

Hyperion[®]

**FEIS Web Site
User Guide**

*Part of the...*Financial Executive Information System
(FEIS)

Hyperion®

FEIS Web Site User Guide



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Contents

	Financial Executive Information System (FEIS) Overview	1
1	Before You Begin	3
	Hyperion Organizational Structure	4
	Using the Mouse	6
	FEIS Home Page	7
	Web Site View	8
	The Internet Explorer Menu	11
	The Financial Executive Information System Menu	13
	Point of View (POV) Table and Bar	14
	Using the POV Table	15
	Using the POV Bar	17
	Additional POV Options	19
	Software Support	22
2	Logging In	23
	General Login Information	24
	FEIS Login	25
	Dial-up Connection Login	28
3	Financial Reporting	29
	Selecting Reports to View	30
	Printing Reports and Exporting Data	31
4	Using Input Schedules	32
	Data Entry Guidelines	33
	Schedule A Input Report	35
	Schedule B Input Report	36
	Flash Input Schedule	38
	Weekly Sales Input	40
	Local Manager Data Input Schedule	42
	Schedule A-1 Other Data Input	43
	Schedule B Other Data Input	44
	Report Card Input Schedule	45
	Underwriter Schedule A Input Report	46
	Underwriter Other Data Input	47
	Schedule B-1	48
	Schedule B-2	50
	Schedule C	52
	Flag Reports	53
	Adjustments to Losses Input Schedule	55

5	Worldwide Watch	56
	Regional Analysis	57
	District, Office and Branch Analysis	60
	Export and Print Options	62
6	Ranking.....	63
	Navigating Ranking Reports	64
	POV Options.....	65
	Exporting and Printing Ranking Reports	66
7	Region Reports	67
	Using Region Reports	68
	Selecting Reports to View	69
8	Profit Center	70
	Organizational Structure	71
	Profit Center Changes	73
	Adjustment to Losses Input Schedule.....	78
	Reports	79
9	Hardcopy Reports	82
	POV Settings for Reports	83
	Using Adobe Acrobat to Print	88
	Printing Reports	89
10	User Guides.....	90
	Location and Description.....	91
	Printing User Guides.....	92
11	Company Information	93
	Submitting Company Information	94
	Using Company Information Options.....	96
12	Troubleshooting Errors.....	97
	Handling Error Messages.....	98
	Glossary	99

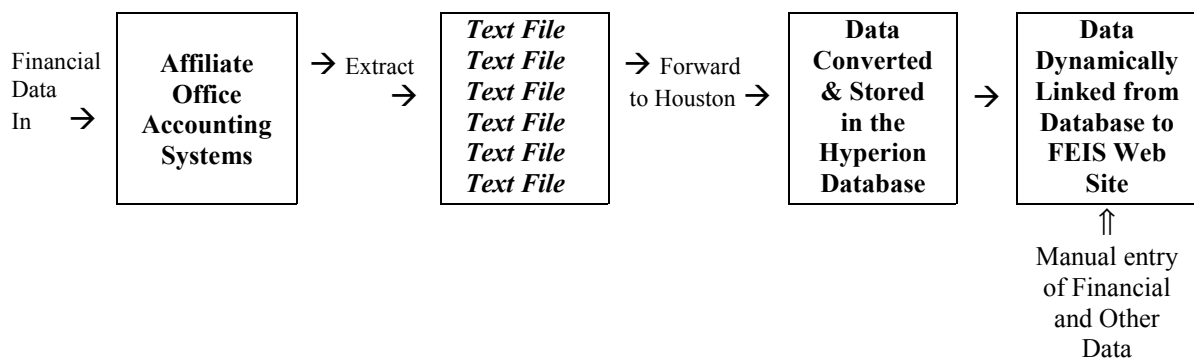
Financial Executive Information System (FEIS) Overview

Purpose of FEIS The Financial Executive Information System (FEIS) is an electronic method of managing financial data. As such, it provides a way of gathering key financial data and reporting the most current information available.

Parts of FEIS FEIS is made up of these components.

Part	Function
Site Databases	Stores the general ledger transaction data entered by individuals in their own affiliate offices.
FEIS Extract Conversion Utility	Extracts affiliate office financial data, converts it into a text file and uploads the data to the Hyperion reporting and consolidation system.
FEIS Web Site	<ul style="list-style-type: none">• <i>(All offices)</i> Tool for entering other, non-financial data and for viewing and printing customized financial reports• <i>(Select Offices)</i> Tool for entering income data, balance sheet data, and all other non-financial data directly into the Hyperion database• <i>(National Accounting and Management)</i> Tool for accessing income statement and balance sheet data from all affiliate offices and reporting results to management

The Flow of Data The flow of financial data from the affiliate offices into the Hyperion database and its access through the FEIS Web site looks like this:



Knowledge Required This user guide assumes that you have a basic understanding of how to use a computer.

Specifically, you must be able to

- Access the Stewart intranet
- Use a username and password
- Understand and use menu options
- Use a computer mouse and keyboard

Continued on next page

Financial Executive Information System (FEIS) Overview, continued

Purpose of this Guide

This user guide is both a procedure and reference manual. Use this table to see which chapters are relevant to which user group.

Chapter	Predominant Users
FEIS Overview	All Users
1: Before You Begin	All Users
2: Logging In	All Users
3: Using Input Schedules	<ul style="list-style-type: none"> • Stewart Office Controllers • Region Controllers
4: Financial Reporting	All Users
5: Worldwide Watch	<ul style="list-style-type: none"> • Stewart President and CEO • Region Controllers • Region Managers
6: Ranking	<ul style="list-style-type: none"> • Stewart President and CEO • Affiliate Office Presidents • Region Controllers • Region Managers
7: Region Reports	<ul style="list-style-type: none"> • Stewart President and CEO • Region Controllers • Region Managers
8: Profit Center	<ul style="list-style-type: none"> • Stewart President and CEO • Region Controllers • Region Managers • District Managers
9: Hardcopy Reports	All Users
10: User Guides	All Users
11: Company Information	<ul style="list-style-type: none"> • Stewart President and CEO • Affiliate Office Presidents • Region Controllers • Region Managers
12: Troubleshooting	All Users

