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Welcome to Master Reports


Master Reports offer additional tools so that you can create customized reports for your agency. These tools include detailed filters, aggregates, grouping, sorting, paging, and chart creation. See each section below for more details.

Report Basics

ACCESS REPORTS

A user must have the appropriate permission to access reports and specific report features. Need report access? Contact support@ezlynx.com.

To access reports:

- Click the reports icon; located on the left side of all EZLynx pages 
 - Each report category can be expanded and collapsed by clicking the report category or the arrow on the right

DOWNLOAD OR PRINT A REPORT

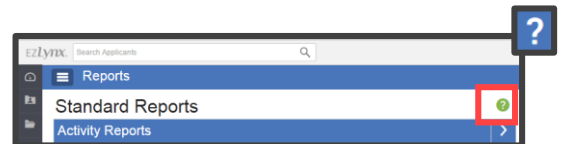
Every report has icons at the upper right, used to download or print the report.

- **Down arrow icon** = export to a CVS, Excel or PDF file
- **Printer icon** = opens a printer friendly version of the report in a new tab; use a browser to send the report to the desired printer



REPORT HELP

Click the *blue ? icon* at the top right corner of any report or the *green ? icon* at the right of the Standard Reports list to view related training documents



SAVE OR SHARE A REPORT

Once a report is customized by applying any combination of report criteria filters, it can be saved for future use.

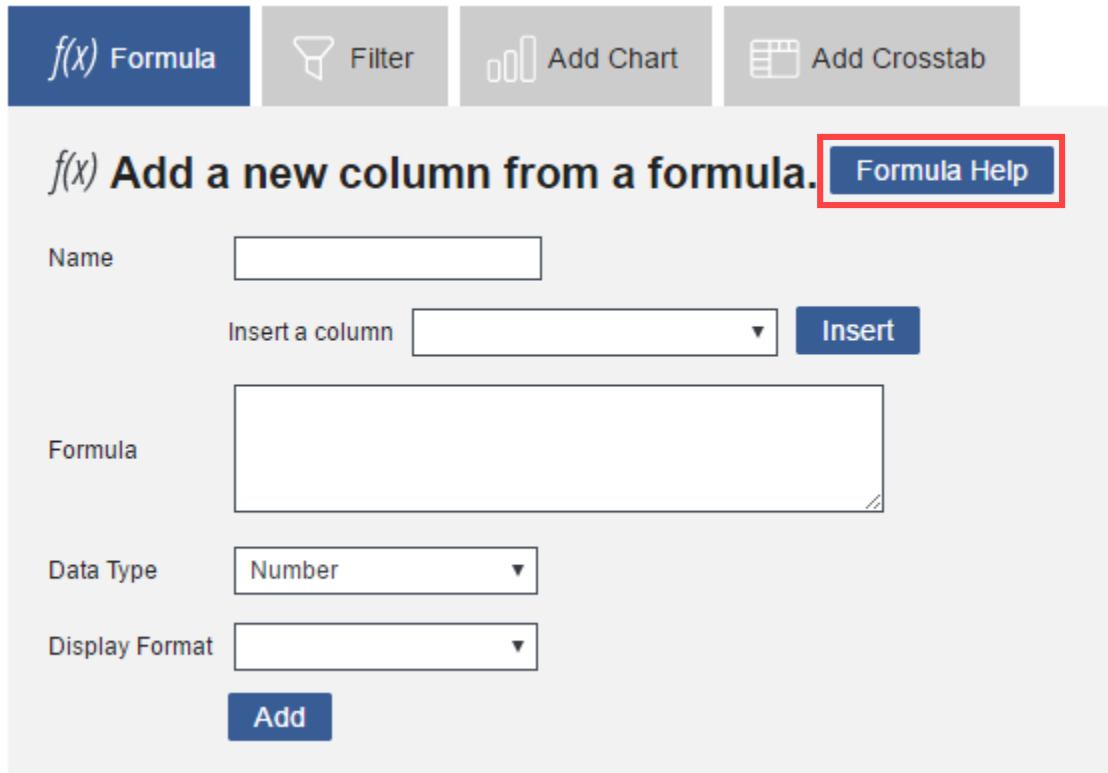


- Click the floppy disk icon
- Enter a report name and description
- Once saved, the report is displayed in Saved Reports on the right of Standard Reports
- See the Report Saving & Sharing Training document for more information

Master Report Formulas

Formulas are not for the faint of heart and are geared towards your analyst user who has a knowledge of SQL. They provide a powerful tool to calculate information that is not available in the report.

