the script type highlighted, from the toolbar, select the  button.  
The Add New Script window opens.
7. From the Script Type drop down list, select the script type.
8. From the Object Type scroll down list, select the object type.
9. Select OK.  
The right frame of the Script Editor window, displays the Properties for the new script.
10. From the toolbar, select the Save button.
11. From the toolbar, select the  button.  
The Script Editor tree displays the new object type under the script type that you selected.

## To View Source Code

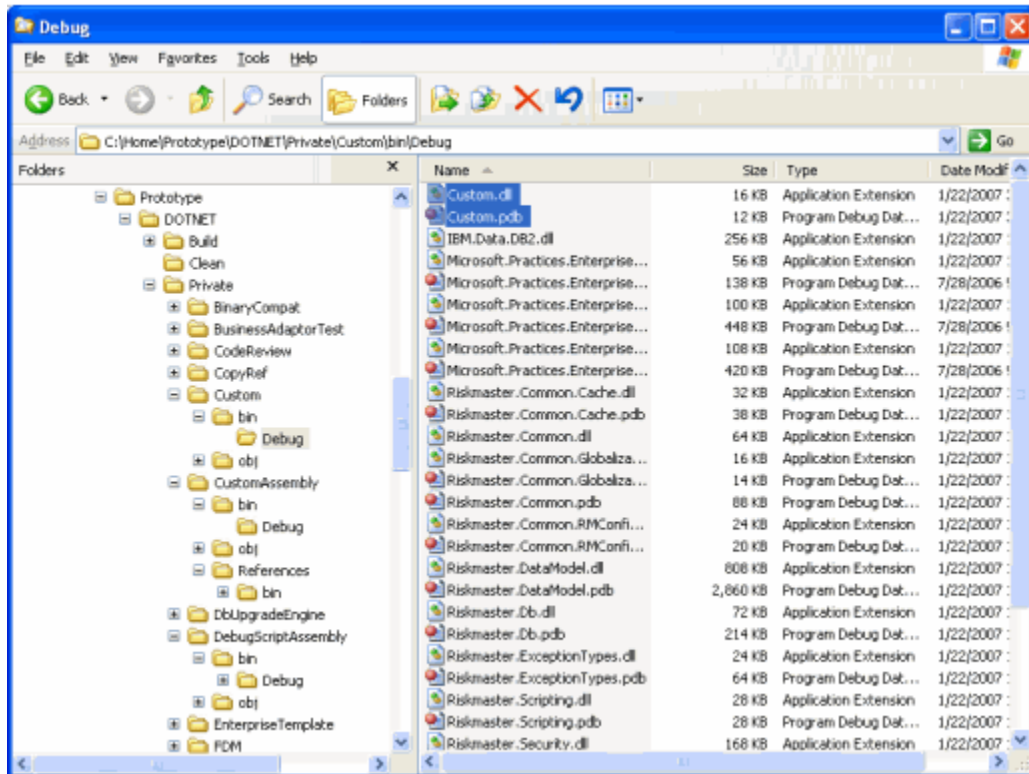
1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select the Tools & Designers.  
The Tools & Designers sub-menu opens.
3. From the Tools & Designers menu, select Script Editor .  
The Script Editor window opens and displays two frames.
4. On the Script Editor window, from the left frame, select the Script Editor.  
The Script Editor tree expands and displays the available script types, such as Validation, Calculation, and so on.
5. Select the + next to the script type to view the available objects.
6. From the Script Type tree, select the object for which you want to view the source code.  
The right frame of the Script Editor window displays the Properties window.
7. Select the SourceCode tab.  
The source code for the selected object displays.

## To Deploy Your Custom Assembly

After you add the references, you can optionally include “using statements” to shorten some of the object type names.

Note: See a language specific (C#) reference.

1. Write and compile your custom code.  
The Debug window opens.

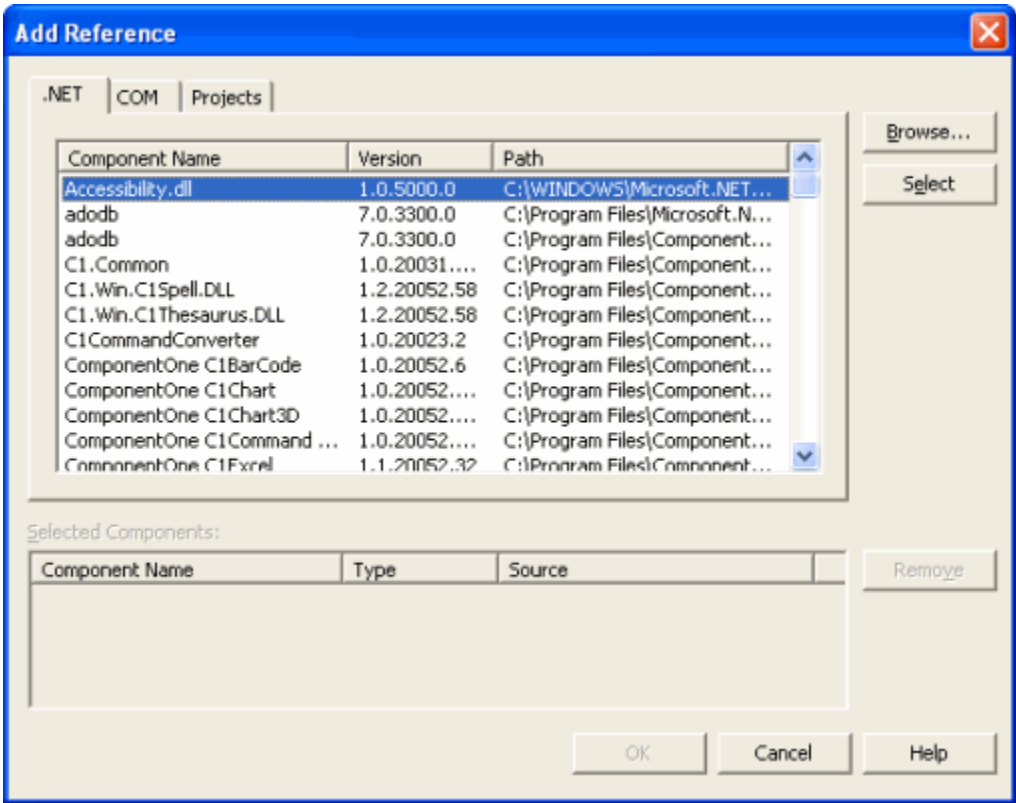


2. Select and copy the Custom.dll and Custom.pdb files.
3. Paste and save the copied files in the cws/bin folder on the test server.

## To Add References to Your Assembly

1. In Microsoft Visual Studio .NET, do one of the following:
  - From the Solution Explorer frame, right click on select References and from the pop-up menu, choose Add References.
  - From the main menu, choose Project > Add Reference.

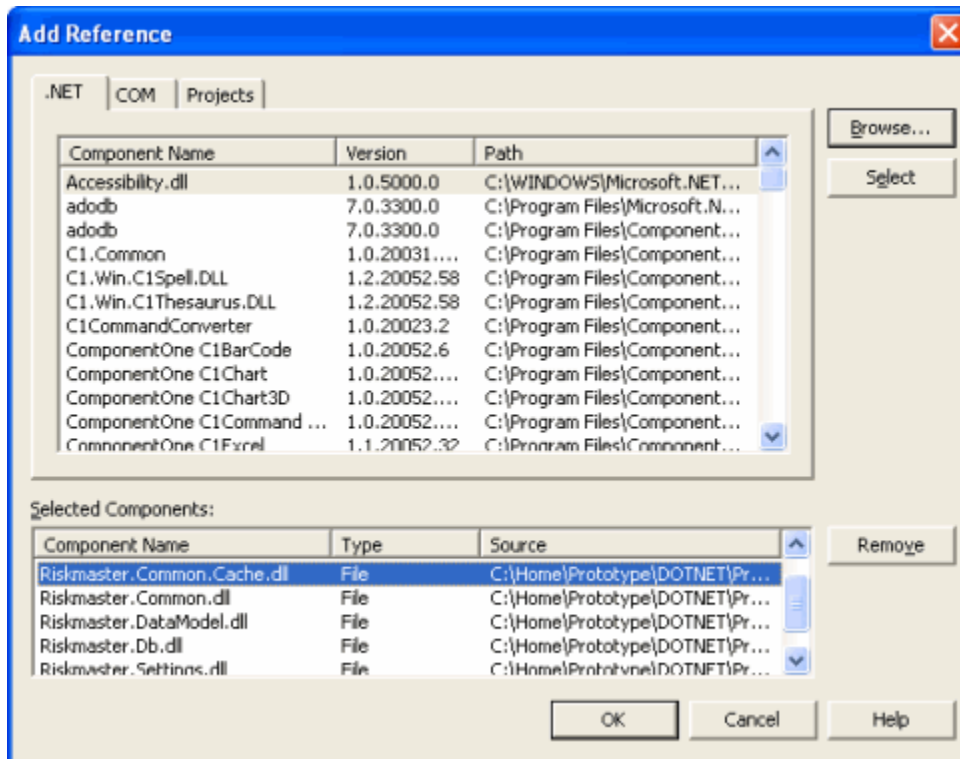
The Add References window opens.



2. Select the Browse button.

Note: In 2005 version, you have to select the Browse tab and then navigate to the component you want to add as a reference.

The Selected Components frame displays the available components.



3. Select the local copy of each of the .dll files, you previously copied to your local machine from the INSURANCE RISKMASTER X server.
4. Select OK.

Note: You can also use the Object Feature to investigate the available INSURANCE RISKMASTER objects in the assemblies you have referenced.

## To Reference and Debug Your Assembly

1. To enable Script Editor to recognize your custom code, add a code to your INSURANCE RISKMASTER .config file.
2. To enable Script Editor to execute your script, add a call to your assembly.

```
Sub InitClaim( objClaim As Riskmaster.DataModel.Claim )
    Custom.Routines.MyClaimInitRoutine(objClaim)
End Sub
```

3. Use Script Editor to debug custom routines from your scripts.

## Working with Assemblies

The INSURANCE RISKMASTER Script Editor has some pre-added references to product functionality. However, when you use the IDE to create your own assembly, you need to add the following references:

- Insurance RISKMASTER.DataModel.dll
- Insurance RISKMASTER.Common.dll
- Insurance RISKMASTER.Common.Cache.dll
- Insurance RISKMASTER.Settings.dll
- Insurance RISKMASTER.Db.dll



- Insurance RISKMASTER.BusinessAdaptor.FormDataAdaptor.dll

Note: You can use the above procedures to add other assembly references to third party tools or .NET Framework components.

After you create a custom assembly, you have to add an item in the Insurance RISKMASTER.config file so that the Script Editor recognizes your custom code. For example, you can add the following code to the config file:

```
<ScriptEngine>
  <AddRef assemblyname="DebugScriptAssembly.dll" />
  <AddRef assemblyname="Custom.dll" />
</ScriptEngine>
```

Note: You may need to stop the web service to successfully save changes to Insurance RISKMASTER.config.

After the test environment is set up you can call and debug custom routines from your scripts.

## Functions of Script Editor

You can use the Script Editor to work with Calculations, Validation, and Event procedures. The Event procedures are based on Initialization, Before Save, and After Save. The sequence of these procedures is:

- Initialization - Triggers after you enter the data and select the OK button. When the object is created, INSURANCE RISKMASTER calls the Event. Initializes any custom default values, for example, default claim date to today's date.
- Calculation - Triggers on save attempt before Validation. Calculates values based on current object values, for example, to populate a supplemental field with data calculated from one or more fields.
- Validation - Creates your custom business rule validations. Cancels the Save process, if validation rules are not met, for example, if specific claim type, then require reserves be set.
- Before Save - Performs example specific tasks or custom imports from third party compatible COM objects, for example, to set automatic reserves.
- After Save - Creates an export to compatible COM Objects. Performs work flow management, for example, to extract claim information to a specific format.

## Debugging in Visual Basic

You can code and execute the debugging scripts in a Visual Basic (VB) environment. You require detailed knowledge of the INSURANCE RISKMASTER programming environment, application design, and the ability to work with Visual Basic and its tools. A special class, VBS\_UCS is embedded into the UCSObjLib.DLL code to perform this function.

*To set up debugging*

- Activate Visual Basic and copy the source code of the application program, such as INSURANCE RISKMASTER main module, Funds Manager, Manual Policy into VB.
- Copy UCSObjLib into the VB Project.
- Change the VBS=0 compile variable in the Project definition, Compile Options, into VBS=-1. This will cause the scripting engine in UCSObjLib to load and call the VBS\_UCS class, containing the problem script.
- Copy VBS\_UCSObjLib.vbp into the VB Project.
- Ensure that a reference to VBS\_UCSObjLib.vbp is in the UCSObjLib reference list.

- The VBS\_UCS.cls module contains a number of subroutines and functions corresponding to Object Event procedures. Most of these subroutines and functions have comments. If the particular Object Event you are debugging is not present, cut and paste an existing procedure and create the Object Event.
- Copy your Object Event source code into the appropriate routine in VBS\_UCS.cls.
- For the most part you can transfer the code directly, but some Visual Basic code may not transfer to VB Script.
- Set a Break Point in your Object Event procedure. When you execute the application, and the object executes the appropriate event, the control should transfer to your procedure. If the control does not transfer to your procedure, then check the spelling of your event procedure, check if script execution is enabled on your work station, and that the references in the application to UCSObjLib, and from UCSObjLib to VBS\_UCSObjLib are set up correctly.
- If your script still does not execute, set a Break Point in the appropriate procedure in the ScriptingFunctions.bas module. The procedure names are self explanatory. After you activate your procedure you can single step through the procedure. This can raise an error as Visual Basic finds variable names or object references spelled incorrectly. Ensure that you do not save anything in UCSObjLib source and turn off VBS=0 in the UCSObjLib project properties. Make the changes to your actual script, that you made to your script procedure and test whether the changes are VB Script compatible.

## Migration of Business Rule Scripts

After you test the Business Rule Scripts, you can use the INSURANCE RISKMASTER Database Upgrade Utility, CCPUDUpgradeDatabase.exe (CCPUD), to migrate the scripts to other environment. CCPUD enables you to export scripts from one database into an XML format and subsequently import the scripts into a target database.

CSC recommends that after you use the Database Upgrade Utility to extract the scripts from the development database, you must check the scripts into a Source Control (configuration control) tool for archival and protection.

## Initialize Event

INSURANCE RISKMASTER executes the Initialize event after you create the object, for example, when you recall data from the database or create a new claim component. INSURANCE RISKMASTER usually uses Initialization scripts for default values in the object, such as date reported to today, claim status to open, and so on. When an object is initialized, INSURANCE RISKMASTER passes it on to its initialization script. Newly created objects do not have valued properties. Objects created from existing data are populated from the database before INSURANCE RISKMASTER executes the initialization script.

## Before Save Event

INSURANCE RISKMASTER executes the Before Save event immediately before the object data is stored to the database. You cannot cancel the save process when you call the Before Save event. You can use these scripts to value child objects, value additional properties, or call third party COM objects for additional processing.

## Test Environment and Visual Studio IDE Remote Debugging

To debug custom logic invoked through Script Editor, you need to have Visual Studio IDE installed.

**Note:** If you do not have Visual Studio IDE, you must use the ordinary log-style debugging approach. Support of the log-style debugging approach is built into RISKMASTER Script Editor.

You must have access to an instance of Visual Studio that has remote debugging access to a test server hosting .

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Note: For details about the setup and configuration of Remote Debugging for Visual Studio, use the product information that came with Visual Studio. You can also find details at: [http://msdn2.microsoft.com/en-us/library/y7f5zaaa\(VS.71\).aspx](http://msdn2.microsoft.com/en-us/library/y7f5zaaa(VS.71).aspx)

Additionally, you may need to configure DCOM on the Visual Studio machine. To configure DCOM, under the machine security configuration enable for "Remote Access" the "Access Permission" for ANONYMOUS LOGON.

CSC recommends the following for step-through script logic:

1. Develop and debug scripts in a test environment isolated from the production environment. During debug sessions, the web site may not respond normally to any requests other than those being actively debugged.
2. Copy any desired product assemblies to the local machine where you will compile your custom assembly. Some examples of product assemblies to include are:
  - Insurance RISKMASTER.DataModel.dll
  - Insurance RISKMASTER.Common.dll
  - Insurance RISKMASTER.Common.Cache.dll
  - Insurance RISKMASTER.Settings.dll
  - Insurance RISKMASTER.Db.dll
  - Insurance RISKMASTER.BusinessAdaptor.FormDataAdaptor.dll

You can find these assemblies on the Server under "Insurance RISKMASTER\cws\bin".

3. Note the location of where you saved copies of these files on your local machine for use when you set up project references within the Visual Studio IDE.

## Debugging Custom Logic

Type topic text here.

## After Save Event

INSURANCE RISKMASTER executes After Save event after the object is successfully saved to the database. All child objects, such as supplementals, are also saved to the database before the After Save script is called. When you call the After Save script, INSURANCE RISKMASTER provides to the After Save script, the properties that are valued during the save process. Processes for duplicate checks, and creation/ modification of child objects, such as reserves under a claim , posting notifications, use the After Save event.

## Debugging with Debug Objects

You can use the `g_RMApp.CDebug.CErrors.MessageBox` function to display data during the execution of the script and get debugging information. INSURANCE RISKMASTER provides several debugging functions that are embedded with the application programs and are available to scripts. You can access most of these functions through the `g_RMApp.CDebug Global Object`, which provides the ability to display messages online and write to log files. The `g_RMApp.CDebug Global Object` can embed debug trace points in a program or script that are active only when you turn on debugging at run time. You can embed debug trace points in your developed scripts and test the scripts with the debugging functions. You can then turn on the debug function embedded in the body of the script to activate the debugging procedures.

The main debug trace functions are:

<b>g_RMApp.CDebug.PushProc</b>	This function indicates the start of a subroutine. Parameters include the name of the subroutine and up to five data items that are usually parameters passed to the routine. When debugging is turned on, each execution of this function posts an *Entering* message to the application log file and displays the value of up to five data values in the log file.
<b>g_RMApp.CDebug.DebugTrace</b>	This function posts an entry up to five data values in to the log file. The first data value usually indicates the position of the DebugTrace in the procedure. When debugging is turned on, the debugging procedure writes an entry to the log file.
<b>g_RMApp.CDebug.PopProc</b>	This function indicates the end of the subroutine or function. You should execute this as the last function in the subroutine unless you set the cDebug object to nothing. You can specify up to five data parameters that are usually return values of a processing. When you turn on debugging, each execution of this function posts a *Leaving* message to the application log file along with the value of the data parameters.
<b>g_RMApp.CDebug.Debugging</b>	This function turns debug processing on (True) or off (False). You can set this function within the body of the script. Ensure that you turn off debugging before you exit the script, else debugging will be turned on for the entire application. You can execute the application with a /Z parameter in the command line to turn on debugging at the application level.

All of the debugging procedures write entries to the application's log file when debugging is turned on for the application. You can use the following logging settings to dynamically control the logging during the execution of your script.

<b>g_RMApp.CDebug.Logging</b>	Turns logging on (True) or off (False)
<b>g_RMApp.CDebug.LogFile</b>	Specifies a log file to write entries to.
<b>g_RMApp.CDebug.LogEntry</b>	Writes a string to the log file.
<b>g_RMApp.CDebug.DiscreteLogging</b>	The application keeps the log file open until you turn off the logging, and does not allow sharing of the log file. The exclusive handling of the log file can cause errors from other execution instances of the application. You can require this exclusive handling to prevent confusion when reading the log file.  To share the log file, set this property to True. When turned on the logging routines closes the log file after each logging event .

## Scope of Business Rule Scripts

Business Rule Scripts are stored in the INSURANCE RISKMASTER database and are only effective for that database. When you define the scripts, they are executed for all processes that occur through the Business Object layer. Some of these functions include:

- Data Entry in INSURANCE RISKMASTER
- First Notice of Loss data entry
- Import of Claims through the XML Import driver

Note: CSC recommends that if you want to build custom code against the RISKMASTER database, all processes must occur through the Business Object Layer.

You must use all Scripts as Source Code as they are code written against a specific INSURANCE RISKMASTER implementation. Scripts can become mission critical particularly when you can use the Scripts to enforce business decisions.

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## Validate Event

INSURANCE RISKMASTER executes the Validation event after you enter data or use the Calculate event, but before you save any additional information related to the data. These scripts enforce customized data entry or processing rules, for example to allow only certain Claim Status codes based on the current or previous status code. The Validate event function returns either a true or false. If the script returns a True, then the validation rules are met and INSURANCE RISKMASTER can save the object. If the script returns a False condition, INSURANCE RISKMASTER cancels the Save action. Validation scripts can value the global Validation Errors Object with the error information for presentation to the user.

## Calculate Event

INSURANCE RISKMASTER executes the Calculate event after you enter data and before you save any additional information related to the data. When you select the OK button or select the Save command for a claim component, INSURANCE RISKMASTER calls the Calculate event. You can use these scripts to value specific object properties of the new data that you enter.

INSURANCE RISKMASTER calls the Calculate event before the Validate event. You can use the executed scripts to populate supplemental, or other fields, before you save the object.

**Note:** To test the object to see if it is a new, unsaved object, test the ID property associated with the object.

## After Load Event

When you request an object to retrieve existing data from the INSURANCE RISKMASTER database, the data is loaded into the object properties after the object is initialized. You can use the After Load event scripts to perform actions on the object or on behalf of the object after the data is loaded to the properties and before it is made available to the calling routine. The After Load script event function returns either a true or false. If the script returns a False, then the object is cleared and the data is not made available to the calling routine. You can use the After Load scripts to protect the data from authorized access.

## Object Scripting Overview

INSURANCE RISKMASTER Objects Scripting enables you to customize object behaviors and characteristics according to customer business needs. You can write scripts in Visual Basic.

The Business Object Layer is the application layer that processes all applications, except in SORTMASTER. This Business Object Layer is also referred to as the UCS Object Layer. UCS is a Class Library that consists of a number Component Object Model (COM) classes that define business components of an INSURANCE RISKMASTER claim.

**Note:** COM is a Microsoft application hosting protocol that facilitates communication among applications executed in a Windows environment.

Each class has an opportunity to execute a script at various points within the object's lifetime. Each execution opportunity is called an Event. Scripts execute at five specific Events:

- Initialization
- Calculation
- Validation
- Before Save
- After Save

The object searches for an appropriate script to execute an event. When the object executes the script, the object passes an address from itself to the script. This allows the script to access all the properties and methods the object defines. You can use the Script Editor to create and maintain scripts.

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## Portal Settings

### GUI

#### RMX Portal Customization Window: Portlet Customization Tab

- To Open
- From the main menu, select Utilities..
  - From the Utilities main menu, choose UI Admin.
  - From the UI Admin menu, choose Customization.
  - From the Customization menu, choose Portal Settings.
  - From the RMX Portal Customization window,select the Portlet Customization tab.

#### Field definitions

**Home window of RMX Portal** Enter the INSURANCE RISKMASTER portal home window.

**View/Update Portal Logo** Select the button to view or update the portal logo.

#### Common Portlets Customization Grid

**Sequence Id** Displays the sequence identification number of the portlet.

**Name of Portlet** Displays the name of the portlet.

**URL of Portlet** Displays the URL of the portlet.



Select to add a new portlet.



Select to edit the existing portlet.



Select to delete the existing portlet.

**Change Tab Order** Select the button to change the tab order for common portlets.



Select to save the changes.




#### RMX Portal Customization Window: User Specific Customization Tab

- To Open
- From the main menu, select Utilities.
  - From the Utilities menu, choose UI Admin.
  - From the UI Admin menu, choose Customization.
  - From the Customization menu, choose Portal Settings.

- From the RMX Portal Customization window, select the User Specific Customization tab.



### Field definitions

#### Individual Portlets Customization Grid

<b>Unique ID</b>	Displays the unique identification number of the portlet.
<b>Name of Portlet</b>	Displays the name of the portlet.
<b>URL of Portlet</b>	Displays the URL of the portlet.
	Select the button to add a new portlet.
	Select a portlet and then select the button to edit the existing portlet.
	Select a portlet and then select the button to delete the existing portlet.
<b>Save Selected Portlet User Access Information</b>	Select the button to save the portlet for a particular user.
<b>Change Tab Order for Highlighted User</b>	Select the button to change the tab order for the selected user.
<b>Groups and Users</b>	Select the check box for the user for which the portlet is to be added.

### Modify Portlet Information Window

**To Open** From the RMX Portal Customization window, do one of following:

- Select the  button to add a new tab.
- Select the  button to edit an existing tab information.

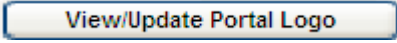
### Field definitions

<b>Name of the Portlet</b>	Enter the name of the tab you want to add.
<b>URL of the Portlet</b>	Enter the URL of the new tab.
<b>OK</b>	Select to apply the current settings.
<b>Cancel</b>	Select to close the window without saving the changes.

## How To


### To Customize Common Portlet

1. From the main menu, select Utilities.  
The Utilities menu opens.

2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Portal Settings.  
The RMX Portal Customization window opens.
5. To add the INSURANCE RISKMASTER portal home window address, in the Home window of RMX Portal field, enter the URL of the portal home window.
6. To view or update the existing image in the portal, select the  button.  
The Upload Banner window opens and displays the existing image in the portal.
7. To browse for a new image from the Upload image field, select the Browse button.  
The Choose File window opens.
8. Select an image you want to upload and select the Open button.
9. The location of the selected image displays in the Upload image field.
10. To upload an image, select the Upload button.

11. Select the  button.


#### To Add New Common Portlet

1. From the main menu, select Utilities.
2. From the Utilities menu, select UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Customization.  
The Customization menu opens.
4. From the Customization menu, select Portal Settings.  
The RMX Portal Customization window opens.
5. To add a new tab, from the Common Portlets Customization Grid section, select the  button.

Note: On the portal, you can add a maximum of 6 portlets.


The Modify Portlet Information window opens.


6. Complete the fields on the Modify Portlet Information window as shown below:

<b>Name of the Portlet</b>	Enter the name of the tab you want to add.
<b>URL of the Portlet</b>	Enter the URL of the new tab.
<b>OK</b>	Select to apply the current settings.
<b>Cancel</b>	Select to close the window without saving the changes.
7. To change the common tab display order, select the Change Tab Order button.
8. Select the  button.


#### To Edit Existing Common Portlet

1. From the main menu, select Utilities.

2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Portal Settings.  
The RMX Portal Customization window opens.
5. To edit an existing portlet, from the Tab Customization section, select a portlet and then select the  button.  
The Modify Portlet Information window opens.
6. Complete the fields on the Modify Portlet Information window. as shown below:
 

<b>Name of the Portlet</b>	Enter the name of the tab you want to add.
<b>URL of the Portlet</b>	Enter the URL of the tab.
<b>OK</b>	Select to apply the current settings.
<b>Cancel</b>	Select to close the window without saving the changes.
7. Select the  button.

#### To Delete Common Portlet

1. From the main menu, choose Utilities.
2. From the Utilities menu, select UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, select Customization.  
The Customization menu opens.
4. From the Customization menu, select Portal Settings.  
The RMX Portal Customization window opens.
5. To delete an existing portlet, from the Common Portlets Customization Grid section, select an existing portlet, and then select the  button.  
A confirmation message displays.
6. To delete the portlet for all users, select the OK button.  
The selected portlet gets deleted from the portlet list.

#### To Customize User Specific Portlet


Use the RMX Portal Customization window to add, modify or delete user specific portlets.

##### To add new user specific portlet

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Portal Settings.

The RMX Portal Customization window opens.

5. Select the User Specific Customization tab.  
The RMX Portal Customization window: User Specific Customization tab opens.


6. To add a new user specific portlet, from the Individual Portlets Customization Grid section, select the  button.

**Note:** On the portal, you can add a maximum of 6 portlets.


The Modify Portlet Information window opens.

7. Complete the fields on the Modify Portlet Information window as shown below:

- |                            |  |
|----------------------------|--|
| <b>Name of the Portlet</b> | Enter the name of the tab you want to add.             |
| <b>URL of the Portlet</b>  | Enter the URL of the new tab.                          |
| <b>OK</b>                  | Select to apply the current settings.                  |
| <b>Cancel</b>              | Select to close the window without saving the changes. |

8. Select the  button.
9. To change the individual tab order for a user, on the RMX Portal Customization window: User Specific Customization tab, select the user and select the Change Tab Order For Highlighted User button.  
The Change Tab Order window opens.
10. Select a portlet and select the Move Up or Move down button to change the tab order specified for the user.
11. Select the Close button.
12. On the [RMX Portal Customization window: User Specific Customization tab](#) from the Groups And Users tree, select the check box for the user or group for which you want to add the portlet.
13. To save the selected portlet for the user access information, select the Save Selected Portlet User Access Information button.

#### To edit an existing user specific portlet


1. From the menu bar, select Utilities.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Portal Settings.  
The RMX Portal Customization window opens.
5. Select the User Specific Customization tab.  
The RMX Portal Customization window: User Specific Customization tab opens.
6. To edit an existing portlet, from the Individual Portlets Customization Grid section, select a portlet and then select the  button.  
The Modify Portlet Information window opens.
7. Complete the fields on the Modify Portlet Information window. as shown below:

<b>Name of the Portlet</b>	Enter the name of the tab you want to add.
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- URL of the Portlet** Enter the URL of the tab.
- OK** Select to apply the current settings.
- Cancel** Select to close the window without saving the changes.

8. Select the  button.

#### To delete a user specific portlet

1. From the menu bar, select Utilities.
2. From the Utilities menu, choose UI Admin.  
The UI Admin menu opens.
3. From the UI Admin menu, choose Customization.  
The Customization menu opens.
4. From the Customization menu, choose Portal Settings.  
The RMX Portal Customization window opens.
5. Select the User Specific Customization tab.  
The RMX Portal Customization window: User Specific Customization tab opens.
6. To delete an existing portlet, from the Individual Portlets Customization Grid section, select an existing portlet,  
and then select the  button.  
A confirmation message displays.
7. Select the OK button.  
The selected portlet gets deleted from the portlet list.



# SSO

## Single Sign On

### Prerequisites

#### SSO Security Server

The SSO Security Server application requires a Java Web server with a Java Development Kit (JDK) of at least 1.4.

The SSO Security Server application has been tested with the following Java Web servers:

1. WebSphere 5.1
2. WebSphere 6.1
3. Tomcat 4.1.31
4. Tomcat 5.5.9
5. Tomcat 6.0.10

#### SSO Java-Based Web Applications

Applications that have a Java-based Web interface are protected by a Java filter. The filter requires a Java Web server that supports Servlet Specification 2.3 for Servlet filters.

The SSO Java filter has been tested with the following Java Web servers:

6. WebSphere 5.1
7. WebSphere 6.1
8. Tomcat 4.1.31
9. Tomcat 5.5.9
10. Tomcat 6.0.10

#### IIS 5.0 Web Applications

Applications that have a Microsoft language Web interface using Internet Information Services 5.0 (IIS) are protected by an Internet Server Application Programming Interface (ISAPI) Filter. The filter requires MSXML 4.0 Service Pack 1 (Microsoft XML Core Services) or later. MSXML 4.0 does not replace MSXML 3.0, so it should not cause any problems with other installed applications.

The ISAPI filter has been tested with IIS 5.0 executing on a Windows 2000 server.

#### IIS 6.0 Web Applications

Applications that have a Microsoft language Web interface using IIS 6.0 are protected by an HTTPModule. The HTTPModule executes in a .NET Framework 1.1 environment.

The HTTPModule has been tested with IIS 6.0 executing on a Windows 2003 server.

## Basic Steps

The procedure you need to follow depends on your installation type—automated or manual.

### *Automated Installation*



Your application may have provided an automated installation program for Single Sign-On (SSO). The automated installation involves the following steps:

1. Run the installation program to install the SSO Security Server application in a Java Application server. The wizard will guide you through the steps, asking you to provide information such as the Authentication Security domain (Active Directory information in the base release) and IP address.
1. Run the installation program to install the SSO Filters in each Web server that requires SSO protection. The installation program will ask you the URL of the SSO Security Server and will install the filters that are applicable to your application. Filters are available for the following platforms:
  2. For IIS 5.0, the ISAPI Filter.
  3. For IIS 6.0, the HTTPModule Filter.
  4. For Java Web applications, the Java Filter.
    1. Create and propagate the SSO Certificate from the SSO Security Server to each Web server that requires SSO protection.
2. This can be skipped for test systems by turning off Secure Socket Layer (SSL) in the configuration files.

#### *Manual Installation*

Installing SSO manually involves the following steps:








3. Install the SSO Security Server application in a Java Application Server using the supplied ear or war file (usually sso.war).
4. Update the SSO Security Server configuration files for the uniform resource locators (URL) and Authentication Security domain (Active Directory information in the base release).
5. Install the SSO Filters in each Web server that requires SSO protection.
6. For IIS 5.0, the ISAPI Filter is delivered in the ISAPIFilter directory
7. For IIS 6.0, the HTTPModule Filter is delivered in the NETFilter directory.
8. For Java Web applications, the Java Filter is delivered in the ssofilter.jar file in the JavaFilter directory.
  1. Update the SSO Filter configuration files in each Web server for the URLs to reference the SSO Security Server application.
  1. Create and propagate the SSO Certificate from the SSO Security Server to each Web server that requires SSO protection.
  - 2.
  3. Note: This can be skipped for test systems by turning off SSL in the configuration files.

# Carrier

## To Work with Code Relationships

Note: The Code Relationships window is visible only when the Use Carrier Claims check box is selected on the General System Parameter Setup window: Carrier Claim Settings.

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select Managers.  
The Managers menu opens.
3. From the Managers menu, select Code Relationships.  
The Code Relationships window opens.
4. Complete the fields on the Code Relationships window, as shown below.

<b>Relationship Type</b>	From the drop down list select the relationship type you want to map.
<b>Claim Type</b>	Select the  button to select the claim type from the Code Selection window.
<b>Loss Component</b>	Select the  button to select the loss components from the Code Se
<b>Available</b>	From the list, select the claim type (s)/loss component (s) to save mapping.
<b>Related</b>	Display the claim type (s)/loss component (s) you selected.
	Select the button to add all the available claim types/loss components to the Related field.
	Select the button to add the selected available claim type/loss components to the Related field.
	Select the button to remove all the claim types/loss components from the Related field.
	Select the button to remove the selected claim type/loss component from the Related field.
	Select the save button to save the changes made to the window.

