

FNF BI Portal

USER GUIDE

MARCH 06, 2019

Table of Contents

General Information	2
Access.....	2
Security Levels	2
Report Data.....	2
How Orders are Counted.....	3
Order Open Date / Closed Date	3
Order Classifications.....	4
Residential vs. Commercial (Property Type)	4
Direct vs. Indirect.....	4
The FNF BI Solutions Portal.....	6
Home Page	6
Reports Tree.....	7
Report Screen Format.....	8
Reports Glossary	11

The FNF Business Intelligence (BI) Portal provides access to various reports utilizing key data from SoftPro Select (i.e., productivity, marketing source activity, etc.), CRRAR (i.e., revenue) and Oracle. It is not a mandatory reporting tool but can be used in replacement of, or in conjunction with, your SoftPro Reports.

General Information

Access

- › The BI Portal is only accessible on the FNF Network or through Citrix > MyAccess if working remotely
- › Reports are based on security (permission) level, not SoftPro Profile (no need to switch profiles to see all orders)
- › All Flash/Cost Center/hierarchy information is sourced by the Oracle employee record
 - ›› Custom rollups to group branches into logical groups is permitted and must be requested by the Fidelity Orders Warehouse (FOW) Team
 - ›› If multiple accounts exist in SoftPro Select for a single employee, they are linked by the Employee Number and shown under the Employee's name
 - ›› Team orders must be mapped to a single employee record (i.e., John and Joan Sales Team)

Security Levels

- › Basic – allows the user to see any orders that are assigned to them based on their job role
- › Operational Management – users have access at the Flash or Branch level allowing a user to view all orders, revenue, head count and financial information
- › Cloning – allows a user to be mapped to another user to see their orders (applies to non-operational management reports)
- › National Sales Flag – can be set to,
 - ›› limit a Sales Representatives view of orders in another Flash Code (e.g., if a sales rep moves to another operation (and new Flash assigned in Oracle), this prohibits them from viewing reports under their old Flash code)
 - ›› expand a Sales Representatives view of orders when they span multiple operations (Flash codes)

Report Data

The reports currently include data for

- › Orders
- › Party – this is the Contact Type in SoftPro Select (i.e., Attorney, Buyer, Lender, etc.)
- › Marketing Source
- › Revenue (from CRRAR)
- › Headcount (management reports only)
- › Oracle Financial Data (management reports only)

How Orders are Counted

Order Open Date / Closed Date

> Open Orders

The following criteria is used to determine an open order.

- » Open Order Date = Created Date (not the Received Date)
- » Cost Center assigned (dependent on the Settlement Type selected in the order) if a,
 - ▶ Title & Escrow (T&E) order, the **A**-Contact Cost Center is used
 - ▶ Escrow Only (EO) order, the **A**-Contact Cost Center is used
 - ▶ Title Only (TO) order, the **T**-Contact Cost Center is used

NOTE: Cost Centers are located in the **Custom Fields** section on the **Order Contacts** screen. If Cost Center is not found or invalid, it reverts to the Profile Cost Center.

- » If a Cost Center is identified, it defaults to the Oracle Cost Center
- » If no Oracle Cost Center, the order is not included in the report

> Closed Orders

- » Closed Order Date = date revenue is posted
- » If revenue is related to
 - ▶ Escrow and Title premium, the order is considered closed
 - ▶ Ancillary charges only (i.e., Doc Prep fees), the order is not considered closed

CRRAR Code	CRRAR Code Label	Close Order Flag	Income Group	Income Category
1000	Owner's Basic Coverage	TRUE	Title	Revenue
1001	CLTA Owner's Policy	TRUE	Title	Revenue
5020	Escrow	TRUE	Escrow	Revenue
5021	National Coordination Fee	FALSE	Other Fees and Income	Revenue
5022	Escrow Fees - Bundled	TRUE	Escrow	Revenue
7744	Recordings	FALSE	Expense	Expense

Examples:

- > Order is closed if
 - » Fees from
 - ▶ Owner's Basic Coverage (1000)
 - ▶ Escrow (5020)
 - ▶ Recordings (7744)
 - » All revenue is posted at the same time
- > If on the above order, the revenue is **not** posted at the same time but as follows,

- ▶ Owner’s Basic Coverage (1000); posted on 5/1
- ▶ Escrow (5020); posted on 5/2

The closed date used for reporting purposes is 5/1; the first day revenue is posted (NOTE: it does not consider the recordings fee because they are ancillary charges).

