

The logo for TALX, featuring the letters 'TALX' in a bold, blue, serif font. The logo is positioned in the upper left corner of the page, above a dark blue horizontal bar. The background of the top right of the page is a blue sky with white clouds.

TALX

TALX Tax Management Services
Unemployment Cost Management

Insight Management Reports

Unemployment Summary Report User's Guide



Welcome to TALX Insight Management Reports!

The place to find all the valuable unemployment information you need in our user-friendly client reporting system!

This guide will provide step-by-step instruction in how to read and interpret the standard “Unemployment Summary” report that can be created in ***Insight***. We’ll point out some of the primary features of this report as well as some helpful hints about key areas of the reports that can assist you in determining the success achieved through your unemployment cost control program.

The “Unemployment Summary” report is a comprehensive and innovative account of all key measurements of your unemployment cost management program. It provides summary information about claims that have been processed, which ones have been protested, what percentage of unemployment decisions you have won for the period, and much, much more. But perhaps most importantly, it lets YOU determine what period of time you wish to see AND it gives you instant access to the employee-level claim detail behind each of those key summary measurements.

The Custom Unemployment Summary even lets you determine which of the reporting segments you wish to retrieve for review.

The statistics and measurements provided in our reports will help you determine which areas of the unemployment cost management process – and even which areas within your organization – are performing well, and which ones represent opportunities for improvement. Your Client Relationship Manager or Account Manager is always a great resource to work with you and can assist in interpreting and evaluating the results of our partnership.

Let’s get started!

1. **webManager Menu:** From the webManager Menu, click on "Reports".

2. **Choose an Action:** Click on "New Report" to start your new report.

3. **Select Report:** Two standard, configurable reports are available to most employers: The “*Unemployment Summary*” and the “*Unit Performance Analysis*.” To start, click on the “**Unemployment Summary**” link as illustrated below.

Click Here

Both the Standard and Custom versions of these reports are available to all reports users. Use the same steps regardless of which report you've chosen to create.

Custom reports are also available and can be used if custom date ranges or additional data filtering is needed. These reports work similarly to the standard versions.

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4. **Report Structure:** The “Unemployment Summary” is a standard report that is highly configurable. Most of our clients prefer to see data organized by their own organizational hierarchy, while others like to see it organized by legal entity and/or state. If more than one option is available to you, you will be asked to choose the structure as illustrated below. The system automatically defaults to the organizational hierarchy your employer provided TALX. Check the desired structure, and click “**Continue.**”

Default

Select a Structure

This screen will only appear if more than one reporting structure is available to you, based on instructions from your corporate office.

Click Here

5. Timeframe & Parameters: Next, you will need to define the parameters of your report. The system is automatically defaulted to include all claim-related data for all areas of your company for which you are responsible (as provided to us by your corporate office). However, you can limit the content of the report by **un-checking** any portions of your organization that you **do not** wish to include.

Next, simply check the desired date range and reference period and click "**Continue**". A **reference period** provides a comparison period for your report by displaying either the period immediately before the period you select, or the same period a year ago for a year-over-year comparison. Structure units with a small **plus** or **minus** box in front of them can be expanded (+) or collapsed (-).

TALX Privacy Policy → Glossary → Help → Log Out

webManager

Reports

- Create New Report
- My Reports (1)
- Company Message
- Select Company
- Client Support

Separation Entry

Claim Status

Tax Intelligence

My Account

Resource Center

Select Parameters

Select the report parameters for your report. When you are finished, click 'Continue'.

* Required Field

Select Report Parameters

Reporting Structure (ENTERPRISE USA - W690):*

- Enterprise USA
 - CLOSED/UNALLOCATED LOCATIONS
 - REGION 1
 - REGION 2
 - REGION 3
 - REGION 4
 - REGION 5
 - UNALLOCATED LOCATIONS

Date Range:*

- Last Week
- Last Month
- Last Quarter

Reference Period:

- None
- Previous Period
- Same Period, Last Year

HELPFUL HINT: If you would like to limit the summary information to only a single unit within your area of responsibility, simply collapse the entire structure (-), uncheck it and expand (+) it again. This will uncheck everything, and you can then check only the unit you wish to view.

Back Continue **Click Here**

6. **Choose an Action:** Now you must determine if you would like to **Save** the report as a template or simply **run** the report. If you have done a great deal of configuration to the parameters of the report and feel this is a report you may need to view again in the future, we recommend that you **save** it for use in the future. If not, simply check **Run** and then click **Continue**.