EZTIP: Use the “Formula Help” link in the report to see all of the functions that are available with this feature.



f(x) Add a new column from a formula. [Formula Help](#)

Name

Insert a column

Formula

Data Type

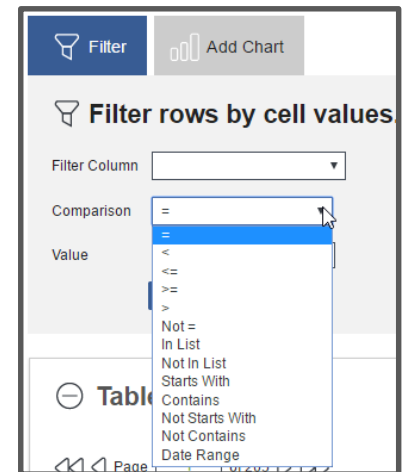
Display Format

1. Click the *Formula* tab above the report
2. Enter the name of the new column that you are creating in the “Name” field
3. In the Formula box, type the formula that you would like to use to populate the column
 - Use the “Formula Help” link in the report to see all of the functions that are available with this feature
4. If you would like to use a column already available in the report, use the “Insert a column” drop down to select the column
5. Click “Insert” to insert that column into your formula; this will ensure that it is named correctly
6. The Data Type and Display Format fields will ensure that your new column is formatted properly

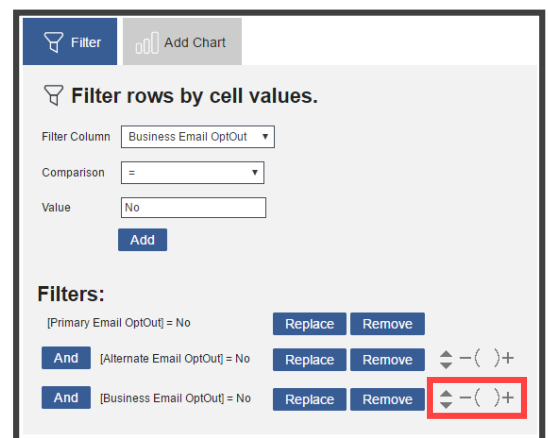
Filter a Master Report

Filter a Master Report to show only the data that meets the filter criteria.

7. Click the *Filter* tab above the report
8. At the *Filter Column* dropdown, select a column to filter; all available columns are listed
9. At *Comparison* dropdown, select a comparison
 - Comparison operators include =, <=, >=, Not =, Starts With, Contains, Not Contains, Does Not Start With and Date Range ([click here for detailed information about date ranges](#))
 - Comparison options vary by selected column
10. At *Value*; options vary by selected column
 - Some have a list of values accessed by clicking the “...” icon, or simply type the value



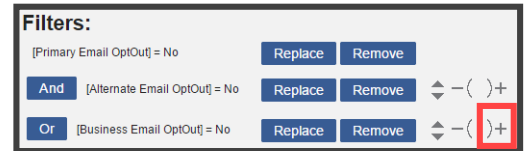
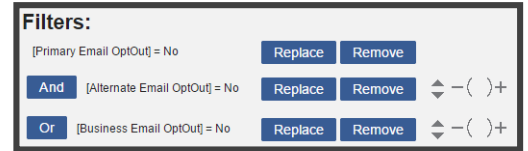
11. To add additional filters, repeat Steps 2 - 4 above
 - When adding multiple filters, they default to the **AND** status
 - Filters can be changed from the **AND** status to **OR** status with a click. Click the AND/OR button to toggle between the two.
 - **AND** = only data that meet **all** the filter criteria is included in the report
 - **OR** = data that meets **any** of the filter criteria is included in the report
 - The icons at the right of the Remove button to re-order the precedence of filters or to group in various arrangements using parentheses



Here is an example of a custom ordered filter:

I want a report to filter individuals whose *Primary Email OptOut* = No AND either their *Alternate Email OptOut* = No or *Business Email OptOut* = No.

