

THOMSON REUTERS™ ODEN POLICY TERMINATOR

CREATING REPORTS

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REPORTS

This menu option takes you to the **Reports** section of web-based Policy Terminator®.

Reports Menu Options

Reports Job Options

Reports Filter Expression

Reports Sorting Expression

Schedule Type (For Intranet customers only)

Reports Status Menu Options

Report Layouts

[Reports - Report Templates \(page xviii\)](#)

REPORTS - JOB OPTIONS

<i>Job Options</i>		Clear Options Save Preferences Preference Library
Report Name:	Report [Untitled]	
Report Title:		
Report Template:	-- None Selected --	
Template Description:		
Template View:		
Report Description:		
Include SQL Query on Report:	☐	

The **Job Options** section of the **Reports** page contains the following fields:

- There are three options you can select on the menu and at the top of the page:
 - Clear Options** - Clears all the fields on the page and resets it to the defaults.
 - Save Preferences** - Saves the current configuration options for use at a later time. Saving configuration options allows for repetitive executions of a report without having to specify the options each time.
 - Preference Library** - Allows you to retrieve a saved preference file or delete an existing one. Click the check mark icon next to the desired report to load the configuration into the **Reports** screen. Click the delete icon to delete the preference file.
- Enter the **Report Name** - a description of the report.
- Enter the **Report Title**. The title appears on the top of the generated report and text prints exactly as entered.
- Select the **Report Template** from the drop-down list of ODEN predefined report templates. (For a list of predefined report templates, click [here](#).)
- Template Description** - This field displays a description of the selected predefined report template.
- Report Template View** - This field displays the view used to generate the report.
- Report Description** - This is a system generated field and displays the name and the date of the Report.

8. Select **Include SQL Query on Report** if you want the SQL SELECT statement used for the report to appear at the end of the report.

Click the Filter link for the next step of reports.

REPORTS - FILTER

[Reports \(page iv\)](#)

A filter expression is a way to limit the records that are included in a report by specifying criteria.

Filter

Field:

-- Available Filter Fields --

Field Name	Op	Value	Logical	
	= v		AND	OR
			(...) AND	(...) OR
			ADD	

Filter Expression

Clear

Validate

The **Filter** section of **Reports** contains the following fields:

1. Select the **Fields** from the list of all of the fields available to use in the filter. This selection appends it to the **Field Name** below.
2. The Field Name is populated when you select the items above.

3. Select the appropriate Operator from the drop-down list. Operators are typically used to compare the values of a field to some fixed specified value. Some operators in the list require special instructions:

=	equal to
<>	not equal
>	greater than
>=	greater than or equal to
<	less than
<=	less than or equal to
IN	Determines if a given value matches any value of a subquery or a list.
NOT IN	The given value does not match any value of a subquery or a list.
LIKE	Determines whether or not a given character string matches a specified pattern.
NOT LIKE	A given character string does not match a specified pattern. The "LIKE" operator is similar to the equals operator except that it allows the right hand value to contain the wildcard "%". For example, the filter text: PolicyApplicableState LIKE "O%" matches policies whose applicable law state is OH, OK or OR. The "IN" operator allows one to specify a list of comma separated values enclosed in parenthesis. For example, the filter text: PolicyApplicableState IN ("OH","OK","OR") matches policies whose applicable law state is OH, OK or OR. The "NOT IN" operator allows one to specify a list of comma separated values enclosed in parenthesis that should specifically be excluded, For example, the filter text: PolicyApplicableState NOT IN ("OH","OK","OR") matches policies whose applicable law state is anything except OH, OK or OR.

4. Select the **Value** that applies. The values are user supplied criteria and in some cases the system provides a list of values for you to select.
5. Select the appropriate Logical operator for your criteria. The Logical provides the simple Boolean operators AND and OR. If nothing is in the filter expression the only valid button is **Add**. See Details below:

AND	Adds another field name to the filter expression to be considered. The system will poll the database for records that match both criteria.
OR	Adds another field name to the filter expression to be considered. The system will poll the database for records that match either criteria.
(...) AND	Adds a string(See AND)
(...) OR	Adds a string(See OR)
ADD	Adds the first field to the filter expression.



The (...)AND or (...)OR buttons when selected will apply parenthesis around the entire existing filter expression and append the new criteria to the end of the expression.

6. The **Filter Expression** displays the actual SQL where clause.
7. Select **Clear** to remove the entire filter expression.
8. Select **Validate** to verify the syntactical correctness of the filter expression.
9. Click Sorting for the next step of reports.

REPORTS - SORTING

You can sort the report by any of the sort fields.