# Carrier

## Carrier Claims Overview

Carrier Claims functionality is included in INSURANCE RISKMASTER X to facilitate carrier claims. To enable this functionality, select the 'Use Carrier Claims' check box on the Carrier Claim Settings tab in Utilities. Once you select this option only General Claims and Worker's Compensation lines of business will be available. Property Claims, Vehicle Accident Claims, and Non-occupational Claims will be disabled.

Using Carrier Claims functionality you can add multiple policies to claims and handle reserves at a policy coverage level. This feature involves several changes to the way handles financials. You should use the financials component of this functionality only if you are a carrier and not a self-insured/self-administered organization. **Carrier fields are not reportable in Business Analytics.**

You can add Subrogation and Demand/Offer details to claims, and enter unit statistical reporting information for worker's compensation claims.

You can also use the Code Relationship window to map between claim types and loss components.

The fields related specifically to this functionality are not available on quick summary.

## Codes Import Window

Use the Codes Import window to import code tables in the form of SQL text files. Importing code table files can save you the trouble of having to create code tables and adding code values to the tables.

**To open** From the Table Maintenance window, in the Code Texts section, select the Import Codes button.

### Field definitions

- Import** Select to import the code table from the code table file.
- Cancel** Select to close the window without importing.
- File** Select the Browse button to open a file browser and then select the code table file you want to import.
- Code Type** Select the code table type you want to import the code table as.
- Edit Description** Select the check box if you want to edit the codes in the code table after importing the file.

## To Work with Code Relationships






Note: The Code Relationships window is visible only when the Use Carrier Claims check box is selected on the General System Parameter Setup window: Carrier Claim Settings.

1. From the main menu, select Utilities.  
The Utilities menu opens.
2. From the Utilities menu, select Managers.  
The Managers menu opens.
3. From the Managers menu, select Code Relationships.  
The Code Relationships window opens.
4. Complete the fields on the Code Relationships window, as shown below.

**Relationship Type** From the drop down list select the relationship type you want to map.

**Claim Type** Select the  button to select the claim type from the Code Selection window.

**Loss Component** Select the  button to select the loss components from the Code Se

<b>Available</b>	From the list, select the claim type (s)/loss component (s) to save mapping.
<b>Related</b>	Display the claim type (s)/loss component (s) you selected.
	Select the button to add all the available claim types/loss components to the Related field.
	Select the button to add the selected available claim type/loss components to the Related field.
	Select the button to remove all the claim types/loss components from the Related field.
	Select the button to remove the selected claim type/loss component from the Related field.
	Select the save button to save the changes made to the window.

## To Set Up Default Department in INSURANCE RISKMASTER Utilities

1. From the Utilities menu, select System Parameters > General System Parameters Setup.  
The General System Parameter Setup window opens.
2. Select the Carrier Claim Settings tab.
3. Select the Auto Populate Department check box.
4. In the Department for Auto Population field, enter the default department, or select the lookup button to select from the Org. Hierarchy.

Once you have entered a default department, the Department field on the Event and Claims windows will not be a required field and you will be able to save events and claims without entering a department. The department you selected here will automatically be used on Event and Claims windows when you save.

5. You can also remove the Department field for Event and Claims windows in PowerView.
6. From the toolbar, select Save.

## To Activate New Carrier Claims Features

By default, new carrier claims features are disabled in . To enable new carrier claims features, you need to obtain an activation code from INSURANCE RISKMASTER Technical Support or your CSC Project Manager.

You must enable new carrier claims features as shown in this section to attach multiple policies to claims and to handle reserves at policy coverage level.

You do not need to enable new carrier claims features to get unit statistical reports or to add subrogation/demand offer data to claims.

### *To Turn on the Carrier Claims setting*

1. From the Utilities menu, select System Parameters > General System Parameters Setup.  
The General System Parameter Setup window opens.
2. Select the Carrier Claim Settings tab.
3. Select the Use Carrier Claims check box.  
An activation code required window opens.
4. Enter the activation code.
5. Select OK.

## To Set Up Unit Statistical Reports in INSURANCE RISKMASTER Utilities

1. From the Utilities menu, select System Parameters > General System Parameters Setup.  
The General System Parameter Setup window opens.
2. Select the Carrier Claim Settings tab.

3. Select the Use Unit Stat check box.  
The Unit Stat tab is added to the Workers Compensation claim window.
4. From the toolbar, select Save.

# Business Analytics

## Business Intelligence Overview

INSURANCE RISKMASTER Business Intelligence uses Business Objects to access and report on the information stored in your INSURANCE RISKMASTER database. Business Objects is the integrated query, reporting, and analytical tool designed for the web and for Windows. Business Objects enterprise reporting enables you to access data, format it, and deliver it as information inside and outside your organization.

INSURANCE RISKMASTER Business Intelligence enables interactive access to claims and loss reports and database information, as well as other business information. You can use INSURANCE RISKMASTER Business Intelligence's drag-and-drop capability to easily create and format reports. Based on your specific needs, you can also customize the simple, organized workspace.

You can use INSURANCE RISKMASTER Business Intelligence with WebIntelligence (WEBI) if you want to use your browser to access reports, or you can use the Business Objects Reporting module to access reports in Windows. WebIntelligence is an analytical reporting tool, designed for the web, that enables you to build reports on corporate data and format presentation level documents

## Introduction

## Business Objects Overview

Business Objects is the primary supported query tool to access your INSURANCE RISKMASTER database. Business Objects presents the data in three hierarchical collections or categories: universes, classes, and objects.

1. A **universe** is a collection of classes for a particular group of users.
2. A **class** is a logical collection of objects. Most classes in Business Objects correspond to a table in the database.
3. An **object** corresponds to a data element, a calculation, or a function based on one or more data elements or INSURANCE RISKMASTER fields. You select objects (data elements) to construct a query on the database. Once the query is performed, the objects are returned with corresponding values.

For the purposes of analysis, objects are classified as:

1. **Dimension objects** retrieve the data that provide the basis for analysis in a report. Dimension objects typically retrieve character-type data, such as employee names, organization names, job titles), or dates (accounting periods, fiscal or calendar years, terms, and so on).
  - **Detail** is always attached to a dimension and provides descriptive data about that dimension. For example, Age is a detail object, associated with Customer dimension. Address provides additional information on customers.
2. **Measure objects** retrieve numeric data, or data that is the result of calculations on data in the database. Measure objects are semantically dynamic, that is the values they return depend on the objects they are used with.

## Key Features

Use Business Objects to:

- Report on data in your INSURANCE RISKMASTER database.
-



- Standardize multiple initiatives on a single platform for significant cost savings.
- Support your business requirements.
- Integrate information in multiple web and non-web user interfaces.
- Create reports using user-friendly drag-and-drop capability.
- Create templates for predefined reports.
- Enter user-friendly data names.

## InfoView User Interface

When you log in to Business Objects to access INSURANCE RISKMASTER Business Intelligence, you open InfoView. InfoView is the portal to the Business Objects business intelligence solution. InfoView window enables you to view, refresh, manage, and distribute WebIntelligence and Business Objects documents from a web browser. It also helps you to share and distribute third-party documents.

- Home window
- InfoView toolbar




### *Home window: Navigation links*

The Home window is the central window of InfoView. From the Home window, you can directly personalize your InfoView window and can go to InfoView inbox. Unless your system administrator creates a default window, the Home window is the first window to open when you log in to InfoView and WebIntelligence.




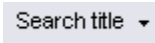
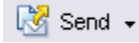



Links	Description
<b>Personalize InfoView now</b>	Select to open Preferences window.
<b>Go to InfoView Inbox</b>	Select to open the InfoView inbox window.

### *InfoView toolbar*

The InfoView toolbar displays across the product. It does not change as you navigate through different portal windows, even when the window contents change. The toolbar includes links to the following windows:

Buttons	Links	Description
	Home	Select to open the Home window.
 My InfoView	My InfoView	Select to open the default My InfoView window. You can personalize your My InfoView window to display data from a variety of sources, on a single web window.
	Preferences	Select to open the Preferences window. You can choose various settings such as view my documents, default navigation view, initial view, InfoView view, my current time zone, my interface locale, desktop intelligence, web intelligence document, OLAP intelligence, crystal reports, password and about and so on.



	Toggle Navigation	Select to open the default My InfoView window.
	Applications	Select to choose
	Create a new item	Select to create the new item from the different types available in list.
	Search option	Select to search for a query.
	Send a document	Select to send the document to different locations available in the list.
	Refresh the Workspace Panel	Select to refresh the workspace panel.
	Help	Select to open the User Guide.
	Log off	Select to log off.

## Web Intelligence Report Panel Overview

To create or edit Web Intelligence documents, you can use one of the following two document editors:

- HTML report panel
- Java report panel

### *Web Intelligence HTML report panel*

If you have basic reporting needs, you can use the wizard-like tabs on the HTML Report Panel to create and format reports. This is ideal for you if you need to access information from partners or suppliers via extranets. No software is downloaded to your computer, when you use the HTML Report Panel.

### *Web Intelligence Java report panel*

If you have sophisticated query, reporting, and analysis needs, you can use the powerful features of the Java Report Panel. This includes the ability to include multiple queries on different data sources (universes) and use formula language to create custom calculations and variables. When you edit or create documents, the Java Report Panel launches in a separate browser window on your desktop. A Java applet is downloaded to your computer the first time you open the WebIntelligence Java Report Panel from InfoView.

## WEBI JAVA Report Panel User Interface

### Web Intelligence Java Report Panel User Interface

To use Web Intelligence, you log into the Business Intelligence portal, InfoView , through your Internet browser.




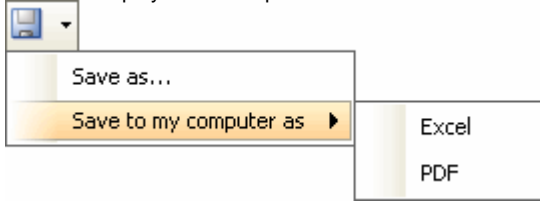

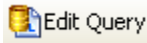





The WebIntelligence toolbar displays the options you need to manage the Java report panel and the document with which you are working.

The Java report panel provides two views of documents:

- Query view, where you can edit the data definition of the entire document.
- Report view, where you edit the data content and formatting of reports.

## The WebIntelligence Toolbar





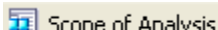






This toolbar displays permanently when you work in the Java report panel.

Button/Tab	Name	Description
	<b>New Document</b>	Select to create a new document on the currently selected universe. Both the query and the reports in the current document are cleared.
	<b>Save</b>	Select to save WebIntelligence documents to your Personal Documents window in InfoView.
	<b>Save As</b>	Select to display the save options. 
	<b>Export to PDF for Printing</b>	Select to generate a copy of individual reports or specific windows to a PDF format file for printing.
	<b>Edit Query</b>	Select to toggle your view of the report panel from Report view to Query view.  <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;">                     Note: You define the data content of the document in Query view.                 </div>
	<b>Edit Report</b>	Select to toggle your view of the report panel from Query view to Report view.  <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;">                     Note: You edit the reports in a document in Report view.                 </div>
	<b>Refresh Data</b>	Select to resend the query to the server and return the latest values from the database to the document. Updated values display in the reports.
	<b>Purge Data</b>	Select to remove the data from the document, but save the document structure (reports, tables, charts, and so on). This enables you to minimize the document size. To return the data to the document, you click Refresh Data.
	<b>Show User Settings</b>	Select to display options to personalize the display properties of the Java report panel.
	<b>Help</b>	Select to display the Help menu with links to online guides, web intelligence help, and information about web intelligence.



## The Query View

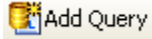
The Query view displays the Query Manager, the Result Objects frame and the Query Filter frame. In the Query Manager, on the left side of the Result Objects and the Query Filter frames, the universe and objects are organized in folders called classes. The objects and classes display in a tree view in the Query Manager.

Button/Tab	Name	Description
 Data	<b>Data tab</b>	Displays the objects available to you on the selected universe.
 Properties	<b>Properties tab</b>	Displays options to optimize and secure the query, as well as to set the order of prompt filters.
 Result Objects	<b>Results Objects frame</b>	Displays the objects included in the document when you run the query.
 Query Filters	<b>Query Filters frame</b>	Displays the filters on the query, including prompt filters.
 Scope of Analysis	<b>Scope of Analysis frame</b>	Displays the level of data behind the reports in the document for drill analysis.
 All Objects	<b>All Objects</b>	Select the option to display the objects and predefined filters available on the universe.
 Hierarchies	<b>Hierarchies</b>	Select the option to display the hierarchical relationship between the dimensions on the universe. The hierarchies are the drill paths for drill analysis.
 Query 1		Displays the different queries within the document.
 Last Refresh Date: June 19, 2007 4:50:53 PM	<b>Status Bar</b>	Displays information on any object selected in the Data tab and displays the data the last time the document data was refreshed.
<b>Query Toolbar</b>		
	<b>Show/Hide Data Manager</b>	Select to show or hide the Query Manager that displays the Data tab, with the objects and hierarchies available on the selected universe. It also displays the Properties tab, where you can set properties for the query, such as limiting the query size and setting security restrictions .
	<b>Show/Hide Filter pane</b>	Select to show or hide the Query Filters frame below the Result Objects frame. You can drag predefined filters or objects, to the Query Filters frame, to add filters on the query. When you drag objects to the Query Filters frame, the Filter Editor displays and enables you to define the filter operator and operand.



**Show/Hide Scope of Analysis pane**

Select to show or hide the Scope of Analysis frame where you define how many levels of data you want to include behind the values displayed in the reports. When you include a scope of analysis, you can drill down on displayed values to analyze more detailed data.



**Add a new query**

Select to insert an additional query into the document. You can define multiple queries on one or multiple universes.



**Add a combined query**

Select to insert a combined query into the document.



**Add a subquery**

Select to add a sub query into the document.



**Add Quick Filter**

Select the Add Quick Filter button to display the list of values associated with the selected object. You can select one or multiple values to define a filter. The filter displays on the Query Filters frame.

Note: This button is active, only when you select an object displayed on the Result Objects frame.



**View SQL**

Select to open the SQL Viewer. The viewer displays the SQL generated by WebIntelligence for the query.



**Run Query**

Select to run the query and retrieve data from the database for your document.

## The Report View

The Report view displays the Report Manager and the reports frame.

Button/Tab	Name	Description
Data	Data tab	Displays the objects and variables included in the document.
Templates	Templates tab	Displays the templates for tables, charts, and free-standing cells.
Properties	Properties tab	Displays options to optimize and secure the query, as well as to set the order of prompt filters.
Map	Map tab	Displays links to the different reports and report elements in the document, for easy navigation.
	Formula toolbar	Select to insert custom formulas into report cells. Use to create variables, clear changes and validate formula.

**Report Filters Applied to: Report 1**

Department Name	Claim Number	Claim Type	Claim Status	Description
Administration	GCCL1996000011	CL	CL	(en) Court case in to Police Administration to p
	VCI199600010	MD	CL	(en) Employee was running down corridor trying to
	VCI199600013	LT	O	Fall off ladder, reaching to replace light bulb at
<b>Administrations</b>				
Ambulatory Care	000037	IST	O	
	000002222	PRETY	O	
		END	O	
<b>Ambulatory Care</b>				
Assisting	000000047	STD	O	
				Assisting letter table to perform as designed caus
				(en) Assisting letter discharged had grease catch

**Report Filters frame**

Displays filters on the current report. To create new filters, you drag objects here and then define filter operators and values in the Filter Editor.

**Document frame**

Displays the reports in the documents.

**Report Toolbar**



**Show/Hide Filter**

Select to show or hide the Report Filters frame. You can drag objects to the Data tab, to add filters on the report. When you drag objects to the Report Filters frame, the Filter Editor displays and enables you to define the filter operator and operand.



**Show/Hide Formula toolbar**

Select to show or hide the Formula toolbar where you can enter custom formulas to add them to report cells. You can also use the Formula Editor to create formulas.



**Show/Hide Variable Editor**

Select to show or hide the Variable Editor, where you can use a graphical interface to create custom formulas and save the formulas as variables for re-use on different reports in the same document.



**Show/Hide Drill Toolbar**

Select to show or hide the drill toolbar. During drill analysis, you can drag objects onto the Drill toolbar to create list boxes that display the values for each object. You can select values to filter the objects you are analyzing.

Note: This button is activate when you start the Drill mode.



**Undo**

Select to cancel the previous formatting modification.

Note: You cannot undo changes to the query definition or undo refresh.



**Alerters**

Select to create, modify, or apply alerters to report cells. Alerters activate conditional formatting on report cells where results meet the conditions you specify.



**Add Quick Filter**

Select the Add Quick Filter button to display the list of values associated with the selected object. You can select one or multiple values to define a filter, on the object, and apply the filter to a selected report, block, or section. The filter displays on the Report Filters frame.

Note: This button is active when you select an object displayed on the Result Objects frame.



**Insert/Remove Break**

Select to insert or remove a break on a table column or row.



**Apply/Remove Ranking**

Select to apply ranking on a section or a block on table.

Select to open

and from the pop-up menu select the Apply/Remove Ranking option.



**Insert/Remove Sort**

Select to insert or remove a sort on a table.

Select to open

and from the pop-up menu select the Ascending/Descending sort option to specify the sort order.

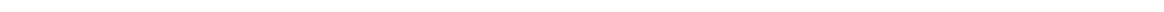


**Insert Sum**

Select to insert a sum calculation for the selected row or column.

Select to open


and from the pop-up menu, select the calculation you can insert for the selected row or column. Each calculation is inserted in a new footer.

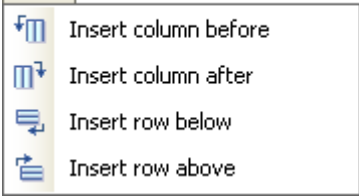




**Insert**

Select to insert a new table row or column in the report table.

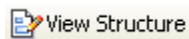
Select  to open



and from the pop-up menu, select the command to insert additional rows below/above an existing row or to insert additional columns before/after an existing column.

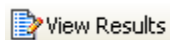
**View window Layout**

Select to toggle between window Layout and Normal views of the current report.

**View Structure/View Results**

Select to toggle between the view of the structure of the report and the results.

- **Structure View** enables you to modify reports and preview your modifications without implementing the changes on the WebIntelligence server.
- **Results View** implements the modifications and displays the values and formatting on the report tables and charts.

**Drill**

Select to start/end Drill mode. You can analyze report values by drilling down or across the dimensions displayed in the tables and charts, to see more detailed slices of data.

**Take Snapshot of Drilled Report**

Select to make a duplicate of the drilled report so that you can keep a copy of the drilled values in the same document.

**window navigation**

Select the arrows or enter a window number in the box to navigate to specific windows in a document.

## Getting Started

### To Log On and Log Off

You can access InfoView through your web browser. Before you can use InfoView and WebIntelligence, contact your system administrator for the following information:

- A URL to the InfoView server or INSURANCE RISKMASTER Business Intelligence URL
- Your user name and password

*To log on*

1. Launch your Internet Browser.
2. Enter the INSURANCE RISKMASTER Business Intelligence URL (InfoView server URL) and press Enter on your keyboard. The Business Objects Log On to InfoView window opens.

**Log On to InfoView**

**Welcome to BusinessObjects**

**Enter your user information and click Log On.**  
(if you are unsure of your account information, contact your system administrator)

System:

User name:


Password:

Authentication:

**Log On**

3. In the System field, enter your system name.
4. In the User Name field, enter your user name.
5. In the Password field, enter your password.
6. From the Authentication drop down list, select the authentication type.
7. Select the Log On button.  
InfoView opens and displays the Home window.

*To log out*

1. From the InfoView toolbar, select Log Off button .  
The Home window closes and the Business Objects Log On to InfoView window displays.


## To Search for Documents

*To search based on document fields, title and keywords*

1. To search for documents, on the InfoView Home window, select the Search title button.  
A pop-up menu opens.

**Note:** The button name changes, such as Search all fields or Search keyword, based on the option you choose from the pop-up menu.

2. From the pop-up menu, do one of the following:
  - To search document based on fields in the document, choose Search all fields and in the field enter field name.
  - To search document by title, choose Search title and in the field enter document title.
  - To search document based on a keyword, choose Search keyword and in the field enter document keyword.

3. Select the Execute Search button .  
The Search Results window opens and displays all the documents that meet your specified search criteria.

#### *To use advanced search*

You can enter specific search criteria and restrict the results that display on your Search Results window.


1. To enter specific search criteria, select the Search title button.  
A pop-up menu opens.
2. From the pop-up menu, choose Advanced Search.  
The Advanced Search window opens.
3. From the Select by Location field, select the check box for the folder or category in which you want to search for your document.
4. In the Select by Keyword field, enter document keyword.
5. In the Select by Title field, enter the document title.
6. In the Select by Description field, enter the text that you previously entered in the document properties.
7. In the Select by Owner field, enter the user name who created the document.
8. From the Select by Type drop down list, select the document type.
9. From the Search by Date Range field, do one of the following:
  - Select the Don't search by time option, if you do not want to search the document based on time.
  - Select the Search Using Last Update Time option, if you want to search the document based on the time it was last updated.
10. To search for document within a time and date range, in the Start field, select the start date from the calendar and select the start time.
11. In the End field, select the end date from the calendar and select the end time.
12. Select the Search button.  
The Advanced Search Results window opens and displays all the documents that meet your advanced search criteria.

## To Work with Default Universe

You can select to use the same universe as default, each time you create a new document. After you select a default universe, the Web Intelligence report panel opens directly.


**Note:** If you have no default universe, then the New Web Intelligence Document window opens.

#### *To set a default universe*

1. From the InfoView toolbar, select the Preferences button .  
The Preferences window opens.
2. Select the Web Intelligence Document tab.
3. From the Select default Universe field, select the Browse button.  
The Select default Universe window opens.
4. Select the option for the universe you want to select as your default universe for new documents.
5. Select OK.

**Note:** When you select new Web Intelligence Document on the InfoView Home window, the default universe displays automatically in the Web Intelligence report panel.


#### *To remove a default universe*

1. From the InfoView toolbar, select the Preferences button .  
The Preferences window opens.

2. Select the Web Intelligence Document tab.
3. From the Select default Universe field, select the Browse button.  
The Select default Universe window opens.
4. Select No default universe option.
5. Select OK.

Note: When you select new Web Intelligence Document on the InfoView Home window, you will be prompted to select a universe.

## To View Universe List

1. On the InfoView Home window, select  button and from the drop down list, select Web Intelligence Document link.  
The New Web Intelligence Document window opens.



Universe	Owner	Folder
eFashion	Administrator	
Island Resorts Marketing	Administrator	
RCT Audit Universe	Administrator	/Report Conversion Tool Universes
Riskmaster	Administrator	

2. To open a universe in the Web Intelligence document, select the link for the universe.  
The Web Intelligence Java report panel opens and displays the classes and objects in the universe.

## Creating Query

### Query Overview

A query is one or more statements that request data from a database. If the data is available, WebIntelligence by default returns the requested data in a tabular format. Queries are sent to the databases in Structured Query Language (SQL).

The Web Intelligence report panel presents the information available in the database as objects. These objects are organized in a structure called a universe, and you combine the objects in a universe to build queries. The universe translates the objects presented in your business language to SQL, and then sends the request for information to the database. The data is returned to the WebIntelligence report panel and presented in a table form, with columns that have the same names as the objects that you use in the query. The data is arranged in rows.

You can set query properties to optimize the time taken for the query to run, or the amount of data returned, set security options, specify the order of prompts in the report, and control potential ambiguous query results.

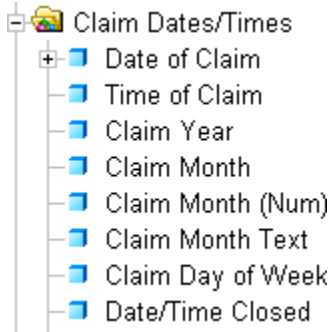
### Scope of Analysis Overview

The scope of analysis for a query enables you to retrieve extra data from the database, to give more details on the data returned by each of the objects in a query. In the universe, the scope of analysis corresponds to the hierarchical levels below the object you select for a query. For example, a scope of analysis of one level down for the object Year, would include the object Quarter, which displays immediately under Year. You can set this level when you build a query.

The query includes objects lower down the hierarchy that do not display in the Results Objects frame. The hierarchies in a universe allow you to choose your scope of analysis, and correspondingly the level of drill available. The data necessary for the scope you specify is saved with the document, even though it does not display in the report, unless you start drill mode and drill down to the data to display the corresponding values.

You can add these objects to the reports at any time, without the need to run the query again. You can also manually select specific objects to create a custom scope of analysis.

You can set the following levels for scope of analysis:


Level	Description
None	Only objects that display in the Result Objects frame are included in the query.
One level down	For each object in the Result Objects frame, one, two, or three objects lower down the hierarchy tree are included in the query. The data from these objects is stored in the data cube until you add them to the document. For example:
Two levels down	
Three levels down	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  <p>Claim Dates/Times</p> <ul style="list-style-type: none"> <li>+ Date of Claim</li> <li>Time of Claim</li> <li>Claim Year</li> <li>Claim Month</li> <li>Claim Month (Num)</li> <li>Claim Month Text</li> <li>Claim Day of Week</li> <li>Date/Time Closed</li> </ul> </div> <div style="flex: 1; padding-left: 20px;"> <p>Level one includes:</p> <p>Date of Claim</p> <p>Level two includes:</p> <p>Date of Claim and Time of Claim</p> <p>Level three includes:</p> <p>Date of Claim, Time of Claim and Claim Year</p> </div> </div>
Custom	The query includes all objects you manually add to the Scope of Analysis frame.


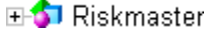
Note: CSC recommends you only include necessary objects in the scope of analysis, to minimize the size of documents and optimize performance.

## How To

### To Select Objects for your Query

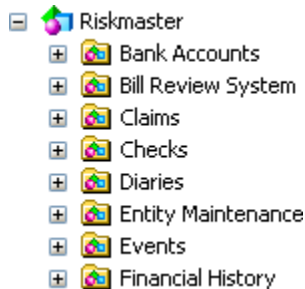
You can use objects in a universe to run queries to access data in your database. You can add objects in Query view.


Note: To open Query view, from the WebIntelligence toolbar, select the EditQuery button  Edit Query.

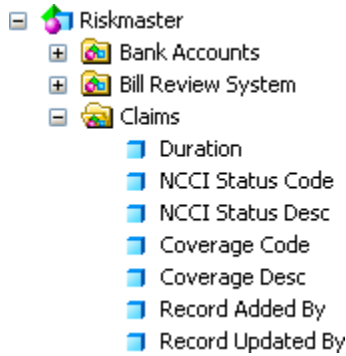
- From the Query Manager: Data tab, select the  button next to the universe name.  
 Riskmaster

Note: You can also double click the universe name.

The navigation tree expands and displays the class folders under the universe.

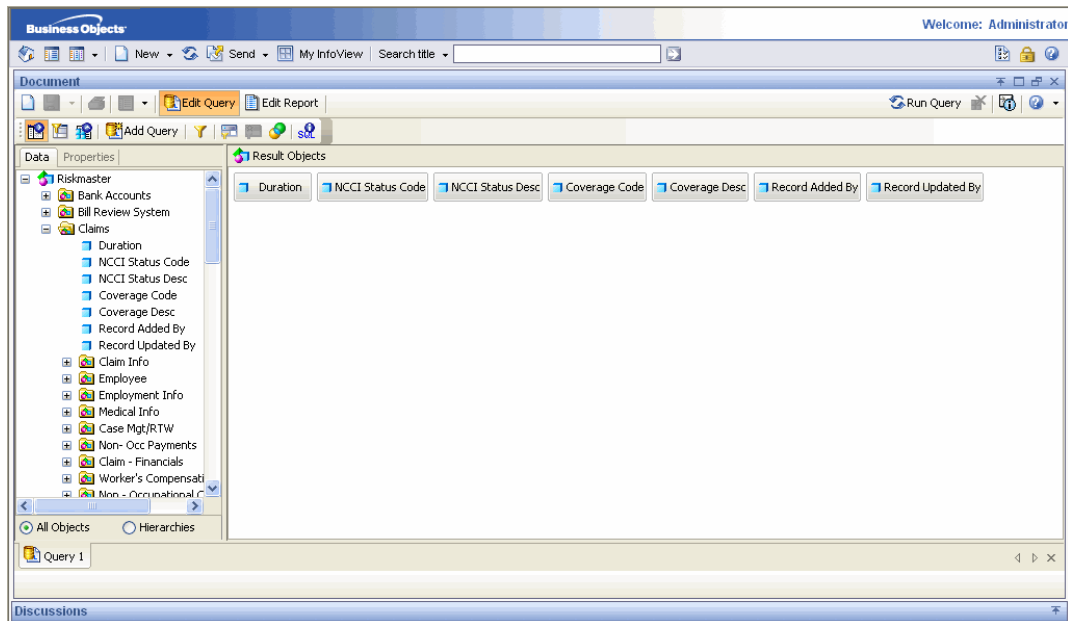


- Select the  button next to a class folder from which you want to select objects. The navigation tree expands and displays the objects.



Note: To collapse a class and hide the objects, select the  button next to a class.

- From the Query Manager, select an object and drag it to the ResultObjects frame. The objects you select from a class display in the Report Objects frame.




- To delete an object from your query, do one of the following:
  - From the Report Objects frame, select the object, and drag and drop onto the Data tab.
  - From the Report Objects frame, select the object, and press Delete on your keyboard.

The object you select does not display in the Report Objects frame.

### To Select Organization Hierarchy for your Query

You can also add organization hierarchy to your query. You can add organization hierarchy in Query View.




Note: To go to Query view, from the WebIntelligence toolbar, select the  Edit Query button.

- On the Query Manager: Data tab, select the Hierarchies option.



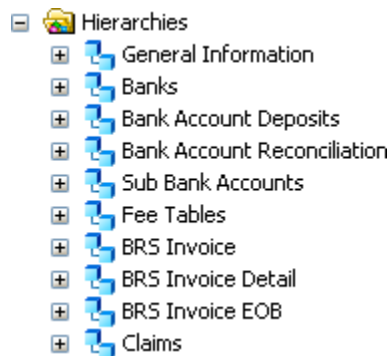
Note: The All Objects option is selected by default.

The Hierarchy navigation tree displays in the Query view.

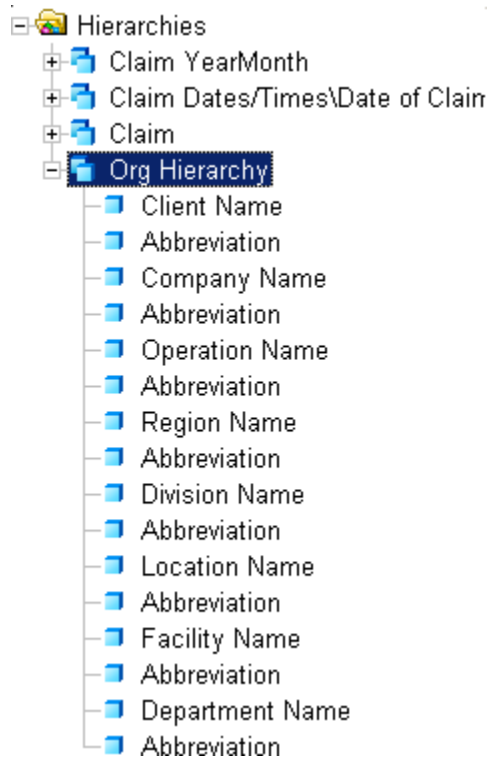
- From the Query Manager: Data tab, select the  button next to hierarchies.  
  Hierarchies

Note: You can also double click the hierarchies name.

The navigation tree expands and displays the class folders under the hierarchy.



- Next to Org Hierarchy, select the  button.  
 The navigation tree expands and displays the levels in the organizational hierarchy.




- From the Org Hierarchy tree, select the level you want to include in your query, and drag it to the Result Objects frame.  
 The level you select from the organizational hierarchy, displays in the Report Objects frame.
- To delete an organizational hierarchy from your query, do one of the following:


- From the Report Objects frame, select the levels, and drag and drop onto the Data tab.
- From the Report Objects frame, select the level, and press Delete on your keyboard.

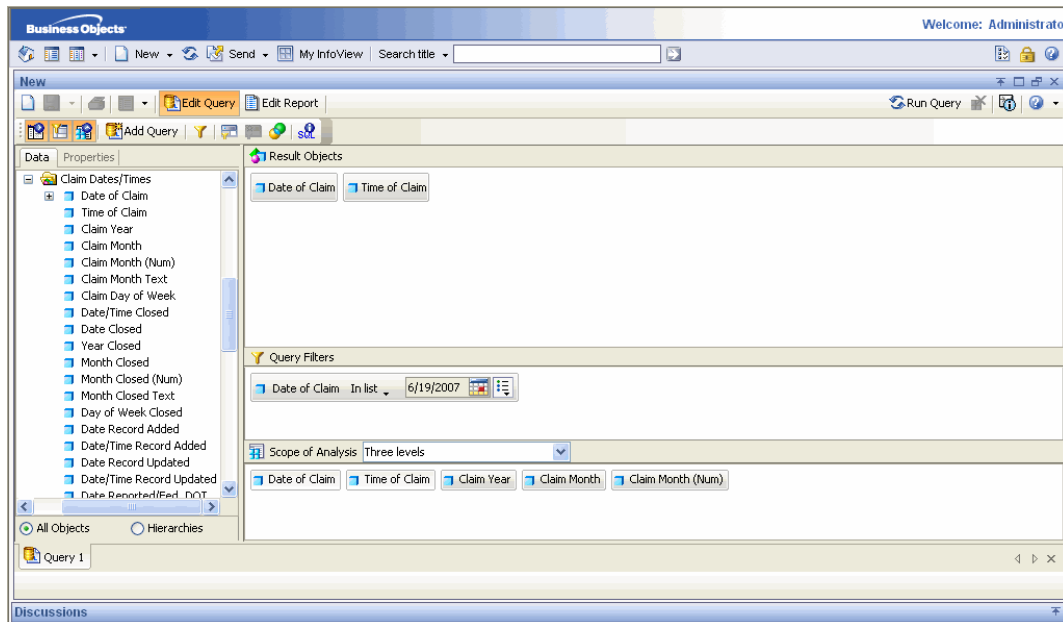
The level you select does not display in the Report Objects frame.