- All Filter Columns and Values are added, and all default to *AND* status
- To create the *OR* status between *Alternate Email OptOut* and *Business Email OptOut*, click *AND* to toggle to *OR*
- To have data pulled in the correct order, go to the *Business Email OptOut* filter and click the “+” icon to add parenthesis
 - Use the up and down arrows to move the parenthesis as needed



DATE TYPES AND RANGES

Date ranges can be fixed or sliding:

- **Fixed** = when report is saved, it pulls a fixed set of data every time the report is opened

Example:

Start Date: June 1, 2016
End Date: June 30, 2016

 - Report will always run this exact data range
- **Sliding** = when the report with sliding dates is saved, it may pull a different set of data each time the report is opened

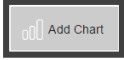
Example:



Start Date: Last Month Start
End Date: Last Month End

 - If this report was run on June 10, 2016, it would pull data for May 1 - 31, 2016
 - If this report was pulled on October 30, 2017, it would pull data for September 1 – 30, 2017

Add Chart

Use report data to generate one or multiple customized charts.

1. Click the *Add Chart* tab above the report 
2. Options vary by chart type
 - Label Column – provides data for the x-axis of a chart. If the column selected is a date-type column, an interval control (year, quarter, month, day) is displayed
 - Data Column – provides data for the y-axis of a chart; the height of each bar
 - Data Aggregation – options include sum, average, standard deviation, count, distinct count, minimum and maximum
 - Compare Column – specify a second data series to chart in addition to the data column values for comparison. Certain charts allow controlling how this second series appears
 - Relevance – automatically Label Columns as an *Other* category – used for that data that isn't considered relevant; these are the relevance setting options:
 - i. Automatic – The report automatically groups data into an *Other* category
 - ii. Rank – set the number of records to include
 - iii. Percentage – set a percent of records to include
 - iv. Off – all Label Columns are displayed

EZTIP: Use the  or  icons to resize charts. Use the minus icon at left to minimize a chart, the settings icon to show or hide these options, and the trash icon to delete a chart.

EZTIP: Use the minus icon to the far left to minimize the chart, the settings icon to show or hide these options, and the trash icon to delete the chart altogether.



EXAMPLE CHARTS

Here are examples of the different chart types. For each chart, we'll start with the Policy Master Report, and apply the same filters to display policies with a sliding Effective Date range between Last Month Start and Last Month End.

Filter
Add Chart




Filter rows by cell values.

Filter Column:

Comparison:




Value:

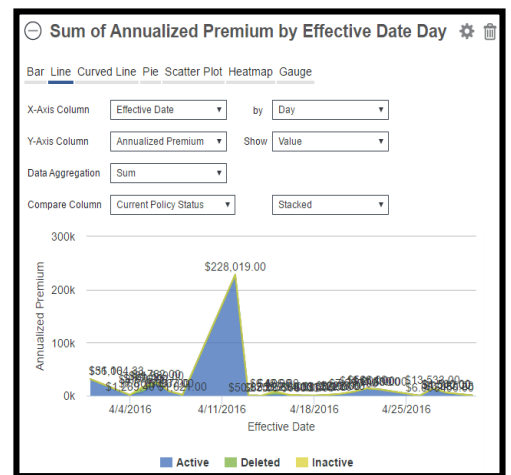
Bar – most versatile chart type, and commonly used to show changes over a period of time or for visualizing comparisons between items.

			
Compare Column Type	Stacked	Stacked Percentage	Side by Side
Excel Name	Stacked Column	100% Stacked	Clustered Column

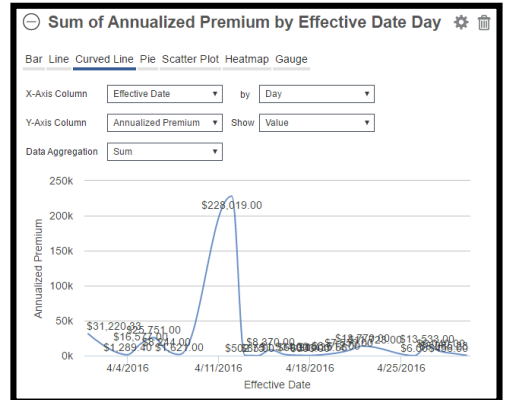
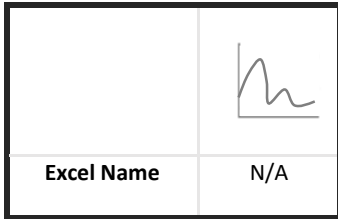


Line – similar to bar charts, but more useful for identifying trends for complex data. Most commonly, line charts are used to show continuous data over time.