Sorting

Field:

-- Specify Sort Order --

Field Name

Sort Order

Ascending

Descending

Sort Expression

Clear

Validate

1. Select the **Field** available to sort the report.
2. The **Field Name** displays the selection made from the above list.
3. Select the **Sort Order** which is the order in which records appear on the report.
 - a. **Ascending** - This option adds the selected field in ascending order to the sort expression. (For example, A-Z or 0-1000). To add an additional sort order, select the desired field and click on the appropriate button.
 - b. **Descending** - This option adds the selected field in descending order to the sort expression. (For example, Z-A or 1000 to 0).

4. Select **Clear** to remove the entire sort expression.
5. Select **Validate** to verify the syntactical correctness of the filter expression.

SCHEDULE TYPE

The **Schedule Type** section only displays for Intranet customers and is used for Reports, Import/Export Schedule Task, and any task you can set up as a scheduled task.

To schedule a task,

1. Select the schedule configuration options that apply to this task.

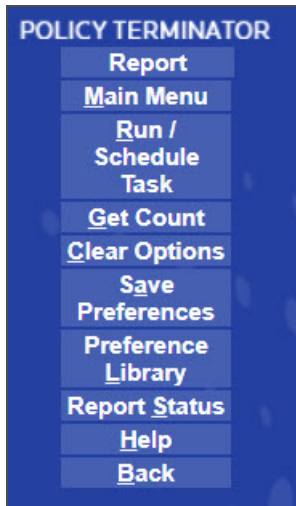
Schedule type	
☒ Run Now	
☐ Run Once On	 5/30/1
☐ Run Monthly On	The 1st day of month
☐ Run Every	☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
☐ Run On	The ☐ 1st ☐ 2nd ☐ 3rd ☐ 4th ☐ 5th Sunday of each month
Run At (Time):	1 PM

2. Select the options that apply:

- **Run Now** - Executes the task immediately.
- **Run Once On** - Schedules the task to execute one time on the day and time specified in the Run At (Time) field.
- **Run Monthly On** - Schedules the task to execute every month on the day and time specified in the Run At(Time) field.
- **Run Every** - Schedules the task to execute repeatedly for each day of the week and time specified in the Run At(Time) field.
- **Run On** - Schedules the task to execute on specific day(s) and week(s) of each month and time specified in the Run At(Time) field.
- **Run At (Time):** - This field defines the execution time for scheduled tasks.

3. Select **Begin Processing** on the menu. The application returns you to the **Task Status** page.

REPORTS - MENU OPTIONS



The menu options to create a report are described below:

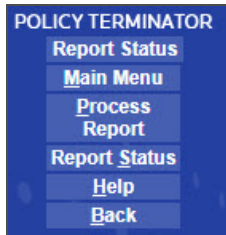
MENU ITEM	DESCRIPTION
Main Menu	Select to return to the Main Menu
Run/Schedule Task	Starts the report generation process
Get Count	Returns a count of the number of records which meet the filter criteria. This option is not available for any of the summary notice counts reports templates.
Clear Options	Clears all the fields on the page and resets it to the defaults.
Save Preferences	Saves the current configuration options for use at a later time. Saving configuration options means you can print the report as many times as needed without having to specify the options each time.
Preference Library	Allows you to retrieve a saved preference file or delete an existing one. Selecting the check mark icon next to the desired report loads the configurations into the Reports screen. Selecting Delete removes the preference file.
Report Status	This option takes you to the report status page where you can see the status for both processed or scheduled reports.
Help	Opens the online help topics for Reports.
Back	Takes you back to the previous page.

Select **Run/Schedule** to generate a report.

REPORTS - REPORT STATUS

Use the Report Status to see details about the generated report.

The **Report Status** menu options consist of the following tasks:



MENU ITEM	DESCRIPTION
Main Menu	Select to return to the Main Menu
Process Report	Takes you to the Define a Report screen.
Report Status	Displays the status of both processed and scheduled reports.
Help	Opens the online help topics for import.
Back	Returns you to the previous screen.

Reports take a few minutes to process once you select **Begin Processing** .

To update the status, on the side menu, select **Report Status**. If the report file is complete the file name displays in green in the **Report Files** field.

Report Status

Click the Report Status button to refresh the page

Task Type:	Report	Delete
Report Description:	Example Report	
Report Files:	userreport48.pdf	
Schedule Type:	Run Immediately	
Report View:	Additional Interest Report - 4/26/2012	
Created By:	Holly Rainbolt	Created On: 4/26/2012
System Scheduled to Delete Report On:	5/3/2012 4:01:33 PM	
Status:	Completed Successfully	
Filter:	PolicyApplicableState = 'PA'	

Task Type - The type of task that is being processed.

Report Description - The user defined report name.