1

Before You Begin

Purpose	<p>The purpose of this chapter is to give you basic information for using the FEIS Web site and who to contact for support. It includes information on</p> <ul style="list-style-type: none">• Using the mouse• What the Web site looks like and the options available• Who to contact for support																						
Overview	<p>To maximize the use of this Web site, it is necessary that you understand</p> <ul style="list-style-type: none">• The overall organizational structure of Hyperion• Fundamentals of mouse use• Key parts of your intranet Web site displayed on screen• Internet menu options available for your use• The Financial Executive Information System (FEIS) menu and the options available for your use• The Point of View (POV) bar and its optional settings• Who to contact for security access problems, data entry problems or database problems																						
Chapter Contents	<table><tr><td>Hyperion Organizational Structure.....</td><td>4</td></tr><tr><td>Using the Mouse</td><td>6</td></tr><tr><td>FEIS Home Page.....</td><td>7</td></tr><tr><td>Web Site View.....</td><td>8</td></tr><tr><td>The Internet Explorer Menu.....</td><td>11</td></tr><tr><td>The Financial Information System Menu.....</td><td>13</td></tr><tr><td>Point of View (POV) Table and Bar.....</td><td>14</td></tr><tr><td>Using the POV Table.....</td><td>15</td></tr><tr><td>Using the POV Bar.....</td><td>17</td></tr><tr><td>Additional POV Options.....</td><td>19</td></tr><tr><td>Software Support.....</td><td>22</td></tr></table>	Hyperion Organizational Structure.....	4	Using the Mouse	6	FEIS Home Page.....	7	Web Site View.....	8	The Internet Explorer Menu.....	11	The Financial Information System Menu.....	13	Point of View (POV) Table and Bar.....	14	Using the POV Table.....	15	Using the POV Bar.....	17	Additional POV Options.....	19	Software Support.....	22
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The Financial Information System Menu.....	13																						
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Using the POV Table.....	15																						
Using the POV Bar.....	17																						
Additional POV Options.....	19																						
Software Support.....	22																						

Hyperion Organizational Structure

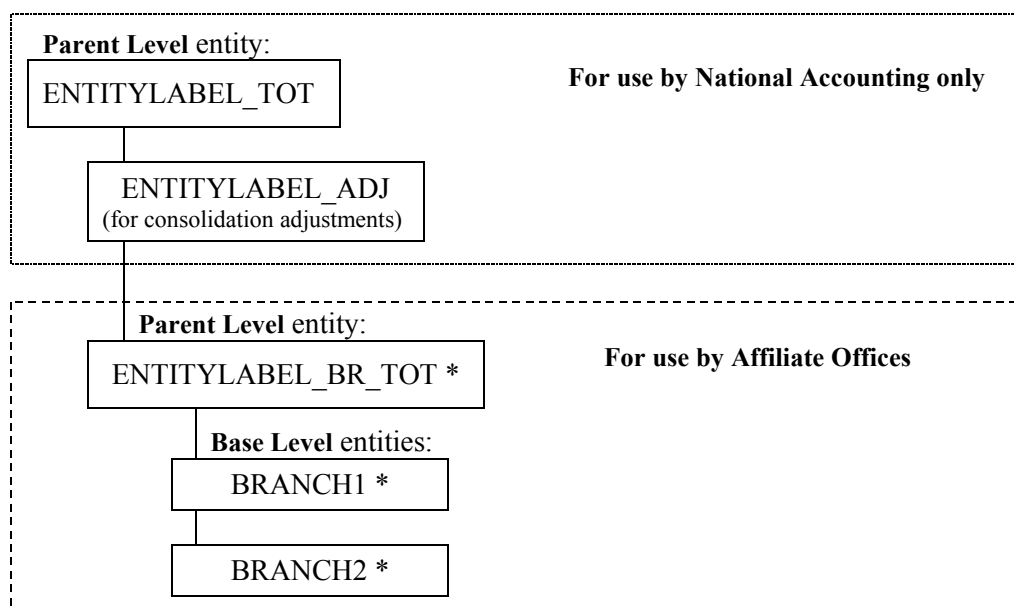
Basic Structure

This table lists the basic structure groupings used to set up the Stewart organization in Hyperion and describes how they are used.

This Structure...	Is used to...
Legal	Display all the entities in the organization based upon legal ownership. This is the most commonly used structure.
Regional	List all Stewart entities as they are organized within STG Districts and Regions.
Segmental	Facilitates reporting of segmental financial results. The two segments reported by SISCO are: <ul style="list-style-type: none"> • Title • Real Estate Information
Geographic	Organized by state or country.

Legal Hierarchy for Offices Reporting Branch Information

This graphic shows the hierarchy of entities within the legal organization for offices reporting branch information.



Financial data entry is allowed only at the **Base Level**. In the example above, financial data could be entered into BRANCH1 and BRANCH2. The data entered into these two branches will be consolidated (combined) at the **Parent Level** (BR_TOT) entity.

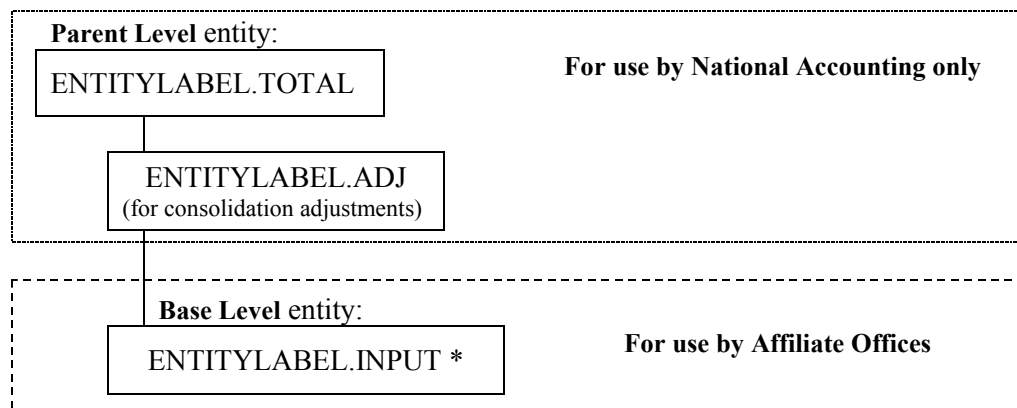
Note: The asterisk (*) indicates those entities that you have security access for viewing and/or inputting data into.

Continued on next page

Hyperion Organizational Structure, continued

**Legal Hierarchy
for Offices Not
Reporting
Branch
Information**

This graphic shows the hierarchy of entities within the legal organization for offices *not reporting* branch level information.



Financial data entry is allowed only at the **Base Level**.

Note: The asterisk (*) indicates those entities that you have security access for viewing or inputting data into.

Using the Mouse

Description The mouse can have either two or three buttons. In either case, only the left and right buttons are used.

How to Use the Mouse Follow these steps to use the mouse.