- › If on the above order, the only item posted is the Recordings fee,
 - » **no** close date is identified
 - » **not** included in the report

Order Classifications

Residential vs. Commercial (Property Type)

Property type is based on the following:

Property Type	Residential/Commercial (Non-Residential)
1-4 Family Residential	Residential
5+ Multi-Family	Commercial (Non-Residential)
Condominium Unit	Residential
Commercial/Industrial	Commercial (Non-Residential)
Unimproved Lot	Commercial (Non-Residential)
Vacant Land	Commercial (Non-Residential)
Time Share	Residential
Government	Commercial (Non-Residential)
Manufactured Housing	Residential
Agricultural Land	Commercial (Non-Residential)
Co-op Unit	Residential
Bulk Sale	Commercial (Non-Residential)
National Commercial	Commercial (Non-Residential)

Direct vs. Indirect

Orders are classified as Direct or Indirect for purposes of analyzing fee-per-file averages on traditional Direct orders.

- › Indirect Orders are,
 - » orders outside the traditional Title and Escrow line of business, such as
 - ▶ Accommodations
 - ▶ Abstract
 - ▶ Customer Service
 - ▶ Deed in Lieu
 - ▶ Joint Order Escrows
 - ▶ Lien Searches
 - ▶ Limited Coverage Policy
 - ▶ Lot Book
 - ▶ PIRT/FLAG
 - ▶ Plat

- » usually have fixed or nominal fees
- » are not included in the WSOB calculations
- » determined based on the CRRAR Transaction Type

CRRAR Transaction Type		Direct / Indirect
Code	Label	
00	Not an Order Type	Indirect
01	Purchase/Resale	Direct
02	Refinance	Direct
03	Equity Loan	Direct
04	New Construction	Direct
05	Leasehold/Contract/Timeshare	Indirect
06	Foreclosure/TSG	Direct
07	Informational	Indirect
08	Land Development	Direct
09	Other	Indirect

The FNF BI Solutions Portal

Home Page

Once you are logged in the FNF BI Solutions tab shows links to,

- › Management Reports – provide performance and financial metrics at the operational level (i.e., order counts, recurring business, staffing, financials, etc.)
 - » Operational Management Reports
 - » Title Production Management Reports
- › Job Role Reports – provide performance and financial metrics at the individual level (i.e., monthly production, order mix, fee detail, orders/revenue by source of business, etc.)
 - » Sales Rep Reports
 - » Title Officer Reports
 - » Escrow Officer Reports

REMEMBER: Access to data is dependent upon your security level and/or role. Contact your manager if you have questions on what data should be available to you.

Reports may be accessed using either set of links.

FNF BI Solutions

Report Subject Area

- Operational Mgmt
- Sales Reports
- Title Reports
- Escrow Reports

Resources & Guidelines

FNF BI Solutions

All Site Content

Announcements

All new users requests, changes to existing user access, and Citrix requests must be submitted through IIQ. For IIQ support, please contact IIQSupport@fnf.com.

Please Submit all Support Questions and Feedback to FCH-BIServices-DL@fnf.com.

Operational Management Reports

Title Production Management Reports

Sales Rep Reports

Title Officer Reports

Escrow Officer Reports

Management Reports

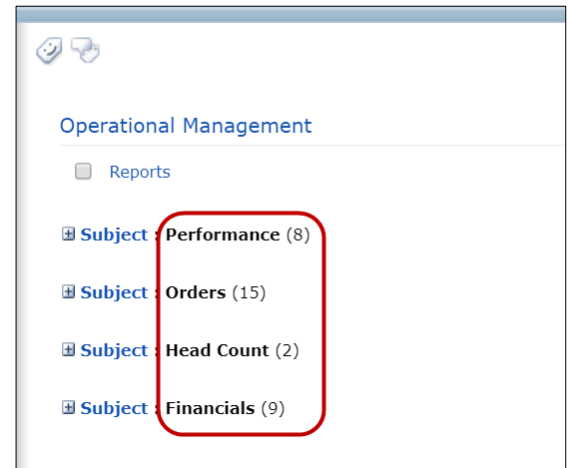
Job Role Reports


Reports Tree

Refer to the [Reports Glossary](#) for a complete list of reports and a brief description.