The screenshot shows the TALX webManager interface. At the top left is the TALX logo. The top right shows the user 'Test User 2' and 'ENTERPRISE USA'. A navigation bar contains links for Privacy Policy, Glossary, Help, and Logout. On the left is a sidebar menu with categories like Reports, Separation Entry, Claim Status, Tax Intelligence, My Account, and Resource Center. The main content area is titled 'Report Created' and contains the text: 'Select an action for your report. If you plan to run a report in the future, we strongly suggest you save the report before running it.' Below this is a 'Select Action' section with four radio button options: 'Save' (selected), 'Run', 'Edit', and 'Delete'. Each option has a brief description. At the bottom are 'Back' and 'Continue' buttons. A red arrow points to the 'Continue' button with the text 'Click Here'. A copyright notice at the bottom reads 'Copyright © 2007 TALX Corporation. All Rights Reserved.'

Choose whether you'd like to Save or Run the report and then click "Continue". You may also go back and edit the parameters of the report or delete the request from here.

HELPFUL HINT: If the report is one you will use again, you should **SAVE** which will create a template for future reports. If you only want to see data once, clicking **RUN** will allow you to do that.

If you chose to run the report without saving it as a template, the system will prompt you to confirm that you do not wish to save it. To continue running the report without saving it, click **Continue**.

7. **SAVE:** If you choose to **Save** your report, you will be presented with a screen which allows you to type in a name for the report as well as a description. The description presents a good opportunity to enter notes regarding the configuration of a report, as well as document the segment of your organization reviewed. If the report is not for your entire company, notes entered could prove to be helpful when either retrieving or running the report again at a later date (for example, this report reflects data for Region A only). Enter the **name** and **description**, and click "**Save**".

TALX Privacy Policy → Glossary → Help → Logout → Test User 2 ENTERPRISE USA

webManager

Save Report

Enter a name and a description for this report. Click 'Save' to save this report template.

* Required field

Save Report Template

Name:*

Description:

Click Here

Enter a report name and description of your choice and then click "Save".

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8. All saved report templates are stored in "My Reports" in the "Manage Saved Reports" tab for easy access at any time. To view the details of a saved report template, click on the report name to view more options. *Note: You may also click "Run" in the Action column to view the report now.*

TALX Privacy Policy → Glossary → Help → Logout → Test User 2

webManager

My Reports

Click the name of your Saved Report to view the Report Details. If you click Run, you will be running live data.

Results Inbox **Manage Saved Reports** Manage Report Schedules

Saved Reports

Name	Type	Created	Action
Quarterly Standard Summary Template	Unemployment Summary	06/25/2007	→ Run
test report2	Unemployment Summary	06/22/2007	→ Run
Link Test	Custom Unemployment Summary	06/14/2007	→ Run

9. **Run:** Once you have saved the report, you may run it, edit the template, or delete the saved report if it is no longer needed. To view the report now, simply click "**Run**".

Viewing Your Summary Report – Key Features


The Unemployment Summary report has many features to ensure the report is as useful as possible. Below is an explanation of some of the key features of this flexible and easily configurable reporting system.

1. **On-Demand Reporting:** Because the Unemployment Summary Report is delivered via a secure Internet website, it can be accessed from anywhere and anytime you have Internet access. For busy business professionals, self-service ensures that you get the information you need when you need it!
2. **Valuable Measurements:** We've made sure that all the key unemployment metrics – such as unemployment claims processed, protested, and appealed – are immediately accessible through the Unemployment Summary Report.
3. **Reference Periods:** To ensure “at a glance” abilities to determine long or short-term trends, Insight provides the ability to use a “Reference Period”. The reference period allows you to not only see summary values for the period of interest, but also for a prior period for comparison. You can choose to compare the report period with the period that directly precedes it OR the same period last year. Reference periods will appear on the report as the right column of summary information as illustrated below.