Step	Action
1	Place the palm of your hand over the top of the mouse.
2	Use your index finger to press the mouse buttons.
3	Keep the mouse on the mouse pad.

Mouse Actions This table describes the most frequently used mouse actions and instructions for doing each.

Action	Description
Point	Moving the mouse to position the on-screen arrow on top of an object.
Double Click	Pressing the left mouse button quickly 2 times in succession.
Select	Pointing to an object on screen and clicking the left mouse button once.
Drag	<ul style="list-style-type: none"> • Positioning the on-screen arrow on an object • Clicking the left mouse button and holding it down • Pulling the mouse either down or sideways across the object area to highlight the object • Releasing the mouse button

FEIS Home Page

Home Page Options

The Financial Executive Information System (FEIS) Home Page has several options to choose from when you need help:

- An individual to contact for Web site and financial questions
- An individual to contact for questions on profit center reports
- A **Call Routing Index** option which launches e-mail to enable you to contact others (in National Accounting) directly regarding different issues requiring their expertise

There is also an option to find out what is new on the FEIS web site. This includes

- Format changes to the web site
- Any changes in accounting deadlines or policies
- Accounting personnel changes
- Other issues you may need to be aware of

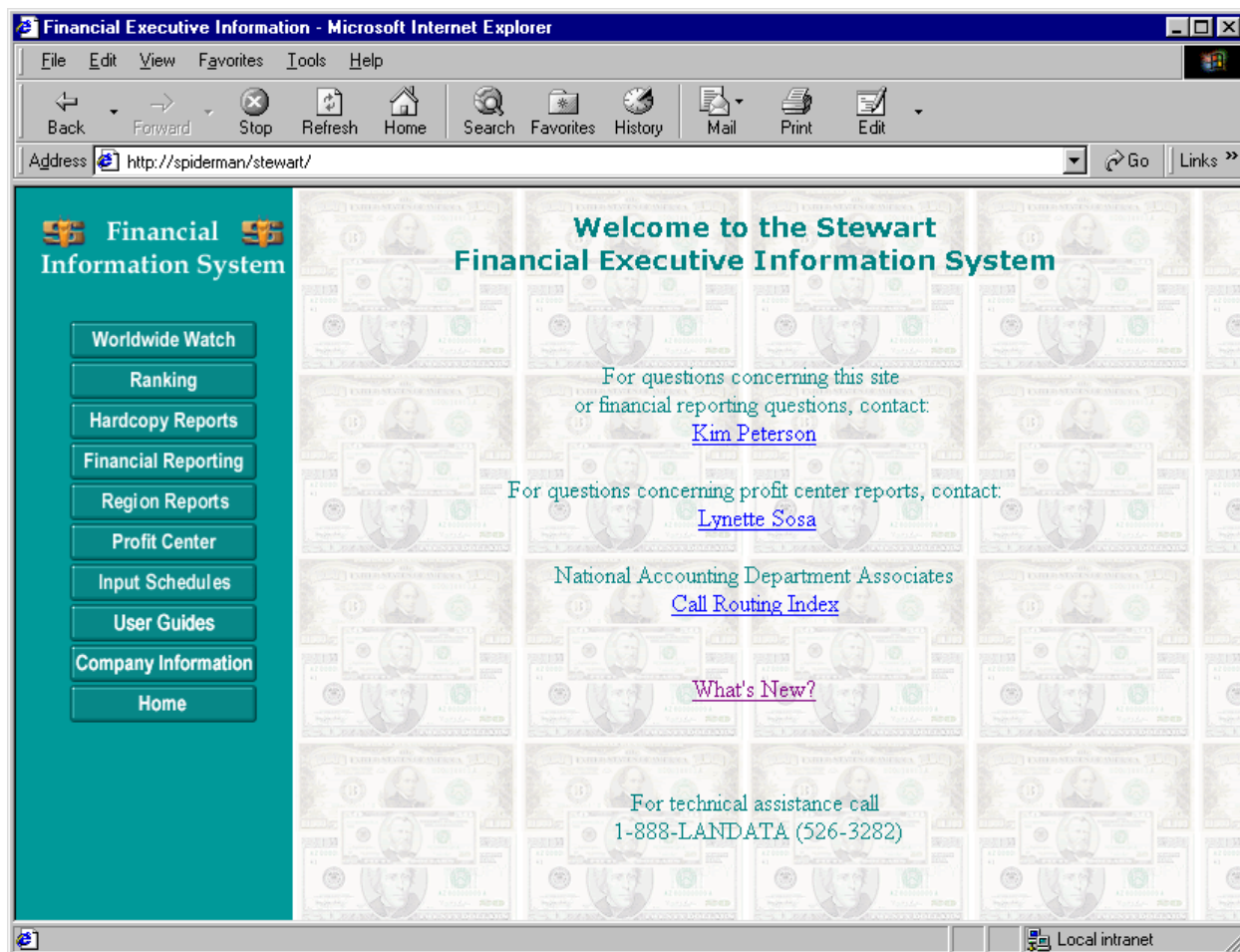
Returning to the Home Page from Other Screens

You may return to the FEIS home page from anywhere in the FEIS Web site by clicking on the large green button labeled **Home** on the left side of your screen.

Web Site View

About the Web Site

This graphic provides a picture of the FEIS Web site home page.



Introduction to the Tool Bars and Menus



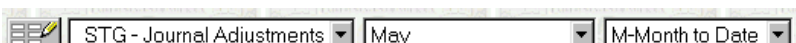

This table lists the different types of tool bars and menus you will use in and around the FEIS Web site.

Menu	Location
Internet Explorer	<p>Always available at the top of your screen. It looks like this:</p>

Continued on next page

Web Site View, continued


Introduction to the Tool Bars and Menus (continued)

Menu	Location
Point of View (POV)	<p>Inside input schedules you are entering data into, in reports you are viewing and at the top of the window in most other screens. It looks like this:</p>  <p>In Worldwide Watch Reports, it looks like this:</p>  <p>Inside Hardcopy Reports it looks like this:</p> 
Adobe Acrobat	<p>Only associated with Hardcopy Reports. Displays at the top of the window of the report you select for printing, and it looks like this:</p> 

Continued on next page

Web Site View, continued

Introduction to the Tool Bars and Menus (continued)

Menu	Location
Financial Information Systems	<p>This menu is continuously displayed in a window located on the left side of the screen. It looks like this:</p>  <p>The screenshot shows a teal-colored menu window titled "Financial Information System" with two gold dollar sign icons on either side. Below the title is a vertical stack of ten buttons: "Worldwide Watch", "Ranking", "Hardcopy Reports", "Financial Reporting", "Region Reports", "Profit Center", "Input Schedules", "User Guides", "Company Information", and "Home".</p>

The Internet Explorer Menu

The Internet Menu

This table lists the Internet menu options available at the top of your display screen, describes what each is used for and identifies those that are recommended for your use while in the FEIS Web site.

