



## Release Notes

*Symbility Mobile Claims and Claims Connect*  
Version 5.7

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## 1. Introduction

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This document describes the new features and enhancements that are part of the upcoming version 5.7 of Symbility *Claims Connect* and *Mobile Claims*. The target dates for this release are March 27, 2015 in Canada and April 17, 2015 in the US.

## 2. Major Enhancements

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### 2.1 Enhancement # 29014 – Symbility Business Intelligence

Claims Managers now have a powerful new module to quantify business unit performance and help them make informed business decisions. Symbility Business Intelligence is focused on helping managers easily and efficiently understand historical, current and future aspects of claims operations. Our Business Intelligence dashboard offers a shift from report-centric to analysis-centric management.

- Customizable dashboards to help managers quickly survey Claims performance and determine which focus areas require attention;
- Extensive library of interactive and customizable canned report templates;
- Interactive data visualization capabilities with custom charts and heat maps,
- Industry trend and reporting capabilities;
- Collaborative interface - save and share custom views with other users;
- Report Designer interface for advanced users;
- Data mining and data export.

For more details about this enhancement, contact your account manager or the Symbility Support Team.

### 2.2 Enhancement # 26509 – New Product - Desk Adjuster

Symbility Desk Adjuster is a powerful new addition to Symbility Claims Connect. It allows you create estimates in Claims Connect without the use of Mobile Claims, helping Insurers centralize small loss handling. It's now possible to accomplish many tasks in Claims Connect that previously required Mobile Claims, such as opening and modifying estimates, browsing pricing databases, and more. Desk Adjuster also offers intelligent questionnaires as a tool to enable Inside Claims personnel to create estimates without needing to be on site, even if they have limited knowledge of the building arts.

Contact your account manager for more information about Desk Adjuster.

### 2.1 Enhancement # 26509 – Add Photos and Forms in Claims Connect

New capabilities have been added for Claims Connect users, so it's now possible to add and edit forms and photo pages in Claims Connect; tasks which previously required Mobile Claims

## 2.2 Enhancement # 24187 – Assemblies

Symbility introduces its new Assemblies interface, designed to save time and improve estimate accuracy. Assemblies provide you with a targeted list of logical items so you can avoid having to search the extensive pricing database. Simply drag and drop an Assembly onto a diagram, then customize it based on a few details about the damages to instantly add the items to your estimate. The result is complete, consistent and accurate lines on every estimate, regardless of user skill level. Companies have access to a range of pre-constructed assemblies or can request custom assemblies from their account manager that align with internal standards to further improve estimating consistency.

## 2.3 Enhancement # 27715 – SpatialKey Integration

Respond proactively to weather events using the SpatialKey integration in Claims Connect! SpatialKey is a Geographic Information System (GIS) that displays weather events layered over claims loss locations in its map interface, and offers the ability to display "Policy-in-Force" (PIF) data to create an even more detailed view. Managers can confidently assess total loss exposure from weather events while optimizing resource mobilization for field response, improving loss verification. SpatialKey delivers the insight managers need to help plan for and monitor the impact of storms and other weather events on all policy locations, not just the ones that have reported claims. Users can open a claim and order roof and hail reports directly from the SpatialKey interface.

## 2.4 Enhancement # 29870 – Mobile Claims - Video Connect Feature Available on Android

Video Connect, the leading video collaboration tool for insurers and their policyholders, is now available to our Android device users as a fully-integrated feature in Mobile Claims for smartphone (previously released as an integrated feature in Mobile Claims for iOS). The Video Connect feature in Mobile Claims combines live audio and video access to the loss site with built-in recording functionality to automatically save captured images directly in the claim.

For more details about Video Connect, contact your account manager or visit our [Symbility Video Connect page](#).

## 3. Other Enhancements

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### 3.1 Enhancement # 14123 – Save and Upload from Within Claim

This new feature gives you the option to save and upload a new claim directly from within the claim, without having to close the claim and return to the Claim List to synchronize. A huge efficiency boost for those who need to immediately accomplish actions that require the claim to be uploaded first, such as locking an estimate or adding a supplement.