Enterprise USA
Unemployment Activity Performance Summary



7/1/2007 - 7/31/2007

Financial Impact *Detailed results are available by clicking the links below.*

	7/1/2007 - 7/31/2007	6/1/2007 - 6/30/2007	
Charge Credits Received	(\$213,481.82)	(\$93,539.42)	
Total Liability Avoided Or Suspended	\$1,911,282.46	\$1,895,596.44	
Total Benefit Charges Received	\$4,025,146.64	\$1,237,996.54	

[View Chart](#)

Activity/Performance Summary *Detailed results are available by clicking the links below.*

	7/1/2007 - 7/31/2007	6/1/2007 - 6/30/2007	
S	10,982	18,037	
	1,207	1,373	
	5,302	5,471	
	4,158	7,699	View Chart
	315	3,494	
C	7,379	9,053	
	\$26,492,470.30	\$31,520,921.04	
L	186	139.00	
% Of Claims Processed	2.52%	1.54%	
Potential Liability	\$673,751.73	\$701,609.47	View Chart

The "Reference Period" will appear as the right-hand column in the Unemployment Summary Report. It allows you to compare the current period with a prior period of your choice.

[Requests for Information](#)

	1,016	315
Request For Initial Separation Information	814	255
Requests For Additional Details	202	60
Average Response Time Provided (days)	5	5
E-mail	10	1
Fax	0	0

[Terms and Conditions](#) →

- Access to the Details:** One key component of the Summary Report is that, as you view totals, percentages, and other summary information, you should have immediate access to the detailed, claim-by-claim information that makes up those measurements. That's why we've made detail accessible through the summary. All you have to do is click on the link provided, and a detail report is provided as illustrated below.

Enterprise USA
Unemployment Activity Performance Summary

7/1/2007 - 7/31/2007

To view the detail behind summary totals, simply click on the link provided for each category.
Note: Only the detail for the current reporting period will be provided.

Financial Impact *Detailed results are available by clicking the links below.*

	7/1/2007 - 7/31/2007	6/1/2007 - 6/30/2007
Charge Credits Received	(\$213,481.82)	(\$93,539.42)
Total Liability Avoided Or Suspended	\$1,911,282.46	\$1,895,596.44
Total Benefit Charges Received	\$4,025,146.64	\$1,237,996.54



[View Chart](#)

Activity/Performance Summary *Detailed results are available by clicking the links below.*

	7/1/2007 - 7/31/2007	6/1/2007 - 6/30/2007
Separations Received	10,982	18,037
Discharges	1,207	1,373
Voluntary Quits / Resignations	5,302	5,471
Lack Of Work / Lay-offs	4,158	7,699
Other Separation Issues	315	3,494
Claims Processed	7,379	9,053
Potential Liability	\$26,492,470.30	\$31,520,921.04
Late Claims Received	186	139.00
% Of Claims Processed	2.52%	1.54%
Potential Liability	\$673,751.73	\$701,609.47
Requests for Information	1,016	315
Request For Initial Separation Information	814	255
Requests For Additional Details	202	60
Average Response Time Provided (days)	5	5
E-mail	10	1
Fax	0	0

Click Any Link

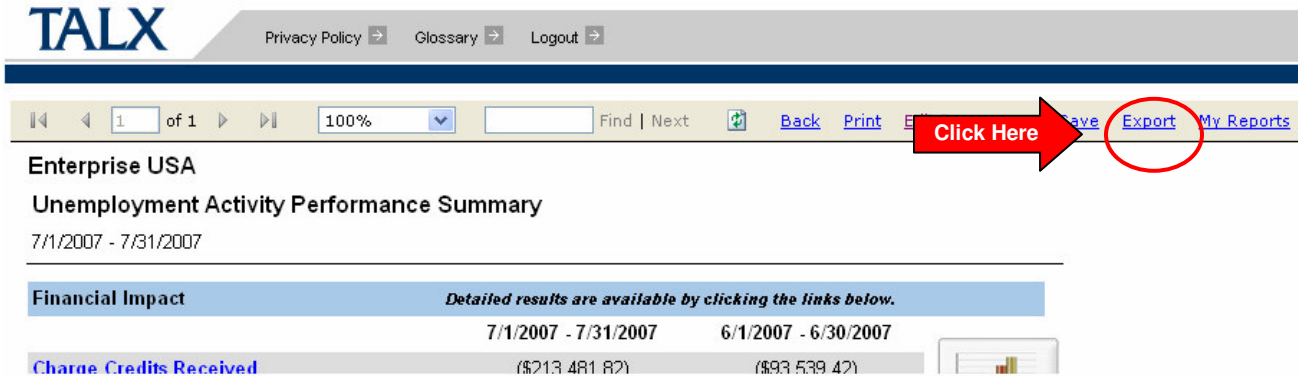


[View Chart](#)