Menu Option	Description	Recommended
Back	Lets you return to pages you have already viewed, beginning with the most recent. Note: It is recommended that you use the buttons on the FEIS menu bar to move within the FEIS Web site and limit use of the 'Back' key.	
Forward	Lets you move forward through pages that you have already viewed using the Back button. Note: It is recommended that you use the buttons on the FEIS menu bar to move within the FEIS Web site and limit use of the 'Forward' key.	
Stop	Halts the process of downloading a Web page.	
Refresh	Updates any Web pages stored in your computer memory with the latest content. Normally, when you return to a page that you have visited already, your browser only displays the file stored in memory rather than the current, updated page.	X
Home	Returns you to your designated home page.	X
Search	Displays a choice of internet search engines in the left window of your screen. Your search results also appear in the left window. When you click on a link, the related page appears in the right window.	
Favorites	Displays a list of Web sites whose addresses you have saved (bookmarked) as either favorites or frequently visited. Click any item in the list to jump to it. Note: For information on adding a bookmark, see "Adding a Favorite Site" beginning on page 12 .	X
History	In the left window of your screen display, this option provides a daily list of all the Web sites visited.	
Channels	In the left window of your screen display, the Microsoft active channel guide provides a listing of the internet channels you may subscribe to.	

Continued on next page

The Internet Explorer Menu, continued

The Internet Menu (continued)

Menu Option	Description	Recommended
Fullscreen	Enlarges the display window and reduces the size of the menu bar.	
Mail	Connects you to the Microsoft Outlook® Express messaging and collaboration client so you can read e-mail and newsgroup messages while you are on the Web.	
Print	Prints the contents of the active window.	X
Edit	Opens a file in the Microsoft Word processor that contains the HTML code for the page you are viewing so that you can see and edit it. Note: All users may not have the option to edit. Its availability depends on the type of browser and version of software being used.	

Adding a Favorite Site

Follow these steps to add the FEIS Web site to your list of favorite Web sites. This will *bookmark* the site for future use and make it easier for you to access.

Step	Action
1	Click on Favorites in the top Internet browser menu bar.
2	Select Add to Favorites from the drop down list of options.
3	Select this option from the list of options: No, just add the page to my favorites
4	Type in a Name for the bookmark. If you do not enter a new name, this option will appear on your list of favorites as Default Page , the name showing in the Name text box.
5	Click OK to add the site to your list of favorites

Accessing a Favorite

Follow these steps to access a favorite site that you have bookmarked.

Step	Action
1	Click on the Favorites file folder located in your Internet browser tool bar. Result: This displays a list of all your favorite Web sites down the left side of the screen.
2	Perform one of these tasks: <ul style="list-style-type: none"> To go to another Web site, select one of the listed sites To close the list of favorites, click on the Favorites file folder

The Financial Executive Information System Menu

Financial Executive Information System Menu Options


This table lists the **Financial Executive Information System** menu options available on the FEIS Web site, describes each option and lists the type of user most likely to use the site.

Menu Option	Description	User Type
Worldwide Watch	Management overview of financial results by geographical area	Executive
Ranking	Report that ranks offices based on specific financial criteria	Executive
Hardcopy Reports	Used to print reports selected from a pre-defined listing	All
Financial Reporting	Used to view reports selected from a pre-defined report list	All
Region Reports	Reports specifically designed for Region Manager use	Executive
Profit Center	Used to view district and regional profit center reports	Executive DM
Input Schedules	Access to all existing report templates used for entering data	Office Controllers
User Guides	Access to a Read-Only electronic copy of these documents which you can open and view on-screen or print a copy of: <ul style="list-style-type: none"> • FEIS Web Site User Guide • SISCO Accounting Guide • FEIS Modification Request Form 	All
Company Information	Access to company-specific documents that you can both view and print. These include <ul style="list-style-type: none"> • A List of the Board of Directors • A List of Company Shareholders • A List of Office Goals • An Organization Chart • A Proxy Letter 	Executive
Home	Returns you to the Financial Executive Information Systems Home Page	All

Point of View (POV) Table and Bar

Description of POV Options

POV is the point of view from which you are looking at the current data. You can change the point of view using either the

- **POV Table** button 
 - Independent buttons that make up the POV bar
-

Location

The **POV Table** and POV bar are found in all areas of the Web site except for:

- The FEIS **Home** page
 - In **User Guides**
-

Using the POV Table

POV Table Screenshot

The **POV Table** button provides access to all the changeable options associated with the point of view. The button used to access the **POV Table** looks like this:



Change POV Screenshot

The **Change Point of View** page looks like this:

How to Use the POV Table

Follow these steps to modify settings for any of the fields accessed through the **POV Table** button.

Step	Action										
1	Go to a report or view that contains a POV bar.										
2	Click the POV Table button to open the Change Point of View page, and then click the magnifying glass associated with the field you want to open.										
3	<p>If the list of items in the open field is long, narrow the focus of your database search through these steps:</p> <table> <tr> <th>Step</th><th>Action</th></tr> <tr> <td>1</td><td>Change the number of Max Entries associated with the open field. Note: See the section “How to Change Max Entries” beginning on page 19.</td></tr> <tr> <td>2</td><td>Click Update List to incorporate the change in Max Entries.</td></tr> <tr> <td>3</td><td>Adjust the filters used to filter the data. Note: See the section “How to Change the Filters” beginning on page 19.</td></tr> <tr> <td>4</td><td>Click Update List to incorporate filter changes.</td></tr> </table>	Step	Action	1	Change the number of Max Entries associated with the open field. Note: See the section “How to Change Max Entries” beginning on page 19 .	2	Click Update List to incorporate the change in Max Entries .	3	Adjust the filters used to filter the data. Note: See the section “How to Change the Filters” beginning on page 19 .	4	Click Update List to incorporate filter changes.
Step	Action										
1	Change the number of Max Entries associated with the open field. Note: See the section “How to Change Max Entries” beginning on page 19 .										
2	Click Update List to incorporate the change in Max Entries .										
3	Adjust the filters used to filter the data. Note: See the section “How to Change the Filters” beginning on page 19 .										
4	Click Update List to incorporate filter changes.										
4	Change the desired field, and click Done to incorporate all your changes and return to the Change Point of View screen.										