## To Set Up the Scope of Analysis

You can specify the scope of analysis to retrieve extra data from the database and provide more details on the data, WebIntelligence return for each of the objects in a query. You can specify the scope of analysis in the Query view.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query.

1. On the Query Manager, from the toolbar, select the Show/Hide Scope of Analysis Pane button . The Scope of Analysis frame opens and displays each object you added in the Result Objects frame.




Note: The Scope of Analysis displays the default scope of analysis as None.

2. To add hierarchical levels below the object, from the Scope of Analysis drop down list, select the level. The selected level displays in the drop down list, and the objects that are hierarchically below each object in the Result Objects frame, displays in the Scope of Analysis frame.
3. To add selected objects to the scope of analysis or create a custom scope of analysis, from the Scope of Analysis drop down list, select the Custom.
4. From the Query Manager, select the object you want to use and drag to the Scope of Analysis frame.
5. To remove your selection, from the Scope of Analysis drop down list, select None.

## To Define Query Properties

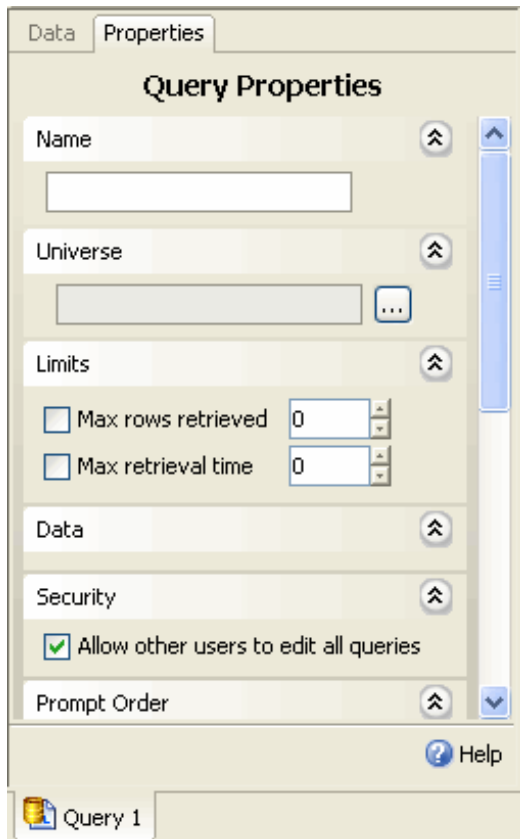
In Query view, you can define query properties on the Query Manager: Properties tab.



Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query.


1. On the Query Manager, after you select the objects you want to include in your query, select the Properties tab.





The Query Manager: Properties tab opens.



Note: Select the  button to view the check boxes for the property you want to set. To close the check box display, select the  button.

2. In the Name frame, in the field, enter a name for the query.  
The name displays on the Query tab at the bottom of the window.
3. To select the universe from the Universe window, in the Universe frame, select  button.
4. In the Limits frame, select Max rows retrieved check box and in the field enter the maximum number of rows of data you want the query to return when you run it.

Note: The security permissions your system administrator sets for you overrides the max rows retrieved setting you enter. For example, if you enter 400 rows in the Max rows retrieved field, but your security profile limits you to 200 rows, when you run the query, only 200 rows of data are retrieved.

5. In the Limits frame, select Max retrieval time check box and in the field enter the maximum time you want the query to run before the query stops.
6. In the Data frame, select Retrieve duplicate rows check box, to enable WebIntelligence to retrieve data all rows, including rows with duplicate data.
7. In the Security frame, select Allow other users to edit all queries check box, to enable all users with assigned editing rights, to edit all the queries in your report.
8. In the Prompt Order frame, from the field, select the prompt for which you want to change the order and select the  or the  button to move the prompt up or down.

Note: Prompts are dynamic filters that display a question or a list of values each time you refresh the report data in a WebIntelligence document.

9. In the Context frame, select the Reset contexts on refresh check box, to choose a context each time you run a query requiring a context.

Note: A context is a defined group of objects that share a common business purpose, such as type of information the objects in a query represent.

- 10. To remove all selected contexts from the context list, select the Clear Contexts button.

## Field Help

### Query Manager: Properties Tab

**To open** In Query view, on the Query Manager, select the Properties tab.

#### Field definitions



Select the button to view the check boxes for a query property you want to set.



Select the button to close the check box display for a query property.


#### Name

Displays the default query name.

Enter a name for the query if you want to change the default query name.

Note: The name displays on the Query tab at the bottom of the window.

#### Universe

Select the  button to select the universe from the Universe window.

#### Limits

##### Max rows retrieved

Select the check box and in the field enter the maximum number of rows of data you want the query to return.

Note: The security permissions your system administrator sets for you overrides the max rows retrieved setting you enter. For example, if you enter 400 rows in the Max rows retrieved field, but your security profile limits you to 200 rows, when you run the query, only 200 rows of data are retrieved.

##### Max retrieval time

Select the check box and in the field enter the maximum time you want the query to run before the query stops.

#### Data

##### Retrieve duplicate rows



Select the check box, if you want to retrieve all rows, including rows with duplicate data, when you run the query.

#### Security

##### Allow other users to edit all queries

Select the check box to enable all users with assigned editing rights, to edit all the queries in your report.

##### Prompt Order

Select the prompt for which you want to change the order and select  or the  button to move the prompt up or down.

Note: Prompts are dynamic filters that display a question or a list of values each time you refresh the report data in a WebIntelligence document.

#### Contexts

##### Reset contexts on refresh

Select the check box, to choose a context each time you run a query requiring a context.

Note: A context is a defined group of objects that share a common business purpose, such as type of information the objects in a query represent.

**Clear Contexts**      Select the button to remove all selected contexts from the context list.

**Help**                Select to open the WebIntelligence online help.

## Working with Query Filters

### Query Filters Overview

You can define filters on a query to limit the data returned to a document for a specific business focus. For example, you can filter the query to return data for a specific customer group or time period. You can include three types of query filter:

- Predefined filters
- Custom filters
- Prompt filters

You can combine all three types of filters on a single query.

Query filters retrieve a sub set of the data from the database and return the corresponding values to the document. For example, you can filter the [Year] object to view only claims for Year 2006, or filter the [Reserve Amount Sum] dimension to view only claims with current reserve sum equal to or greater than \$10000.

You can use query filters on the data definition of the query to:





- Keep document data relevant to a specific business question
- Minimize the size of quantity of data returned to the document to optimize performance
- Reduce the run time for reports
- Hide the data for specific users

To create a filter, you need to specify three elements:

- Filtered object
- Operator
- Value(s)

When you run the query, WebIntelligence applies the operator to the filtered object and retrieves the value(s) from the database that corresponds to the value(s) you specify.

You can define custom query filters on any dimension, measure, or detail object that displays on the Data tab in Query view. You can also use predefined filters that your administrator creates at the universe level. Predefined filters display as follows:

-  Current Calendar Year
-  General Claim
-  Vehicle Accident
-  Workers Comp

Note: You can apply filters at two levels within a document: query filters and report filters. Report filters limit the values that display on reports, tables, charts, sections within the document, but do not modify the data retrieved from the data source.

## Operators Overview

Use operators to link various objects in a query filter. You can use the following operators:

Operator	Example
Equal to	[Claim Number] Equal to 24689.
Not Equal to	[LOB ] Equal to Non-Occupational.
Greater than	[Dependant Age] Greater than 18.
Greater than or Equal to	[Reserve ] Greater than or equal to 10000.
Less than	[Employee Age] Less than 65.
Less than or Equal to	[Collection amount] Greater than or equal to 10000.
Between	[Claim Year] Between 2000 to 2005
Not Between	[Event Year] Not Between 1999 to 2000
In list	[Jurisdiction ] In list 'Michigan; Texas; Florida'
Not in list	[Jurisdiction] Not in list 'Michigan; Texas; Florida'
Is null	Dependants (Is null), i.e. No data is entered for Dependants in the database.
Is not null	Dependants (Is not null), i.e. Data is entered for Dependants in the database.
Matches pattern	[DOB] Matches pattern, '72'
Different from pattern	[DOB] Different from pattern, '72'
Both	[Reserve Type] Both "indemnity" and "medical"
Except	[Funds ] Except "Reserves" and "Payments"

## Prompts Overview

A prompt is a dynamic filter that displays a question every time you refresh the data in a document. You can either enter an answer for the prompt or select the value(s) you want to view before you refresh the data.

WebIntelligence retrieves only the values you specify from the database and returns those values to the reports within the document. Use prompts to enable multiple users to specify different subsets of database information on a single document, and display it in the same report tables and charts.

Prompts for multiple queries are merged when the following three parameters in the prompts are the same:


- The objects are the same data type, such as string, date, or numeric.
- The operators are the same operator type
- The prompt text message or question is the exactly the same












When you refresh multiple queries with prompts with same parameters, only one prompt message displays.

## How To

### To Use Predefined Filters

Use predefined filters to make the specific data you typically need for reports permanently available on the WebIntelligence Query Manager: Data tab. Your system administrator creates and edits predefined filters and you cannot view the component parts of predefined filters or edit predefined filters.


Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query .

1. Select objects for your query.
2. To view the Query Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button  .
3. On the Query Manager, expand the navigation tree for the object for which you want to view predefined queries.
  -  Qtr3 Start Date
  -  Qtr3 End Date
  -  Qtr4 Start Date
  -  Qtr4 End Date
  -  Week End Day
  -  Num Periods
  -  Current Calendar Year
  -  General Claim
  -  Vehicle Accident
  -  Workers Comp
4. Select a predefined filter and drag it to the Query Filters frame.  
The predefined filter you select, display in the Query Filters frame.



Note: When you run the query, WebIntelligence returns the data corresponding to the query filter(s) you select.

### To Use the Quick Filter to Create Custom Filters

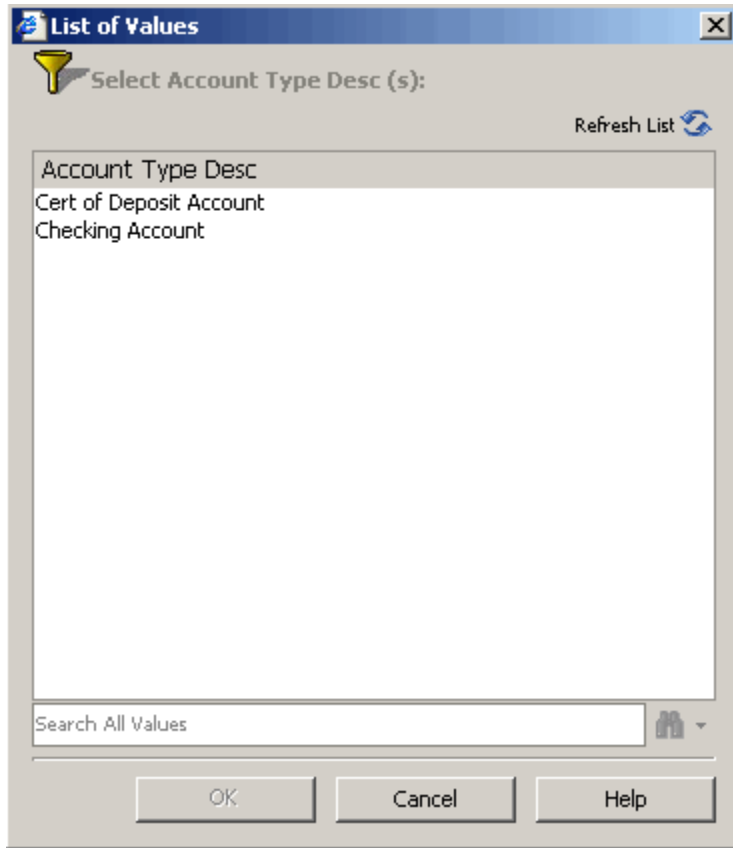
Use custom query filters to limit document data to information corresponding to a specific business question or the business information needs of a specific group of users. In Query view, you can use Quick filters to quickly select one or multiple values from a list of value(s). By default, Quick filters use the Equal to operator if you select a single value or the In list operator if you select multiple values.




Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query .

To use the quick filter to create custom filters

1. Select objects for your query.
2. To view the Query Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button  .
3. On the Result Objects frame, select the object you want to filter and from the WebIntelligence toolbar, select the Add Quick Filter button  .

The List of Values window opens and displays the values for the selected object.




4. Select the value(s) you want to retrieve from the database.
5. To find a specific value, for example all values that contain the number 7, enter 7 in the Search All Values field.
6. Next to the  button, select the  button.  
A pop-up menu opens.
7. From the pop-up menu, choose whether you want to match the upper or lower case of the value you enter, or search all possible value.
8. Select the  button.  
All values that contain the specific value display in the object name field.
9. To refresh the value list, select the Refresh List button.
10. Select OK.  
The new filter displays in the Query Filters frame.

**Note:** When you run the query, WebIntelligence returns the data corresponding to the query filter(s) you select.


## To Work with Query Filters

In Query view, you can edit and delete the filters on queries.


**Note:** To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query .

To edit a query filter

1. Search for the document from which you want to delete a query filter.


2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button .  
The Query Filters frame displays the query filters and prompts.
4. Edit the information in the Query Filters frame.
5. Select OK.  
The modified query filter displays in the Query Filters frame.

#### To delete a query filter


1. Search for the document from which you want to delete a query filter.
  2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
  3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button .  
The Query Filters frame displays the query filters and prompts.
  4. To delete a filter from your query, do one of the following:
    - From the Query Filters frame, select the query, and drag and drop onto the Query Manager.
    - From the Query Filters frame, select the query, and press Delete on your keyboard.
- The filter does not display in the Query Filters frame.

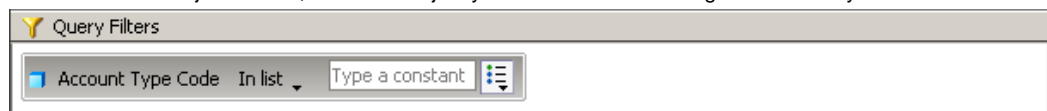
### To Use the Filter Editor to Create Custom Filters

Use custom query filters to limit document data to information corresponding to a specific business question or the business information needs of a specific group of users. In Query view, you can use Quick filters to quickly select one or multiple values from a list of value(s). By default, Quick filters use the Equal to operator if you select a single value or the In list operator if you select multiple values.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button .

#### To use the filter editor to create custom filters


1. Select objects for your query.
2. To view the Query Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button .
3. From the Result Objects frame, select the object you want to filter and drag it to the Query Filters frame.

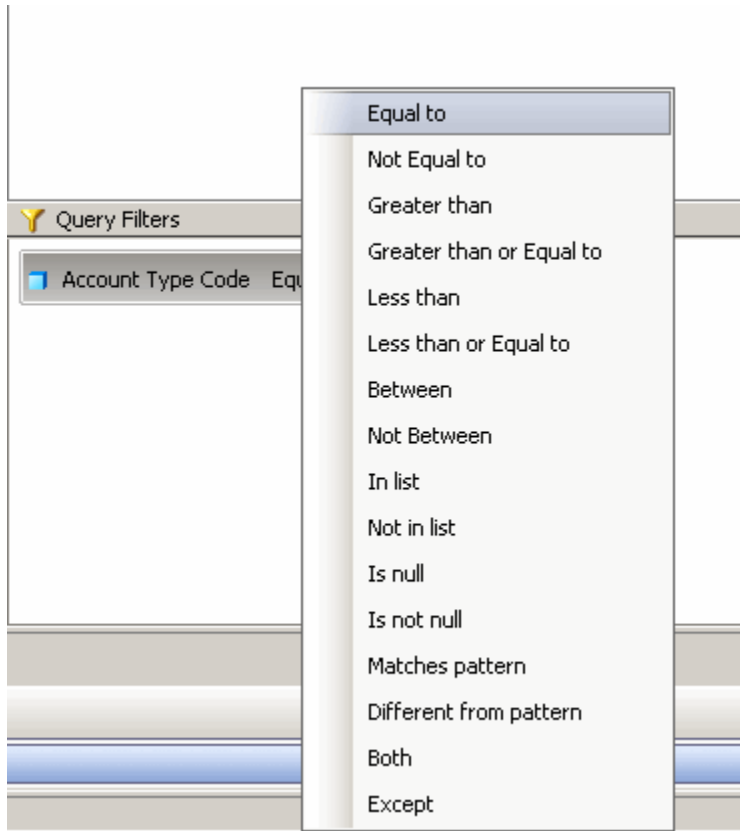


4. To create a custom filter on the selected object, you can do one of the following:
  - Select an operator and enter a constant
  - Select an operator and select Value(s) from list
  - Select an operator and select objects and variables
5. Select the Run Query button.  
WebIntelligence returns the data corresponding to the query filter(s) you select.


#### To select an operator

In the Query Filters frame, you can select an operator for an object.

1. To view all available operators, on the displayed object, next to the operator name, select the  button. A pop-up menu opens and displays a list of operators you can apply to your query filters.




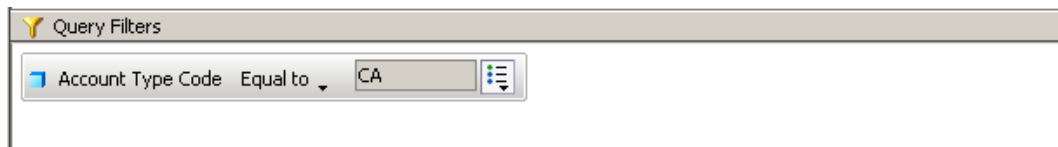
2. From the pop-up menu, choose an operator.

Note: The name of the operator you select displays next to the  button.

#### To enter a constant

After you select an operator, you can enter a constant value, such as the names of months or numbers for specific years, for an object.

1. On the displayed object, select the  button. A pop-up menu opens.
2. From the pop-up menu, choose Constant.
3. In the Type a constant field, enter a constant value.




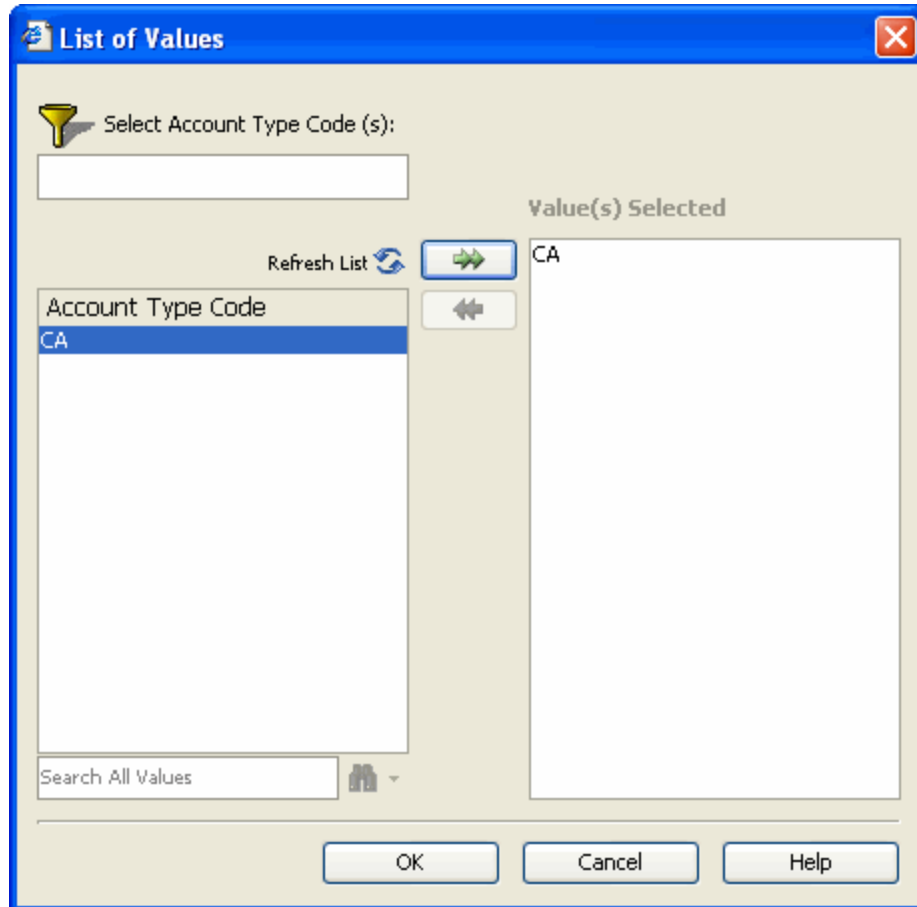
The Query Filter is created as a combination of the operator and the constant value.





#### To select Value(s) from list

After you select an operator, you can select a value from a list, to use with the operator.




1. On the displayed object, select the  button.  
A pop-up menu opens.
2. From the pop-up menu, choose Value(s) from list.  
The List of Values window for the selected object displays.

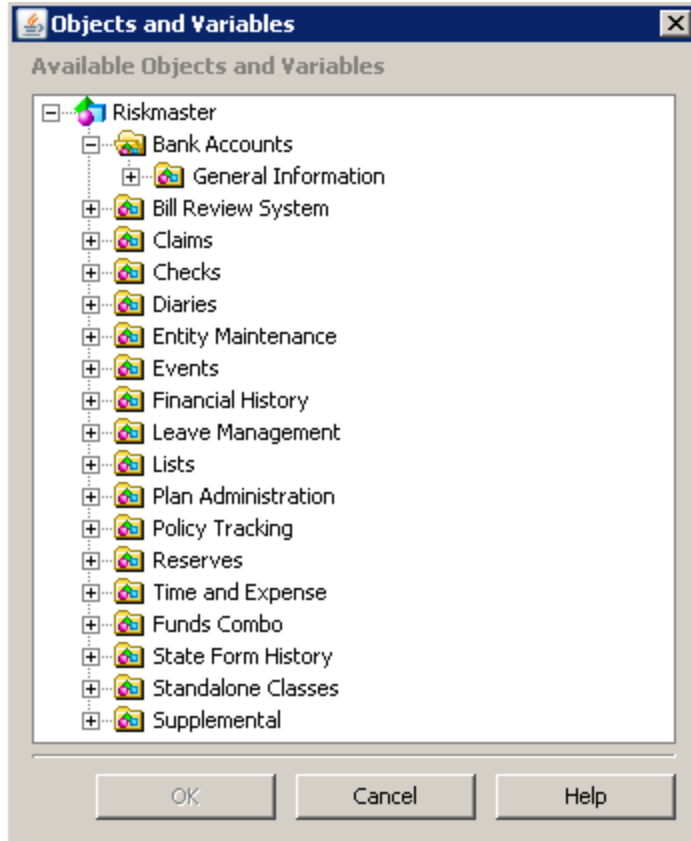


3. From the list of values for the object, select the value(s) you want to use and select the  button.  
The value you select, displays in the Value(s) Selected field.
4. To find a specific value, for example all values that contain the number 7, enter 7 in the Search for Values field.
5. Next to the  button, select the  button.  
A pop-up menu opens.
6. From the pop-up menu, choose whether you want to match the upper or lower case of the value you enter, or search all possible value.
7. Select the  button.  
All values that contain the specific value display in the object name field.
8. To refresh the value list, select the Refresh List button.
9. Select OK.  
The Query Filter is created as a combination of the operator and the constant value.

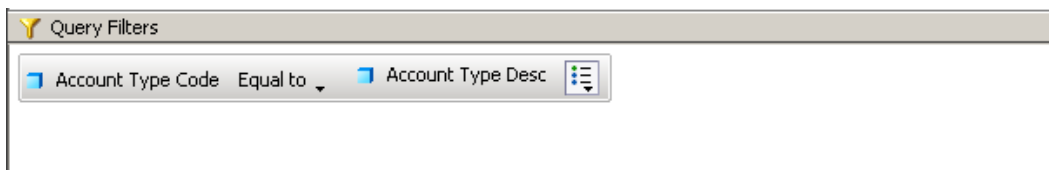
To select objects and variables

After you select an operator, you can select an object or variable, to use with the operator.

1. On the displayed object, select the  button.  
A pop-up menu opens.
2. From the pop-up menu, choose Object.  
The Object and Variables window opens.



3. Navigate and select the object or variable that you want to use in your query filter.  
The selected object or variable displays next to the object in the Query Filter frame.




The Query Filter is created as a combination of the operator and the selected object or variable.



## To Create Prompts


Use prompts to enable multiple users to specify different subsets of database information on a single document, and display it in the same report tables and charts.


In Query view, you can use Filter Editor to build prompts and select how you want to display the prompts.



Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button .

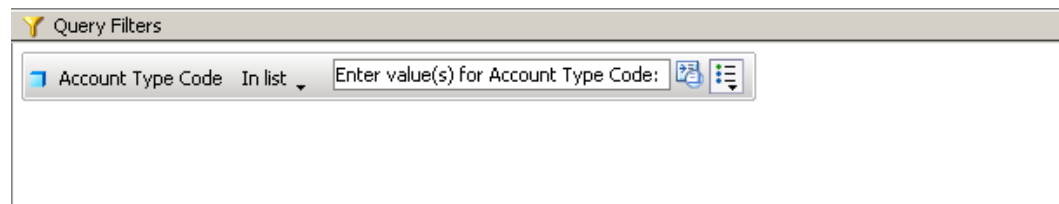
1. Select objects for your query.


2. To view the Query Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button .
3. From the Result Objects frame, select the object on which you want to apply a prompt and drag it to the Query Filters frame.
4. To view all available operators, on the displayed object, next to the operator name, select the  button. A pop-up menu opens and displays a list of operators you can apply to your prompt.
5. From the pop-up menu, choose an operator.

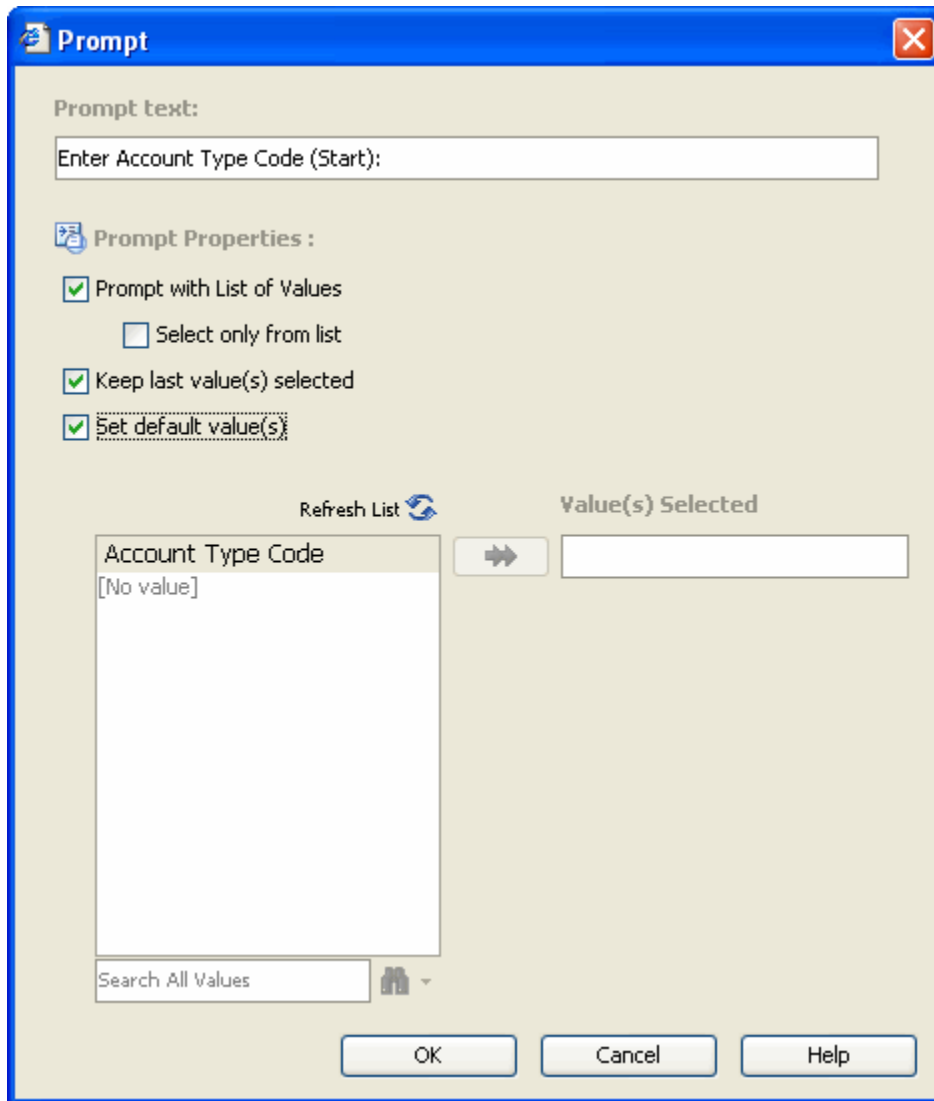
Note: You cannot use the following operators for prompts: Is null, Is not null, Both, and Except. The name of the operator you select displays next to the  button.

6. On the displayed object, select the  button. A pop-up menu opens.
7. From the pop-up menu, choose Prompt.

The blank field displays Enter value(s) for (object name) and the button  displays next to the  button.







8. To select prompt properties, select the  button. The Prompt window opens.



9. In the Prompt Text field, enter the message or question you want the prompt to display.
10. To display the entire list of values associated with the filtered object, select the Prompt with List of Values check box.
11. To display the value(s) you specified the last time you answered the prompt, select the Keep last value(s) selected check box.


**Note:** You can select additional or different value(s) also.

12. To display the value(s) you specify as default, select the Set default value(s) check box.  
The blank field displays the values for the selected object, based on the prompt properties you selected.
13. From the field, select the value(s) you want to use and select the  button.  
The value you select, displays in the Value(s) Selected field.
14. To find a specific value, for example all values that contain the number 7, enter 7 in the Search for Values field.
15. Next to the  button, select the  button.  
A pop-up menu opens.
16. From the pop-up menu, choose whether you want to match the upper or lower case of the value you enter, or search all possible value.



17. Select the  button.  
All values that contain the specific value display in the object name field.
18. To refresh the value list, select the Refresh List button.
19. To display only a list of values that exist in the database, select the Select only from List check box.
20. Select OK.  
Each time you run the query or refresh the document the Prompts window opens.

## To Work with Prompts



In Query view, when you select multiple prompts, you can prioritize the order of prompts. You can also edit and delete the filters on queries.



Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button .

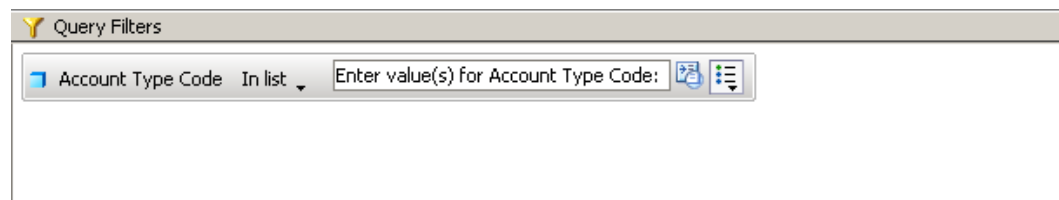
### To set prompt order


1. Search for the document for which you want to set the prompt order.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. On the Query Manager, select the Properties tab.  
The Queries Manager: Properties tab opens.
4. In the Prompt Order frame, from the field, select a prompt and then select the  and  button to move the prompt up or down.  
When you select Run Query or refresh the document data, the prompts display in the new order you specify.

### To edit a prompt

1. Search for the document for which you want to set the prompt order.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button .
4. On the displayed object, select the  button.  
A pop-up menu opens.
5. From the pop-up menu, choose Prompt.


The blank field displays Enter value(s) for (object name) and the button  displays next to the  button.



6. To select prompt properties, select the  button.  
The Prompt window opens.
7. Edit the information in the fields on the Prompt window.

8. Select OK.

To delete a prompt

1. Search for the document to which you want to set the prompt order.
2. On the Search Results window, select the Modify link to view the Query Manager for the document. The Query Manager opens.
3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button . The Query Filters frame displays the query prompts.
4. To delete a filter from your query, do one of the following:
  - From the Query Filters frame, select the prompt, and drag and drop onto the Query Manager.
  - From the Query Filters frame, select the prompt, and press Delete on your keyboard.

The prompt does not display in the Query Filters frame.

## Field Help

### Filter Editor Window

**To open** From the Result Objects frame, select the object you want to filter and drag it to the Query Filters frame.

### Field definitions

**Filtered Objects** Displays the object name for which you want to create a query filter.



From the drop down list, select the operator you want to apply to objects to filter required data.



- Select the Constant option if you know the exact spelling or name of the data you want to filter.
- Select the Value(s) from List option if you do not know the exact spelling or name of the value(s) you want to filter.
- Select the Prompt option to create a prompt.

#### *Fields for Constant operator*

**Type a Value** Enter a constant value, such as the names of months or numbers for specific years.

#### *Fields for Value(s) from List operator*

**Object name** Displays the list of values for the object.



Enter a specific value in the field and select the button.

**Note:** The field displays the list of values for the object.

**Refresh List** Select the button to refresh the list of values.





From the list of values for the object, select the value(s) you want to use and select the button, to add the selected object to the Value(s) Selected field.



Select the value(s) from the Value(s) Selected field and select the button, to remove the selected object.

**Value(s) Selected** Displays the value(s) you select.

## Prompts Window

- To open**
- From the Result Objects frame, select the object you want to filter and drag it to the Query Filters frame.
  - Select the  button and from the pop-up menu, choose Prompt.
  - Select the  button.

## Field definitions

**Prompt Text** Displays the object name and operator you select.

Note: You can edit the text and enter the message or question you want the prompt to display.

**Prompt with List of Value** Select the check box to display the entire list of values associated with the filtered dimension, measure, or detail.

**Keep last value(s) selected** Select the check box to display the value(s) you specified the last time you answered the prompt.