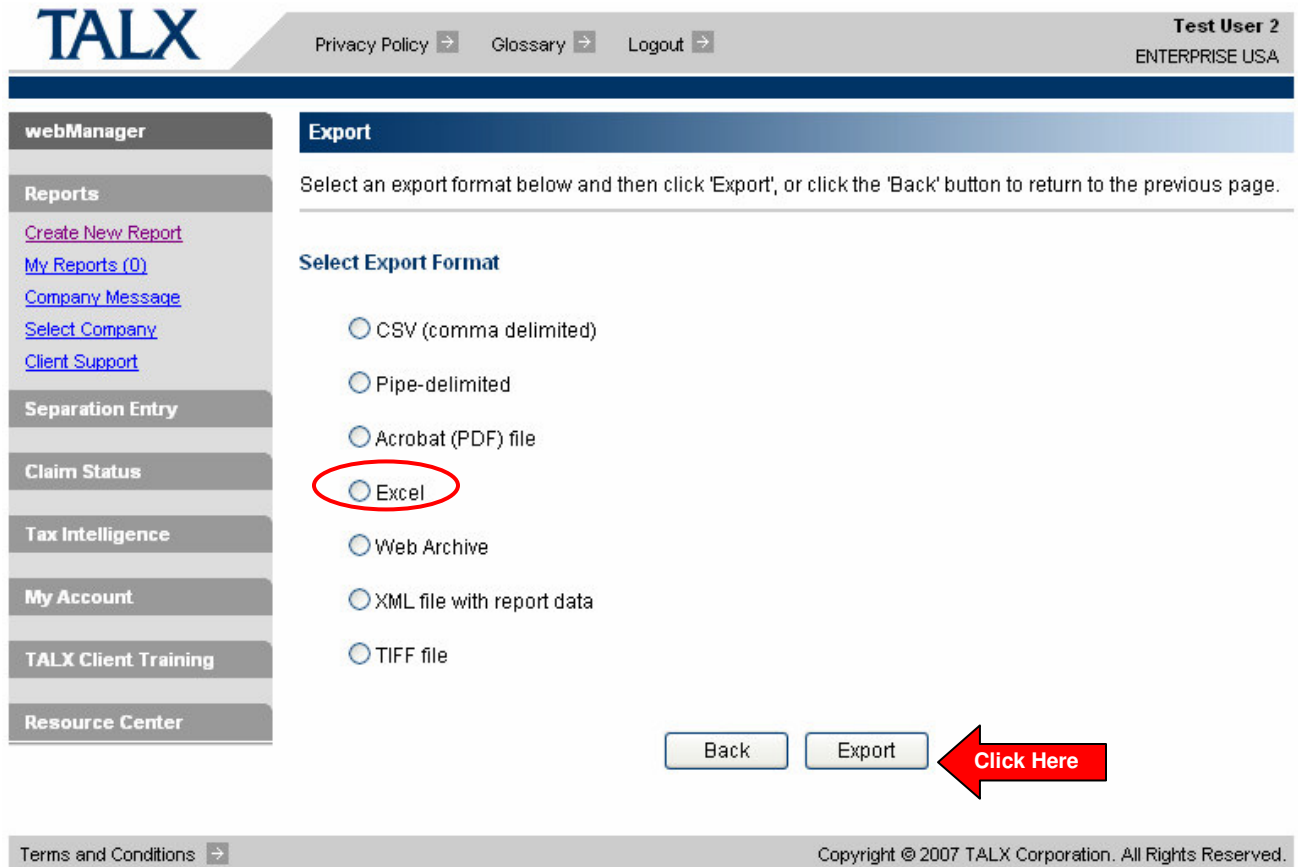


[View Chart](#)

5. **Export Capabilities:** Another key feature of the Summary Report is the ability to take reports OUT of Insight to manipulate the data in ways that are meaningful to you. Exporting reports is simple! When viewing any report in Insight, just click on the "Export" link as illustrated below:



Then, choose the type of file format in which you'd like to save the report, as illustrated below. (Note: For most users, Microsoft Excel will be the most common and user-friendly format.)



6. **Exportable Charts and Graphs:** Insight provides access to many charts and graphs which will depict several of the key metrics provided. These graphs – illustrated in the picture below for “Separations Received by Category” – may also be exported to Excel or other formats for use in presentations or meetings.

ENTERPRISE USA

Separations Received By Category

7/1/2007 - 9/30/2007