Continued on next page

Using the POV Table, continued

How to Use the POV Table (continued)

Step	Action	
5	Perform one of these actions to verify the changes.	
	If...	Then...
	Okay	Click Done again to accept the changes and redisplay the report using the revised data.
	Not okay	Follow steps 2-4 to make the needed changes.
6	Repeat steps 2-5 to change any of the other fields in the POV, as needed, for the report or schedule you are currently using.	

Access to Entities You will have security access only to those entities **at or below** your office level. Due to the nature of the system, you may also see the following entities listed in your POV, but you may not be able to see the data associated with them:

- GLOBAL
- SISCO_LGL
- STG_TOT
- STC_TOT
- STC_GEN_TOT
- Other totaling entities that may be a part of your office organizational structure

Contact for Entity Access Problems

A change in security access may be required if you experience either of these problems:

- Unable to see or select an entity that you believe you should have access rights to
- If you have access to an entity you do not believe you should

For assistance with security access, please e-mail:


Claudia Light in National Accounting at clight@stewart.com

Using the POV Bar

POV Bar Purpose and Warning

The POV bar serves a dual purpose. It:

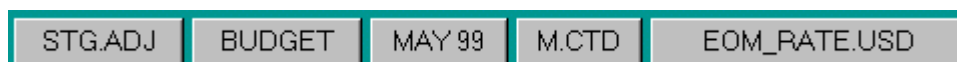
- Displays the settings previously selected through the POV tables **Change Point of View** page.
- Acts as a short cut to a single selection table used for changing only that setting.

Warning: Whenever possible, use the **POV Table** button  to change a setting. Using the POV bar buttons to modify settings *should* display the new setting in your active window, but does not always work.

Note: For certain reports, you do not have the option of changing all fields. Fields that cannot be changed are “grayed out” on the POV bar.

POV Bar Screenshot

The POV bar looks like this:



POV Bar within Company Information

The POV bar display within **Company Information** differs from the one displayed on other screens. The only valid changes you can make here are to select a new **Entity** and **Period**.

The **POV Table** button is still accessible and can be used to open the complete set of tables on the **Change Point of View** page. However, changing any settings other than **Entity** and **Period** will have no impact on the information displayed within the **Company Information** window.

Use this table to make the correct company selection to view **Company Information**.

If you are a company...	Then select...
With branches in Hyperion	Branch Total (company ending in BR_TOT)
Without branches in Hyperion	Any selection with a .INPUT label

POV Bar within Worldwide Watch

The POV bar display on the **Worldwide Watch** map page differs from the one displayed on other Spiderman screens. Most options are the same, but **Worldwide Watch** includes an additional drop-down list for “**Tolerance of %**” in place of **Entity**. For information on **Tolerance of %**, see the section “**Worldwide Watch**” beginning on [page 56](#).

Note: Drilling down to the report segments of **Worldwide Watch** displays both the **Print** and **Excel** buttons to the right of the POV bar. These options enable you to print a report or create an **Excel** version of the report data.

Continued on next page

Using the POV Bar, continued

How to Use the POV Bar Buttons

Follow these steps to use the buttons on the POV bar.

Note: These steps apply to the POV bar within **Financial Reporting** and **Hardcopy Reports** only.

Step	Action
1	Select a report.
2	Open a specific list box, such as Entity or Category , by selecting the applicable button from the POV bar.
3	Select a new option and click Done to accept the change. Result: This returns you to the active report window and displays the new selection on the POV bar button.

Additional POV Options

Additional POV Options

There are three POV filter options to limit the number of drop-down list choices:

- **Max Entries**
- **Filter**
- **More Filters...**

What Filters are Used For

Filters help to narrow the focus of data to meet a specific need. In most cases, the filters associated with the program you are running are pre-defined and are automatically applied to your data. You may never need to change the existing filters.

For those who do need to modify their filters, most filtering is done within these two areas:

- **Entity** – Used to reduce the size of the entity pick list for end-users with a large number of entities.
- **Account** – The chart of accounts within Hyperion is quite lengthy and includes many inter-company accounts as well as sub-accounts for all SISCO reporting entities.

Description of Max Entries

Max Entries is a filtering tool used to narrow the number of records that the database searches through for a given report.

Impact of Changing Max Entries

This table describes the impact on **Entity** and **Period** of adjustments made in **Max Entries**.

Field	Impact of Change
Entity	The default number of Max Entries that the program searches is 500. Normally, there are not that many entities listed in the Entity list box. However, if the list is long, you can speed up the data search process by changing the number of entities to less than 500.
Period	Starts the period with January and filters it for the number of months you set. Example: If you set the Max Entries to 5, then the selection list displayed only shows January through May.

How to Change Max Entries

Follow these steps to change the number of maximum entries.

Step	Action
1	Double click the left mouse button inside the Max Entries text box to highlight the existing number.
2	Type a new number.
3	Left click on the Update List button. Result: The Entity list box now contains the maximum number of entries you defined.

Continued on next page

Additional POV Options, continued

How to Use the Filter Text Box

Follow these steps to change the filter(s) that helps narrow your search.

Step	Action								
1	Select the Entity POV bar option.								
2	Narrow the data search for those cities or offices that have a long list of items appearing in the list box by performing these actions: <table border="1"> <tr> <th>Step</th><th>Action</th></tr> <tr> <td>1</td><td>Place your cursor inside the white Filter text box.</td></tr> <tr> <td>2</td><td>Type the first four letters of the city or office label you are looking for.</td></tr> <tr> <td>3</td><td>Click the Update List button. Result: The main list box now displays only the cities or offices associated with the filter you applied.</td></tr> </table>	Step	Action	1	Place your cursor inside the white Filter text box.	2	Type the first four letters of the city or office label you are looking for.	3	Click the Update List button. Result: The main list box now displays only the cities or offices associated with the filter you applied.
Step	Action								
1	Place your cursor inside the white Filter text box.								
2	Type the first four letters of the city or office label you are looking for.								
3	Click the Update List button. Result: The main list box now displays only the cities or offices associated with the filter you applied.								
4	Select the desired Entity from the displayed list.								
5	Once you have adjusted your filters and selected an entity, click Done to incorporate the changes.								

Note: Use **Reset** to return the screen to its original or default settings.

Continued on next page

Additional POV Options, continued

How to Use the More Filters... Option

The only POV options that you are likely to use **More Filters...** with are **Entity** and **Account**. Other POV options do not have a long enough list of selections to warrant filtering through **More Filters...**. Follow these steps to use the **More Filters...** option.