**Set default value(s)** Select the check box to display the value(s) you specify as default.

*Value(s) list* Displays the list of values associated with the object.



From the list of values for the object, select the value(s) you want to use and select the button, to add the selected object to the Value(s) Selected field.

**Value(s) Selected** Displays the value(s) you selected.

**Select only from list** Select the check box to display only a list of values that exist in the database.



Enter a specific value in the field and select the button.

Note: The field displays the list of values for the object.

**Refresh List** Select the button to refresh the list of values.

**OK** Select to run your query or refresh your document.

**Cancel** Select to close the window without entering any prompts.

**Help** Select to open the WebIntelligence online help.

## Working with Multiple Queries

### Multiple Queries Overview

You can include one or multiple queries in a single WebIntelligence document, based on a single or on multiple universes available in InfoView . For example, for litigation data on a claim , you can include litigation information in one query and defendant information in another query. You can define multiple queries in a single document, when you want

- To include the data available on multiple universes, in a document.





- To create several differently-focused queries on the same universe.


You can define multiple queries when you can build a new document or add more queries to an existing document. You can present the information from all of the queries on a single report or on multiple reports in the same document.


Note: You can create a maximum number of 15 queries in a document.

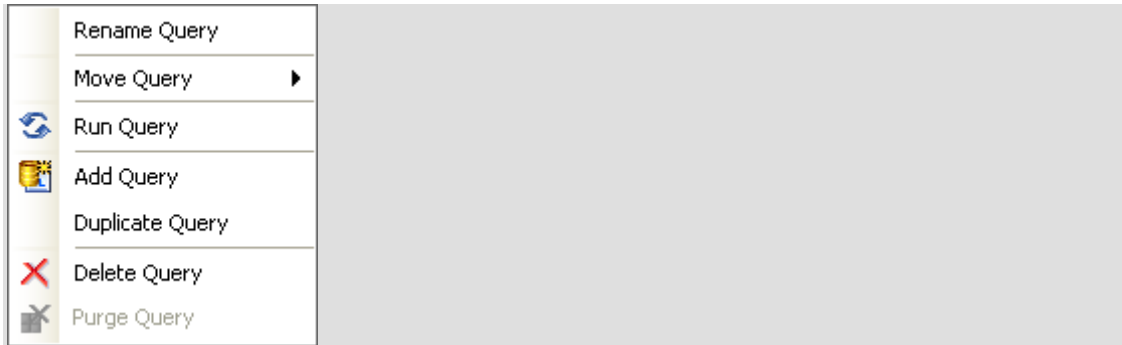
## How To

### To Add a Query

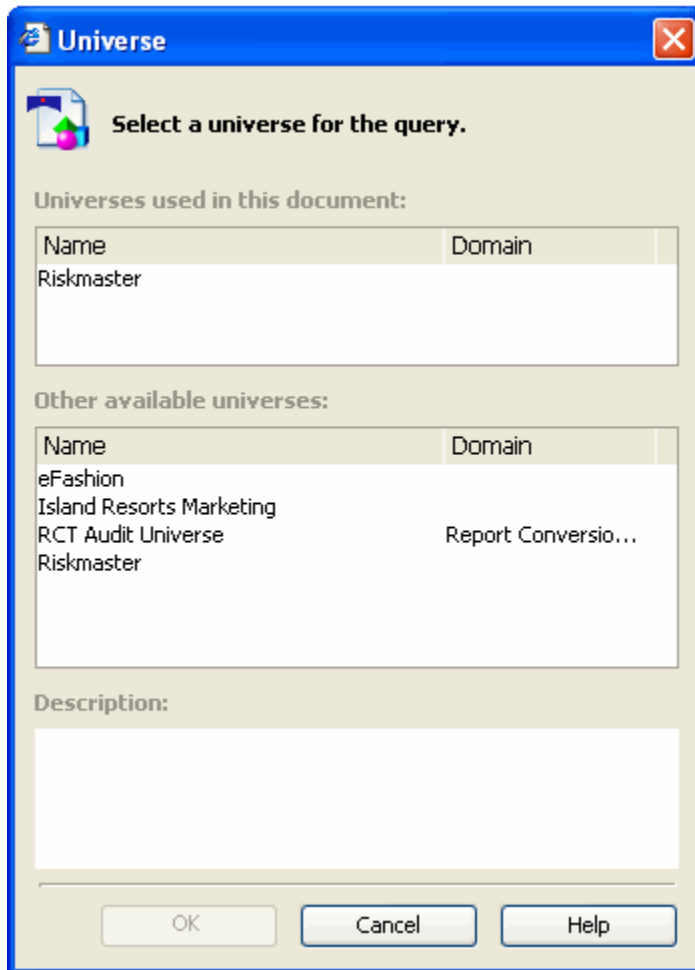
In Query view, you can add multiple queries to an existing document.

Note: To open Query view, from the WebIntelligence toolbar, select the EditQuery button  Edit Query .

1. Search for the document to which you want to add a query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document. The Query Manager opens.
3. Do one of the following:
  - From the toolbar, select the Add Query button  Add Query .
  - Right click the name tab at the bottom of the Query Manager, and from the pop-up menu, choose Add Query.



The Universe window opens and Universes used in this document frame displays the universe you have used to create queries.




4. From the Other available universes frame, select the universe you want to use to create a new query. The Description field, displays a description of the universe you select.
5. Select OK. The Query Manager for a new query opens.

Note: The name tab at the bottom of the Query Manager, display as Query(*n*), where *n* is the number of query you have added to the existing document.

## To Delete a Query

In Query view, you can delete a query from a document.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query.


1. Search for the document for which you want to rename an existing query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document. The Query Manager opens.
3. Right click the query name tab at the bottom of the Query Manager. A pop-up menu opens.
4. From the pop-up menu, choose Delete Query.

A confirmation message to delete the query data displays.

5. Select Yes.  
Web Intelligence deletes the selected query.

### To Duplicate a Query


In Query view, you can build a different query on a universe already included in the document. You can then modify the duplicate query.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query

1. Search for the document for which you want to rename an existing query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. Right click the query name tab at the bottom of the Query Manager.  
A pop-up menu opens.
4. From the pop-up menu, choose Duplicate Query.  
WebIntelligence creates a duplicate of the selected query.

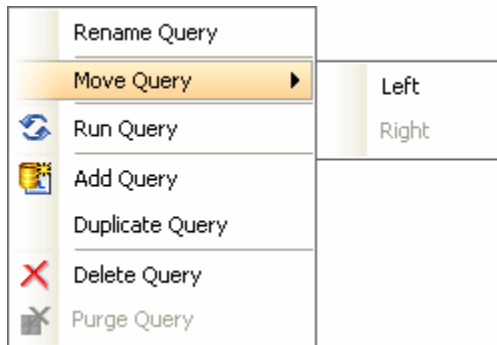
### To Move a Query

In Query view, you can change the order in which WebIntelligence runs the queries. This is useful if different queries in the document include prompts. You change the order of queries to define the order in which the prompts will display when users refresh the document. For example, if Query 1 has a prompt on [Claim Date] and Query 2 has a prompt on [Event Date], you can move Query 2 before Query 1 to ensure that the prompt for Event Date displays first.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query

To move a query

1. Search for the document for which you want to rename an existing query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. Right click the query name tab at the bottom of the Query Manager.  
A pop-up menu opens.




4. Do one of the following:
  - To move a query left to another query, from the pop-up menu, choose Move Query > Left.

- To move a query right to another query, from the pop-up menu, choose Move Query > Right.



WebIntelligence moves the query, accordingly.

## To Purge Data


In Query view, you can purge data from a document. When you purge a document, you remove all data from the document, but save the document structure intact. If the document contains multiple queries, you can purge specific queries within the document.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query

### To purge data


1. Search for the document for which you want to rename an existing query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To purge data on all queries in the document, from the WebIntelligence toolbar, select the Purge Data button .  
A Web Intelligence window opens.
4. To purge data on a single query, from the WebIntelligence toolbar, next to the Purge Data button, select the  button.
5. From the drop down list, select the query name for which you want to purge data.  
A confirmation message to purge data, displays.
6. Select Yes.  
A Purge Complete message displays and WebIntelligence removes values from the report cells.

Note: To return data to the document, from the WebIntelligence toolbar, select the Refresh Data button

 Refresh Data and then select the query you purged.

## To Rename a Query

In Query view, you can rename an existing query when you have multiple queries in a document.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button  Edit Query

1. Search for the document for which you want to rename an existing query.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. On the Query Manager, do one of the following:
  - Select the query name tab at the bottom of the Query Manager, and select the Properties tab.
  - Right click the query name tab at the bottom of the Query Manager, and from the pop-up menu, choose Rename Query.

The Query Manager: Properties tab opens.

4. In the Name field, enter the new name for the query.
5. Press the Enter key on your keyboard.  
The new query name displays on the query name tab at the bottom of the Query Manager.

## To Run Multiple Queries

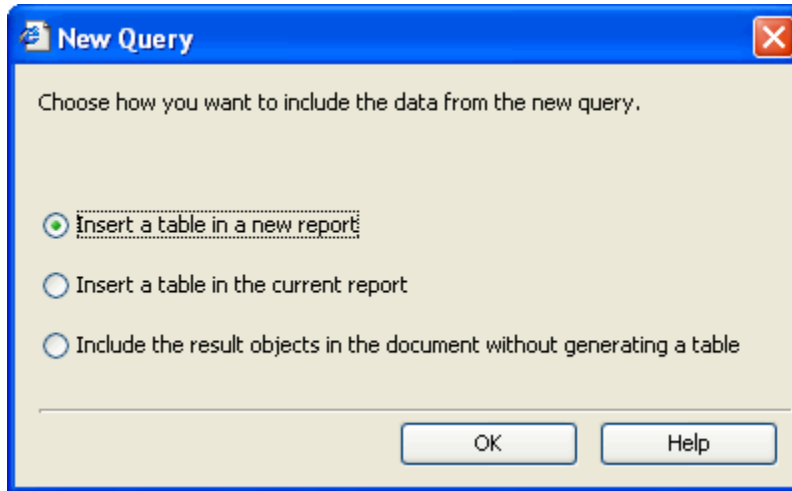
1. Add a new query to an existing document.
2. Select objects for the new query.
3. Do one of the following:
  - To return data only from the new query, at the bottom of the Query Manager right click the name tab for the new query, and from the pop-up menu, choose Run Query.

- To return data for all the queries in the document, from the toolbar, select the Run Query button



The Prompts window opens.

4. Select the prompt filters you want to use to return data for the query.
5. Select OK.  
The Retrieving Data window opens and after the data is retrieved the New Query window opens.




6. Do one of the following:
  - To display the data on a new report in the document, select the Insert a table in a new report option.
  - To display the report data in a new table, select the Insert a table in the current report option.
  - To include the data in the document without displaying the data on a report, select the Include the result objects to the document without generating a table option.
7. Select OK.  
WebIntelligence runs the new query and returns the data to the document.

## Field Help

### Select a Universe for the Query Window

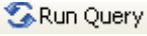
To open

- From the toolbar, select the Add Query button .
- Right click the name tab at the bottom of the Query Manager, and from the pop-up menu, choose Add Query.

## Field definitions

<b>Universes used in this document</b>	Displays the universe you have used to create queries.
<b>Other available universes</b>	Displays list of available universe that you can use to create a query. Select the universe you want to use to create a new query.
<b>Description</b>	Displays a description of the universe you select.
<b>OK</b>	Select to open the Query Manager for a new query.
<b>Cancel</b>	Select to close the window without selecting a universe.
<b>Help</b>	Select to open the WebIntelligence online help.

## New Query Window

**To open** From the toolbar, select the Run Query button .

## Field definitions

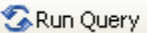
### Choose how you want to include the data from the new query

<b>Insert a new table in a new report</b>	Select the option, if you want to display the data on a new report in the document.
<b>Insert a table in a current report</b>	Select the option, if you want to display the data on the currently selected report in a new table.
<b>Include the result objects in the document without generating a table</b>	Select the option to include the result objects in the document without displaying the data on a report.
<b>OK</b>	Select to run a new query and return the data to the document.
<b>Help</b>	Select to open the WebIntelligence online help.

## Running Queries

### How To

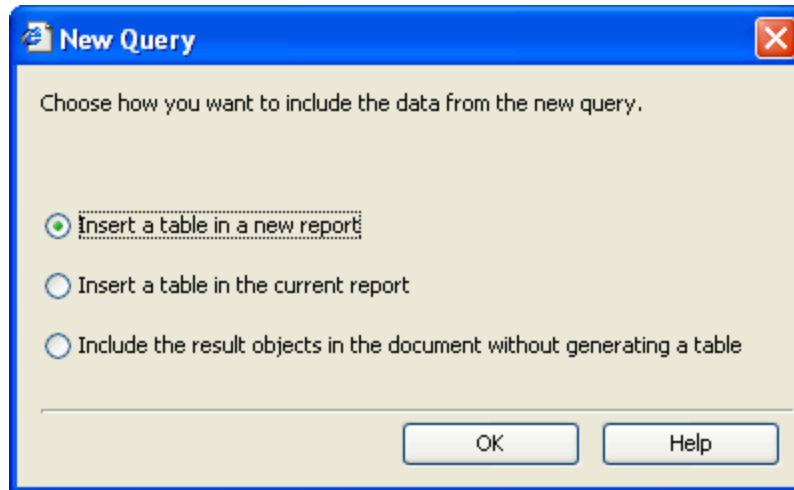
#### To Run Multiple Queries

1. Add a new query to an existing document.
2. Select objects for the new query.
3. Do one of the following:
  - To return data only from the new query, at the bottom of the Query Manager right click the name tab for the new query, and from the pop-up menu, choose Run Query.
  - To return data for all the queries in the document, from the toolbar, select the Run Query button .

The Prompts window opens.

4. Select the prompt filters you want to use to return data for the query.
5. Select OK.



The Retrieving Data window opens and after the data is retrieved the New Query window opens.



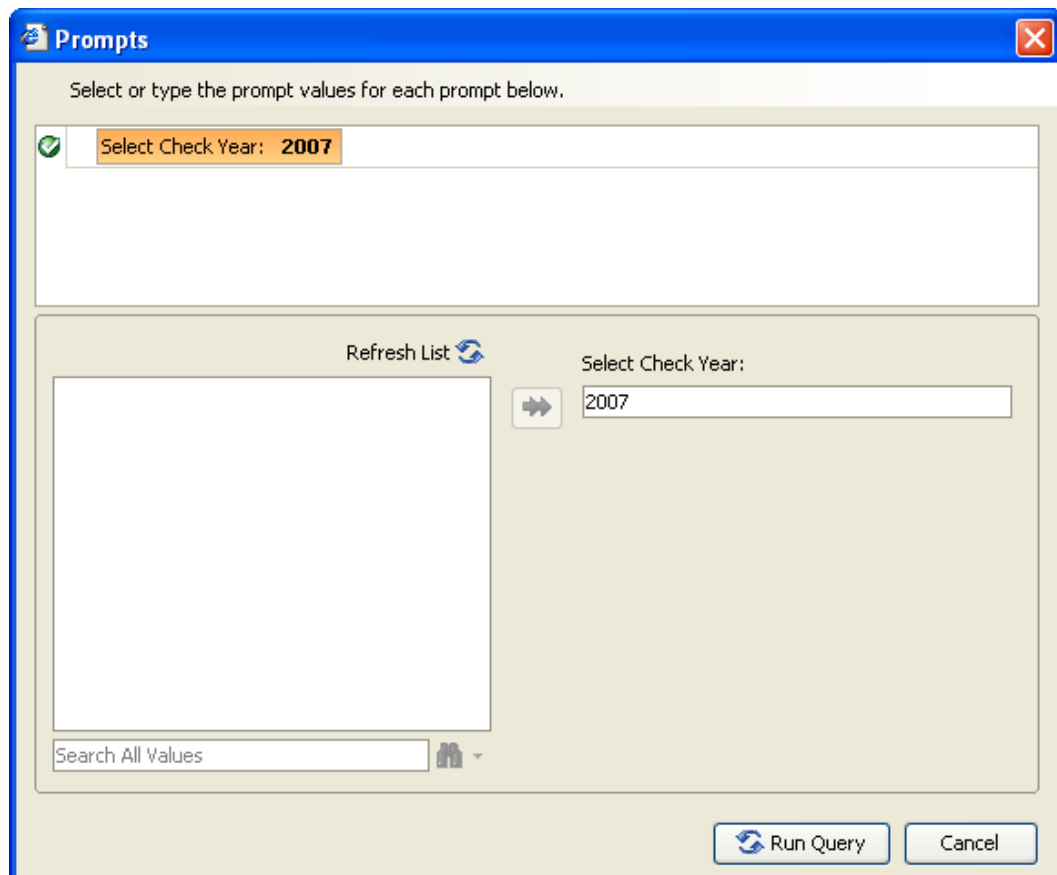
6. Do one of the following:
  - To display the data on a new report in the document, select the Insert a table in a new report option.
  - To display the report data in a new table, select the Insert a table in the current report option.
  - To include the data in the document without displaying the data on a report, select the Include the result objects to the document without generating a table option.
7. Select OK.





WebIntelligence runs the new query and returns the data to the document.

### To Answer a Prompt

1. On a document, for which you want Web Intelligence to return data, do one of the following:
  - From the toolbar, select the Run Query button  Run Query .
  - From the toolbar, select the Refresh Data button  Refresh Data .

If you created prompts for the query in the document, the Prompts window opens.



2. If a question displays, then enter a value for the question.
3. If a List of Values display, from the field select a value, and select the  button. The value you select, displays in the Value(s) Selected field.
4. To find a specific value, for example all values that contain the number 7, enter 7 in the Search for Values field.
5. Next to the  button, select the  button. A pop-up menu opens.
6. From the pop-up menu, choose whether you want to match the upper or lower case of the value you enter, or search all possible value.
7. Select the  button. All values that contain the specific value display in the object name field.
8. To refresh the value list, select the Refresh List button.
9. Select OK.



## Working with Tables



### How To

#### To Select Objects for your Table

You can use objects in a universe to insert one or multiple tables on a report. You can add objects in Report view.

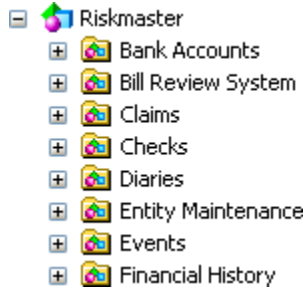



Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .  
 CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure .

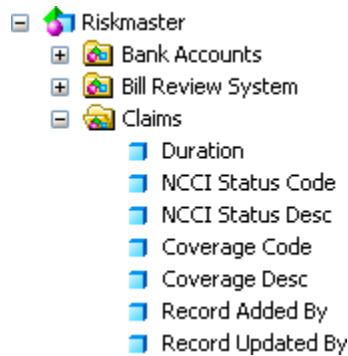
1. From the Report Manager: Data tab, select the  next to the universe name.  
 Riskmaster

Note: You can also double click the universe name.

The navigation tree expands and displays the class folders under the universe.



2. Select the  next to a class folder from which you want to select objects.  
 The navigation tree expands and displays the objects.

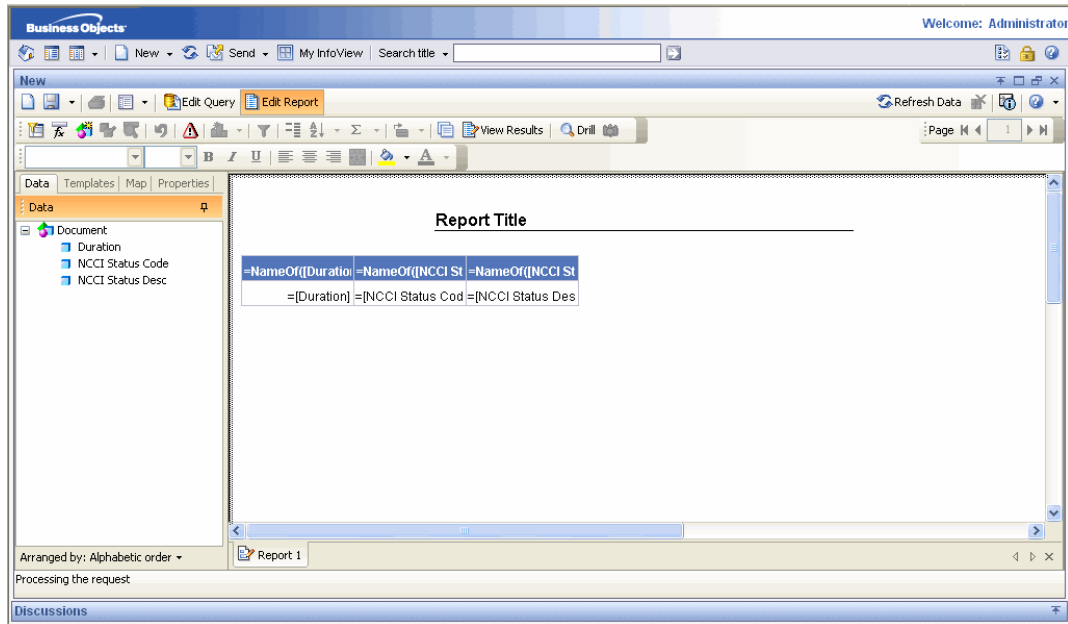


Note: To collapse a class and hide the objects, select the - next to a class.

3. Do one of the following:
  - If your report is blank, from the Report Manager, select an object and drag it to the report frame .
  - If your report contains tables or charts, on your keyboard, keep the Alt key pressed and from the Report Manager, select an object and drag it to the report frame.

A new table header and body cell displays on the report. The table header displays the name of the object.

Note: If you select a class, all the objects in the class display in the report frame.





4. To add another object to the table, from the Data tab drag another object and drop it to the left or right of the existing column header.
5. To create a new column before the existing column, drag and drop the object onto the left of a column.
6. To create a new column after the existing column, drag and drop the object onto the right of a column.
7. To create a new row above the existing row, drag and drop the object onto the top edge of a row.
8. To create a new row below the existing row, drag and drop the object onto the bottom edge of a row.

Note: Drop the object onto the report frame at the location you want, only after the Drop here to insert a cell tool tip displays.

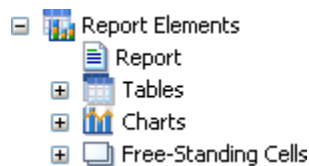
As you add the objects you require, WebIntelligence displays the values in a vertical table.


## To Select a Template for your Table

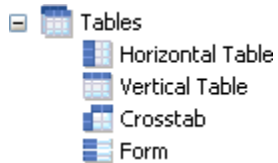
In Report view, you can use templates to create one or multiple tables on a report. A table template defines the structure of the table, to which you can drag and drop objects to build complex tables.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report. CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure.

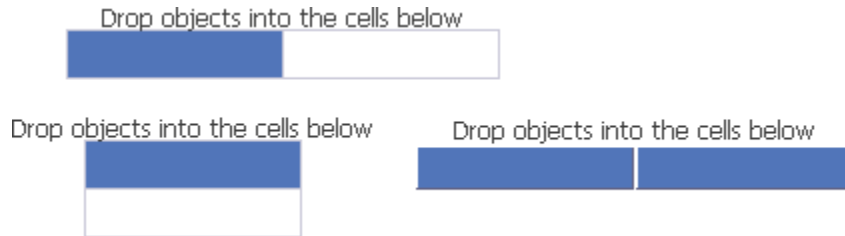
1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to select a template.
2. On the Report Manager, select the Templates tab.  
The Query Manager: Templates tab displays the Report Elements navigation tree.



3. Select the  next to Tables.  
The navigation tree expands and displays the available templates.





- From the navigation tree, select the template you want to use and drag and drop onto the report frame. The blank template displays in the report frame.




- On the Report manager, select the Data tab.
- From the Data tab, select objects for your table. As you add the objects you require, WebIntelligence displays the values in the selected table template.

### To Use Different Templates for the Same Table

In Report view, you can apply different templates to the same table to modify the layout.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report . CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure .

To use drag and drop to apply a different template

- In Report view, select the name tab at the bottom of the report frame, for the report for which you want to modify template.
- On the Report Manager, select the Templates tab. The Report Elements navigation tree displays.
- To expand Tables, select the  button. The navigation tree expands and displays the available templates.
- From the navigation tree, select the template you want to use and drag and drop onto the existing report block in the report frame. WebIntelligence applies the new template to the table block.

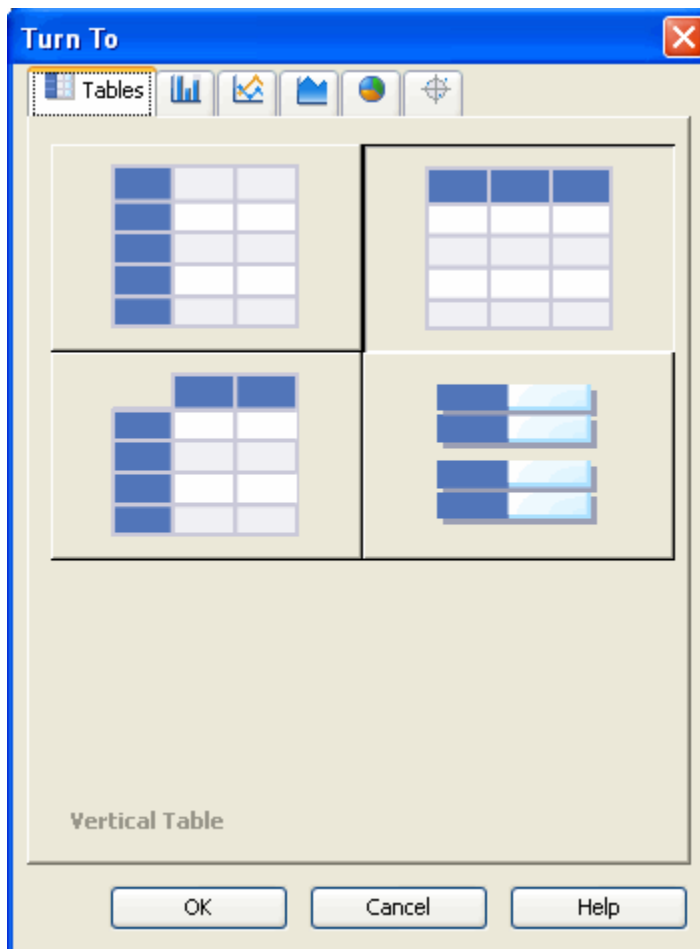
To use Turn To

- In Report view, select the name tab at the bottom of the report frame, for the report for which you want to modify template.
- In the report frame, select the top edge of the table. A blue border displays around the table.
- Right click the report block.

A pop-up menu opens.

Depart	Claim Number	Claim Type	Claim Status	Description
35th St	GC1996000062	VL	O	04/09/2002 01:02 PM (dtg)
	GC1998000017	PROP	O	4/5/2002 11:13 AM (dtg) C
	GC1998000065	GL	TESTON LY	
	VABIP35000036	BI	O	
	VAPDP35000037	PD	O	
	VAPDP35000041	PD	O	
	WCB9998883	NA.	OAL	05/21/2002 10:55 AM (dtg)
	WCM000011	M	O	
<b>35th Street Pool DEPARTMENT</b>				
Administration DEPARTMENT	DI2003000162	DIS	O	

- From the pop-up menu, choose Turn To.  
The Turn To window opens.





5. From the Turn To window, select the table template you want to use.
6. Select OK.

Note: You can also select a chart you want to use to view the table as.

WebIntelligence applies the template or chart you select, to the table block.


## To Work with Rows and Columns


In Report view, you can insert or delete rows and columns in tables.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .  
 CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure .

### To insert rows and columns

1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to add new rows and columns in the table.
2. In the report frame, from the table block, select a row or column.

On the Report toolbar, the Insert button  becomes active.

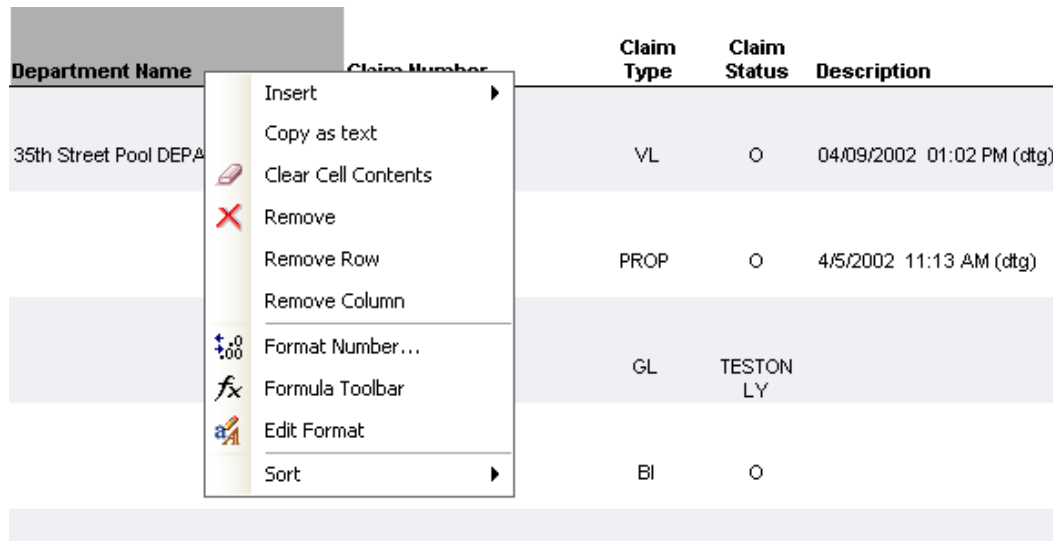
3. Select the  button to open the drop down list.
4. From the drop down list, select the command to insert additional rows below/above an existing row or to insert additional columns before/after an existing column.

WebIntelligence inserts blank row(s) and column(s) to the table block.

### To delete rows and columns

1. In Report view, select the name tab at the bottom of the report frame, for the report from which you want to remove rows and columns.
2. In the report frame, on the table block, right click the row or column you want to delete.

A pop-up menu opens.





3. From the pop-up menu, choose one of the following:
  - To delete the contents of the cell, select Clear Cell Contents.
  - To delete all the columns and rows for the selected object, select Remove.

- To delete the row from the table block, select Remove Row.
- To delete the column from the table block, select Remove Column.

## To Work with Tables

In Report view, you can duplicate tables and also delete existing tables in a report. You can modify the duplicate tables to create a new table in the same report.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .  
CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure .

### To duplicate tables

You can duplicate an existing table and paste it onto a blank area of the same report. You can then modify the format or data definition of the duplicate table, or change it to a chart.

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to duplicate a table.
2. In the report frame, select the top edge of the table.  
A blue border displays around the table.
3. With the table selected, on your keyboard, press the Ctrl key.  
WebIntelligence creates a duplicate of the selected table.
4. Select the duplicate table, press the Ctrl key, and drag and drop onto the blank space on your report.
5. Release the mouse pointer and the Ctrl key.  
The duplicate table displays in the blank space on your report.


### To delete tables

1. In Report view, select the name tab at the bottom of the report frame, for the report from which you want to a table.
2. In the report frame, select the top edge of the table.  
A blue border displays around the table.
3. To delete the table, do one of the following:
  - Right click the table block and from the pop-up menu, choose Remove.
  - Select the table block and drag and drop onto the Report Manager.
  - Select the table block and press Delete on your keyboard.

The table does not display in the reports frame.

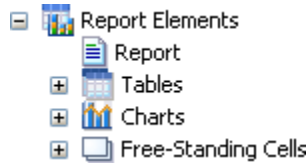
## To Work with Free-Standing Cells


In Report view, you can insert and format free-standing cells. Free-standing cells are single cells that stand alone in a report. Free-standing cells contain information such as predefined text or formula, logos, links to hyperlinks. You can insert blank cells on reports and then insert text, an image, a hyperlink, or a formula into the blank cell. You can position, size, and format each blank cell independently without affecting the other cells on the report.

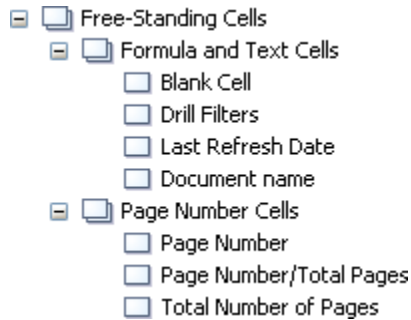
Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

### To insert and format blank cells

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to insert a free-standing cell.
2. On the Report Manager, select the Templates tab.  
The Query Manager: Templates tab displays the Report Elements navigation tree.



3. Next to Free-Standing Cells, select the  button.  
The navigation tree expands and displays the available templates.




4. On the navigation tree, from the Formula and Text branch, select Blank Cell and drag and drop onto the report frame.  
The blank cell displays in the report frame.
5. To format the blank cell, select the cell on the Report Manager and select the Properties tab.  
The Properties tab opens up on the Report Manager.
6. To format the cells, select the appropriate options on the Properties tab.  
WebIntelligence applies the selected format to the free-standing cell.

## To Work with Breaks


You can break up data in tables and crosstabs to display all the data for each unique value of a object in separate tables. A break displays as a self-contained division in a result table in which data is grouped according to a selected value. You can insert multiple breaks in a report and can also prioritize the breaks. You can also remove breaks.

### To insert a break

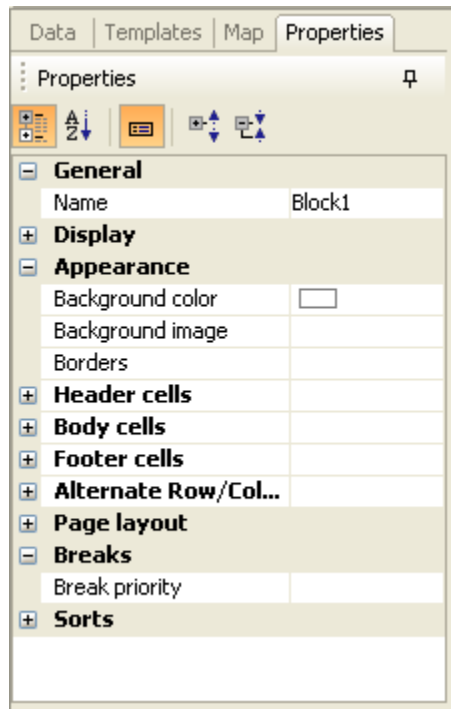
1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to insert a break.
2. In the report frame, select a cell in the column or row where you want to insert a break.  
A blue border displays around the cell.
3. From the Report toolbar, select the  button.  
WebIntelligence divides the table up with as many breaks as there are unique values for the selected cell. WebIntelligence inserts a footer at the end of each break.