### 3.2 Enhancement # 18760– Ability for Assignors to Acquire Ownership of Assignee Claims and Modify Assignee Estimates

The Assignor permissions have been expanded to enable all Assignors – not only the claim Originator – to edit any pages added by one of their Assignees, such as estimates, forms, and more.

### 3.3 Enhancement # 24658 – Improved efficiency for Adding Mitigation Equipment

It's now quick and easy to add multiple pieces of the same Water Mitigation equipment to a diagram at once. There is a new Preferences setting that enables you to turn off the automatic equipment-detail popup that appears when a piece of equipment is added to a diagram. When this option is selected, you can drag and drop equipment onto one or more rooms then use the Quick Quantity control to increase the quantity of equipment added in one simple step.

### 3.4 Enhancement # 25870 – New Share Options When Defining Default Document Folders

We've added new share options to define default permissions at the document folder level that can be set by an administrator when defining folders in default claim structures. As well as being able to share folders and their contents with Originators and Assignors by default, now folders can be shared with Assignees and/or Peers by default, or a combination of those permissions, by defining the desired permissions in the claim structure. When these permissions are defined for a given default folder, they apply automatically to its files and subfolders whenever the relevant claim type is used.

### 3.5 Enhancement # 26723 – New Company Option that Allows Power Users to View All Claims

There's a new company option for Independent Adjusters, Contractors and intermediary companies that specifically allows their "Power User" type users to view all claims when the option is enabled. Contact your account manager if you would like to have this option enabled for your company.

### 3.6 Enhancement # 27584 – Water Mitigation - Meter Name and Type Retained For All New Claims

Mobile Claims now retains the name and type of the meters you add to a water mitigation claim and uses them to automatically populate those fields for new meters of the same kind that you add in the future.

### 3.7 Enhancement # 28303 – Quick Search by Zip/Postal Code

Symbility has added an option for companies whose users need to be able to quickly search for claims by zip/postal code. With this option enabled, a quick search using a zip/postal code returns any and all claims associated with that zip/postal code. Contact your account manager to have this option enabled for your company.

### 3.8 Enhancement # 28754 – “Select All” Checkbox Added to All Multi-Select Dropdown Lists

It's now possible to select or deselect all checkboxes in any dropdown list containing multiple checkboxes using the new “Select All” checkbox at the top of this type of list. This is particularly useful in the Advanced Search page to select a set of search criteria, or in the Items tab of the Database Manager if you need to select all categories at once.

### 3.9 Enhancement # 28761 – Add “Task Comments” Column to Tasks Summary Report Template

Task Comments can now be selected as one of the columns in the Task Summary report template, for companies that use this report.

### 3.10 Enhancement # 28764 – Add Journal Entry without Participating

This new functionality allows any user to add a Journal entry to a claim from Claims Connect without the need to participate in the claim. The entry will include the name of its author, and can be used to log messages relevant to the claim or intended for the claim owner.

### 3.11 Enhancement # 29030 – Ability to Prevent Editing of Estimates in Closed Claims and Completed Assignments

Companies that need to prevent further editing of estimates once a claim is closed or an assignment completed now have the option to do so. Enabling this new option helps to ensure that external financial reporting systems are using the final version of the estimate, so there is no discrepancy between financial reports and the estimate data. Should there be a need to edit an estimate in a closed claim or completed assignment, the user will be forced to re-open the claim or the assignment before being able to modify an estimate. In this case, the claim or assignment status change will be recorded so that any systems that rely on the status change as a trigger will be alerted when the claim is closed, or the assignment completed, again after editing.

### **3.12 Enhancement # 29233 – "Assignment Cancelled" Status Non-Mandatory When Creating a New Assignment Type**

Administrators now have the option to remove the status "Assignment Cancelled" from the list of available assignment statuses when creating or modifying an assignment type. This enables companies to create an assignment type that can't be marked as Cancelled, should this be a requirement.

### **3.13 Enhancement # 29364 – Company Forms Enhancements**

There are several new options to help define which users have access to certain forms, and the new default permission is that users have only the forms added specifically by their company available to them.

### **3.14 Enhancement # 29521 – User Account Export Report Shows All Account Status Types**

All user account status types now appear in the Status column when you export a User Accounts report.

