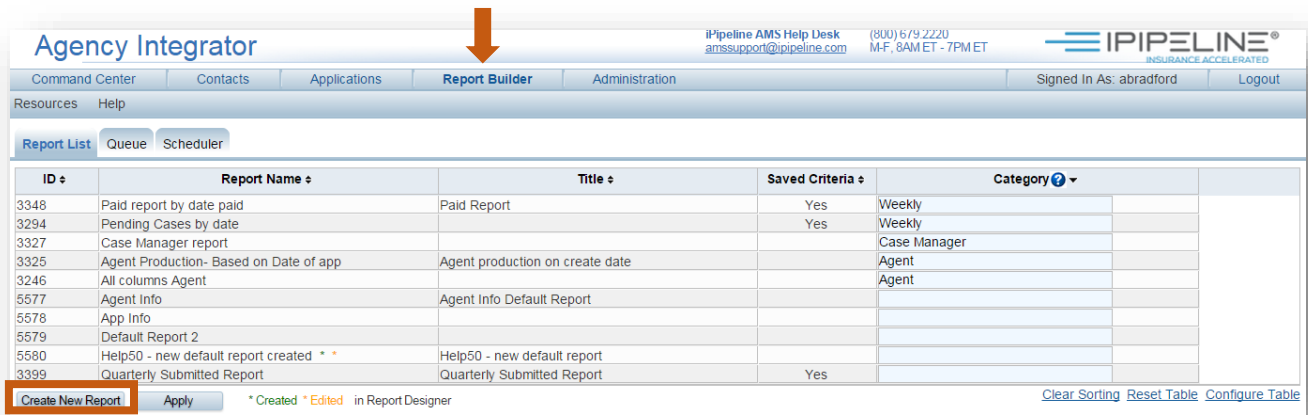# Agency Integrator

This TechNote describes a new Data Group called **App Info - Aging** that has been added to **Report Builder**. This data group contains the dates that Applications were placed into each **Status** in your system, and the number of days the Applications resided in each particular status. This data can facilitate your agency in tracking the "cycle time" of your Apps agency-wide, by Carrier, by Organization, by Line of Business, etc.

Contents

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Accessing App Info – Aging Data Group

If you have the proper **User Rights** access to Report Builder, click **Report Builder** from the top menu bar. Click the **Create New Report** button:

Creating a New Aging Report

A list of Available Data Groups appear. Click on **App Info – Aging**, you will see a description on what to use this group for, a list of default columns and criteria, and a sample report preview:
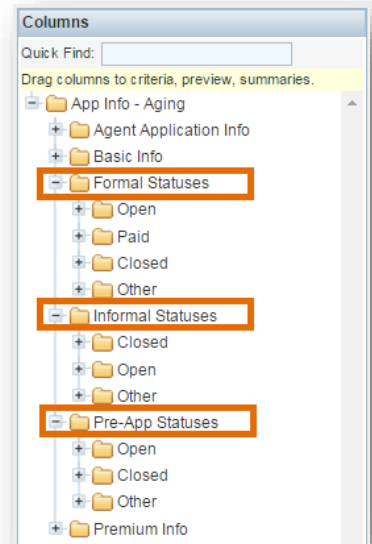

After selecting a data group, click **Create**. The Report Designer screen appears with a new unsaved report. This is the screen where you will design and customize your aging report.

Using Aging Data Group

The Aging Data Group's Columns, key, and Summary sections have some notable differences from other Report Builder Data Groups:
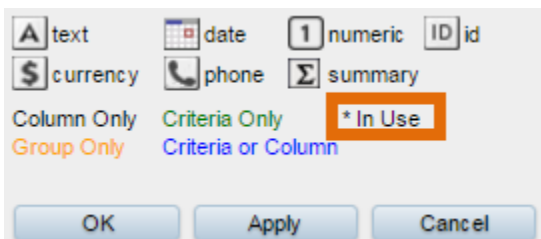
Aging Data Group Columns

The available status options are listed in separate folders split up by the application type **Formal**, **Informal**, and **Pre-application**.
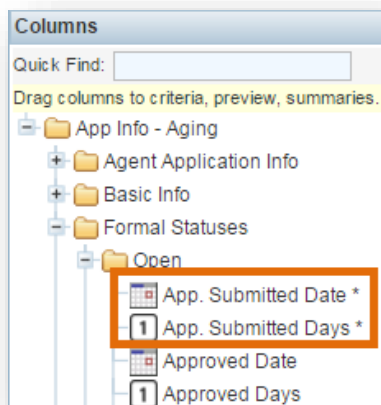

Report Designer Key

A new designation on the key ***In Use** shows Statuses in use, in Agency Integrator.