### To set a priority on a break

1. In Report view, select the name tab at the bottom of the report frame, for the report with multiple breaks.
2. In the report frame, place your mouse cursor over the border of the table that contains multiple breaks.



The Break Priority button  displays at the top left of the selected table.

3. Select the Break Priority button.




4. To set break priority, next to the Breaks section, select the  button. The navigation tree expands.
5. From the navigation tree, select the  button next to Break priority field. The Breaks window opens.

Note: If the table you select is a vertical table, then WebIntelligence applies all the breaks to columns and the Vertical breaks option is selected by default. If the table you select is a horizontal table, then WebIntelligence applies all the breaks to rows and the Horizontal breaks option is selected by default. If you select a crosstab table, then both the Vertical breaks and Horizontal breaks options display as selected.

6. To move the break up or down, from the Break priority field, select the break type and then select the  and  button.
7. To discard the priority order and reset the priority, select Reset.
8. To save the priority order, select Apply.

WebIntelligence applies the new priority to the breaks on the selected table and displays the results on the report.

#### To remove a break

1. In Report view, select the name tab at the bottom of the report frame, for the report from which you want to remove a break.
2. In the report frame, select a cell in the column or row where you want to remove a break. A blue border displays around the cell.
3. From the Report toolbar, select the  button. WebIntelligence removes the selected break.



## Field Help


### Query Manager: Templates Tab


**To open** On the Query Manager, select the Templates tab.


#### Field definitions

##### Report Elements

**Report** Select to view the report in the report frame .

**Tables** Select the  button next to the branch to view and use available table templates - Horizontal table, Vertical table, Crosstab and Form.

**Charts** Select the  button next to the branch to view and use available chart templates - Bar, Line, Area, Pie and Radar.

**Free-Standing Cells** Select the  button next to the branch to view and use free-standing cell templates - Formula and Text Cells and window Number Cells.

### Breaks Window

**To open** From the Report toolbar, select the  button.

#### Field definitions

##### Break Priority

**Vertical Breaks** If the table you select is a vertical table, then WebIntelligence applies all the breaks to columns and the Vertical Breaks option is selected by default.

**Horizontal Breaks** If the table you select is a horizontal table, then WebIntelligence applies all the breaks to rows and the Horizontal Breaks option is selected by default.

Note: If you select a crosstab table, then both the Vertical Breaks and Horizontal Breaks options display as selected.

**Block Name** Displays the name of the block you selected.



From the *block name* field, select a break and then select the button to move the break up in the priority list.



From the *block name* field, select a break and then select the button to move the break down in the priority list.

**Reset** Select the button to discard the priority order and reset the priority.

**OK** Select to save the break priority.

**Cancel** Select the button to close the window.

**Apply** Select the button to apply the priority order.

**Help** Select to open the WebIntelligence online help.

## Tables Overview


After you create a document with queries and run the queries, WebIntelligence generates a report. The report displays in Report view, in tabular format. You can edit the table contents, format the table, and generate different table types or charts. You can also insert more tables onto the same report or onto new reports within the same document.

WebIntelligence reports display in four table templates:

- Vertical tables
- Horizontal tables
- Crosstabs
- Forms

Vertical table is the default format.

You can format or view tables in Results view as well as Structure view. WebIntelligence does not directly send the changes you make in Structure view, to the server. After you preview the changes that you want to finalize, you can return to Results view to send the changes to the WebIntelligence server.


Note: CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button  View Structure .


## Formatting Table and Table Cells

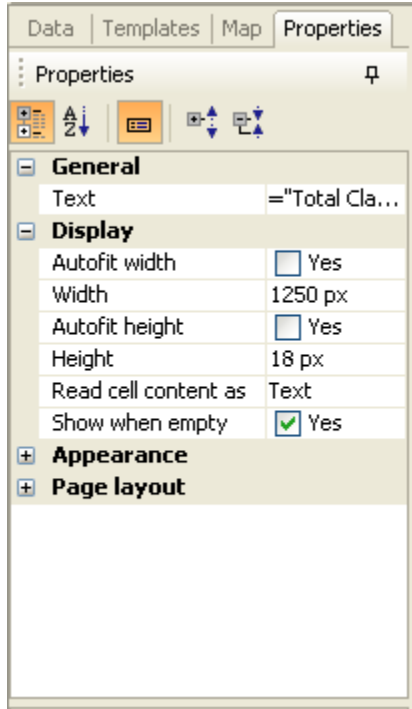
### General and Display Properties

#### To Set Cell Properties

In Report view, you can show or hide cell(s) for which there is no data on the database, insert an image, a hyperlink, or a skin, and specify the width and height of the cell.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .


1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to set cell properties.
2. From the report frame, select the cell for which you want to set properties.  
A blue border displays around the cell.
3. On the Report Manager, select the Properties tab.
4. To set general properties, next to the General section, select the  button.



Note: In the Business Objects Xlr2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.


5. In the General section, enter the title in the Text field.

Note: The Text field displays the object name by default.


6. To set display properties, next to the Display section, select the  button.
  7. To auto fit the cell width, in the Display section, select the Autofit width check box.
  8. To manually adjust the cell width, in the Width field, enter the cell width in centimeters.
  9. To auto fit the cell height, select the Autofit height check box.
  10. To manually adjust the cell height, in the Height field, enter the cell height in centimeters.
  11. From the Read cell contents as drop down list, select the display style for the cell text, such as hyperlink, HTML, or web URL.
  12. To display empty cells in the report, select Show when empty check box.
  13. To adjust horizontal padding, in the Horizontal padding field, enter the value in pixels.
  14. To adjust vertical padding, in the Vertical padding field, enter the value in pixels.
- WebIntelligence applies the properties to the selected cell.

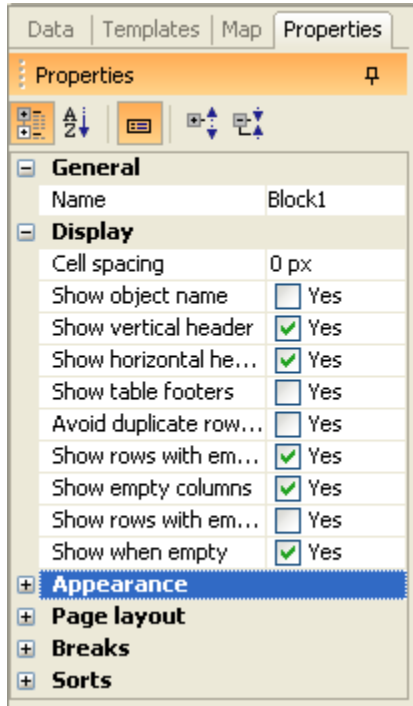
## To Set Crosstab Properties

In Report view, you can define crosstab properties.


Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set crosstab properties.
2. In the report frame, select a table with a crosstab format.  
A blue border displays around the crosstab.

3. On the Report Manager, select the Properties tab.
4. To set general properties, next to the General section, select the  button.





Note: In the Business Objects XI R2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

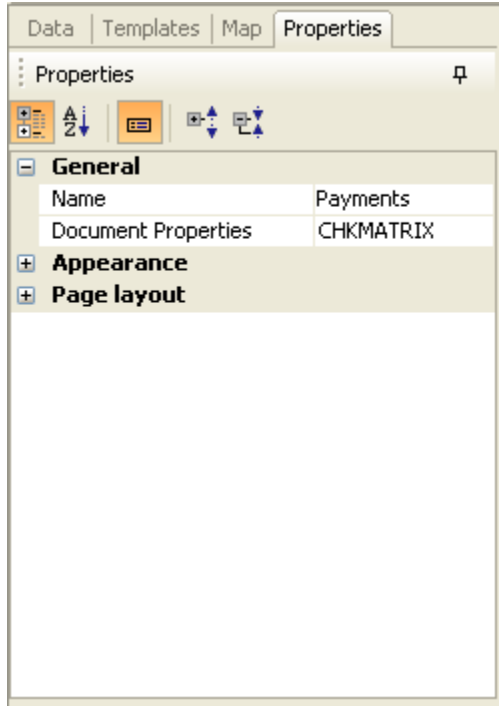
5. In the General section, enter the table name in the Name field.
  6. To set display properties, next to the Display section, select the  button.
  7. In the Display section, to manually enter the cell spacing, in the Cell spacing field enter the space between cells in centimeters.
  8. To view the object name, select the Show object name check box.
  9. To view the vertical header, select the Show vertical header check box.
  10. To view the horizontal header, select the Show horizontal headers check box.
  11. To view the table footers, select the Show table footers check box.
  12. To display each duplicate value in any row with the same set of objects, in a separate row or column on the table, select the Avoid duplicate row aggregation check box.
  13. To display rows with empty measure value in the report, select the Show rows with empty measure value check box.
  14. To display empty columns in the report, select the Show empty columns check box.
  15. To display rows with empty dimension value in the report, select the Show rows with empty dimension value check box.
  16. To display the empty elements in the report, select the Show when empty check box.
- WebIntelligence applies the properties to the selected crosstab table.

## To Set Report and Document Properties

In Report view, you can define table properties to make documents easy to navigate.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set properties.
2. In the report frame, select the top edge of the table.  
A blue border displays around the table.
3. On the Report Manager, select the Properties tab.
4. To set general properties, next to the General section, select the  button.




Note: In the Business Objects X1r2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

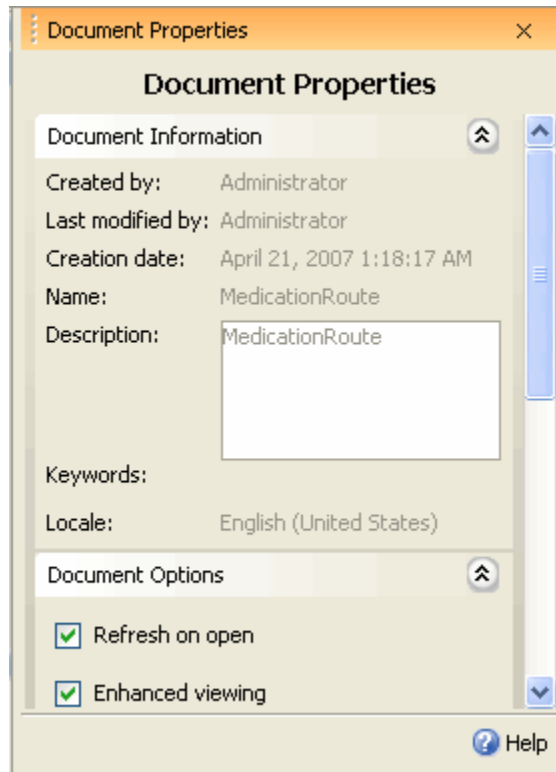
5. In the General section, enter the report name in the Name field.



Note: The Name field displays the report name by default.

6. To set document properties, do one of the following:

- From the documentation properties field, select the  button.
- Right click the name tab at the bottom of the Report Manager, and from the pop-up menu, choose Document Properties.


The Document Properties window opens.




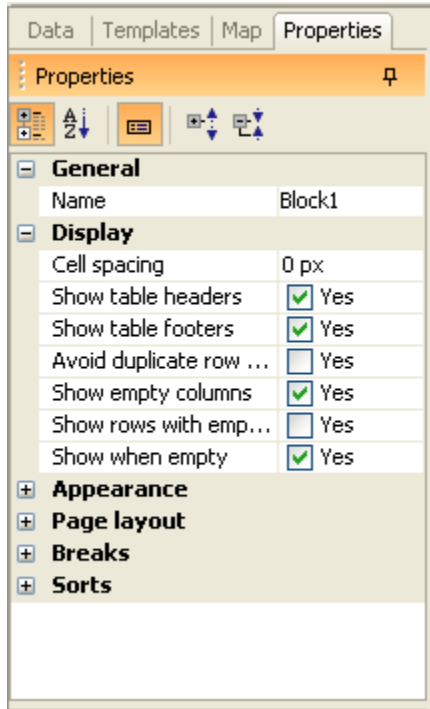
7. To automatically refresh the report data, each time you open the document, from the Document Options section, select the Refresh on open check box.
8. To enable you to view reports in HTML format without any window breaks or paper size limitations that you defined for printing or for viewing the document in the Java Report Panel, select the Enhanced viewing check box.
9. To use query drill in the document, select the Use query drill check box.
10. To automatically include the merge dimensions in the document, from the Data Synchronization Options section, select the Auto-merge dimensions check box.
11. To extend merge dimension values, select the Extend merged dimension values check box.
12. In the Report Order section, from the field, select a report and then select the  and  button to move the report up or down in the order list.  
When you refresh the document data, the reports display in the new order you specify.

## To Set Table Properties


In Report view, you can define table properties.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set table properties.
2. In the report frame, select a table.  
A blue border displays around the table.
3. On the Report Manager, select the Properties tab.
4. To set general properties, next to the General section, select the  button.



Note: In the Business Objects Xlr2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.


5. In the General section, enter the table name in the Name field.
6. To set display properties, next to the Display section, select the  button.
7. In the Display section, in the Cell spacing field, enter the space between cells in centimeters.
8. To view table headers, select the Show table headers check box.
9. To view table footers, select the Show table footers check box.
10. To display each duplicate value in any row with the same set of objects, in a separate row or column on the table, select the Avoid duplicate row aggregation check box.
11. To display empty tables in the report, select the Show when empty check box.
12. To display rows with empty dimension value in the report, select the Show rows with empty dimension values check box.
13. To display rows with empty measure value in the report, select the Show rows with empty measure values check box.

WebIntelligence applies the properties to the selected table.


## Appearance and Text Formats

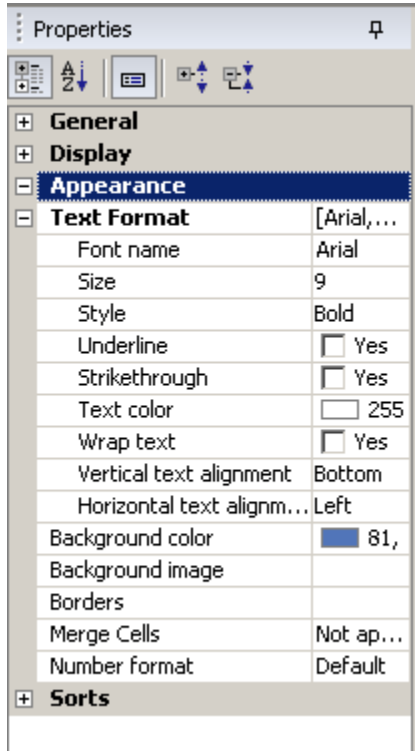
### To Format Cells


In Report view, you can format cell text, background and border.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .


1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to format cells.
2. From the report frame, select the cell you want to format.  
A blue border displays around the cell.

3. On the Report Manager, select the Properties tab.
4. To format cells, next to the Appearance section, select the  button.

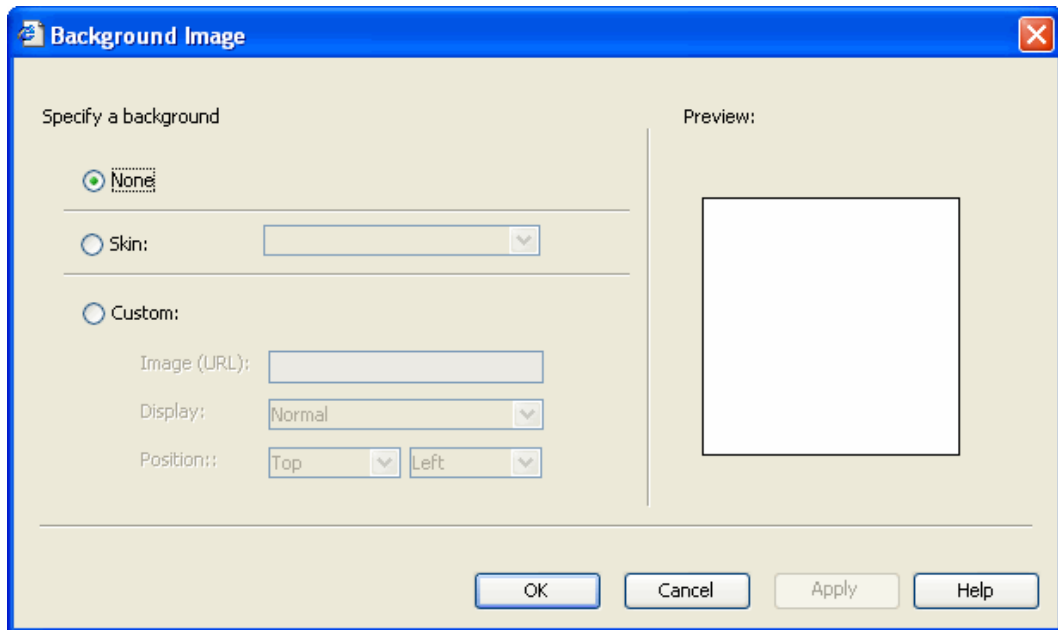



5. To view the Text Format section, next to the Appearance section, select the  button.
6. In the Text Format section, complete the fields to enter the font, font style and size, color, and vertical and horizontal alignment properties.
7. To set the background of the cell, from the Background color down list, select the background color.

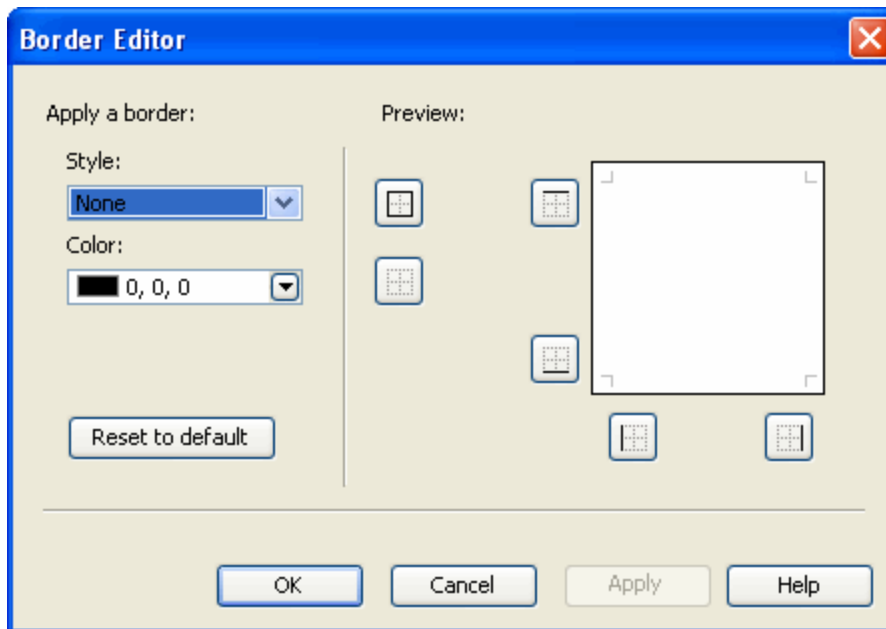
Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

8. To display an image in the background, from the Background image field, select the  button. The Background Image window opens.




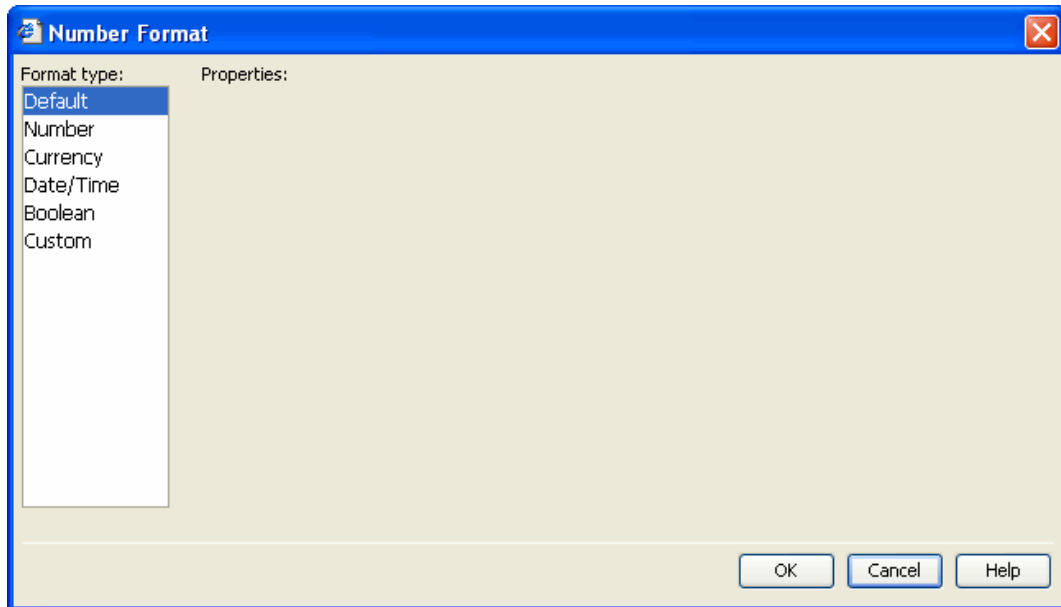


9. From the Specify a background field, do one of the following:
  - If you do not want to display a background image, select the None option.
  - To display default available skins in the background, select the Skin option.
  - To customize your background, select the Custom option. In the enabled fields, enter the Image URL, from the Display drop down list, select the Display property, and from the Position drop down list, select the image position.
  
10. To apply borders to your cell, select the  button. The Border Editor window opens.



11. From the Style drop down list, select a border line style.
12. From the Color drop down list, select the border line color.
13. Select the Apply button.


14. To set the number formats in the cell, from the Number format field, select the  button  
The Number Format window opens.




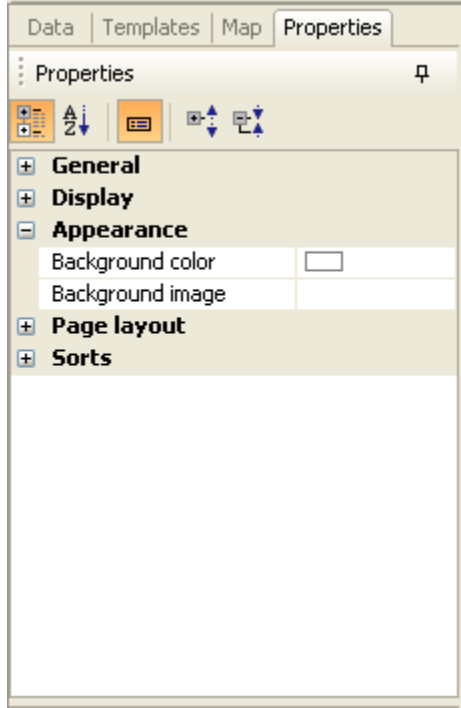
15. From the Format type field, select a format the number.  
16. In the Properties field, enter the properties for the selected number type.  
17. Select OK.  
WebIntelligence applies the formatting to the selected table cells.

## To Format Sections

In Report view, you can format section background color, image and skin.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .


1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to format sections.
2. From the report frame, select the section you want to format.  
A blue border displays around the section.
3. On the Report Manager, select the Properties tab.  
To format sections, next to the Appearance section, select the  button.



Note: In the Business Objects Xlr2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

4. To set the background of the section, from the Background color down list, select the background color.


Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

5. To display an image in the background, from the Background image field, select the  button. The Background Image window opens.
6. From the Specify a background field, do one of the following:
  - If you do not want to display a background image, select the None option.
  - To display default available skins in the background, select the Skin option.
  - To customize your background, select the Custom option. In the enabled fields, enter the Image URL, from the Display drop down list, select the Display property, and from the Position drop down list, select the image position.


WebIntelligence applies the formatting to the selected sections.

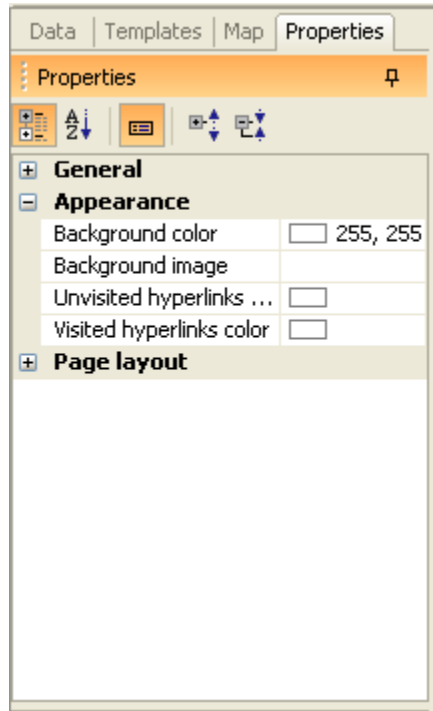
## To Format Reports

In Report view, you can format section background color, image, skin and hyperlink colors.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

1. In Report view, select the name tab at the bottom of the report frame, for the report you want to format.
2. In the report frame, select the top edge of the table.  
A blue border displays around the table.


3. On the Report Manager, select the Properties tab.
4. To format reports, next to the Appearance section, select the  button.




Note: In the Business Objects XIR2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.


5. To set the background color of reports, from the Background color drop down list, select the background color.

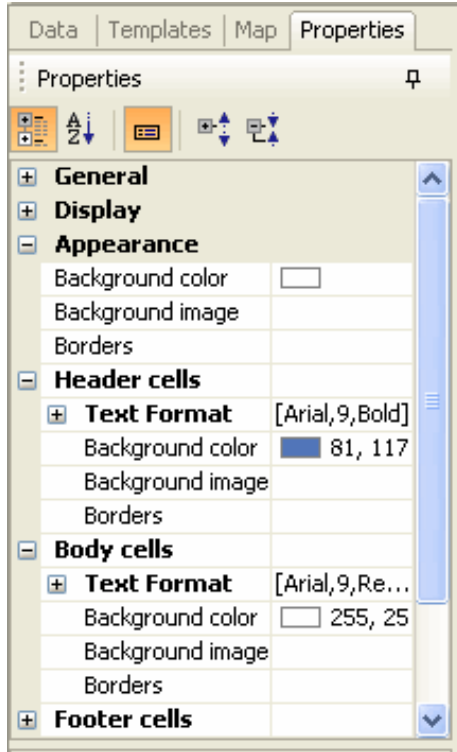
Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

6. To display an image in the background, from the Background image field, select the  button. The Background Image window opens.
  7. In the Specify a background field, do one of the following:
    - If you do not want to display a background image, select None option.
    - To display default available skins in the background, select the Skin option.
    - To customize your background, select the Custom option. In the enabled fields, enter the Image URL, from the Display drop down list, select the Display property, and from the Position drop down list, select the image position.
  8. To define colors for hyperlinks, from the Unvisited hyperlinks color drop down list, select the color to display hyperlinks you have not visited.
  9. To select the color to display hyperlinks you have visited, from the Visited hyperlinks color drop down list, select the color to display hyperlinks you visited.
- WebIntelligence applies the formatting to the selected report.

## To Format Tables

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .



1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to format tables.
2. In the report frame, select a table.  
A blue border displays around the table.
3. On the Report Manager, select the Properties tab.
4. To format tables, next to the Appearance section, select the  button.





Note: In the Business Objects Xlr2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

5. To set background of the cell, from the Background color drop down list, select the background color.


Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.


6. To display an image in the background, from the Background image field, select the  button.  
The Background Image window opens.
7. From the Specify a background field, do one of the following:
  - If you do not want to display a background image, select the None option.
  - To display default available skins in the background, select the Skin option.
  - To customize your background, select the Custom option. In the enabled fields, enter the Image URL, from the Display drop down list, select the Display property, and from the Position drop down list, select the image position.
8. To apply borders to your cell, from the Borders field, select the  button.  
The Border Editor window opens.
9. From the drop down lists, select the line type and color for the cell border.
10. From the Style drop down list, select a border line style.
11. From the Color drop down list, select the border line color.

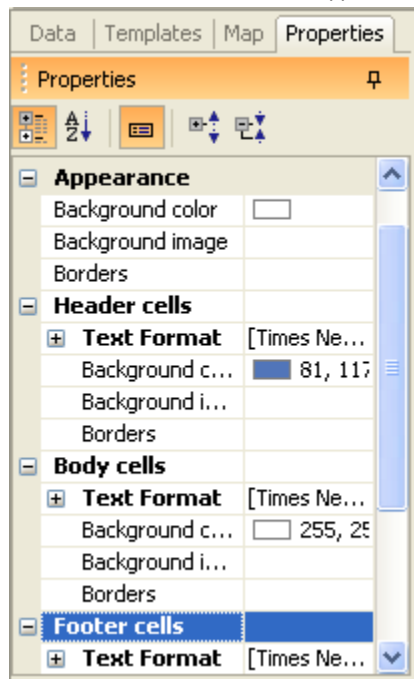
12. Select the Apply button.
  13. To format the header, footer and body cells in the tables, select the  button next to each of the Header, Footer and Body Cells sections.
  14. To view the Text Format section, from each of the section, select the  button.
  15. In the Text format section, complete the fields to enter the font, font style and size, color, and vertical and horizontal alignment properties.
- WebIntelligence applies the formatting to the selected table.

## To Format Crosstab Tables


In Report view, you can personalize crosstab formats. Crosstab reports are also called intersection reports, matrix reports, or pivot tables

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .





1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to format the crosstab tables.
2. In the report frame, select a table with a crosstab format.  
A blue border displays around the crosstab.
3. On the Report Manager, select the Properties tab.
4. To format crosstabs, next to the Appearance section, select the  button.



Note: In the Business Objects XIR2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

5. To format reports, next to the Appearance section, select the  button.
6. To set the background of the cell, from the Background color drop down list, select the background color.


Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

7. To display an image in the background, from the Background image field, select the  button.  
The Background Image window opens.
8. From the Specify a background field, do one of the following:
  - If you do not want to display a background image, select the None option.
  - To display default available skins in the background, select the Skin option.
  - To customize your background, select the Custom option. In the enabled fields, enter the Image URL, from the Display drop down list, select the Display property, and from the Position drop down list, select the image position.
9. To apply borders to your cell, from the Borders field, select the  button.  
The Border Editor window opens.
10. From the Style drop down list, select a border line style.
11. From the Color drop down list, select the border line color.
12. Select the Apply button.
13. To format the header, footer and body cells in the tables, select the  button next to each of the Header, Footer and Body Cells sections.
14. To view the Text Format section, from each of the section, select the  button.
15. In the Text format section, complete the fields to enter the font, font style and size, color, and vertical and horizontal alignment properties.  
WebIntelligence applies the formatting to the selected crosstab table.


## Page Layout

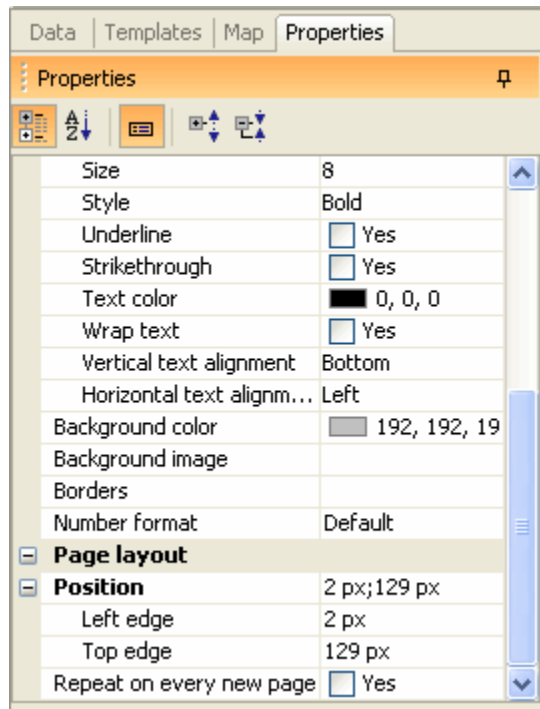
### To Set Window Layout for Cells


In Report view, you can define the position and alignment of single cells that standalone on the report, also known as free-standing cells. Free-standing cells contain information such as predefined text or formula, logos, links to hyperlinks.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

To set window layout for cells

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set cell window layout.
2. In the report frame, select a cell.  
A blue border displays around the cell.
3. On the Report Manager, select the Properties tab.
4. To set window layout, next to the window layout section, select the  button.



5. To position the selected cell on a report, in the window layout section, in the Left edge and Right edge fields enter the position from the window margins.
6. To select the position of the selected cell, in relation to another block, select the  button next to Position section.

Note: A block is a table, chart, or form on the report.


The Relative Position window opens.

7. In the Place the upper-left of this table/chart/cell section, from the from the drop down lists, select the Left/Right and Top/Bottom position.
  8. From the of drop down list, select the other block.
  9. To repeat the selected cell on each window of the report, in the window layout section, select the Repeat on every new window check box.
- WebIntelligence applies the window layout to the selected cell.

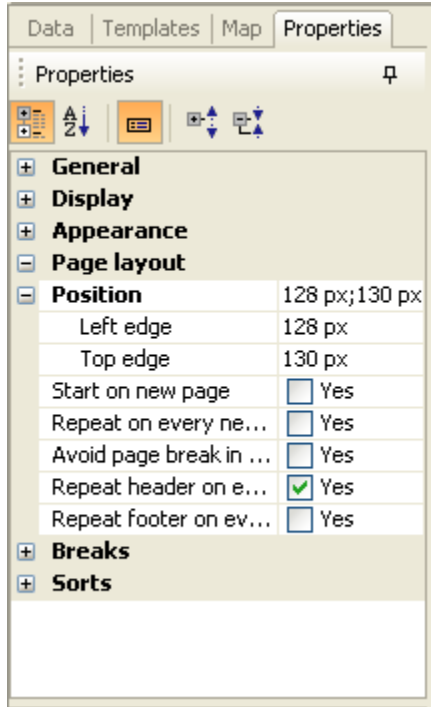
## To Set Window Layout for Crosstabs


1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to format a block .