Step	Action						
1	Select either the Entity or Account POV bar option.						
2	Click the More Filters... button. Result: The More Filters for Entity or the More Filters for Account screen displays.						
3	Select new filtering options from the displayed filter boxes. Note: Entity has three filtering possibilities. Account has four.						
4	Highlight the desired filters in accordance with the information below: <table border="1"> <thead> <tr> <th>If changing...</th><th>You may filter by...</th></tr> </thead> <tbody> <tr> <td>Entity filters</td><td> <ul style="list-style-type: none"> • Top Filter box – Do not use. • Middle Filter box – Filters out either parent or base-level entities Example: To review only the lowest level entity reports and data, de-select Parent to limit your entity list to only branch level entities. • Bottom Filter box – Organizational structure Note: The Legal structure is the default structure. Region Managers or Controllers may find it helpful to de-select Legal and select Regional as the filter in order to display regions, districts and offices on their pick list. </td></tr> <tr> <td>Account filters</td><td> <ul style="list-style-type: none"> • Top Filter box – Do not use. • Second Filter box – Sub-account filtering • Third Filter box - Organizational structure • Bottom Filter box – Accounting filters </td></tr> </tbody> </table>	If changing...	You may filter by...	Entity filters	<ul style="list-style-type: none"> • Top Filter box – Do not use. • Middle Filter box – Filters out either parent or base-level entities Example: To review only the lowest level entity reports and data, de-select Parent to limit your entity list to only branch level entities. • Bottom Filter box – Organizational structure Note: The Legal structure is the default structure. Region Managers or Controllers may find it helpful to de-select Legal and select Regional as the filter in order to display regions, districts and offices on their pick list. 	Account filters	<ul style="list-style-type: none"> • Top Filter box – Do not use. • Second Filter box – Sub-account filtering • Third Filter box - Organizational structure • Bottom Filter box – Accounting filters
If changing...	You may filter by...						
Entity filters	<ul style="list-style-type: none"> • Top Filter box – Do not use. • Middle Filter box – Filters out either parent or base-level entities Example: To review only the lowest level entity reports and data, de-select Parent to limit your entity list to only branch level entities. • Bottom Filter box – Organizational structure Note: The Legal structure is the default structure. Region Managers or Controllers may find it helpful to de-select Legal and select Regional as the filter in order to display regions, districts and offices on their pick list. 						
Account filters	<ul style="list-style-type: none"> • Top Filter box – Do not use. • Second Filter box – Sub-account filtering • Third Filter box - Organizational structure • Bottom Filter box – Accounting filters 						
5	Once you have highlighted your new filter selections, select the Done button to accept the changes and return you to the Select Entity or Select Account page. Note: The Reset button is used to reestablish your previous filter settings <i>after</i> you have highlighted new ones, but <i>before</i> you use the Done button. Once you have used the Done button to accept the new settings, Reset cannot return you to the original or default settings.						

Software Support

For Security Access

For problems accessing the Landata server or the FEIS Web site, contact the Landata Systems, Inc. HelpCenter at this number:
1-888-LANDATA (526-3282)

For Problems With FEIS

FEIS problems include

- Internal problems with the FEIS Web site
- Data entry into the **Input Schedules** segment of the database
- Viewing and printing reports

For help with any of these problems, contact Kim Peterson or Norma Starling.

Contact	Phone	E-mail
Kim Peterson	(713) 625-8041	kpeterso@stewart.com
Norma Starling	(713) 625-8048	nstarlin@stewart.com

Purpose

The purpose of this chapter is to provide login instructions for these users:

- Stewart President and CEO
- Affiliate Office Presidents
- Region Controllers
- Region Managers
- District Managers
- Stewart Office Controllers
- Region Controllers

Overview

Login to the FEIS Web site depends on your particular office setup. All logins require you to use both a unique Spiderman and a unique Hyperion

- Username
- Password

Note: You must be a member of the Stewart domain to be able to access the FEIS Web site located on the Stewart intranet. If you are not a member of the Stewart domain, please contact the Landata Help Center to gain access.

**Chapter
Contents**


General Login Information	24
FEIS Login	25
Dial-up Connection Login	28

General Login Information

User Groups	<p>The FEIS Web site has been divided into two user groups.</p> <ul style="list-style-type: none"> • Spiderman • Spiderman1 						
Login Usernames and Passwords	<p>There are three sets of usernames and passwords. They are used for accessing</p> <ul style="list-style-type: none"> • The FEIS Web site <ul style="list-style-type: none"> ◆ Required each time user logs on • Hyperion Enterprise Financial Reporting (FINRPT) <ul style="list-style-type: none"> ◆ Only required the first time user logs on ◆ Username and password is saved by the system ◆ Determines what rights you have in the system ◆ Entities you can see ◆ Whether you can input data or not • Hyperion Enterprise Profit Center (PRFTCNTR) <ul style="list-style-type: none"> ◆ Required when accessing Profit Center Input Schedule or Profit Center Reports tab ◆ Restricted access to some users <p>Tip: Your FINRPT and PRFTCNTR usernames and passwords could be the same if you have access to both applications.</p>						
Logging Into the FEIS Web Site	<p>The first time you log into the FEIS Web site, you will need to use both of these sets of usernames and passwords:</p> <ul style="list-style-type: none"> • The assigned username and password for the FEIS Web site • The assigned username and password for the Hyperion Enterprise Financial Reporting database <p>Note: When you first log in using both usernames and passwords, your Hyperion login is saved by the system. After that, you will only be prompted for the Spiderman login. Users accessing Profit Center, will be prompted to enter an additional username and password. It is recommended that you keep your usernames and passwords in a safe and accessible location in case they are needed.</p>						
Login Problems	<p>Contact the Landata HelpCenter if you experience any of these problems:</p> <ul style="list-style-type: none"> • FEIS Web site login not accepted • System prompts for your username and password <i>after</i> you have already entered it into the system 						
Requesting a Login Username and Password	<p>Follow these steps to request access to the FEIS Web site.</p> <table border="1"> <thead> <tr> <th>Step</th><th>Action</th></tr> </thead> <tbody> <tr> <td>1</td><td>Contact your Region Controller for approval to request access to the FEIS Web site.</td></tr> <tr> <td>2</td><td>E-mail the approval to Claudia Light in National Accounting, clight@stewart.com. Result: You will be notified by return e-mail of your FEIS User Group and usernames and passwords.</td></tr> </tbody> </table>	Step	Action	1	Contact your Region Controller for approval to request access to the FEIS Web site.	2	E-mail the approval to Claudia Light in National Accounting, clight@stewart.com . Result: You will be notified by return e-mail of your FEIS User Group and usernames and passwords.
Step	Action						
1	Contact your Region Controller for approval to request access to the FEIS Web site.						
2	E-mail the approval to Claudia Light in National Accounting, clight@stewart.com . Result: You will be notified by return e-mail of your FEIS User Group and usernames and passwords.						