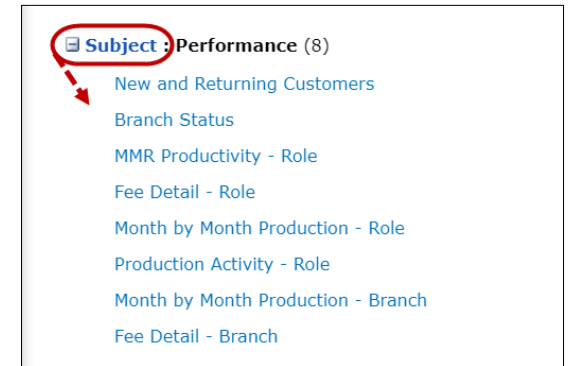
Once you click a **Reports** link, if you select the,

- > **Operational Management Reports** – you see four reporting categories followed by the number of reports found in each category
 - » Performance (8)
 - » Orders (15)
 - » Head Count (2)
 - » Financials (9)



Click the **Expand**  icon or the **Subject** link to expand the reports tree

NOTE: Your default setting may be to show all folders already expanded.

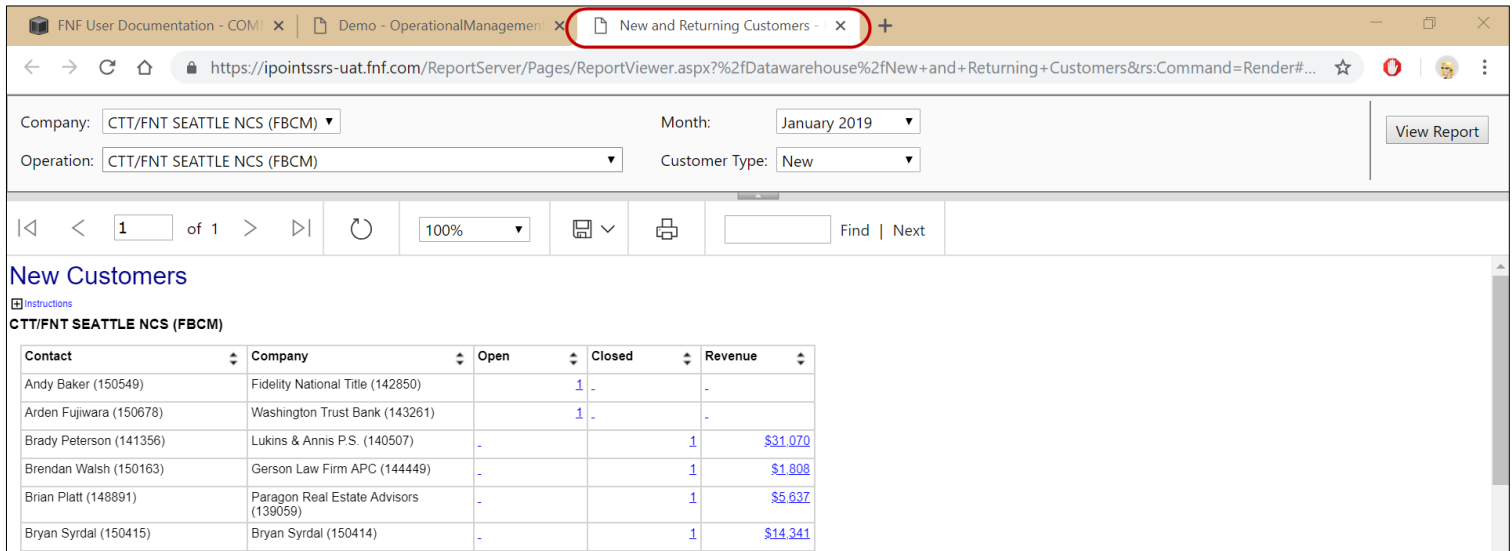


- > **Reports by Role** – you see the list of available reports; the same reports are available regardless of which role’s report link is selected