Note: A block is a table, chart, or form on the report.

2. In the report frame, select a block.  
A blue border displays around the block.
3. On the Report Manager, select the Properties tab.
4. To set window layout, next to the window layout section, select the  button.





5. To position a selected block on a report, in the Position section, in the Left edge and Top edge fields enter the position from the window margins.
6. To select the position of the selected cell, in relation to another block, select the  button next to Position section.

Note: A block is a table, chart, or form on the report.

The Relative Position window opens.

7. In the Place the upper-left of this table/chart/cell section, from the from the drop down lists, select the Left/Right and Top/Bottom position.
8. From the of drop down list, select the other block.
9. To start each table on a new window of the report, in the window layout section, select the Start on a new window check box.
10. To repeat the selected table on each window of the report, select the Repeat on every new window check box.
11. To avoid window breaks on the tables on the report, select the Avoid window break in table check box.


Note: If the table is bigger than one window, WebIntelligence inserts a window break.

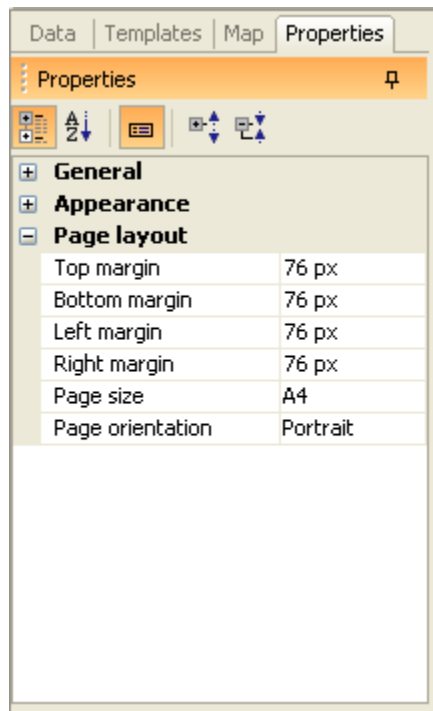
12. To repeat the table header on each window, if the table runs into the next window, select the Repeat header on every window check box.
13. To repeat the table footer, if the table runs into the next window, select the Repeat footer on every window check box.

WebIntelligence applies the window layout to the selected report.

## To Set Window Layout for Reports

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set report window layout.
2. In the report frame, select the top edge of the table.  
A blue border displays around the table.
3. On the Report Manager, select the Properties tab.


4. To set window layout, next to the window layout section, select the  button.




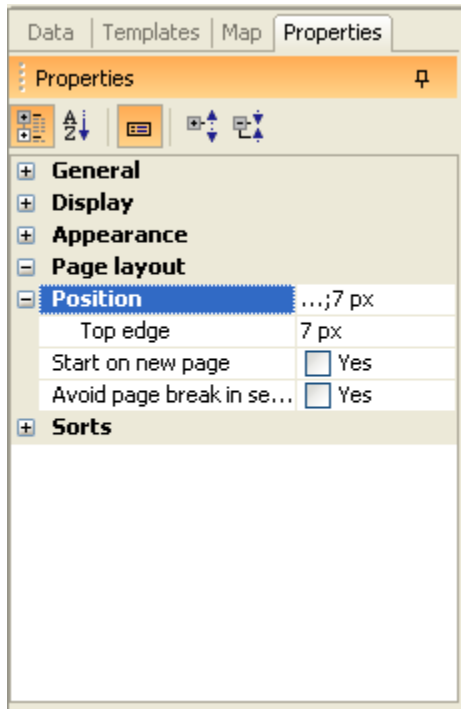
5. To specify window margins, in the window layout section, enter the size of each margin in the Top margin, Bottom margin, Left margin, and Right margin field.
6. To specify the paper size, from the window size drop down list, select the paper size.
7. To specify the window orientation, from the window orientation drop down list, select the paper size. WebIntelligence assigns windows to reports from left to right, and then top to bottom.


## To Set Window Layout for Sections

In Report view, you can define the position and alignment of single cells that standalone on the report, also known as free-standing cells. Free-standing cells contain information such as predefined text or formula, logos, links to hyperlinks.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

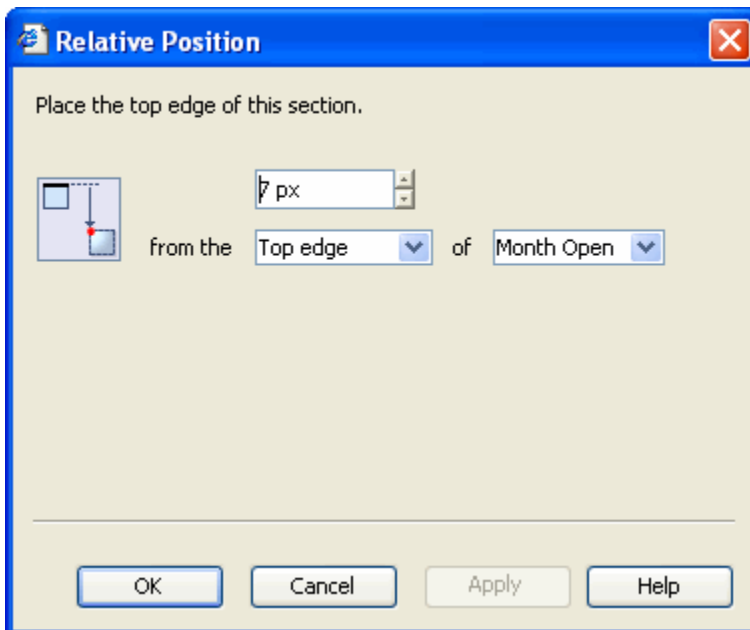
1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set section window layout.
2. In the report frame, select a section.  
A blue border displays around the section.
3. On the Report Manager, select the Properties tab.
4. To set window layout, next to the window layout section, select the  button.



5. To position a selected section on a report, in the Position section, in the Top edge field, enter the position from the top of the window.
6. To select the position of the selected cell, in relation to another block, select the  button next to Position section.

Note: A block is a table, chart, or form on the report.

The Relative Position window opens.




7. In the Place the top edge of this section window, from the from the drop down lists, select the Top/Bottom position.
8. From the of drop down list, select the other block.

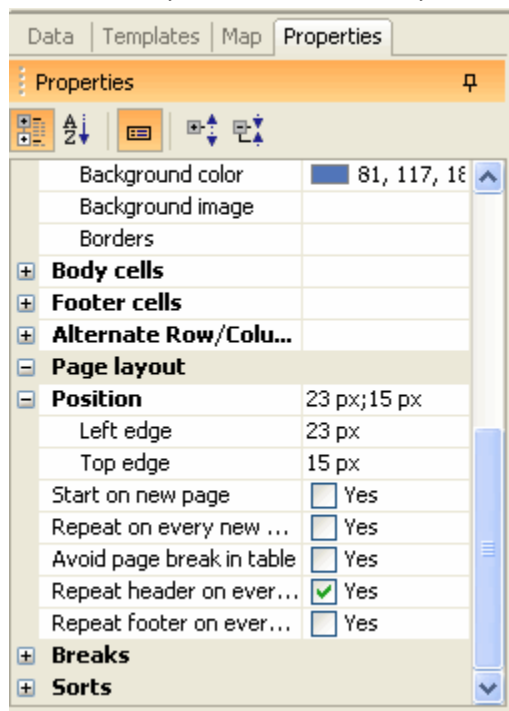
9. To start each section on a new window of the report, in the window layout section, select the Start section on a new window check box.
10. To avoid window breaks on the sections on the report, select the Avoid window break in section check box.


Note: If the section is bigger than one window, WebIntelligence inserts a window break.

WebIntelligence applies the window layout to the selected report.

## To Set Window Layout for Tables

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set table window layout.
2. In the report frame, select a table.  
A blue border displays around the table.
3. On the Report Manager, select the Properties tab.
4. To set window layout, next to the window layout section, select the  button.



5. To position a selected block on a report, in the Position section, in the Left edge and Top edge fields enter the position from the window margins.
6. To select the position of the selected cell, in relation to another block, select the  button next to Position section.

Note: A block is a table, chart, or form on the report.

The Relative Position window opens.

7. In the Place the upper-left of this table/chart/cell section, from the from the drop down fields, select the Left/Right and Top/Bottom position.
8. From the of drop down list, select the other block.
9. To start each table on a new window of the report, in the window layout section, select the Start on a new window check box.
10. To repeat the selected table on each window of the report, select the Repeat on every new window check box.

- To avoid window breaks on the tables on the report, select the Avoid window break in table check box.

Note: If the table is bigger than one window, WebIntelligence inserts a window break.


- To repeat the table header on each window, if the table runs into the next window, select the Repeat header on every window check box.
- To repeat the table footer, if the table runs into the next window, select the Repeat footer on every window check box.


WebIntelligence applies the window layout to the selected report.

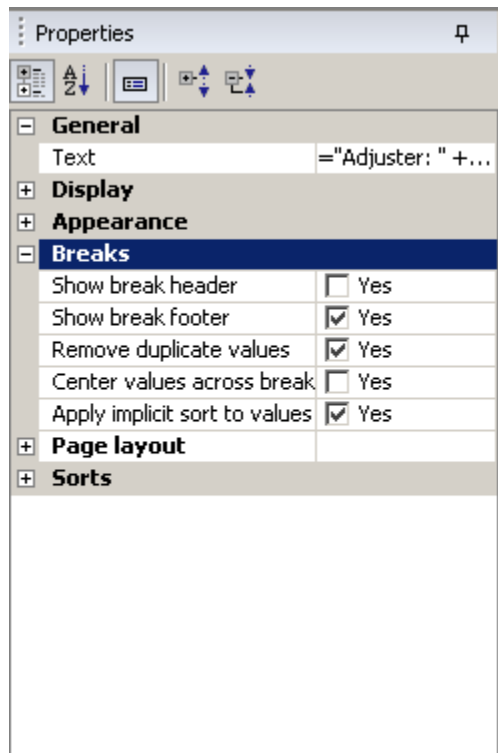
## Breaks and Sorting

### To Set Break Properties

When you insert a break on data, WebIntelligence applies default display properties. In Report view, you can change the display break properties.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.

- In Report view, select the name tab at the bottom of the report frame, for the report in which you want to set break properties.
- In the report frame, select the section or cells on the table, where you want to add a break. A blue border displays around the cell.
- On the Report Manager, select the Properties tab.
- To set breaks, next to the Breaks section, select the  button.



- To display a break header for each part of the table or crosstab, in the Breaks section, select the Show break header check box.

Note: A block is a table, chart, or form on the report.

- To display a footer after the last row for a table or column for a crosstab, select the Show break footer check box.



Note: When you apply a calculation to the data, the result displays in the footer.

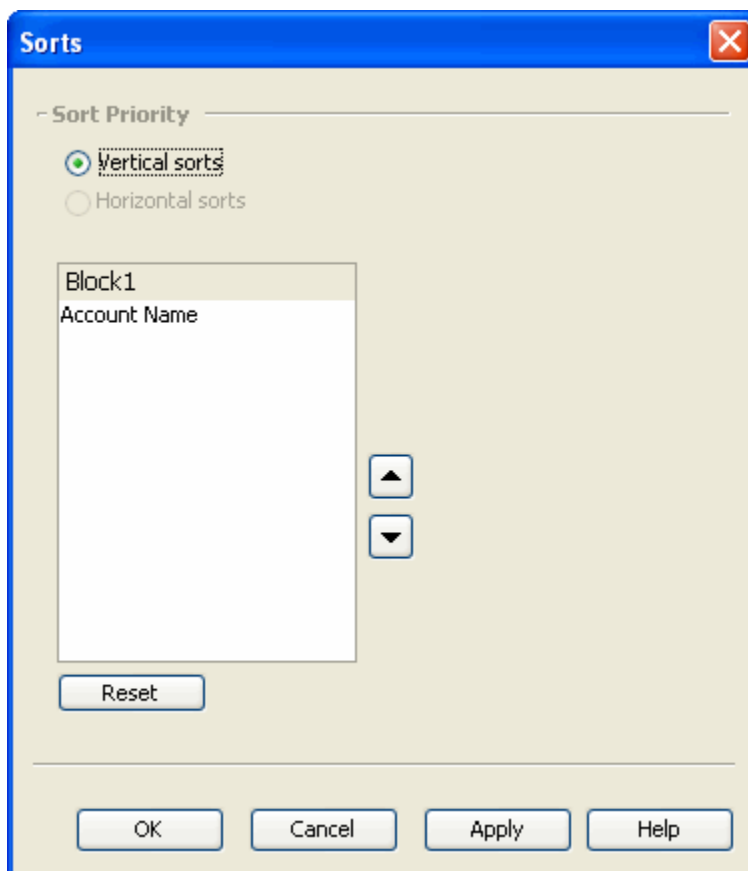
7. To remove all duplicate values from the data in a table or crosstab, select the Remove duplicate values check box.
8. To merge empty cells and place the value name over the merged cells, select the Center values across break check box.

Note: This check box is active only when you select the Remove duplicates values check box.



WebIntelligence displays the selected break properties and window layout.

## To Sort Sections

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to sort sections.
2. In the report frame, select a section.  
A blue border displays around the section.
3. On the Report Manager, select the Properties tab.
4. To set sections, next to the Sorts section, select the  button.
5. From the Sort priority field in the Sorts section, select the  button.  
The Sorts window opens.





Note: If the section you select contains a vertical table, then you can sort by column and the Vertical sorts option is selected by default. If the section you select contains a horizontal table, then you can sort by rows and the Horizontal sorts option is selected by default. If the selected section contains a crosstab, then both the Vertical sorts and Horizontal sorts options display as selected.

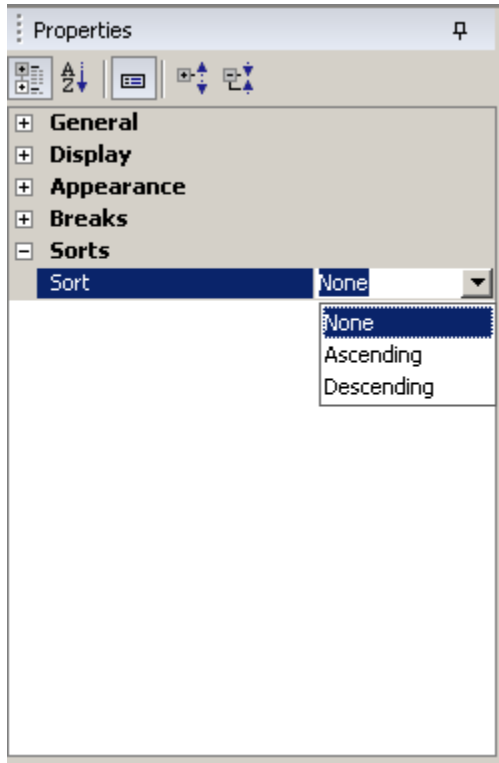
6. From the *section* field, select a section and then select the  and  button to move the section up or down.
7. To discard the sort order and reset the priority, select the Reset button.
8. To apply the sort order, select Apply.  
WebIntelligence applies the new priority to the sorts on the selected table and displays the results on the report.

## To Sort Section Cells

In Report view, you can sort sections to organize the section headers logically in a report. You can sort the cell in a table.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to sort section cells.
2. In the report frame, select a section or cell in a table.  
A blue border displays around the selected section or cell in a table.
3. On the Report Manager, select the Properties tab.
4. To set sort, next to the Sorts section, select the  button.




5. Do one of the following:
  - To sort the results by ascending numeric order for numeric data, ascending chronological order for date and alphabetical order for alphanumeric data, select None.
  - Select the Ascending option to sort the results in ascending order.


- Select the Descending option to sort the results in descending order.



## To Set Priority of Multiple Sorts in a Table

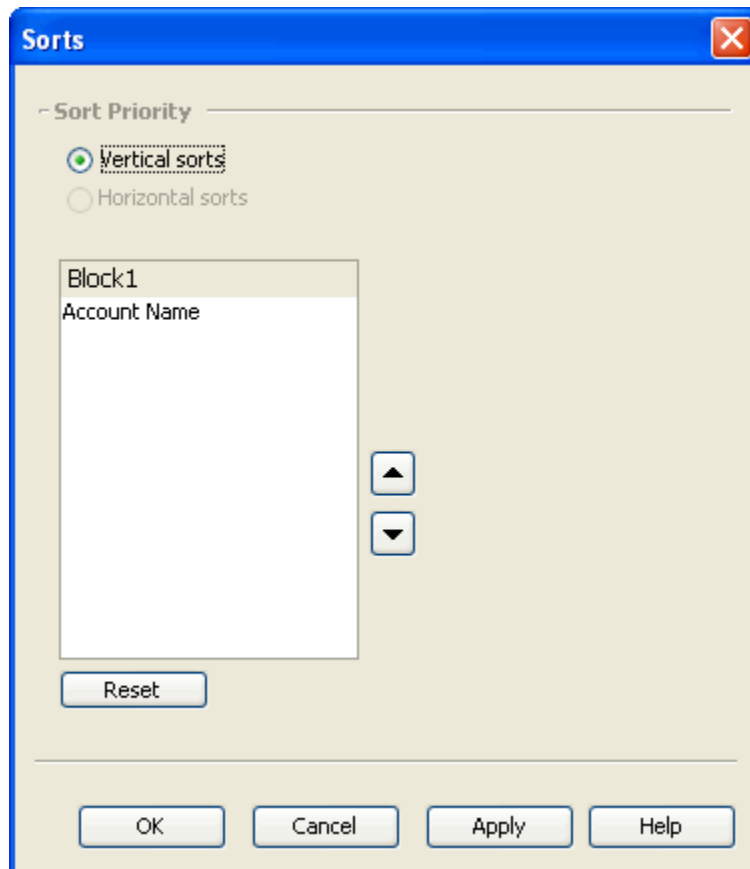
In Report view, you can prioritize the order of multiple sorts on the same table.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to prioritize the order of multiple sorts.
2. In the report frame, place your mouse cursor over the border of the table that contains multiple sorts.



The sort button  displays at the top left of the selected table.

3. Select the sort button.
4. On the Report Manager, select the Properties tab.
5. To set sort, next to the Sorts section, select the  button.
6. From the Sort priority field, in Sorts section, select  button.  
The Sorts window opens.



Note: If the section you select contains a vertical table, then you can sort by column and the Vertical sorts option is selected by default. If the section you select contains a horizontal table, then you can sort by rows and the Horizontal sorts option is selected by default. If the selected section contains a crosstab, then both the Vertical sorts and Horizontal sorts options display as selected.



7. From the *section* field, select a section and then select the  and  button to move the section up or down.
8. To discard the sort order and reset the priority, select the Reset button.
9. To apply the sort order, select Apply.  
WebIntelligence applies the new priority to the sorts on the selected table and displays the results on the report.

## Alerters

### Alerters Overview

Use alerters to highlight results that meet or fail specific business targets. You can create a simple alerter to highlight particularly high or low results with a specific color or with a text comment. Alerters are dynamic and highlight the latest available results when you refresh your document. You can apply thirty alerters in a WebIntelligence document, to a maximum of 20 table columns or rows, free-standing cells, or section cells on the reports.

You can apply the alerter to a table column/row or cell, and use an operand to determine the condition based on which WebIntelligence will apply the formatting to the report. WebIntelligence compares the condition you define with the results on the selected column/row or cell, and displays any results that meet that condition in the format you specified. A single table column or row, free-standing cell, or section cell can have ten alerters.

An alerter can contain multiple conditions. This enables you to highlight information that meets multiple business criteria.

You can include multiple sub-alerters in an alerter and each sub-alerter can contain one or multiple conditions. Sub-alerters enable you to apply different conditions and different formatting to a single object. You can include a maximum of eight sub-alerters in an alerter.

You can include a maximum of six conditions in a single sub-alerter.

You can define alerters to display the following formatting changes to the selected table columns/rows or cells:


- Text color, size and style
- Cell border colors and style
- Cell background display – specific colors, images, or hyperlinks to web windows


You can also define alerters that display a text or formula, an image, or a hyperlink.



## How To

### To Set Priority of Alerters

When you create more than one alerter, in Report view you can set the priority of alerters.


Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

1. In Report view, select the name tab at the bottom of the report pane, for the report in which you want to set the alerter order.
2. In the report frame, select a table column, a table row, a section cell, or a free-standing cell.  
A blue border displays around the table column, a table row, a section cell, or a free-standing cell.
3. On the Report toolbar, select the  button.  
The Alerters window displays on the Report Manager.

4. From the Apply the following alerter(s) field, select an alerter and then select the  and  button to move the alerter up or down.

## To Set the Alerter Display Format

In Report view, after you create an alerter , you can set the alerter display format.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

1. On the Alerter Editor window, from the If the above is true then display field, select the Format button. The Alerter Display window opens.
2. In the Display field, enter the alert you want to display.

Note: To use a formula in the display, select the  button to open the Formula Editor window and build a formula.


3. To set number format, from the Number Format field, select the number format button. The Number Format window opens.
4. From the Format type frame, select the number format. The Properties frame displays the properties of the number format you select.
5. To set the number properties, enter information in the fields.
6. Select OK.
7. On the Alerter Display window, select the Read contents as check box to select the display style for the alerter.
8. From the drop down list, select the display style such as hyperlink, HTML, or web URL.
9. In the Text frame, from the drop down lists, select the font, color, and vertical and horizontal alignment properties.
10. To set the background of the table, in the Background frame, from the Color drop down list, select the background color.

Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

11. To display an image in the background, select the Image option.
12. In the URL field, select the web server URL or directory and folder path of the image, you want to use.
13. From the Display drop down list, select the display of the selected image, such as Stretch, Normal and so on.
14. From the Position drop down list, select the position co-ordinates to display the selected image.
15. To display default available skins in the background, select the Skins option.
16. From the drop down list, select the skin you want to use.
17. In the Border frame, do one of the following:
  - To apply a border all around the selected cell, select the Apply to all sides check box.
  - To manually select the side on which you want to apply the border, Clear the Apply to all sides check box.
18. From the drop down list, select the line type and color for the cell border. WebIntelligence applies the formatting to the alerter.


## To Use Formula to Create Alerter

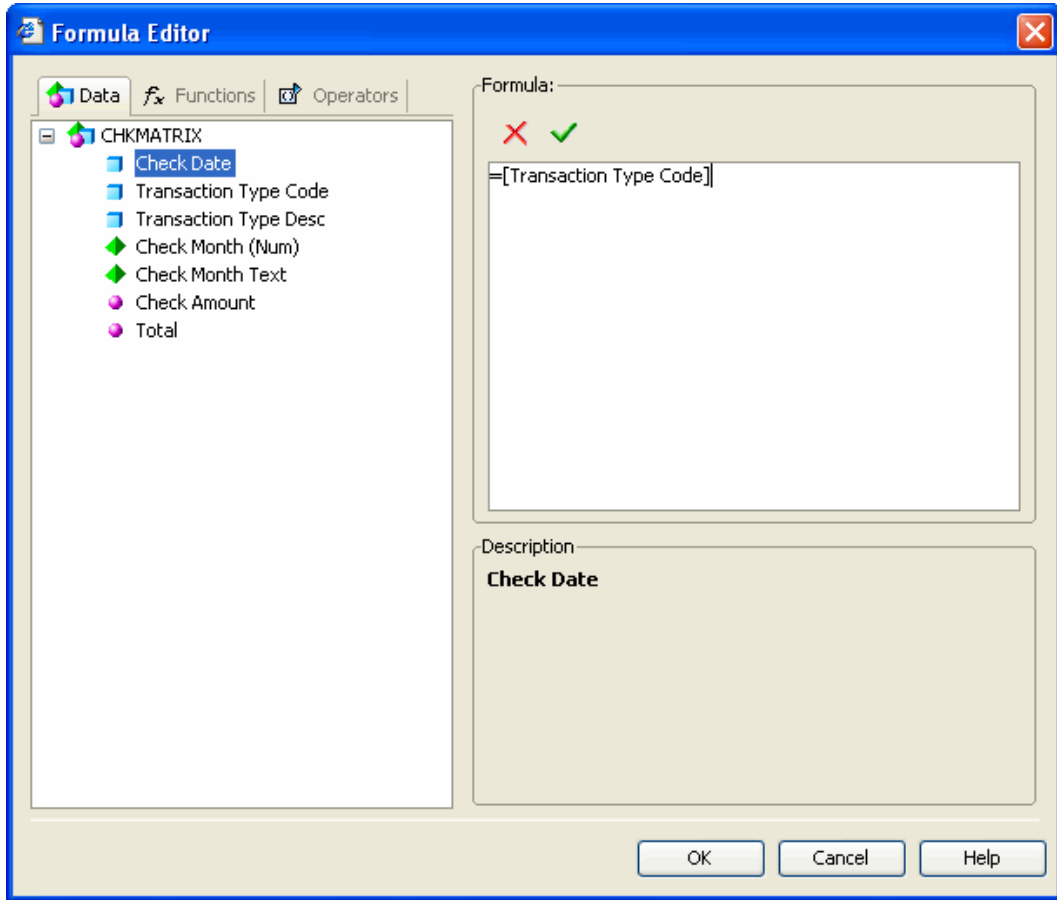
In Report view, you can display formula as alerters. You can select objects, operators, and functions to build a formula.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button .

1. On the Alerter Editor window, select the Formula check box.

The Sub-Alerter field displays the Formula Editor and Validate buttons.

2. Select the  button .  
The Formula Editor window opens.




3. From the Available Objects field, select the object you want to use to build the formula.
4. From the Available Functions field, select the function you want to apply to the selected object.

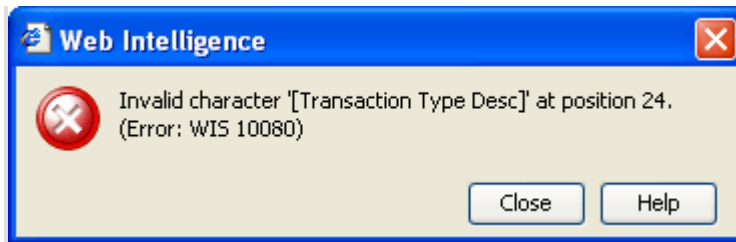
Note: A function is an operation that receives zero or more values as input and returns output based on those values.

5. From the Available Operators field, select the operator you want to apply to the object and the function.

Note: Operators link the various components in a formula. Formulas can contain four kinds of operators: Mathematical, Conditional, Logical and Context.

6. To save the formula as a variable and re-use it throughout a report, select the Validate button. 

If your formula has an error WebIntelligence displays an error message.




7. After you successfully validate the formula, select OK.


The formula displays in the Sub-Alerter field on the Alert Editor window.

## To Work with Alerters



In Report view, you can edit, duplicate, or delete alerters. When you duplicate alerters you can modify the definition of an existing alerter to create a new alerter.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

### To edit an alerter

1. In Report view, select the name tab at the bottom of the report pane, for the report in which you want to edit alerters.
2. In the report frame, select a table column, a table row, a section cell, or a free-standing cell.  
A blue border displays around the table column, a table row, a section cell, or a free-standing cell.
3. On the Report toolbar, select the  button.  
The Alerters window displays on the Report Manager.
4. From the Available Alerter field, select the alerter you want to edit.
5. Select the Edit button.  
The Alerter Editor window opens.
6. Edit the information in the fields.
7. Select OK.


### To duplicate an alerter

1. In Report view, select the name tab at the bottom of the report pane, for the report in which you want to edit alerters.
2. In the report frame, select a table column, a table row, a section cell, or a free-standing cell.  
A blue border displays around the table column, a table row, a section cell, or a free-standing cell.
3. On the Report Manager, select the Properties tab.
4. Do one of the following:
  - From the Report toolbar, select the  button.
  - From the Report Manager: Properties tab, select the  button.

The Alerters window displays on the Report Manager.

5. From the Available Alerters field, select the alerter you want to duplicate and select Duplicate button.  
WebIntelligence displays a duplicate alerter in the Available Alerter field.

### To delete an alerter

1. In Report view, select the name tab at the bottom of the report pane, for the report in which you want to edit alerters.
2. In the report frame, select a table column, a table row, a section cell, or a free-standing cell.  
A blue border displays around the table column, a table row, a section cell, or a free-standing cell.
3. On the Report toolbar, select the  button.  
The Alerters window displays on the Report Manager.
4. From the Apply the following Alerter field, select the alerter you want to delete and select Remove button.  
WebIntelligence removes the selected alerter from the Apply the following Alerter field.

## Field Help

### Alerter Display Window

**To open** From the Alerters window, select the Format... button.

#### Field definitions

##### Display



Select the button to open the Formula Editor window and build a formula.

##### Number format

If the alerter text is a number, then select the Default button and select a format for the number.

##### Read content as

Select the check box to select the display style for the alerter, and from the drop down list, select the display style such as hyperlink, HTML, or web URL.

##### Text

##### Font

From the drop down list, select the font name, style and size to display the alerter text.

##### Underline

Select the check box to underline the alerter text.

##### Strikethrough

Select the check box to strike through the alerter text.

##### Color

From the drop down list, select the color of the alerter text.

##### Vertical

From the drop down list, select the vertical position, such as top, bottom, or center, of the alerter text.

##### Horizontal

From the drop down list, select the horizontal position, such as left, right, or center, of the alerter text.

##### Background

##### Color

From the drop down list, select the background color of the alerter text.

Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.

##### Image (URL)

Select the option if you want to use an image as the alerter text background.

##### URL



Enter the web server URL or directory and folder path of the image, you want to use.



<b>Display</b>	From the drop down list, select the display of the selected image, such as Stretch, Normal and so on.
<b>Position</b>	From the drop down list, select the position co-ordinates to display the selected image.
<b>Skin</b>	Select the option to display default available skins in the background, and from the drop down list, select the skin you want to use.
<b>Border</b>	
<b>Apply to all sides</b>	Select the check box to apply a border all around the selected alert text.
	Note: To manually select the side on which you want to apply the border, Clear the Apply to all sides check box.
<b>Drop down lists</b>	From the drop down lists, select the border line style and color.
<b>OK</b>	Select the button to apply the new alert settings.
<b>Cancel</b>	Select the button to return to the Alert Editor window.
<b>Help</b>	Select to open the WebIntelligence online help.

### Alert Editor Window


**To open** From the Alerts window, select the New button.

#### Field definitions



<b>Alert Name</b>	Enter a name for the alert.
<b>Description</b>	Enter a description for the alert.
<b>Sub-Alert</b>	
<b>Filtered object or cell</b>	Displays the name of the object or cell you selected. Select the  button to open a pop-up menu. From the pop-up menu, do one of the following: <ul style="list-style-type: none"> <li>▪ To base the alert on the contents of a cell(s) irrespective of any specific object or variable, from the pop-up menu, choose Cell Contents.</li> <li>▪ To base the alert on a specific object or variable in the document, from the pop-up menu, choose Select an object or variable.</li> </ul>
<b>Operator</b>	From the drop down list, select an operator.
<b>Operand(s)</b>	Select the  button to open as pop-up menu. From the pop-up menu, do one of the following: <ul style="list-style-type: none"> <li>▪ To select an object or variable for a cell or measure object, from the pop-up menu, choose Select an Object or Value.</li> <li>▪ To select value for a dimension object, from the pop-up menu, choose Select Value(s).</li> </ul>

	Select the button to add a condition.
	Select the button to remove a condition.
<b>If the above is true, then display</b>	Displays the alerter text you want to display.
<b>Format...</b>	Select the button to open the Alerter Display window and edit the alerter text you want to display.
<b>Add Sub-Alerter</b>	Select the button to add a sub-alerter.
<b>Remove Sub-Alerter</b>	Select the button to remove a sub-alerter.
<b>Formula</b>	Select the check box if you want to enter a formula as a sub-alerter.
<b>OK</b>	Select to save the alerter.
<b>Cancel</b>	Select to close the window.
<b>Help</b>	Select to open the WebIntelligence online help.

### Alerters Window

- To open**
- From the report frame, select a table column, a table row, a section cell, or a free-standing cell.
  - From the Report toolbar, select the  button.




### Field definitions

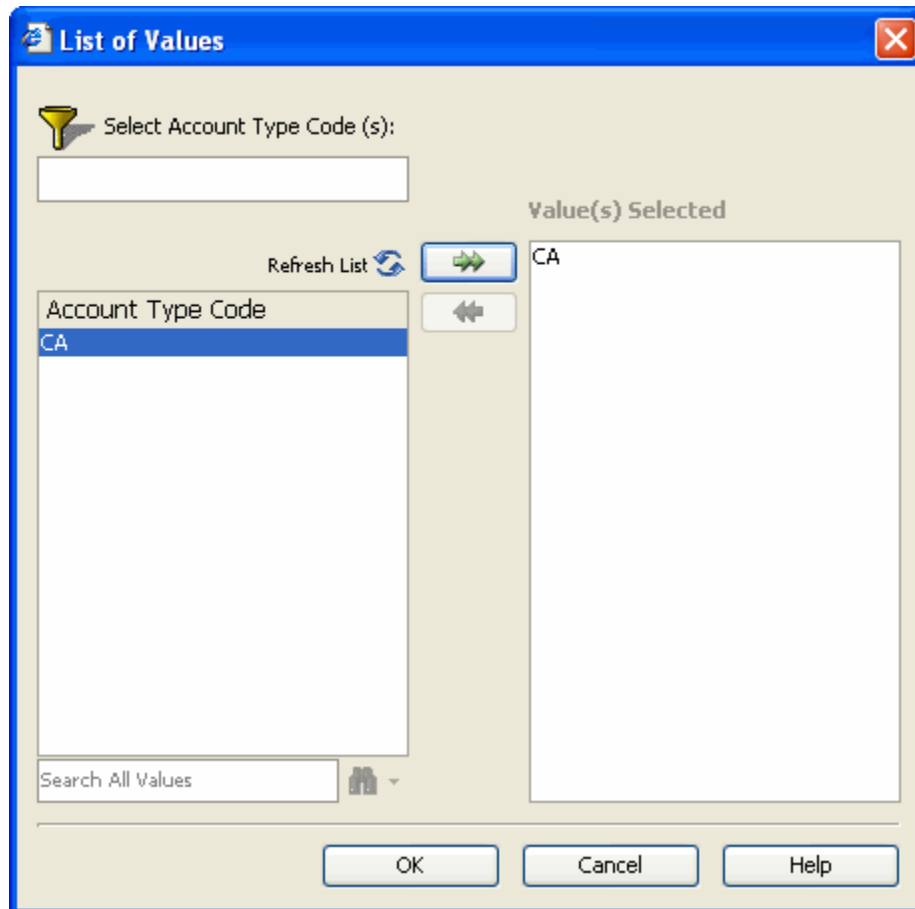
<b>Available Alerters</b>	Displays a list of available alerters. Select the check box for the alerter you want to apply.
	From the Available Alerter field select an alerter and select the button to move the alerter up the priority list.
	From the Available Alerter field select an alerter and select the button to move the alerter down the priority list.
<b>New</b>	Select to open the Alerter Editor window.
<b>Edit</b>	From the Available Alerter field select an alerter you want to edit and select the button.
<b>Duplicate</b>	From the Available Alerter field select an alerter you want to duplicate and select the button.
<b>Remove</b>	From the Available Alerter field select an alerter you want to delete and select the button.
<b>OK</b>	Select to save the alerter.
<b>Cancel</b>	Select to close the window.
<b>Help</b>	Select to open the WebIntelligence online help.