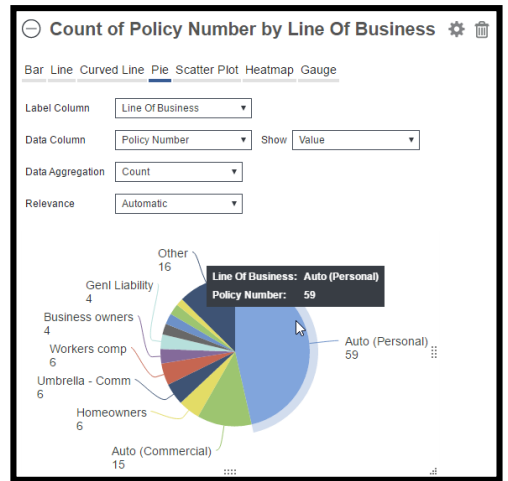
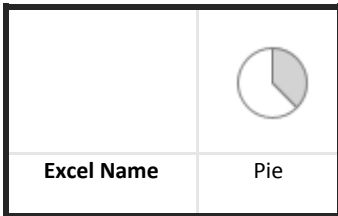
			
Compare Column Type	Stacked	Stacked Percentage	Side by Side
Excel Name	Line	Stacked Area	100% Stack Area



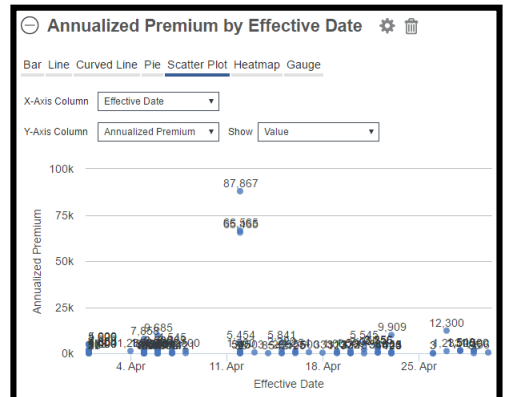
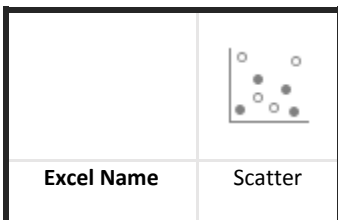
Curved Line – similar to side-by-side line charts, but the line is curved to help smooth anomalies.



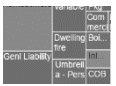
Pie – most commonly used for to illustrate percentages of a whole.



Scatter Plot – shows the relationship between two sets of numeric data.






Heatmap – similar to Pie Charts since they are useful for viewing proportions. However, heatmaps can also look at a third item. For example, the chart below looks at line of business by number of policies and the total annualized premium.

	
Excel Name	N/A



Gauge – recommended for goal tracking.

			
Gauge Type	Arc	Balloon Bar	Bullet Bar
Excel Name	N/A	N/A	N/A

EZTIP: Use Goal-1, Goal-2 and Max settings to completely customize the gauge. Set each color range beginning and ending, as well as the colors, by clicking the color picker icon.



Add Crosstab

Crosstabs are commonly known as “pivot tables” and allow users to view report data in both the rows and the columns. To set up a crosstab table:

1. Open the Crosstab area and make the following selections
2. Header Values Column – This will set the values that are make up the column headers
3. Label Values Column – This selection provides the rows of the table
4. Aggregate Values Column – Aggregate values will populate the cells of the table
5. Summary Function – Select this option to add a summary row at the top of the table

Below is an example of a commonly requested report:

EZLynx

🔍

Quotes Reports

Quote Master

Full list of all quotes in the organization. This includes both EZLynx real-time quotes as well as any quote manually added to the system; you are able to customize | Data Updated: 6/12/2017

Include Deleted Applicants No

f(x) Formula
🔍 Filter
📊 Add Chart
📄 Add Crosstab

⊖ Quote Date by LOB Code on Count of Quote ID
⚙️ 📄 🗑️

Header Values Column Quote Date by Year Each distinct value adds a crosstab column.

Label Values Column LOB Code Each distinct value adds a crosstab row.