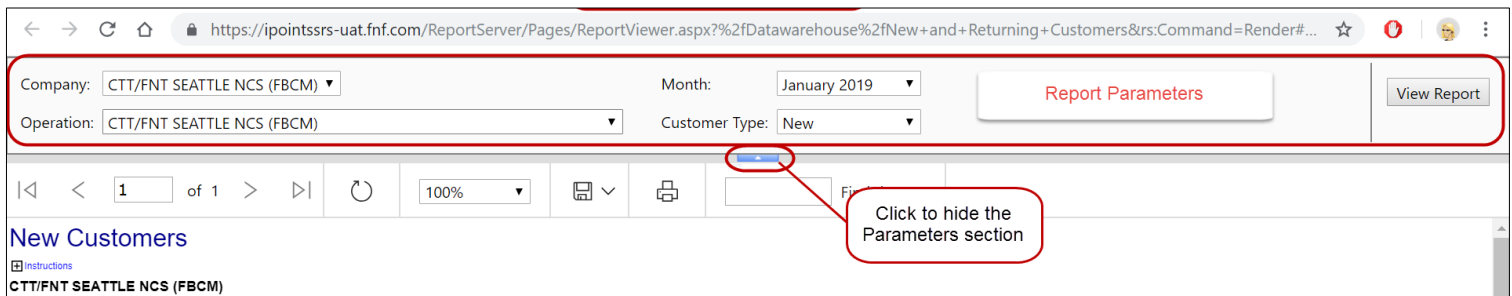
Report Screen Format

When you click a **Report** link the report opens in a new tab.




The **Report** screen layout is the same regardless of report selected.

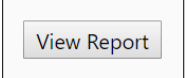
- › **Report Parameters** are shown at the top of the screen; selections made here determine what data is shown in the report



The selections available change based on the report selected. However, the data reported on does not change. The reports include data for,

- ›› Orders
- ›› Party
- ›› Marketing Source
- ›› Revenue
- ›› Headcount (management reports only)
- ›› Oracle Financial Data (management reports only)

- › **View Report** button (on the right); use this to refresh your report when parameters are changed
- › **Hide Parameters**  icon is used to collapse the parameters section (and open if closed)



> Report Toolbar

Company: CTT/FNT SEATTLE NCS (FBCM) | Month: January 2019 | Operation: CTT/FNT SEATTLE NCS (FBCM) | Customer Type: New

Navigation icons: |< < 1 of 1 > >| | Refresh | 100% | Export | Print | Find | Next

New Customers | Report Toolbar

- » **Navigation** icons - move forward/backward through the report pages
- » **Refresh** – use to refresh the current report
- » **Zoom** drop-down - scale the on screen report based on selection
- » **Export** drop-down – various formats available (i.e., Excel, PDF, Word, etc.); exported files are saved to the local drive > Downloads folder
- » **Print** icon – allows you to print to **PDF** only
- » **Find** – search a key word in the report shown

|< < 1 of 1 > >|

Refresh

100%

Export

Print

Find | Next

> **Report data** automatically populates for the current month based on the first entry of each parameter (i.e., **Company, Operation, Customer Type**, etc.). Select report criteria in the **Parameters** section and click the **View Report** button to regenerate the report.

The report shows,

- » Report name (i.e., **New Customers**)
- » Operation name (i.e., **CTT/FNT Seattle NCS(FBCM)**)
- » Column headers; some reports allow data to be sorted in ascending/descending order by clicking the sort icon
- » Report data - current through one day prior to today

Company: CTT/FNT SEATTLE NCS (FBCM) | Month: January 2019 | Operation: CTT/FNT SEATTLE NCS (FBCM) | Customer Type: New

Navigation icons: |< < 1 of 1 > >| | Refresh | 100% | Export | Print | Find | Next

New Customers | Report Name | Report Data

CTT/FNT SEATTLE NCS (FBCM) | Operation Name - set in parameters

Contact	Company	Open	Closed	Revenue
Andy Baker (150549)	Fidelity National Title (142850)	1	-	-
Arden Fujiwara (150678)	Washington Trust Bank (143261)	1	-	-
Brady Peterson (141356)	Lukins & Annis P.S. (140507)	-	1	\$31,070
Brendan Walsh (150163)	Gerson Law Firm APC (144449)	-	1	\$1,808
Brian Platt (148891)	Paragon Real Estate Advisors (139059)	-	1	\$5,637
Bryan Syrdal (150415)	Bryan Syrdal (150414)	-	1	\$14,341

- » Data link to view further details for that entry

You can continue to drill down on the detail from each open screen using the available links. The detail screen shown depends upon the link used.