## Working with Report Filters

### How To

#### To Use the Quick Filter to Create Custom Report Filter

1. Search for the document in which you want to insert a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
4. To view the Report Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button .
5. Select the part of the report you want to filter, such as the entire report, a section, a table, chart or form, and from the WebIntelligence toolbar, select the Add Quick Filter button .  
The List of Values window opens and displays the values for the selected section or block.




6. Select the value(s) you want to retrieve from the database.  
To find a specific value, select the  button.  
To refresh the value list, select the Refresh List button.
7. Select OK.  
The new filter displays in the Report Filters frame.




Note: When you run the query, WebIntelligence returns the data corresponding to the report filter(s) you select.

## To Work with Report Filters


In Report view, you can edit and delete the filters on queries.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .

### To edit a report filter

1. Search for the document from which you want to delete a report filter.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button  .  
The Report Filters frame displays the report filters.
4. Double click the filter you want to edit.  
The Filter Editor window opens.
5. Edit the information in the fields on the Filter Editor window.
6. Select OK.  
The modified report filter displays in the Query Filters frame.

### To delete a report filter


1. Search for the document from which you want to delete a report filter.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. From the WebIntelligence toolbar, select the Show/Hide Filter Pane button  .  
The Query Filters frame displays the report filters and prompts.
4. To delete a filter from your report, do one of the following:
  - From the Query Filters frame, select the report, and drag and drop onto the Query Manager.
  - From the Query Filters frame, select the report, and press Delete on your keyboard.  
The filter does not display in the Query Filters frame.

## To View Report Filters

You can view the filters, you apply:

- To the entire report
- To a specific section or block


### To view all the filters on a report

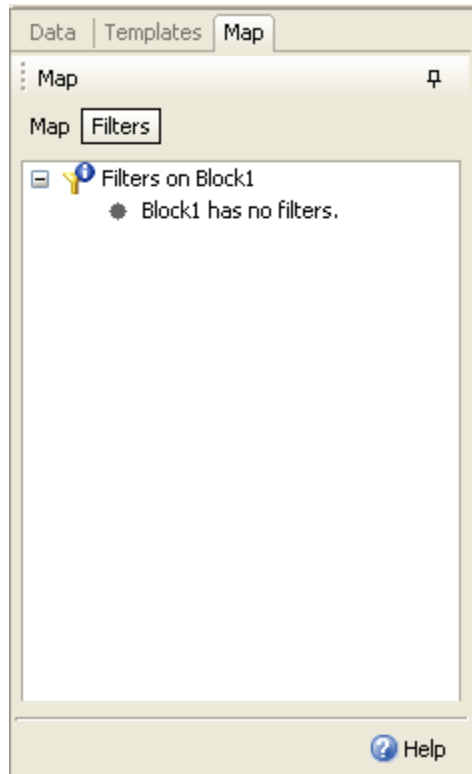
1. Search for the document in which you want to insert a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.

5. From the Report Manager, select the Map tab.
6. From the Report Manager: Map tab, select Filters the tab.  
The filters displays.





To view the filters applied to a selected section or block

1. Search for the document in which you want to insert a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
4. In Report view, select the report name tab at the bottom of the report frame.
5. In the Report frame, select the block or section for which you want to view the filters.
6. From the Report Manager, select the Map tab.
7. From the Report Manager: Map tab, select Filters tab.  
The filters display in a tree format.



### To Use the Filter Editor to Create Custom Report Filter

1. Search for the document in which you want to insert a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
4. To view the Report Filters frame, from the WebIntelligence toolbar, select the Show/Hide Filter Pane button .
5. From the Result Objects frame, select the object you want to filter and drag it to the Report Filters frame.  
The Filter Editor window opens and the Filtered Object field displays the name of the object you select.

**Filter Editor**

**Editing Block1 Filters**

**Filtered Object**

Account Number

**Operator**

Equal to

**Operand Type**

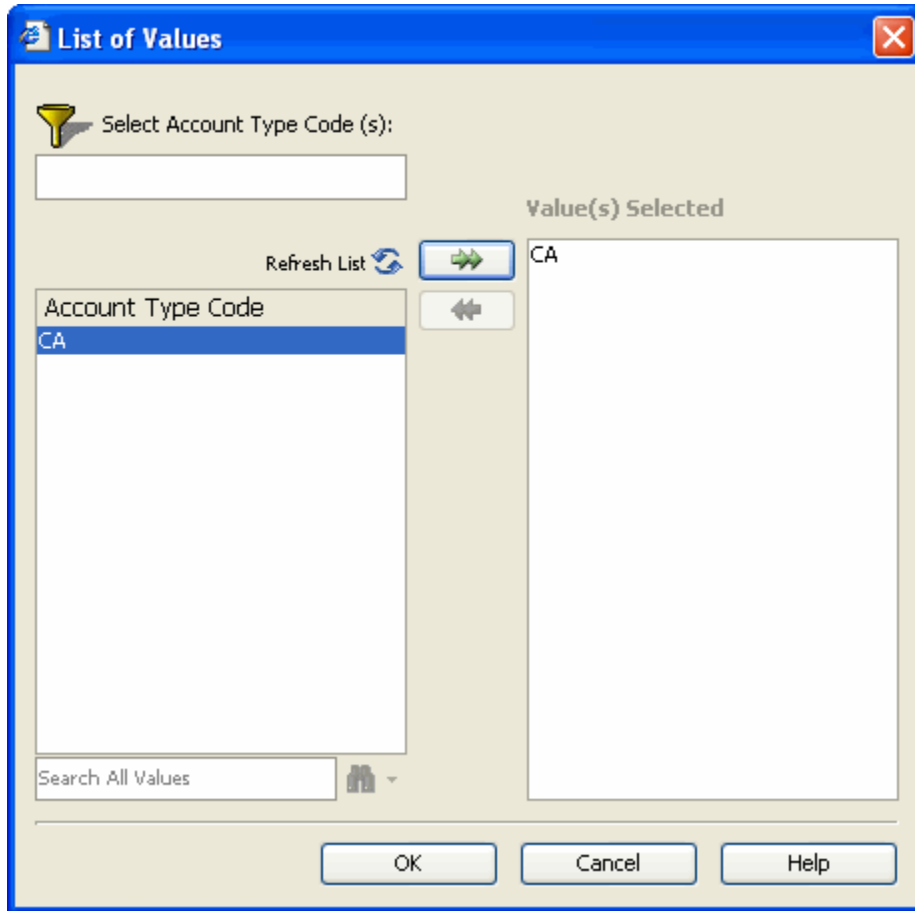
Constant



Value(s) from list

Type a value:

OK Cancel Help

6. From the operator drop down list, select the operator you want to use to create your query filter.
7. From the Operand Type field, select the Constant option, if you know the exact spelling or name of the data you want to filter.  
The Type of Value field displays.
8. In the Type a Value field, enter the constant value, such as the names of months or numbers for specific years.
9. From the Operand Type field, select the Value(s) from list option, if you do not know the exact spelling or name of the value(s) you want to filter.
10. The (Object Name) list of values field for the selected object displays.



11. From the list of values for the object, select the value(s) you want to use and select the  button. The value you select, displays in the Value(s) Selected field.
12. To find a specific value, for example all values that contain the number 7, enter 7 in the field and select the  button. The (*Object Name*) list of values field displays all values that contain the specific value you want to find.
13. To refresh the value list, select the Refresh List button.
14. Select OK.

Note: When you run the report, WebIntelligence returns the data corresponding to the report filter(s) you select.

## Field Help

### Filter Editor Window

**To open** From the Result Objects frame, select the object you want to filter and drag it to the Report Filters frame.

### Field definitions

**Filtered Objects** Displays the object name for which you want to select a filter.

**Operator** From the drop down list, select the operator you want to apply to objects to filter required data.

- Operator Type**
- Select the Constant option if you know the exact spelling or name of the data you want to filter.
  - Select the Value(s) from List option if you do not know the exact spelling or name of the value(s) you want to filter.

*Fields for Constant operator*

**Type a value, then add it.** Enter a constant value, such as the names of months or numbers for specific years.

*Fields for Value(s) from List operator*

**Object name** Displays the list of values for the object.



Enter a specific value in the field and select the button.

**Note:** The field displays the list of values for the object.



From the list of values for the object, select the value(s) you want to use and select the button, to add the selected object to the Value(s) Selected field.



Select the button to move the selected object from Value(s) Selected field.

**Value(s) Selected** Displays the value(s) you select.

**OK** Select to save the filter.

**Cancel** Select to close the window without selecting a filter.

**Help** Select to open the WebIntelligence online help.

## Report Filters Overview

You can filter the values in reports to display specific data, such as a specific claimant or fiscal period. The data you filter out does not display in the report tables or charts. You can change or remove report filters to view the hidden values, without modifying the query definition for the document.

Report filters enable you to view a different sub set of the document data in different reports or on different sections, tables, or charts in the same report. You can apply report filters to any of the reports, sections, tables, charts, or forms in a WebIntelligence document.


## Working with Multiple Reports

### How To

#### To Insert a Report


Your document can contain one or multiple reports. In Report view, you can insert a new report to display different subsets of document information on different report tabs.

1. Search for the document in which you want to insert a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.

3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.  
A pop-up menu opens.
5. From the pop-up menu, choose Insert Report.  
WebIntelligence inserts a new report in the document.


### To Duplicate a Report

Your document can contain one or multiple reports. In Report view, you can duplicate an existing report and modify the report to create a new report.

1. Search for the document in which you want to duplicate a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.  
A pop-up menu opens.
5. From the pop-up menu, choose Duplicate Report.  
WebIntelligence creates a duplicate report in the document.

### To Rename a Report


Your document can contain one or multiple reports. You can display different subsets of document information on different report tabs. In Report view, you can rename an existing report when you have multiple reports in a document.

1. Search for the document in which you want to rename a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.
5. A pop-up menu opens.
6. From the pop-up menu, choose Rename Report.  
The Properties tab opens in the Report Manager.
7. In the Name field from the General frame, enter the new name for the report.
8. WebIntelligence creates a report in the document with the new name.  
  
The new report name displays on the report name tab at the bottom of the report frame.

### To Delete a Report




Your document can contain one or multiple reports. In Report view, you can delete an existing report.

1. Search for the document in which you want to delete a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.

3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.  
A pop-up menu opens.
5. From the pop-up menu, choose Delete Report.  
WebIntelligence removes the selected report from the document.




## To Move a Report

Your document can contain one or multiple reports. In Report view, you can re-order the reports in a document.

1. Search for the document in which you want to move a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.  
A pop-up menu opens.
5. From the pop-up menu, choose Move Report.  
The Document Properties window opens in the Report Manager.
6. In the Report Order frame, from the field, select a prompt and then select the  and  button to move the prompt up or down.  
When you refresh the document data, the reports display in the new order you specify.

## To Switch to Drill Mode


In Report view, you can drill a report to analyze the detailed data contained in the results that displays on tables and charts. To drill on a report you need to switch to the drill mode.

1. Search for the document in which you want to drill a report.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, right click the report name tab at the bottom of the report frame.  
A pop-up menu opens.
5. From the pop-up menu, choose Drill Report.  
On the WebIntelligence toolbar the Drill button  Drill displays as selected. In the report frame, the report name tab displays the drill button  Report 1 .

**Note:** To return to Report view, from the WebIntelligence toolbar, select the Drill button.

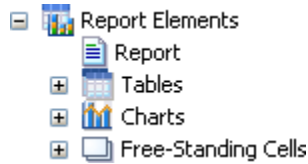
## To Insert Window Numbers


In Report view, you can insert special cells to display window information on a report.

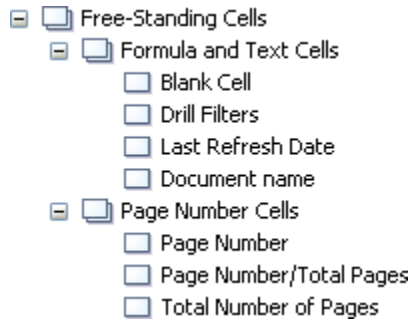
**Note:** To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .





1. In Report view, select the name tab at the bottom of the report frame for the report in which you want to insert window number cell.
2. On the Report Manager, select the Templates tab.  
The Query Manager: Templates tab displays the Report Elements navigation tree.



3. Select the  next to Free-Standing Cells.  
The navigation tree expands and displays the available templates.



4. Do one of the following:
  - To display the window number of the report window, from the window Number Cells branch, select window Number cell and drag and drop onto the report frame.
  - To display the total number of windows in the document, from the window Number Cells branch, select window Number/Total windows cell and drag and drop onto the report frame.
  - To display the window number of the report window followed by the total number of windows in the document, from the window Number Cells branch, select Total Number of windows cell and drag and drop onto the report frame.
5. To display the position the window numbers in the window header or footer, from the toolbar select the View window Layout button .
6. To view the window header and footer, from the toolbar, select the View Structure button  View Structure.
7. From the navigation tree, drag and drop a window number cell template onto the header or footer cell.

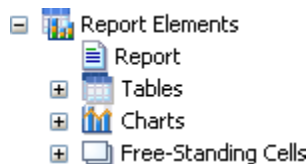
Note: To display window numbers anywhere on the report except the window header or window footer, you can drag and drop a window number cell template onto an empty area of the report.


8. To edit the window Number cell, do one of the following
  - Select the cell and on the Report Manager, select the Properties tab.
  - Right click the cell and from the pop-up menu, choose Edit Format.
9. The Cell Properties window displays on the Report Manager.
10. To format the cell, select the appropriate options on the Cell Properties window.  
WebIntelligence applies the selected format to the special cell.

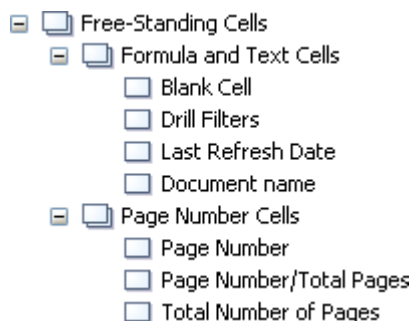
## To Insert Information about Report Data

You can insert special cells to display information about report data, such as the last refresh date and drill filters.

1. In Report view, select the name tab at the bottom of the report frame, for the report in which you want to insert a special cell.
2. On the Report Manager, select the Templates tab.  
The Query Manager: Templates tab displays the Report Elements navigation tree.




3. Select the  next to Free-Standing Cells.  
The navigation tree expands and displays the available templates.




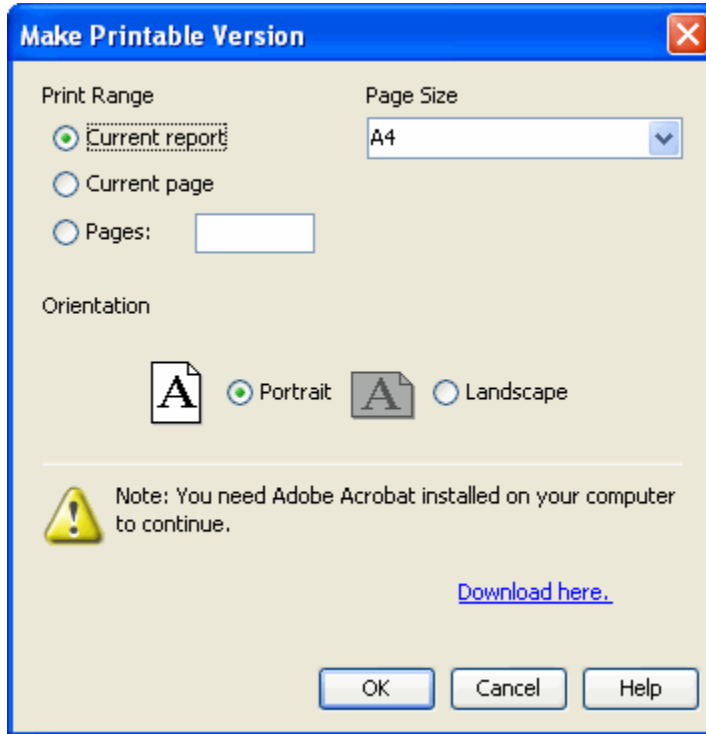
4. To display the date on which the report data was updated with the latest database data, from the Formula and Text Cells branch, select Last Refresh Date cell and drag and drop onto the report frame.
5. To display the names of the objects that you use to filter and display report data, from the Formula and Text Cells branch, select Last Refresh Date cell and drag and drop onto the report frame.
6. To format the special cells, do one of the following
  - Select the cell and on the Report Manager, select the Properties tab.
  - Right click the cell and from the pop-up menu, choose Edit Format.
7. The Cell Properties window displays on the Report Manager.
8. To format the cell, select the appropriate options on the Cell Properties window.  
WebIntelligence applies the selected format to the special cell.

## To Print Reports in a Document

WebIntelligence prints reports from left to right, and then top to bottom. If a report is wider than the width of the paper size defined in the Report window Layout, WebIntelligence inserts window breaks for the printout.

1. Search for the document you want to print.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
4. In Report view, select the report name tab at the bottom of the report frame .

5. From the WebIntelligence toolbar, select the Export to PDF for Printing button . The Make Printable Version window opens.



6. To specify the range of reports you want to print, do one of the following:
- To print the entire report, select the Current Report option.
  - To print the window that currently displays, select the Current window option.
7. To print a range of windows, select the windows option and in the field enter the specific window numbers, or window range.  
To change the paper size, from the Paper Size drop down list, select a different paper size.
8. To select the Orientation, select the Portrait or Landscape option.
9. Select OK.  
WebIntelligence generates a copy of the report to a PDF file.

## Drilling on Reports

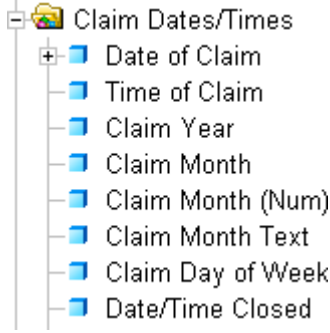
### Scope of Analysis Overview

The scope of analysis for a query enables you to retrieve extra data from the database, to give more details on the data returned by each of the objects in a query. In the universe, the scope of analysis corresponds to the hierarchical levels below the object you select for a query. For example, a scope of analysis of one level down for the object Year, would include the object Quarter, which displays immediately under Year. You can set this level when you build a query.

The query includes objects lower down the hierarchy that do not display in the Results Objects frame. The hierarchies in a universe allow you to choose your scope of analysis, and correspondingly the level of drill available. The data necessary for the scope you specify is saved with the document, even though it does not display in the report, unless you start drill mode and drill down to the data to display the corresponding values.

You can add these objects to the reports at any time, without the need to run the query again. You can also manually select specific objects to create a custom scope of analysis.

You can set the following levels for scope of analysis:

Level	Description
<b>None</b>	Only objects that display in the Result Objects frame are included in the query.
<b>One level down</b>	For each object in the Result Objects frame, one, two, or three objects lower down the hierarchy tree are included in the query. The data from these objects is stored in the data cube until you add them to the document. For example:
<b>Two levels down</b>	
<b>Three levels down</b>	 <p>Level one includes:</p> <p>Date of Claim</p> <p>Level two includes:</p> <p>Date of Claim and Time of Claim</p> <p>Level three includes:</p> <p>Date of Claim, Time of Claim and Claim Year</p>
<b>Custom</b>	The query includes all objects you manually add to the Scope of Analysis frame.

Note: CSC recommends you only include necessary objects in the scope of analysis, to minimize the size of documents and optimize performance.

## Drill Overview

You can drill a report to analyze the detailed data that displays as results on tables and charts. When you drill on reports you can go deeper into your data to discover the details behind the summary results. You can directly drill on a selected report or create a duplicate report and drill on the duplicate. If you have security permissions to drill for information that is not included in the scope of analysis for the document, you can set up a message prompt to create a new query during a drill action. You can synchronize your drill actions on all the blocks in the drilled report.

Note: A block is a table, chart, or form on the report.

To make a document drillable you need to specify the scope of analysis included behind the displayed results. You can specify a predefined scope of analysis for all dimension objects in the report, or customize the scope of analysis for each dimension object in each class.

When you analyze data in drill mode, you move along a drill path. The drill paths are based on the dimension object hierarchies. In a universe, dimension objects are organized in classes in a hierarchy with the most summary objects at the top and the most detailed at the bottom. When you make a high-level report, your query will include objects at the top of the hierarchy. To see more detailed information, you have to drill down on each object value that displays on your report.

Drill paths usually follow the same hierarchy order as the classes on a universe. For example, a class called Time typically includes the Year object at the top of the class, followed by the Quarter, Month, and Week objects. You can also define custom hierarchies.

Note: You cannot drill on detail objects.

## How To


### To Set Up Drill Options

You set your drill options in InfoView. When you modify your drill options, WebIntelligence implements the changes the next time you start Drill mode.

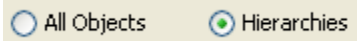
1. From the InfoView toolbar, select the Preferences button.  
The Preferences window opens.
2. Select the Web Intelligence Document tab.
3. To select the tasks you want to perform on reports, from Select a view format, do one of the following:
  - To perform drill analysis only, select the HTML option.
  - To perform drill interactive, select Portable Document Format (AdobeReader required) option
4. To set options For each new drill session, do one of the following:
  - To drill on a duplicate report, select the Start drill on a duplicate report option.
  - To drill on the existing report, select the Start drill on the existing report option.
5. To receive a prompt if a drill action requires a new query to extend the scope of analysis, in the General drill options, select the Prompt if drill requires additional data check box.
6. To synchronize drilling on all report blocks, select the Synchronize drill on report blocks check box.
7. To hide the drill toolbar when you switch to drill mode, select the Hide drill toolbar check box.
8. Select OK.  
WebIntelligence applies your new drill settings.

## To View Drill Hierarchies in a Universe

In Query view, you can view drill hierarchies in a universe.

Note: To open Query view, from the WebIntelligence toolbar, select the EditQuery button  Edit Query .

1. Search for the document in which you want to view drill hierarchies.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. Select the Data tab.
4. On the Query Manager: Data tab, select the Hierarchies option.



The Hierarchy navigation tree displays in the Query view.

5. To view the dimension objects on each hierarchy, click the  button next to each hierarchy.

Note: The hierarchies organize the dimension objects with the most summary data at the top and the most detailed data at the bottom.

## To Drill on Dimension Objects




You can analyze dimension object values in tables, section cells, and charts on a report. Dimension objects typically represent character-type data, such as customer or business names, and dates. WebIntelligence makes calculations based on the dimension objects in a report. In Report view, you can:

- Drill down to analyze the lower-level data behind the visible data
- Drill up to analyze the more detailed data aggregates to a higher-level result

To drill on dimension objects

1. Search for the document in which you want to view drill hierarchies.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.

The Query Manager opens.

3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button .
4. From the WebIntelligence toolbar, select the Drill button . On the report frame, the drillable values display on the report as hyperlinks.
5. To drill down on a dimension value in a table or section header, right click the value. A pop-up menu opens.
6. From the pop-up menu, choose Drill down. Your report displays data one dimension level down.
7. To drill up on a dimension value in a table or section header, from the dimension value select the Drill Up button . Your report displays data one dimension level up.




### To Drill on Measure Objects

When you drill on a measure object, WebIntelligence performs the drill action one level down for each related dimension in the block and displays the new measure calculation for the displayed dimension objects.

You can:

- Drill down to analyze one level down for each related dimension in the report
- Drill up to analyze one level up for each related dimension in the report

#### To drill on measure objects

1. Search for the document in which you want to view drill hierarchies.
2. On the Search Results window, select the Modify link to view the Query Manager for the document. The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button .
4. From the WebIntelligence toolbar, select the Drill button . On the report frame, the drillable values display on the report as hyperlinks.
5. To drill down on a measure value in a table or section header, right click the measure. A pop-up menu opens.
6. From the pop-up menu, choose Drill down. Your report displays data one dimension level down.
7. To drill up on a dimension value in a table or section header, from the measure value select the Drill Up button . Your report displays data one dimension level up.

### To Choose a Drill Path

A dimension object can belong to several hierarchies. When you drill a result on a dimension that belongs to more than one hierarchy, you must define a drill path. In Query view, you can choose a drill path when more than one is available.

Note: To open Query view, from the WebIntelligence toolbar, select the Edit Query button



1. Search for the document in which you want to view drill hierarchies.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.

3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button



4. From the WebIntelligence toolbar, select the Drill button



On the report frame, the drillable values display on the report as hyperlinks.


5. Right click the dimension value in a table or section cell.  
A pop-up menu opens and displays the drill by path.
6. Select the path you want to drill.
7. Select OK.

### To Drill on Measure Objects in Charts

A chart graphically displays the measure values in a report. When you drill on the body of a chart, WebIntelligence performs the drill action for each dimension in the chart that corresponds to that measure value. You can drill on the measures that display on bar charts, line and radar line charts, and pie charts.

Note: You can drill down or up on a measure value in a chart. You cannot drill by.

To drill on measure objects in charts

1. Select a chart template for your report.
2. On the chart, right click the measure value you want to drill.  
A pop-up menu opens.
3. To drill down, from the pop-up menu, choose Drill down.  
Your report displays data one dimension level down.
4. To drill up on a dimension value in a table or section header, from the dimension value select the Drill Up button  
  
Your report displays data one dimension level up.

### To Drill by Dimension Objects

When you drill on dimension values, you can use Drill by to skip across dimensions in the same hierarchy class or move to another class.

1. Search for the document in which you want to view drill hierarchies.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.

3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button



4. From the WebIntelligence toolbar, select the Drill button



On the report frame, the drillable values display on the report as hyperlinks.



5. Right click the dimension value on which you want to drill by.  
A pop-up menu opens and displays your drill options and their respective drill paths.

- From the pop-up menu, choose the class to which you want to drill and then select the dimension to which you want to drill.  
Your report now displays data for the new dimension.

## To Drill Outside the Scope of Analysis

When you want to drill up or down beyond the data included in the document, you need to extend the defined scope of analysis. You have to specify the dimensions you want to return to the document in order to continue your analysis. To return the additional data, WebIntelligence runs a new query, including the additional dimension(s) you specify.

To drill outside the scope of analysis

- Search for the document in which you want to view drill hierarchies.
- On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
- To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
- From the WebIntelligence toolbar, select the Drill button  Drill.  
On the report frame, the drillable values display on the report as hyperlinks.
- Drill on a dimension value in a table or section cell.  
If you set drill options to receive a prompt if a drill action requires a new query, the Extend the Scope of Analysis window opens.



**Note:** The Extend the Scope of Analysis window displays the dimensions in the hierarchy above and below the drilled value. The check box for the dimensions already included in the document display as selected.

- Select the check box(es) for the dimension(s) you want to drill.
- Select the check box(es) for the filters you want to use to filter the query.
- Select OK.  
WebIntelligence runs a new query and returns the additional data to the document.

## To Save your Drill Results

You can take a snap shot of the drill results and save a copy of the results. When you take a snapshot, InfoView inserts a new report after the last report in the document. The snap shot of the drill results is read-only. You can also save your report in drill mode. When you open that report, InfoView displays the report in drill mode.



To save a copy of the drill results

- Search for the document in which you want to drill and save a copy of the drill results.
- On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
- To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
- On a drilled report, from the WebIntelligence toolbar, select the Take Snapshot of Drilled Report button .  
WebIntelligence displays a new report after your last report in the document.
- To view the snap shot, select the new report tab.

To save reports in drill mode

- Search for the document in which you want to save a report in the drill mode.
- On the Search Results window, select the link for the document you want to open.  
The document displays.



3. Select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
4. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .
5. From the WebIntelligence toolbar, select the Save button  .
6. From the pop-up menu, choose document type.
7. On the Save as *document type* window, select the Refresh on open check box to refresh the document data when you open the document.
8. Select OK.

## Working on Documents

### Documents Overview

You can save WebIntelligence documents for your personal reference or share your documents with other users. You save WebIntelligence documents to InfoView. You can also save WebIntelligence documents as Microsoft Excel spreadsheets and Adobe Acrobat PDF files.


You print WebIntelligence documents report-by-report. You can print one or multiple reports from a single document. WebIntelligence generates a temporary PDF file from the selected report before printing.

**Note:** To print WebIntelligence reports, you need to have Adobe Acrobat Reader installed on your computer.

### How To



#### To Delete Web Intelligence Documents

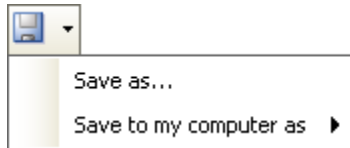
If you have the appropriate security permissions, you can delete the Web Intelligence documents you save to InfoView Personal Documents or Corporate Documents.

1. Search for the document you want to delete.
2. On the Search Results window, the documents that meet your specified search criteria display.
3. Select the check box next to the name(s) of the document(s) you want to delete.
4. Select the Delete Document button  .  
The confirmation message is displayed.
5. Select OK to delete the document.  
A Item(s) successfully deleted message displays.

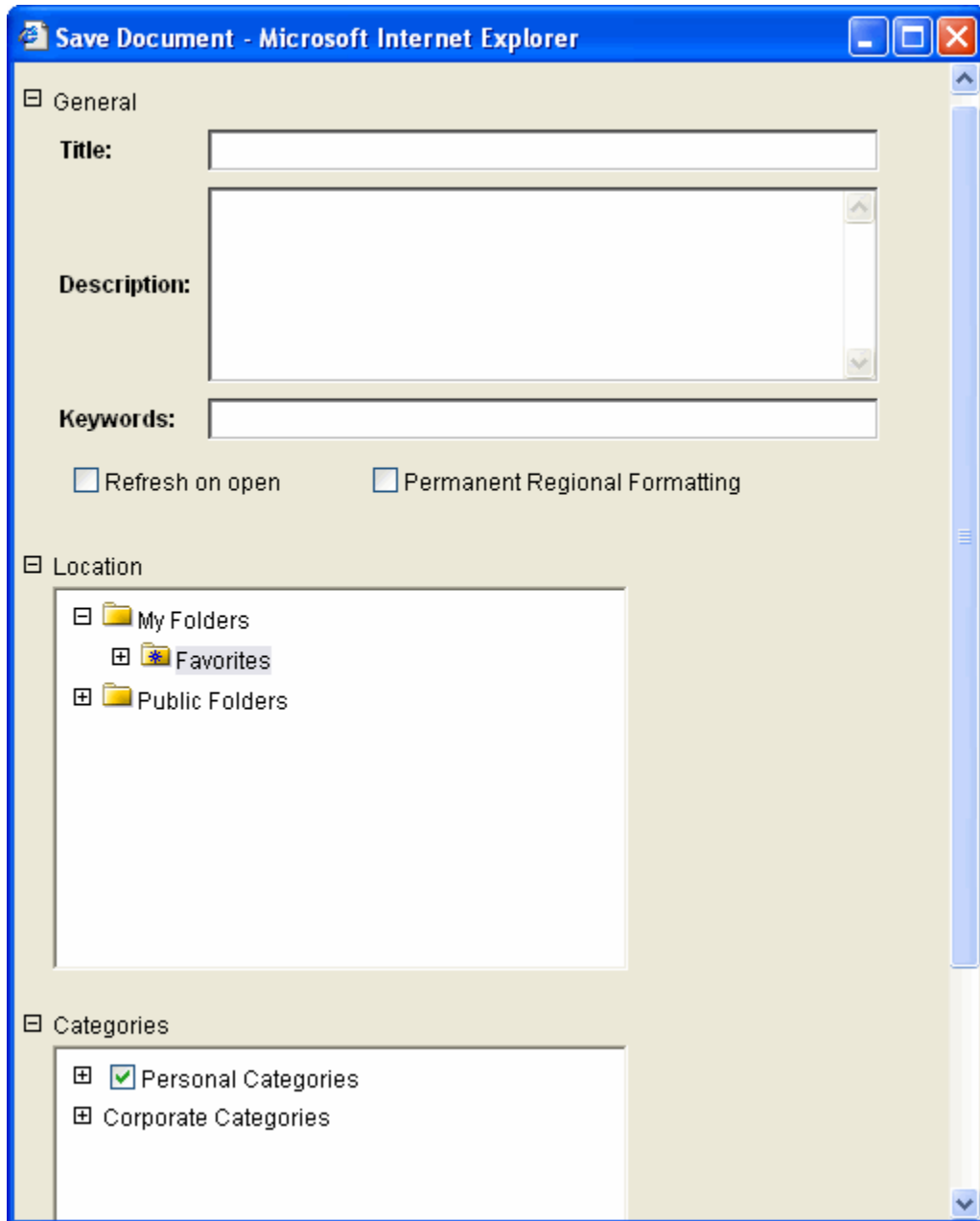
#### To Save a New Document to Personal Documents

After you create a document, to save a new document to personal documents

1. After you create a document, from the toolbar, select the  next to the  button.  
A pop-up menu opens.



2. From the pop-up menu, choose Save as...  
The Save Documents window opens.





3. From the General frame, in Title field enter the document title.
4. In the Description field, enter a description for your document.
5. In the Keywords field, enter any keywords you want to use to search for the document.
6. To refresh the document data automatically each time you open the document, select the Refresh on open check box.