FEIS Login

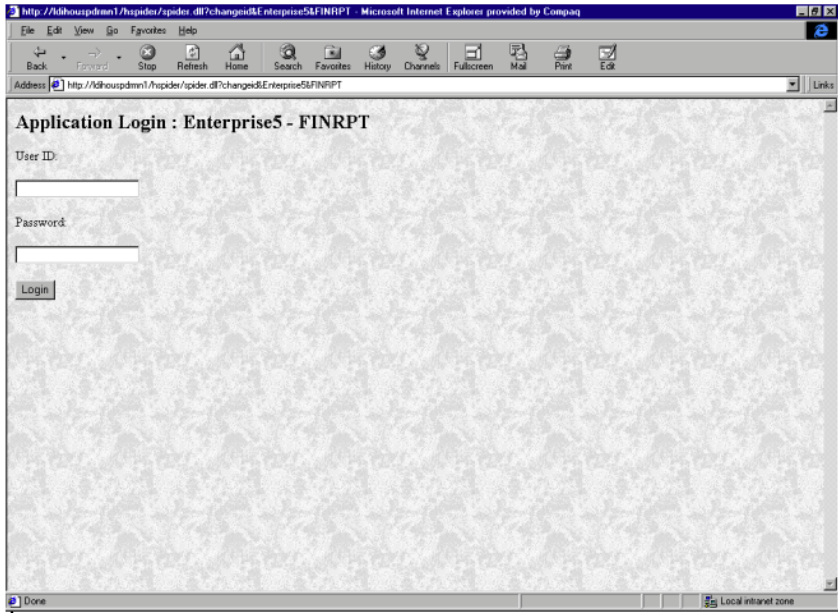
First Time Login Follow these steps the very first time you log in to the FEIS Web site through your office network (WAN).

Step	Action
1	To get on to the internet, launch the Internet browser from your toolbar or Start menu.
2	<p>To access the correct intranet area, type your assigned User Group address into the Address text box located near the top of the screen and press <Enter> on your keyboard.</p> <p>http://spiderman/stewart or http://spiderman1/stewart</p> <p>Result: A login box labeled Enter Network Password displays.</p> 
3	<p>Type in your User Group username and password.</p> <p>Note: If you have not received your username and password, contact the Landata HelpCenter (1-888-526-3282)</p> <p>Warning: The system is case sensitive. You <i>must</i> use lower case letters when entering your password, otherwise it will not accept them.</p>

Continued on next page

FEIS Login, continued

First Time Login (continued)

Step	Action
4	<p>To access the Hyperion Database where all the financial data is stored, type your assigned Hyperion username and password into the second login box that appears on screen.</p>  <p>Note: When you first log in using both usernames and passwords, your Hyperion login is saved by the system. After that, you will be prompted for the FEIS login. Users accessing Profit Center Input Schedule or Profit Center Reports will be prompted to enter their assigned PRFTCTNR username and password.</p>
5	<p>To open the FEIS Web site, perform one of these actions:</p> <ul style="list-style-type: none"> • Single click on OK. • Press the <Enter> key.

Continued on next page

FEIS Login, continued

How to Log In After the First Login

Follow these steps to log into the FEIS Web site through your office network (WAN) any time after you have initially logged in to this site.

Step	Action
1	To get on to the internet, launch the Internet browser from your toolbar or Start menu. Result: This displays the Stewart Home Page.
2	Click the down arrow located on the right side of the Address box to display a drop down list of previous Web sites visited.
3	Select the FEIS Web site address from the list. Result: This displays the Spiderman User Group login box (Enter Network Password).
4	To log into the FEIS Web site, refer back to “ First Time Login ” instructions, steps 3 and 5.

Dial-up Connection Login

How to Log In Through a Dial-up Connection

If your office is set up to access the internet through a dial-up connection, follow these steps to log in to the FEIS Web site.

Step	Action
1	Double click on My Computer .
2	Double click on Dial Up Networking . Result: This displays a list of dial-up connections for your computer.
3	Double click on the appropriate dial-up connection. Result: This displays the dial-up connection window with the username and password boxes and a button option to connect to the internet. Note: If set up correctly, the username box should already be filled in. Depending on your office setup, the password may also be filled in or may not be required.
4	Click the Connect button and wait for the system to dial the preset phone number that connects you to the internet. Results: The system takes one of these actions: <ul style="list-style-type: none"> • Successfully connects with the internet and displays the internet home page associated with your internet provider • Fails to connect and continues to re-dial until it makes a successful connection
5	To complete the remainder of your login to the FEIS Web site, see the section of this user guide “ FEIS Login: First Time Login ,” steps 2-5, beginning on page 25 .

Note: You must already have an internet service provider and have your computer system set up in order for this login to work. Contact the Landata HelpCenter if you have problems connecting to the Web site with this dial-up process.

3

Financial Reporting

Purpose	The purpose of this chapter is to give you basic information for on-line viewing of up-to-date reportable financial data. It also discusses printing reports directly from the viewing area and exporting data into Excel spreadsheets.
----------------	---

Overview	To view a copy of any of the available financial reports, it is necessary that you <ul style="list-style-type: none">• Select a report to view• Access the POV Table and set the point of view for your office• Redisplay the selected report
-----------------	---

Chapter Contents	Selecting Reports to View	30
	Printing Reports and Exporting Data	31

Selecting Reports to View

Report Options

Use this table to determine which reports you want to review.

To see a report on the...	Select....
Income Statement – Current Year	Schedule A Report
Balance Sheet	Schedule B Report
Underwriter's Income Statement	Underwriter Schedule A
Summary of Notes Payable	Schedule B-1
Summary of Notes Receivable	Schedule B-2
Summary of Inter-company Accounts Receivable and Accounts Payable	Schedule C
Flash Data Submitted	Flash Input Summary Report
Weekly Sales Data Submitted	Weekly Sales Summary
Income Statement – Prior Years	Schedule A – Prior Years
Other Data Report	Schedule A-1 Other Data Report
Underwriter Other Data Report	Schedule A-1 Underwriter Other Data
Calculation of Cash to Houston	Report Card – Page 1
Delinquencies to Houston	Report Card – Page 2
Calculation of 2 Week's Expense Needs	Report Card – Page 3
Rollup of Branch Detail	Check Branch Roll-up

How to Use Financial Reporting

Financial Reporting gives you the opportunity to view the most up-to-date information in the format that it will be reported in. Follow the steps in this table to use the Financial Reporting options.