Aggregate Values Column Quote ID Set the column to be aggregated into the crosstab cells.

Aggregate Function Count Set the function for calculating the crosstab cells.

Summary Function Sum Add a summary row and summary column for grand totals.

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⏴ ⏵

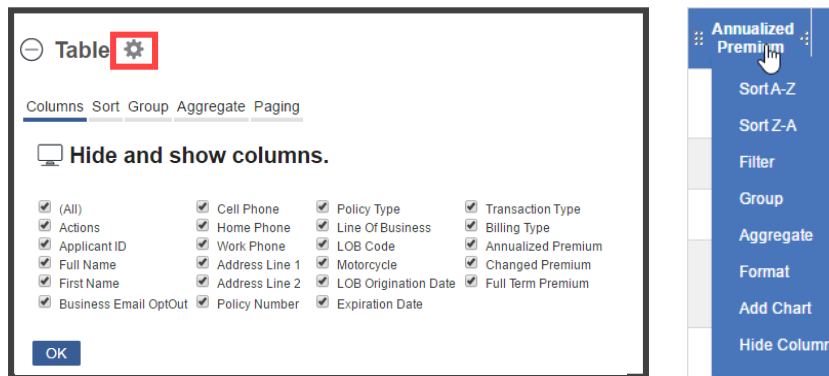
LOB Code	Total Count	2014	2015	2016	2017
	2,421	140	410	1,027	844
Abusive Acts Liability	4			4	
Accidental D&D	10		2	4	4
Accidental Medical Coverage	5		4	1	
Agr Sched/Unsched Pers Prpty	1		1		
Agriculture Liab	3		3		
Agriculture Pkg	12		3	7	2
Agriculture Prpty	6		3	2	1
Annuity Fixed	3		3		

Additional Report Settings

The gear icon displays additional reporting tools, including the ability to customize columns, sort, group, aggregate, and adjust the report paging.

CUSTOMIZE COLUMNS



To hide or show columns, click the gear icon, then the Columns option. Once selections are made, click *OK*.

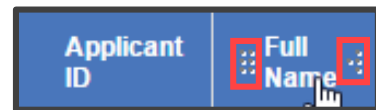


EZTIP: Also, a column can be hidden by clicking the Column Header and choosing *Hide Column*.

ARRANGE AND RESIZE COLUMNS

All columns can easily be rearranged or resized.

- To move a column, click the  icon and drag and drop the column to the desired position
- To resize a column, click the  icon and drag until the column reaches the desired width



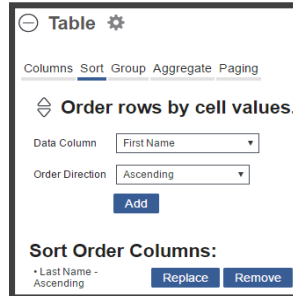
SORT

There are two methods for sorting columns; both options ensure that columns are sorted columns in the desired order.

Option 1

Recommended for sorting multiple columns

1. Click the gear icon
2. Choose *Sort*
3. Add columns to sort in Ascending or Descending order



Option 2

1. Click a column header
2. Choose either *Sort A-Z* or *Sort Z-A*



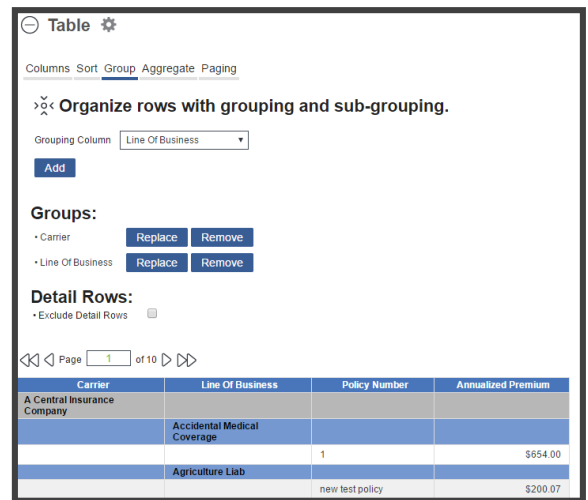
GROUP

Grouping, which is often used with the Aggregate feature, is used to add groups and sub-groups to reports.