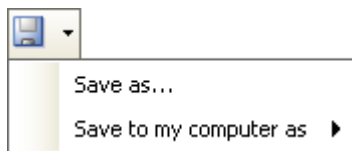
7. To include regional formatting in your document, select the Permanent Regional Formatting check box.
8. From the Location field, select the location where you want to save your document.
9. From the Categories field, select the check box for the category in which you want to save the Personal document.

**Note:** Your system administrator creates categories in InfoView.

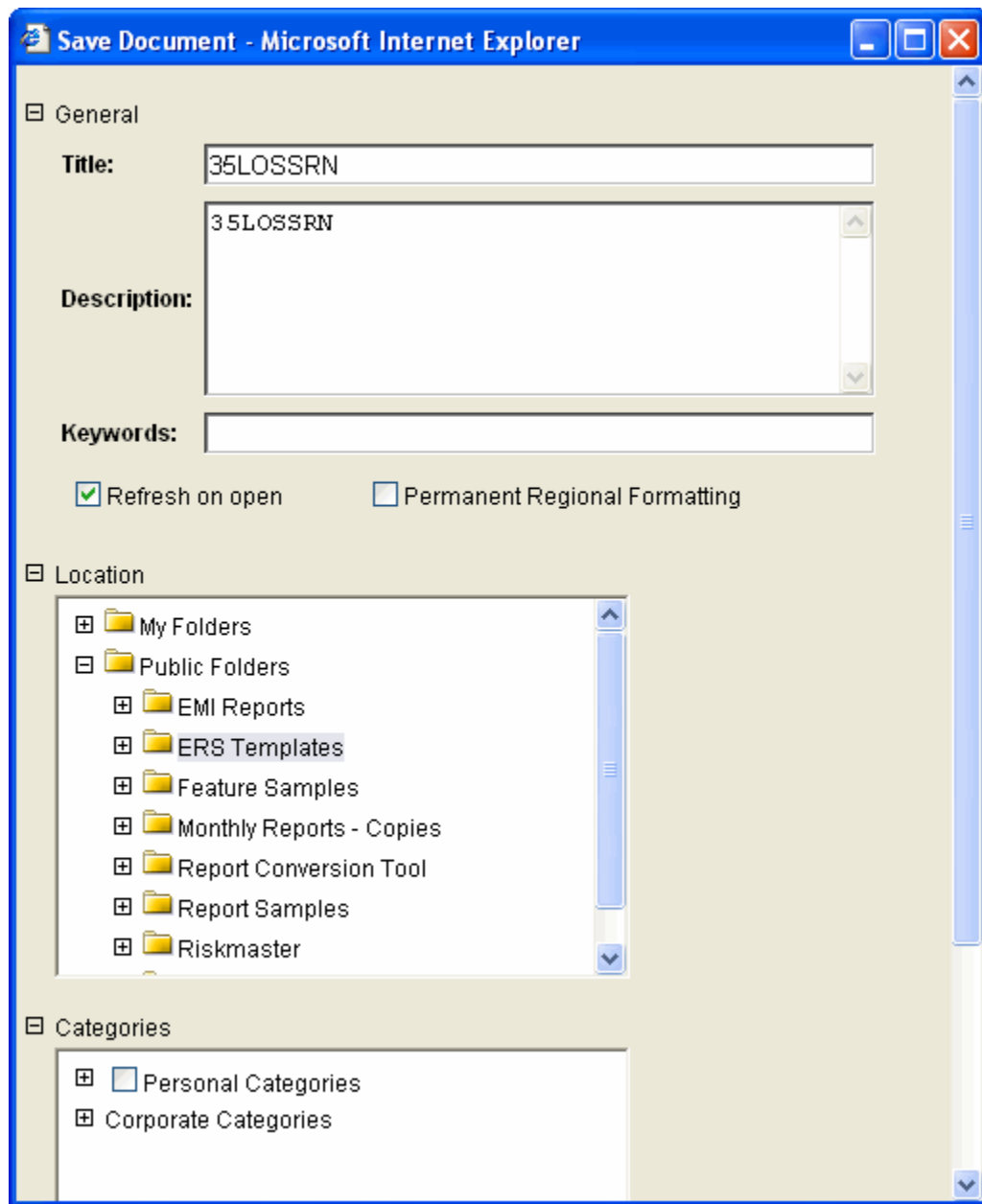
10. Select OK.  
WebIntelligence saves the document to the Personal Documents window in InfoView.

### **To Save a New Document to Corporate Documents**

1. After you create a document , from the toolbar, select the  next to the  button. A pop-up menu opens.



2. From the pop-up menu, choose Save as...  
The Save Documents window opens.



3. From the General frame, in the Title field enter a document title.
4. In the Description field, enter a description for your document.
5. In the Keywords field, enter any keywords you want to use to search for the document.
6. To refresh the document data automatically each time you open the document, select the Refresh on open check box.
7. To include regional formatting in your document, select the Permanent Regional Formatting check box.
8. From the Categories field, select the check box for the category for your corporate document.



Note: Your system administrator creates categories in InfoView.

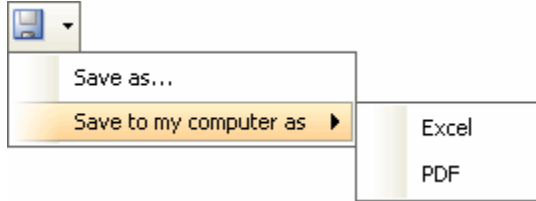
9. In the Location field, select the location where you want to save your document.
10. Select OK.  
WebIntelligence saves the document in InfoView.

## To Save Documents in Different File Formats

You can save documents in excel or pdf format.



To save a document in excel format

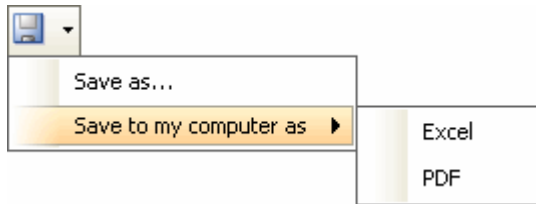
1. After you create a document, from the toolbar, select the  next to the  button. A pop-up menu opens.



2. From the pop-up menu, choose Save to my computer as > Excel. A File Download window opens.
3. Select the Save button. A Save As window opens.
4. In the File Name field, enter a name for the Excel document.
5. Navigate to the directory and folder path where you want to save the document.
6. Select Save. The Excel document is saved on your computer at the location you select.

To save a document in adobe acrobat format

1. After you create a document, from the toolbar, select the  next to the  button. A pop-up menu opens.





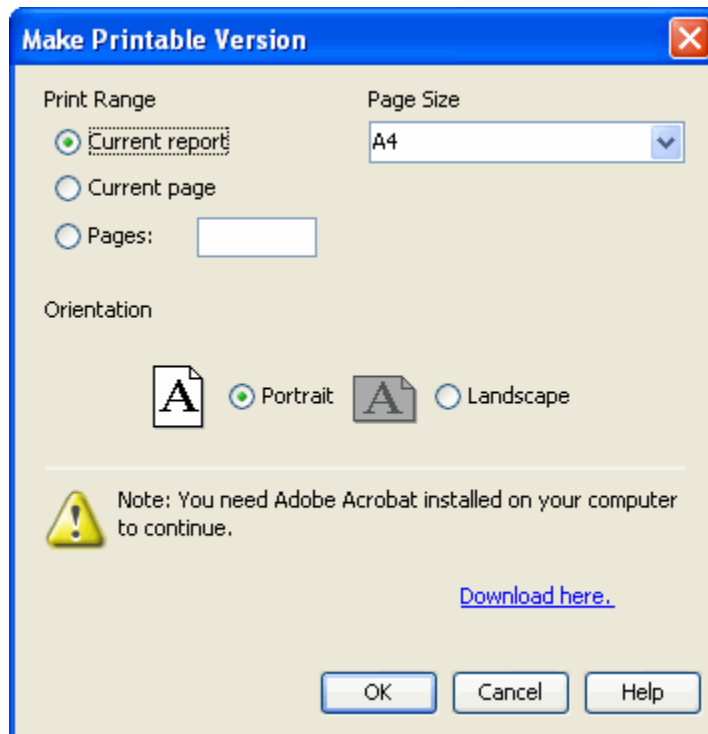
2. From the pop-up menu, choose Save to my computer as > PDF. A File Download window opens.
3. Select the Save button. A Save As window opens.
4. In the File Name field, enter a name for the Excel document.
5. Navigate to the directory and folder path where you want to save the document.
6. Select Save. The Excel document is saved on your computer at the location you select.

## To Print Reports in a Document

WebIntelligence prints reports from left to right, and then top to bottom. If a report is wider than the width of the paper size defined in the Report window Layout, WebIntelligence inserts window breaks for the printout.

1. Search for the document you want to print.

2. On the Search Results window, select the Modify link to view the Query Manager for the document. The Query Manager opens.
3. To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report.
4. In Report view, select the report name tab at the bottom of the report frame.
5. From the WebIntelligence toolbar, select the Export to PDF for Printing button . The Make Printable Version window opens.



6. To specify the range of reports you want to print, do one of the following:
  - To print the entire report, select the Current Report option.
  - To print the window that currently displays, select the Current window option.
7. To print a range of windows, select the windows option and in the field enter the specific window numbers, or window range.  
To change the paper size, from the Paper Size drop down list, select a different paper size.
8. To select the Orientation, select the Portrait or Landscape option.
9. Select OK.  
WebIntelligence generates a copy of the report to a PDF file.

## Field Help

### Save to Personal Documents Window

#### To open

From the toolbar, select the arrow next to the Save button. 


From the pop-up menu, choose Save as...

### Field definitions

#### General

<b>Title</b>	Enter a document name.
<b>Description</b>	Enter a description for your document.
<b>Keywords</b>	Enter any keywords you want to use to search for the document.
<b>Refresh on open</b>	Select the check box to refresh the document data automatically each time you open the document.
<b>Permanent Regional Formatting</b>	Select the check box to include regional formatting permanently in the document.
<b>Categories</b>	Select the check box for the category in which you want to save the document. <div style="background-color: #e0e0e0; padding: 2px; margin-top: 5px;">Note: Your system administrator creates categories in InfoView.</div>
<b>Location</b>	Select the location where you want to save your document.
<b>Groups</b>	Select the groups of users who can access your document.
<b>OK</b>	Select to save the document.
<b>Cancel</b>	Select to close the window.

### Save to Corporate Documents Window

<b>To open</b>	From the toolbar, select the arrow next to the Save button. 
	From the pop-up menu, choose Save as ...

### Field definitions

#### General

<b>Title</b>	Enter a document name.
<b>Description</b>	Enter a description for your document.
<b>Keywords</b>	Enter any keywords you want to use to search for the document.
<b>Refresh on open</b>	Select the check box to refresh the document data automatically each time you open the document.
<b>Permanent Regional Formatting</b>	Select the check box to include regional formatting permanently in the document.
<b>Categories</b>	Select the check box for the category in which you want to save the document. <div style="background-color: #e0e0e0; padding: 2px; margin-top: 5px;">Note: Your system administrator creates categories in InfoView.</div>
<b>Location</b>	Select the location where you want to save your document.
<b>Groups</b>	Select the groups of users who can access your document.

**OK** Select to save the document.

**Cancel** Select to close the window.

## Make Printable Version Window

**To open** From the WebIntelligence toolbar, select the Export to PDF for Printing button .

### Field definitions

#### Print Range

**Current report** Select the option to print the current report.

**Current window** Select the option to print the window that currently displays.

**windows** Select the option to print a range of window and in the field enter the specific window numbers, or window range.

**window Size** From the drop down list, select the window size on which you want to print the report.

**Orientation**

- Select the Portrait option to print the report in portrait format.
- Select the Landscape option to print the report in landscape format.

**Download Here** Select the link to download Adobe Acrobat.

**OK** Select to print the document.

**Cancel** Select to close the window.


**Help** Select to open the WebIntelligence online help.

## Working with Charts

### How To

#### To Format Charts


In Report view, you can personalize a chart template. You can select format options for the text, backgrounds, and borders of the chart body, axes, and legend.

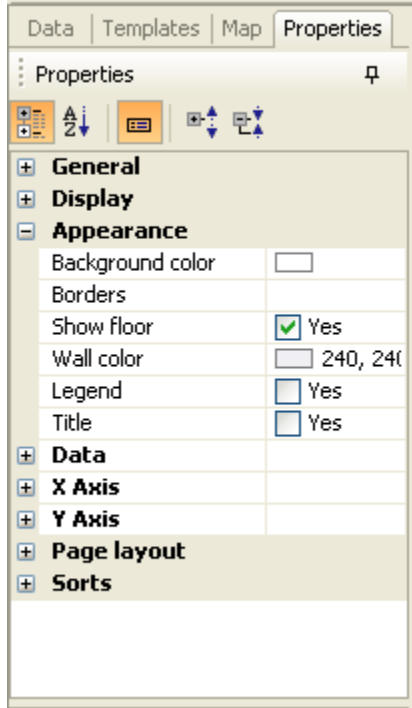
Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report .


- To format chart appearance
- To format chart legend
- To format chart data
- To format axis labels






To format chart appearance

1. In Report view, select the name tab at the bottom of the report pane, for the report in which you want to format a chart.
2. In the report frame, select the chart.  
A blue border displays around the chart.
3. On the Report Manager, select the Properties tab.
4. To format charts, next to the Appearance section, select the  button.





5. In the Appearance section, to set background color, from the Background color drop down list, select a background color.
6. To select the background color, select the Background color drop down list and select a color.
7. To set border, next to the Borders field, select the  button.  
The Border Editor window opens.
8. In the Border Editor window, from the Style drop down list, select a border line style.
9. From the Color drop down list, select the border line color.
10. Select the Apply button.
11. To display one or all of the chart walls, select the Show floor check box and from the drop down list, select a color for the chart walls.


To format a chart legend

1. To format the legend, in the Appearance section, select the Legend check box.
2. To view the Legend section, select the  button.
3. To set the legend position, from Position drop down list select a position.
4. To format the legend title, in the Legend section, select the  button.
5. To view Text Format section for legend title, in the Title section, select the  button.
6. In the Text format section, complete the fields to enter the font, font style and size, color, and underline, text color properties.

Note: You can select the legend background color and border, as you selected for your chart.






7. To format legend values, in the Legend section, select the  button.
8. To view Text Format section for legend values, in the Values section, select the  button.

Note: You can select the legend values text format, background color and border, as you selected for legend text.


9. To format the chart title, in the Legend section, select the Title check box.
10. To view the Text Format section for chart title, in the Title section, select the  button.

Note: You can select the chart title text format, background color and border, as you selected for legend text.






#### To format chart data

1. To format chart data, next to the Data section, select the  button.
2. To set the Palette, in the Palette field select the  button .  
The Select Palette window opens.
3. In the Select Palette window, select the palette type for the chart.
4. To set the border color, from the Border color drop down list, select the border color.
5. To select chart values, select the Values check box.
6. To view the Values section, select the  button.
7. In the Values section, to view chart data, select the Show data check box.
8. To format data values, in the Data section, select the  button.
9. To view the Text Format section, in the Data section, select the  button.



Note: You can select the data values text format, background color and border, as you selected for legend text.

10. To set border, next to the Borders field, select the  button.  
The Border Editor window opens.
11. In the Border Editor window, from the Style drop down list, select a border line style.
12. From the Color drop down list, select the border line color.
13. Select the Apply button.


#### To format axis labels

1. To format the axis labels, next to X or Y Axis, select the  button.
2. To view the grid values, select the Grid check box.
3. To view a Grid section, next to Grid, select the  button
4. To show markers, in the Grid section, select the Show marker check box.
5. To select the values, in the X or Y Axis section, select the Values check box.
6. To view the Values section, select the  button.
7. In the Values section, to view chart data, select the Show data check box.
8. To format data values, in the Data section, select the  button.
9. To view the Text Format section, in the Data section, select the  button.

Note: You can select the data values text format, background color and border, as you selected for legend text.

10. To set border, next to the Borders field, select the  button.  
The Border Editor window opens.
11. In the Border Editor window, from the Style drop down list, select a border line style.
12. From the Color drop down list, select the border line color.
13. Select the Apply button.
14. To view the Label section, in the X or Y Axis section, select the Label check box.
15. In the Other label field, enter the other label name.
16. To view the Text Format section, in the Label section, select the  button.


Note: You can select the data values text format, background color and border, as you selected for legend text.

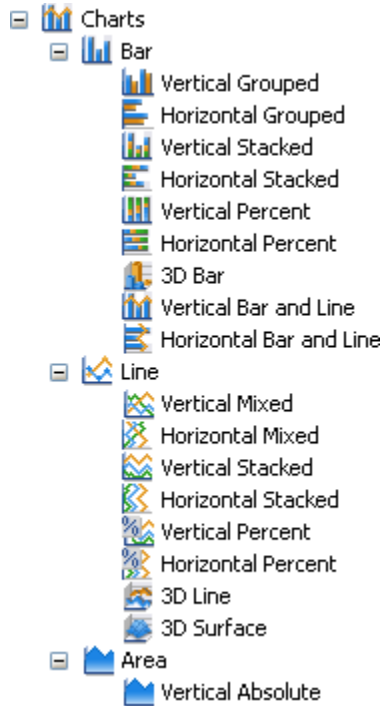
17. To set border, next to the Borders field, select the  button.  
The Border Editor window opens.
18. In the Border Editor window, from the Style drop down list, select a border line style.
19. From the Color drop down list, select the border line color.
20. Select the Apply button.
21. To manually adjust the minimum and maximum values in the chart, in the Scale section, select the Min. value or Max. value fields.

Note: The Scale section is only available when you select Y Axis.

WebIntelligence displays the formatted values in the axis.

### To Select a Chart Template


1. Search for the document in which you want to use a chart.
2. On the Search Results window, select the Modify link to view the Query Manager for the document.  
The Query Manager opens.
3. Select the Templates tab.  
The Query Manager: Templates tab displays the Report Elements tree.
4. To display all available chart templates, select the  next to Charts.




5. To open Report view, from the WebIntelligence toolbar, select the Edit Report button.
6. From the Charts navigation tree select the chart template you want to use and drag and drop onto your report.  
WebIntelligence displays the report values in the chart template you select.

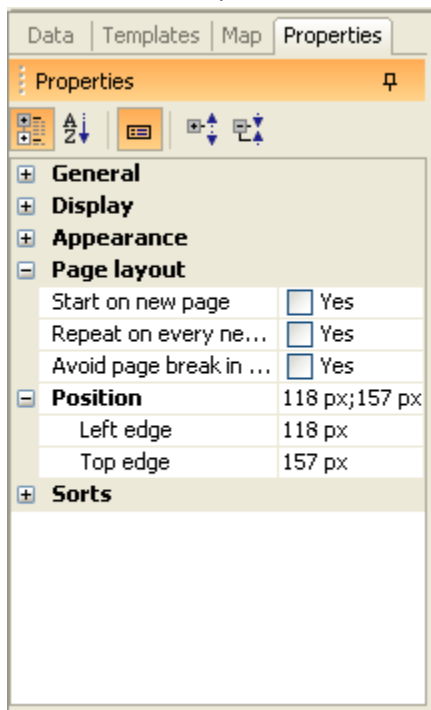
### To Set Window Layouts for Charts


In Report view, you can define the position and alignment of charts on the report window.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report

To set window layout for charts

1. In Report view, for the report in which you want to set chart window layout, select the name tab at the bottom of the report frame.
2. In the report frame, select the chart.  
A blue border displays around the chart.
3. On the Report Manager, select the Properties tab.
4. To set chart window layout, next to the window layout section, select the  button.



5. To display the selected chart on a new window in the report, select the Start on a new window check box.
6. To select the position of the selected cell, in relation to another block, next to Position section, select the  button.

Note: A block is a table, chart, or form on the report.

The Relative Position window opens.



7. In the Place the upper-left of this table/chart/cell section, from the from the drop down fields, select the Left/Right and Top/Bottom position.
8. From the of drop down list, select the other block.
9. To repeat the selected chart on each window of the report, in window layout section, select the Repeat on every new window check box.
10. To avoid window breaks in the charts on the report, in window layout section, select the Avoid window break in chart check box.
11. To position a selected block on a report, in the Position section, in the Left edge and Top edge fields enter the position from the window margins.

Note: A block is a table, chart, or form on the report.


WebIntelligence applies the window layout to the selected chart.

## To Use Different Templates for the Same Chart

In Report view, you can apply different templates to the same chart to modify the layout.

Note: To open Report view, from the WebIntelligence toolbar, select the Edit Report button  Edit Report. CSC recommends you create and modify tables in Structure view. To open Structure view, in Report view, from the toolbar, select the View Structure button .

To use drag and drop to apply a different template

1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to modify chart template.
2. On the Report Manager, select the Templates tab. The Report Elements navigation tree displays.
3. Select the  button next to Charts. The navigation tree expands and displays the available templates.
4. From the navigation tree, select the template you want to use and drag and drop onto the existing report block in the report frame. WebIntelligence applies the new template to the table block.

To use Turn To

1. In Report view, select the name tab at the bottom of the report frame, for the report for which you want to modify chart template.
2. In the report frame, select the top edge of the table or the chart. A blue border displays around the table.
3. Right click the report block. A pop-up menu opens.

Claim Number	Claim Type	Claim Status	Description
GC1996000062	VL	O	04/09/2002 01:02 PM (dtg)
GC1998000017	PROP	O	4/5/2002 11:13 AM (dtg)
GC1998000065	GL	TESTON LY	
VABIP35000036	BI	O	
VAPDP35000037	PD	O	
VAPDP35000041	PD	O	
WCB9998883	NA.	OAL	05/21/2002 10:55 AM (dtg)
WCM000011	M	O	



  

35th Street Pool DEPARTMENT			
Administration DEPARTMENT	DI2003000162	DIS	O

4. From the pop-up menu, choose Turn To. The Turn To window opens.
5. From the Turn To window, select the chart template you want to use.
6. Select OK. WebIntelligence applies the chart you select, to the table block or existing chart.

## Field Help

### Report Manager: Properties Tab (for charts)

- To open**
- From the report frame, select the chart you want to format.
  - From the Report Manager: Properties tab.
  - To expand a specific section, next to the section you want to expand, select the  button.
  - To expand all the frames on the Properties tab, select the  button.

Note: In the Business Objects Xlr2 user interface buttons to open windows to set formats and properties, and drop down lists, display when you select on the fields in the sections.

### Field definitions

#### General section

**Name** Displays the chart name.

#### Display section

**Avoid Duplicate row aggregate** Select the check box to display each duplicate value in any row with the same set of objects, in a separate row or column on the table.

**Show rows with empty dimension values** Select the check box to display rows with empty dimension value in the report.

**Show when empty** Select the check box to display empty tables in the report.

**3D Look** Select the check box, to include 3 dimensional view to the chart.

**Width** Select the  button to manually adjust the cell width

**Height** Select the  button to manually adjust the height of the cell.

#### Appearance section

**Background color** From the drop down list, select the background color for the chart.

Note: To set custom colors, from the drop down list, select Custom to open the Custom Color window and use the Swatches, HSB (Hue, Saturation, Brightness), or RGB (Red, Green, Blue) tabs to create colors.







**Borders** Select the  button to open the Border Editor window.

In the Border Editor window, from the drop down list, select the style and color for the border, and select the Apply button.

**Show floor** Select the check box to include show floor feature for the chart.

**Wall color** From the drop down list, select the wall color for the chart.



<b>Legend</b>	Select the check box to view the Legend navigation tree and formatting options.  Select the  button next to Title and Values to open the respective sections.
<b>Position</b>	From the drop down list, select the legend position.
<b>Title section</b>	
<b>Text Format section</b>	Select the  button to view the Text Format section.  <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"><p>Note: The Text Format section is available under each of the following sections:</p><ul style="list-style-type: none"><li>▪ Legend Title</li><li>▪ Legend Values</li><li>▪ Axis Values</li><li>▪ Axis Labels</li></ul></div> The Text Format fields in each of the section are the same and enable you to select the font style, size, display and color.
<b>Font name</b>	From the drop down list, select the font for the table text.
<b>Size</b>	From the drop down list, select the font size for the table text.
<b>Style</b>	From the drop down list, select the font style for the table text.
<b>Underline</b>	Select the check box, if you want to underline the cell text.
<b>Strikethrough</b>	Select the check box, if you want to strike through the table text.
<b>Text color</b>	From the drop down list, select the color for the table text.
<b>Background color</b>	From the drop down list, select the background color for the chart.
<b>Borders</b>	Select the  button to open the Border Editor window.  In the Border Editor window, from the drop down list, select the style and color for the border, and select the Apply button.
<b>Values section</b>	Select the  button to view the Text Format section for legend values and then select the legend value font style, size, display and color.
<b>Title</b>	Select the check box to view the Text Format section for legend title and then select the legend value font style, size, display and color.
<b>Data section</b>	
<b>Palette</b>	Select the  button to open Select Palette window and select a palette from it.
<b>Border Color</b>	From the drop down list, select the border color.
<b>Values section</b>	Select the  button to view the Show data check box.
<b>Show data</b>	Select the check box to view the Text Format section for data values and then select the data value font style, size, display and color.



**X Axis/Y Axis**

**Grid** Select the check box to view grid values in the chart.

**Show markers** Select the check box to view markers in the chart.

**Grid color** From the drop down list, select the grid color for the chart.


**Values** Select the check box to view values section.


**Orientation** From the drop down list, select the orientation.

**Label** Select the  button to view the Label section.

**Other label** Enter the any other name for your chart.

**Scale** Select the check box to adjust scale in the chart.

**Max scale** Select the  button to manually adjust the maximum scale for the chart.

**Min. scale** Select the  button to manually adjust the minimum scale for the chart.

**window layout section**

**Start on new window** Select the check box to start each chart on a new window of the report.

**Repeat on every new window** Select the check box to repeat the selected chart on each window of the report.

**Avoid window break in chart** Select the check box to avoid window breaks on the charts on the report.

**Position**

**Top edge** Enter the left edge position of the selected table from the window margins.

**Left edge** Enter the left edge position of the selected table from the window margins.

**Sorts section**

**Sort priority** Select the  button to open the Sorts window.

In the Sorts window, from the Sort Priority select the options for sort type and then set priority.

**Chart Window Layout Window**

- To open**
- From the report frame, select the chart for which you want to set window layout.
  - From the Report Manager: Properties tab.

**Field definitions****window layout section**

- Start on new window**      Select the check box to start each chart on a new window of the report.
- Repeat on every new window**      Select the check box to repeat the selected chart on each window of the report.
- Avoid window breaks in chart**      Select the check box to avoid window breaks on the charts on the report.
- Position**
- Left edge**      Enter the left edge position of the selected table from the window margins.
- Top edge**      Enter the left edge position of the selected table from the window margins.

## Charts Overview

You can include one or multiple charts on the reports in a WebIntelligence document. You can create a chart when you build or new document or insert charts into an existing document. You can select one of five basic chart types in WebIntelligence:

- Bar charts
- Line charts
- Area charts
- Pie charts
- Radar charts

You can apply different templates to the same chart to modify the layout. You can define the position and alignment of charts on the report window. You can also personalize a chart template.

## Universe Deployment

### INSURANCE RISKMASTER Universes

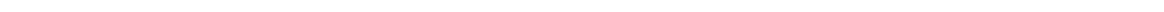
For INSURANCE RISKMASTER Business Intelligence reporting, you can use five INSURANCE RISKMASTER universes:

<b>Universe Name</b>	<b>File Name</b>	<b>Description</b>
Insurance RISKMASTER	RM_PROD	Includes INSURANCE RISKMASTER data

You can deploy the Insurance RISKMASTER universe after you successfully install Business Objects XI R2. You also have to create a Data Source Name ( DSN ) that uses an ODBC driver to provide connectivity to the database you want to use. To deploy a universe, you have to open the universe into Designer. After you have opened the universe in designer, you have to create a new connection and then assign the connection to a Universe.

### How To

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## To Open a Universe in Designer

1. Copy the Universe file to any folder on the computer on which you have installed and configured the Designer to point to the Business Objects server.
2. From the Start menu, choose Programs > BusinessObjects > Designer 6.1.  
The Login window opens.
3. Enter your user ID and password.

**Note:** To deploy a Universe you must have Administrator privileges.

The Designer opens.

4. From the main menu, choose File > Open.
5. On the Open window, navigate to the folder where you saved the Universe file.
6. Select the Universe file and select Open.  
A Designer window opens and displays the message, "Universe connection is not accessible."
7. Select OK.  
The Universe opens in the Designer.

## To Create a New Connection

1. On the Designer, from the main menu, choose Tools > Connections.  
The Connections window opens.
2. Select the Add button.  
The Add a Connection window opens and displays a list of drivers.
3. From the list, select the ODBC driver you want to use and select OK.  
The ODBC driver window opens.
4. In the Name field, enter a connection name.
5. On the ODBC driver window, in the User Name field, enter the user name.
6. In the Password field, enter the password.
7. From the Data Source Name drop down list, select the DSN.
8. From the Type drop down list, select the Secured connection type.
9. Select OK.  
The Connections window opens and the Available Connections field displays the new connection you created.
10. Select OK.

## To Assign a Connection to a Universe

1. On the Designer, from the main menu, choose Files > Parameters.  
The Universe Parameters window opens.

**Note:** The Name field displays the name of the Universe you opened in the Designer and to which you want to assign a connection.

2. From the Connection drop down list, select the new connection you created.
3. Select OK.  
The connection is assigned to the Universe.
4. From the main menu, choose Files > Export.  
The Export Universe window opens.

5. From the Universes field, select the Universe to which you assigned a connection.
6. Select OK.  
The selected Universe is exported into Business Objects repository. You can now use the Universe data to create Desktop Intelligence/ WebIntelligence documents.

### To Add Supplemental Fields to Business Objects Universes

1. Close the Designer.
2. Back up the Universe to which you are adding supplemental fields.
3. Run SyncUniverse.exe.  
The Synchronize Universe window opens.
4. From the BO LOGIN section, in the System field, enter the system name.
5. In the User Name field, enter the Business Objects user name.  
**Note:** By default the user name is set as Administrator.
6. In the Password field, enter the Business Objects password.
7. From the Authentication drop down list, select the Business Objects authentication type.
8. To connect to the INSURANCE RISKMASTER database, In the DB LOGIN section, from the DSN drop down list, select the database DSN type.
9. In the UID field, enter the user identification number.
10. In the Password field, enter the password to login to database.
11. Select the Connect button.  
The Select Universe frame displays list of all universe folders. Select a universe to which you want to add Supplemental/Admin tracking fields from the list.
12. From the Choose fields to add in the universe section, select the Supplemental Fields check box, to include the supplemental fields in the universe.
13. Select the Admin Tracking check box to include the administrative tracking fields in the universe.
14. Select the Write Progress Log check box to prepare the progress log.
15. To add the required fields in the universe, select the Add button.  
The Update Results field displays the updated universe files.
16. To close the window, select the Exit button.

## Field Help

### Connections Window

**To open** On the Designer, from the main menu, choose Tools > Connections.

### Field definitions

<b>Available Connections</b>	Displays all existing connections.
<b>Add</b>	Select to open the Add a Connection window and select the ODBC driver you want to use.
<b>Remove</b>	From the Available Connections field, select a connection and select the button to delete the connection.
<b>Edit</b>	From the Available Connections field, select a connection and select the button to edit the connection.
<b>Test</b>	Select to test the connection.

<b>OK</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window.
<b>Help</b>	Select to open the Online Help file.

### Universe Parameters Window: Definition Tab

<b>To open</b>	On the Designer, from the main menu, choose Files > Parameters.
----------------	---

#### Field definitions

<b>Name</b>	Displays the name of the Universe you opened in the Designer and to which you want to assign a connection.
<b>Description</b>	Displays a description of the Universe.
<b>Connection</b>	From the drop down list, select the connection you want to assign to the Universe.
<b>New</b>	Select to create a new Universe parameter.
<b>Edit</b>	Select to edit the Universe parameter.
<b>Test</b>	Select to test the connection.
<b>OK</b>	Select to save the changes.
<b>Cancel</b>	Select to close the window.
<b>Help</b>	Select to open the Online Help file.

### Synchronize Universe Window

Do one of the following:

<b>To Open</b>	<ul style="list-style-type: none"> <li>▪ Double click the SyncUniverse.exe.</li> <li>▪ From the start menu, choose All Programs &gt; SyncUniverse for BO XI R2.</li> </ul>
----------------	--

#### Field definitions

##### BO LOGIN

<b>System</b>	Enter the Business Objects system name.
<b>User Name</b>	Enter the user name as Administrator.
<b>Password</b>	Enter the Business Objects password.
<b>Authentication</b>	From the drop down list, select the authentication type.

##### DB LOGIN

<b>DSN</b>	From the drop down list, select the DSN name.
<b>UID</b>	Enter the database user Identification number.
<b>Password</b>	Enter the database password.
<b>Connect</b>	Select the button to populate universe folder name.
<b>Select Universe</b>	Displays the list of universe folders.
<b>Choose fields to add in Universe</b>	
<b>Supplemental Fields</b>	Select the check box to add the supplemental field in the universe.
<b>Admin Tracking</b>	Select the check box to add the administrator tracking field in the universe.
<b>Write Progress Log</b>	Select the check box if you want to create a process log.
<b>Add</b>	Select the button to add the fields in the universe.
<b>Exit</b>	Select the button to close the window.
<b>Update Results</b>	Displays the results.

# Glossary

## C

**Claimant:** A party that makes a claim, especially one that is legally cognizable.

## D

**Data Source:** A name given to the connection set up to a database from a server.

## L

**LOB:** Line of Business: Either for claim or policy.

## P

**Policy Coverage:** Insurance coverage is the amount of risk or liability that is covered for an individual or entity by way of insurance services.

## S

**Security Management System (SMS):** Define permissions for each user based on individual requirements, set up and use module security groups, restrict access to data sources.

## T

**TPA:** Third Party Administrator: an organization that processes insurance claims or certain aspects of employee benefit plans for a separate entity.

## V

**VFK:** VFK allows existing as well as new users to create both carrier and corporate claims in the same database.



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