Report Files - The name of the report file. Once the generation of the report is complete, the file name appears in green. To view the report, select the file name to open the report in Adobe Acrobat.

Schedule Type - The type of schedule specified for the report to run.

Report View - The report template you selected.

Created By - The name of the individual who generated the report.

Created On - The date the report file was generated.

System Scheduled to Delete Report On - The date and time the report file will be purged.

Status - The status of the report. (For example, Completed Successfully or Failed)

Filter - The filter expression that was used.

For Report Layouts, click [here](#).

REPORTS - REPORT LAYOUT

Once the report is processed you can view it by selecting the file name located in the **Report Files** field.

The following is an example of a generated report.

Example Report							
Policy Notice Activity							
Policy Number	08152002	Insurance Type	C	Applicable State	MD	Notice Status*	NN
Policy Type	policy type						
<u>Named Insured</u>		<u>Insurance Carrier</u>		<u>Producer</u>			
Name1	COMMERCIAL NAMED INSURED	Carrier	AAA Mid-Atlantic Insurance Group	Number	88686		
Name2		NAIC	00004	Name1	Centerpointe Insurance Service		
Misc		Branch	18580	Name2			
Address	ADDRESS CITY MT 83774	Address	PO Box 4390 New York NY 10034	Address	28720 Roadside Drive Suite 299 Agoura Hills CA 91301		
<u>Notice History</u>							
Notice Type	Reason	Generation Date	Last Print Date	Inception Date	Effective Date	Mail Date	
Cancellation	NONE OF THE ABOVE APPLY You no longer meet our minimum	08/15/2002 12:03:41 PM	08/15/2002 11:32:56 AM	08/15/2002	08/15/2002	08/15/2002	

PRINTING REPORTS

Print the report by selecting the **Print** icon from the Adobe Acrobat toolbar or by selecting **File, Print** from the menu options in the Adobe Acrobat window.

REPORTS - REPORT TEMPLATES

ODEN has predefined the following Report Templates to use when generating a report:

TEMPLATE NAME	DESCRIPTION	PDF FILE
Additional Interests	This report template prints current additional interest information.	
Branch	This report template prints current branch information.	
Carrier	This report template prints current carrier (NAIC) information.	
Consumer Report Agency	This report template prints current consumer reporting agency information.	
Inactive Users	This report template prints a list of active users that have notice generation rights but have not generated any notices within the specific time period.	
Notice Activity Short (Landscape)	This report template prints CURRENT general policy information and notice history detail.	
Notice Activity Short II (Landscape)	This report template prints CURRENT general policy information and notice history detail.	
Notice Summary	This report template prints a summary of notice information.	
Policy	This report template prints current detailed policy information. Use this template if you wish to query based on policy information. WARNING: If a policy is missing ANY of the following pieces of information it will NOT come out on the report: Branch, Producer, Carrier and Policy Type. To obtain a list of policies that are missing basic policy information see the Missing Information Report found in the Preference Library.	
Policy(Single Line)	This report template prints out the following policy information on one line: Applicable State, Branch Code, Policy Number, Producer Code, First Name Insured, User Defined Field 1and Premium Amount Due.	

TEMPLATE NAME	DESCRIPTION	PDF FILE
Policy Notice Activity (Landscape)	This report template prints CURRENT general policy information and notice history detail. Use this template if you wish to query based on notice information. If a policy does not contain a notice that meets the query criteria the policy DOES NOT print on the report. Consequently if a policy does not have any notice history it does not print on this report.	
Policy Notice Activity (Portrait)	This report template prints CURRENT general policy information and notice history detail. Use this template if you wish to query based on notice information. If a policy does not contain a notice that meets the query criteria the policy DOES NOT print on the report. Consequently if a policy does not have any notice history it does not print on this report.	
Producer	This report template prints current producer information.	
Summary Notice Counts By Branch	Summary report of the number of notices by branch.	
Summary Notice Counts By Carrier	Summary report of the number of notices by notice carrier.	
Summary Notice Counts By Creator	Summary report of the number of notices by creator.	
Summary Notice Counts By Insurance Type	Summary report of the number of notices by insurance type.	
Summary Notice Counts By Notice Policy Type	Summary report of the number of notices by policy type.	
Summary Notice Counts By Producer	Summary report of the number of notices by notice producer.	

TEMPLATE NAME	DESCRIPTION	PDF FILE
Summary Notice Counts By State	Summary report of the number of notices by notice applicable state. report.	
Summary Notice Counts By Underwriter	Summary report of the number of notices by underwriter.	
Two Percent	This report template prints 2% information based upon policies written for particular territories or zip codes within New Jersey, New York and Hawaii.	
Underwriter	This report template prints current underwriter information.	