### **3.15 Enhancement # 29551 – Originator Default Estimate Names and Coverages Available for Use by Assignee Companies**

To help maintain consistency throughout a claim that uses default estimate names and coverages defined by the Originator, these defaults can now be used by Assignees of the claim as well. Assignees are able to select the default estimate name when adding an estimate, if any default names exist. Likewise for coverages; if a default coverage was defined by the Originator for one of its default estimate names, then that coverage will apply when an Assignee adds an estimate with that default estimate name.

### **3.16 Enhancement # 29669 – Ability for Assignors to Revoke Ownership of Assignee Claims**

The permissions for Assignors have been updated to offer intermediary Assignors more complete control over their network of Assignees. All Assignors now have the ability to revoke ownership from their assignees, regardless of whether or not the Assignor is the Originator of the claim.

### **3.17 Enhancement # 29670 – Option to Limit Assignee from Marking Estimate Completed**

If your company's review process requires that all estimates from assignees be reviewed by the assignor before they are marked completed, this new assignment type option provides a simple way to ensure this. An administrator can enable the option, for specific assignment types, to prevent Assignees from marking their estimates as Completed. Assignees then have only two estimate status options available – Ready for Review and Cancelled.



### **3.18 Enhancement # 29671 – Option to Automatically Share Documents Returned by Third-Party Vendors**

You can now choose to have third-party documents and reports shared automatically by default with claim assignees, by enabling this option on the relevant Integration/Interface Partner page in Claims Connect, so documents no longer need to be shared manually. This option is available for most of our Integration/Interface Partners, and also enables sharing with Originators and Assignors, and Peers when a company is not the Originator of the claim.

### **3.19 Enhancement # 29677 – Improved Search among Intermediary Companies**

Symbility has expanded its optional Manage Relations functionality to include all intermediary company branches. When a company has this option enabled, users of its branches can search for claims and assignments across all of its branches.

### **3.20 Enhancement # 29678 – Company Item Batches**

Item batches can now be designated as Company Item Batches by administrators or power users so that the batches are shared automatically with all participants in any claims originating from the company. Batches no longer need to be shared manually with each Vendor or Assignee for them to have access to the company's item batch, making for a more coherent approach to estimate building.

### **3.21 Enhancement # 29943 – Simplified WeatherFusion Report History**

WeatherFusion and Symbility have simplified the reports so that it's no longer necessary to select a report length. By default, each report will include complete hail event data from January 1 2006 until the date the report is requested.

### **3.22 Enhancement # 30620 – Option to Have Branch Companies Automatically Acquire Objects Created by Parent Company**

We've added a new company option to help streamline which objects are acquired by branch companies in claims created by their parent company. The new option, when enabled, causes all claim objects accessible in Mobile Claims that were created by a Parent company to be automatically acquired by users of any branch of that company when they acquire ownership. Contact your account manager or Symbility Technical Support for more information.

## 4. Major Resolutions

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### 4.1 Resolution # 23199 – Issues with the Term "Supplement" – Changed to "Revision"

The term "Supplement" was used for any estimate created as an addition to a previously closed or finalized estimate, but this naming convention was not suitable for all current use cases of this type of estimate (e.g. for making corrections after the estimate is closed, etc.). The name designating any estimate added on to an existing closed or finalized estimate has been changed to "Revision".

### 4.2 Resolution # 28933 – Signature Captured on Smartphone Not Visible

We have resolved the issue of signatures that were not visible if captured in a manual journal entry from the smartphone version of Mobile Claims.

### 4.3 Resolution # 29513 – Creating Roof Openings

We have resolved the issue of two roof openings appearing when only one was created and the issue of incorrect walls appearing when an exterior plan was created from a roofplan with a roof opening.

### 4.4 Resolution # 29558 – Imported Roofplan XML Diagram not Displaying on Claims Connect

We have resolved the issue of imported roofplan xml diagrams not displaying after being uploaded to Claims Connect.

### 4.5 Resolution # 30057 – Display Issues on Windows Surface

Two issues that were occurring on Windows Surface have been resolved. The link to download new languages is now functioning correctly as is the scrollbar in the Claim and Estimate status dropdowns.