To add Groups:

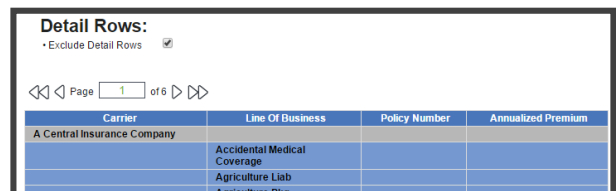
1. Click the gear icon at Table header
2. Select *Group*
3. Select a column to group by
4. Click *Add*

EZTIP: Grouping columns must be added in the correct order. First column added (Carrier in example) is the first heading, second is a sub-group (LOB in example), etc...



Carrier	Line Of Business	Policy Number	Annualized Premium
A Central Insurance Company	Accidental Medical Coverage	1	\$654.00
	Agriculture Liab	new test policy	\$200.07

5. Check *Exclude Detail Rows* to hide or collapse the un-grouped rows.



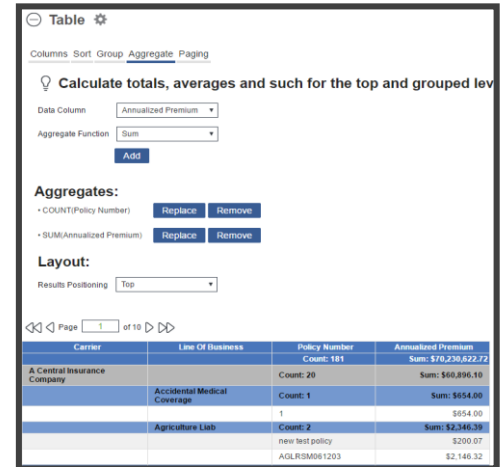
Carrier	Line Of Business	Policy Number	Annualized Premium
A Central Insurance Company	Accidental Medical Coverage		
	Agriculture Liab		

AGGREGATE

Aggregate is used to calculate total, averages, and other standard functions for the overall report and for grouped items.

To add Aggregates:

1. Click the gear icon at Table header
2. Select Aggregate
3. Choose a Data Column for calculation
4. Select the Aggregate Function; options vary by column but may include Sum, Average, Standard Deviation, Count, Distinct Count, Minimum or Maximum
5. Click *Add*
6. Also, select whether the total appears at the top or bottom of report. Aggregates are calculated by Group.



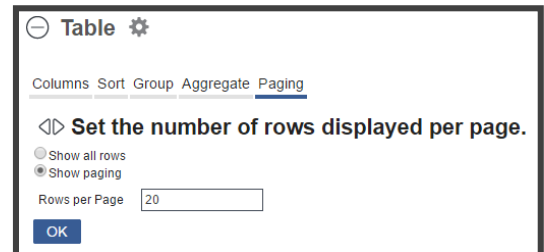
Carrier	Line Of Business	Policy Number	Annualized Premium
		Count: 181	Sum: \$70,230,622.72
A Central Insurance Company		Count: 29	Sum: \$69,896.10
	Accidental Medical Coverage	Count: 1	Sum: \$654.00
		1	\$654.00
	Agriculture Liab	Count: 2	Sum: \$2,346.39
		new test policy	\$200.07
		AOLRSM061203	\$2,146.32

PAGING

Paging is used to customize the number of records displayed per page; default is 20.

To adjust paging:










1. Click the gear icon at Table header
2. Select Paging
3. Set a number
4. Click *OK*



COLUMN FORMATTING

Additional formatting options are available by clicking the column headers.

Annualized Premium	Changed Premium	Full Term Premium
Sort A-Z	\$0.00	\$561.00
Sort Z-A		
Filter		\$0.00
Group		\$0.00
Aggregate		
Format		
Add Chart		
Hide Column		
\$12,345.00		
\$111.00		
\$1,234.00		
\$1,151.00		

Report Format	Excel Equivalent or Example
Align Left	 Align Left
Align Center	 Align Center
Align Right	 Align Right
Expanded Spaces	 Justify
###,###,##0.00	 General Number
####,###,##0.00	 Currency
Percent	 Percent
yyyy/MM/dd	
yyyy/MM/dd hh:mm:ss	
MM/dd/yyyy	
MM/dd/yyyy hh:mm:ss	
True/False	
Bar Gauges	
Cell Colors	 Conditional Formatting
No Format	 Clear Formatting

Questions? Contact support@ezlynx.com