In the example below, clicking the **File Number** link opens the **File Snapshot**; clicking the **Escrow** link opens the **File Fee Detail Report**.

SettlementType: N/A,Unknown,Escrow and Title,Es Property Type: All View Report

VisibleColumns: Transaction Type,Source & Conta

1 of 1 100% Find | Next

Daily Income Report

Property Type: All
Settlement Type: All
01/31/2019 - Day 21 of 21 days
CTT/FNT SEATTLE NCS (FBCM)
Source of Business : Bryan Syrdal (150415)

File Number	Company	Opened	Closed	Transaction Type	Address	Source	Contact	Escrow	Title	Total
20377600	610120 - FNT OF WA - UNIVERSITY OFFICE	8/28/2018	1/2/2019	Purchase/Resale	2830 228th Ave SE	Bryan Syrdal (150414)	Bryan Syrdal (150415)	\$3,800.00	\$10,541.00	\$14,341.00
Total										

File Snapshot

20377500 Details

Open Date: 8/28/2018
Closed Date: 1/2/2019
Flash: CTT/FNT SEATTLE NCS (FBCM)
Operation: Weighted Value: 1
610120 - FNT OF WA - UNIVERSITY OFFICE
Title Department: King Commercial Production Ctr
Settlement Type: Escrow and Title
Transaction Type: (WSPB/CRRAR/Prod System) Resale \ Purchase/Resale \ Sale-TE-Com (27)
Property Type: Commercial/Industrial
Sales Price: \$4,579,520.00
Loan Amount 1: \$3,206,000
Property Address: 2830 228th Ave SE
Property City/State: Sammamish, WA
Property County: King


Date	Operation	Income Code	Amount
01/02/19	610120	9825 - Wa Sales & Use Tax	\$1,463.60
01/02/19	610120	9960 - Recording Fees	\$427.00

File Fee Detail Report

610120 - FNT OF WA - UNIVERSITY OFFICE
01/01/2019 to 01/31/2019

Branch	File Number	Opened Date	CM Closed Count	Transaction Type	Escrow Officer	Title Officer	Sales Rep	Source/Contact	Income Code
610120 - FNT OF WA - UNIVERSITY OFFICE	20377600	8/28/2018 1/2/2019	1.0	Purchase/Resale	PACKWOOD, MEGAN (6010075)	WISE, MARC (6009666)	REYES, JENNIFER (6053444)	Bryan Syrdal(150414)	5020 - Escrow
20377600 Total			1.0						
610120 - FNT OF WA - UNIVERSITY OFFICE Total			1.0						
Report Total			1.0						

Things to remember when using a detail link,

- » Each link opens the report in a new screen
- » The Toolbar works the same as the initial report
- » The Parameters default to criteria to pull the specific data shown on screen
- » You must click the **Close**  icon on each screen to close

Reports Glossary

Operational Management Reports

Report Group / Report Name	Purpose of Report
Performance	
New and Returning Customers	List of Customers who are new to the operation, or haven't placed an order in a specified time frame.
Branch Status	Branch Breakdown of Open/Closed/Cancelled orders and Escrow/Title/Other charges
MMR Productivity - Role	MTD and YTD breakdown of Open/Closed and Escrow/Title/Other charges by Employee/Role (Sales, Escrow, Title)
Fee Detail - Role	Breakdown of all Fees by CRRAR Transaction Code by Employee/Role (Sales, Escrow, Title)
Month by Month Production - Role	Month by Month breakdown of Open/Closed orders and Escrow/Title/Other charges by Employee/Role (Sales, Escrow, Title)
Production Activity - Role	Month over Month variance report of Orders/Revenue by Employee/Role (Sales, Escrow, Title)
Month by Month Production - Branch	Month by Month breakdown of Open/Closed orders and Escrow/Title/Other charges by Branch
Fee Detail - Branch	Breakdown of all Fees by CRRAR Transaction Code by Branch
Orders	
Top Source of Business Report by Month	Top Source of Business Customers by Open, Closed or Revenue
Top Source of Business Report by Month (Sales Officer)	Top Source of Business Customers by Open, Closed or Revenue filtered by Sales Rep
Customer Business Profile	Customer overview showing Open/Closed/Revenue
Orders and Revenue Trend	Monthly variance and averages for Open/Closed/Revenue
Lead Report	Shows customers that haven't been the Source of Business in a given date range to determine potential leads
File Lookup	Quick File Lookup
Orders and Revenue Detail	Breakdown of Open/Closed orders and Escrow/Title/Other charges by Employee/Role (Sales, Escrow, Title) with monthly pace
Daily Report	Daily breakdown of Open/Closed/Revenue by Branch
Daily Report (Residential - Commercial)	Daily breakdown of Open/Closed/Revenue by Residential/Commercial
Order Mix	Order Breakdown by Settlement and Transaction Type
MTD Prior Period Variance	Month over Month variance report of Orders/Revenue with staffing counts
Regional Daily Order Summary	Regional overview of Open Orders
Orders and Revenue by Party	Breakdown of Open/Closed/Revenue by Party
Orders and Revenue by Source of Business	Breakdown of Open/Closed/Revenue by Source of Business
Flash Overview	Monthly breakdown of Open/Closed/Revenue by Sub Region/Branch/Cost Center
Head Count	
Employee Head Count	Breakdown of Employee Head Count by job function
Employee Roster	Listing of all Employees by Branch