When selecting your status from columns, an asterisk ***** to the right of the field will now show. This will help you add only statuses your agency is currently using.

Summaries

Summaries can be added to the end of your PDF report, or viewed by itself, without the detailed report data. The following default summary columns have been added for the Aging Data Group:

- App Count
- Total
- Average Days

Carrier Summary

Status	App Count	Total Days	Average Days
App. Submitted			
Allianz Life	1	43	43
Banner	3	75	25
West Coast Life	1	92	92
Totals for App. Submitted	**5**	**210**	**42**
Approved			
Banner	1	0	0
Totals for Approved	**1**	**0**	**0**
Issued - Del. Req.			
Totals for Issued - Del. Req.	**0**	**0**	**0**
In Force			
Banner	2	0	0
Totals for In Force	**2**	**0**	**0**

Note No additional summary columns may be added to the summaries section for this data group.

Default Report

A new default report has been added to your list in Report Builder Called **Application Aging Report** to show how to use this new data group. As a best practice, make a copy of the report and add your own customizations for the Statuses and Dates most important to your agency.

Report Name (Default) Application Aging Report · **Title** [   ]   Logo [select... ▾]

Columns

Quick Find: [   ]

Drag columns to criteria, preview, summaries.

- App Info - Aging
  - Agent Application Info
  - Basic Info
  - Formal Statuses
  - Informal Statuses
  - Pre-App Statuses
  - Premium Info

A text	date	1 numeric	ID id
$ currency	phone	Σ summary	

Column Only — Criteria Only — * In Use
Group Only — Criteria or Column

[OK] [Apply] [Cancel]

Criteria   Remove All Criteria

Organization	✗
Include Sub-Organizations	✗
Carrier	✗
Case Status Category	✗
Create Date	✗

Drop data options here.

☐ **Preview**   Remove All Columns   Relabel Columns   Reset Sorting

Drop groups here.

Applicant Nan	Agent Name	Plan Type ✗	Policy Nur	Face Amo	Case Stat	App. Subn	App. S	Approved	Appro	Issued - D	Issued	In Force D	In Forc	Age of C	Crea
No data.															
☑ Wrap	☑ Wrap	☑ Wrap	☑ Wrap	☑ Wrap ☐ Subtota ☐ Average	☑ Wrap	☑ Wrap	☑ Wra ☐ Sub ☑ Ave	☑ Wrap	☑ Wra ☐ Sub ☑ Ave	☑ Wrap	☑ Wra ☐ Sub ☑ Ave	☑ Wrap	☑ Wra ☐ Sub ☑ Ave	☑ Wrap ☐ Subto ☑ Avera	☑ W ☐ S ☑ A

☑ Include Record Count and Grand Totals (PDF only)

Summaries (PDF reports)

Summarize by   (1) Organization ✗   (2) Carrier ✗

App Count	Total Days	Average Days
No Data		

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Default Aging Report

(Default) Application Aging Report
For Create Date: 01/01/2016 - 10/21/2016

Applicant Name	Agent Name	Plan Type	Policy Number	Face Amount	Case Status	App. Submitted Date	App. Submitted Days	Approved Date	Approved Days	Issued - Del. Req. Date	Issued - Del. Req. Days	In Force Date	In Force Days	Age of Case	Create to Paid/Closed Days
Housekeeper, Bart	Jane, Koda	UNIVERSAL LIFE	12344444	$6,000,000.00	In Force	10/04/2016	17					10/21/2016		17	17
Housemyer, Bobby	Bradford, Addison E	MISC SPDA		$0.00	App. Submitted	09/08/2016	43							43	
Jones, Percy	Banana, Anna	UNIVERSAL LIFE	8734161	$2,333,333.00	In Force	09/06/2016	45					10/21/2016		45	45
Pryor, Jason	Powers, Samuel	10 YR TERM	DDDDDDDDDD	$5,000,000.00	Approved Other than Applied	10/04/2016	13	10/17/2016						17	
Shamy, Anna	Bradford, Addison E	2ND-TO-DIE TERM		$500,000.00	App. Submitted	07/21/2016	92							92	
Overall Average							42		0		0		0	43	31
Record Count (5)															

Days in status columns will be the total aggregated days, even if the case jumped from app submitted to approved and then back to app submitted. The report will reflect the total time the case spent in App Submitted, regardless of order of progression.