Financials	
Daily Income Report	Daily month over month Income variance
Balance Sheet	Oracle Financials Balance Sheet
Income Statement Summary Trend	Oracle Financials Income Statement Summary
Income Statement Detail Trend	Oracle Financials Income Statement Detail
Income Mix	Daily breakdown of Escrow/Title/Other Fees by Branch
Income Mix (Residential - Commercial)	Daily breakdown of Escrow/Title/Other Fees by Residential/Commercial
Weekly Summary of Business Automation Rules	Corporate Weekly Summary of Business with Automation Report
Revenue Recognized Previous Quarters	Files closed where the income was recognized in a later quarter

Title Production Manager Reports

Report Name	Purpose of Report
Weekly Summary of Business Title	Corporate WSOB Report (Title Only)
Title Production Activity - Title Officer	Month over Month variance report of Orders/Revenue by Title Employee
Orders by Title Dept	Order Count by Title Department
Daily Title Report	Daily/Weekly breakdown of Open/Closed by Title Department

Sales Rep Reports

Report Name	Purpose of Report
Sales Rep Month by Month Production	Month by Month breakdown of Open/Closed orders and Escrow/Title/Other charges
Production Activity - Sales Rep	Month over Month variance report of Orders/Revenue
Sales Business Summary	Dashboard of Orders and Revenue by Customer and Transaction Type
Sales Order Mix	Order Breakdown by Settlement and Transaction Type
Sales Manager Dashboard	Manager Dashboard showing top employee metrics MTD/YTD
Sales Rep Fee Detail	Breakdown of all Fees by CRRAR Transaction Code
Sales Income Mix	Daily breakdown of Escrow/Title/Other Fees
Orders and Revenue by Source of Business	Breakdown of Open/Closed/Revenue by Source of Business

Escrow Officer Reports

Report Name	Purpose of Report
Escrow Officer Month by Month Production	Month by Month breakdown of Open/Closed orders and Escrow/Title/Other charges
Production Activity - Escrow Officer	Month over Month variance report of Orders/Revenue
Escrow Business Summary	Dashboard of Orders and Revenue by Customer and Transaction Type
Escrow Order Mix	Order Breakdown by Settlement and Transaction Type
Escrow Manager Dashboard	Manager Dashboard showing top employee metrics MTD/YTD
Escrow Officer Fee Detail	Breakdown of all Fees by CRRAR Transaction Code
Escrow Income Mix	Daily breakdown of Escrow/Title/Other Fees
Orders and Revenue by Source of Business	Breakdown of Open/Closed/Revenue by Source of Business

Title Officer Reports

Report Name	Purpose of Report
Title Officer Month by Month Production	Month by Month breakdown of Open/Closed orders and Escrow/Title/Other charges
Production Activity - Title Officer	Month over Month variance report of Orders/Revenue
Title Business Summary	Dashboard of Orders and Revenue by Customer and Transaction Type
Title Order Mix	Order Breakdown by Settlement and Transaction Type
Title Manager Dashboard	Manager Dashboard showing top employee metrics MTD/YTD
Title Officer Fee Detail	Breakdown of all Fees by CRRAR Transaction Code
Title Income Mix	Daily breakdown of Escrow/Title/Other Fees
Orders and Revenue by Source of Business	Breakdown of Open/Closed/Revenue by Source of Business