Step	Action
1	Select Financial Reporting from the Financial Information System menu bar.
2	Select a report from the list of report options displayed on screen.
3	Modify the POV settings as needed.
4	Review the report data. Note: Keep in mind that you cannot modify the data in this option. If you see that data is missing or needs correcting, you must make those changes through Input Schedules or by resubmitting your FEIS extract file.
5	Perform one of these tasks to exit: <ul style="list-style-type: none"> • If exiting the report but selecting another report to view, click on the Financial Reporting button to redisplay the report selection page. • If exiting the view area but staying in the Spiderman Web site, select another option from the Financial Information System menu. • If exiting the Web site, select File and Close from the top menu bar.

Printing Reports and Exporting Data

Printing and Exporting Options

Financial Reporting is intended as a view only area, but options to print reports or export report data are included for your convenience. These are:

- The Internet Explorer **Print** option



- An Adobe Acrobat print icon



- An MS Excel icon



Printing From Internet Explorer

For a hard copy of the financial details of the report you are viewing, use the Internet Explorer **Print** button to print out a copy of the information currently displayed in your active window.

Note: The printed copy appears in the same format as is displayed on-screen, not in the established report format. It also prints the POV tool bar as a final, separate page. For information on printed reports, see the section “[Hardcopy Reports](#)” beginning on [page 82](#).

Launching Adobe Acrobat

The **PDF** print icon provides a short cut to printing your reports. Clicking on it opens Adobe Acrobat and allows you to print a report without having to exit **Financial Reporting** and navigate to **Hardcopy Printing** to produce a report.

For more information on using Adobe Acrobat, see the section “[Using Adobe Acrobat to Print](#)” beginning on [page 88](#).

Launching Microsoft Excel

Follow these steps to open Microsoft Excel, export your report data into the spreadsheet, and save the file.

Step	Action
1	Click on the MS Excel icon to simultaneously <ul style="list-style-type: none"> • Open an Excel spreadsheet • Export the report data you are currently viewing into the open Excel spreadsheet.
2	Once the data has been exported, select File and Save as from your internet browser menu to save the file to your hard drive or some other location. Note: Close the FEIS report view before opening the saved file in Excel.

Excel Print Warning

Once report data is exported into an Excel spreadsheet, the data becomes static and is no longer dynamically linked to the Hyperion database. As a result, data that is changed after being exported will not automatically be updated in the database.

Note: All report formatting is lost when using the **Excel** option to print.

4

Using Input Schedules

Purpose	The purpose of this chapter is to provide the guidelines for data entry and define data entry requirements for each of the input reports.																																
Overview	Selecting the Input Schedules menu button displays a list of schedules for data entry. These schedules are used for entering both financial and non-financial data into the Hyperion database.																																
Chapter Contents	<table><tr><td>Data Entry Guidelines</td><td>33</td></tr><tr><td>Schedule A Input Report</td><td>35</td></tr><tr><td>Schedule B Input Report</td><td>36</td></tr><tr><td>Flash Input Schedule</td><td>38</td></tr><tr><td>Weekly Sales Input</td><td>40</td></tr><tr><td>Local Manager Data Input Schedule</td><td>42</td></tr><tr><td>Schedule A-1 Other Data Input</td><td>43</td></tr><tr><td>Schedule B Other Data Input</td><td>44</td></tr><tr><td>Report Card Input Schedule</td><td>45</td></tr><tr><td>Underwriter Schedule A Input Report</td><td>46</td></tr><tr><td>Underwriter Other Data Input</td><td>47</td></tr><tr><td>Schedule B-1</td><td>48</td></tr><tr><td>Schedule B-2</td><td>50</td></tr><tr><td>Schedule C</td><td>52</td></tr><tr><td>Flag Reports</td><td>53</td></tr><tr><td>Adjustments to Losses Input Schedule</td><td>55</td></tr></table>	Data Entry Guidelines	33	Schedule A Input Report	35	Schedule B Input Report	36	Flash Input Schedule	38	Weekly Sales Input	40	Local Manager Data Input Schedule	42	Schedule A-1 Other Data Input	43	Schedule B Other Data Input	44	Report Card Input Schedule	45	Underwriter Schedule A Input Report	46	Underwriter Other Data Input	47	Schedule B-1	48	Schedule B-2	50	Schedule C	52	Flag Reports	53	Adjustments to Losses Input Schedule	55
Data Entry Guidelines	33																																
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Data Entry Guidelines

Protocols for Using Electronic Forms

Certain protocols must be followed in using the FEIS Web site for data entry. These include:

- Cell color related to data entry
- Point of View settings specific to each schedule
- Timing of data entry

Color Protocols

Use this table to understand the colors that appear on the Input Schedule screens and their impact on your level of activity within each cell.

Color	Level of Activity
Yellow	Areas of the screen where data can be entered.
Green	Areas of the screen that do not allow any data entry. These areas either show 1) a “calculated” field or 2) an entity that is not available for input.
Red	<p>A warning color indicating that the cells you have entered data in are unable to be written to the database when the schedule is saved.</p> <p>Cause: Generally one of three situations:</p> <ul style="list-style-type: none"> • National Accounting may be in the main database at the same time that you are entering data. As system administrators, the actions of National Accounting take precedence over yours and effectively lock you out of the database. • More than one user can have the same base level entity open in an input schedule. The first user to open an input schedule for a certain base entity creates a “lock” on that entity. No other user may enter data to the entity until the first user has closed the input schedule. • You are trying to enter data during the daily Maintenance Window. <p>Solution: Wait a short while and try to re-enter the data. If the cells still turn red, call National Accounting and request assistance.</p>

Recalculate and Submit Data Buttons

These buttons are important for calculating and submitting your data to the Hyperion database. This table describes how and when to use each.

Button	Description of Use
Recalculate	After you have entered data, press this button to display totals calculated by the system.
Submit Data	<p>Once you are ready to send data to the database, press this button to automatically post newly entered data to the Hyperion database in Houston.</p> <p>Note: If you discover an error in the data submitted for the current month, you may change and re-submit the data any time within the first ten calendar days following that month-end.</p>

Continued on next page

Data Entry Guidelines, continued

Timing/ Maintenance Window

Everyday (7 days per week) from 12 noon - 2PM and 12 midnight - 2AM (CST), the FEIS Web site is taken off-line so that a series of daily maintenance activities can be conducted. These include data loads, web alterations, consolidations and security modifications. All users should exit the web page promptly at the start of the daily maintenance windows.

Warning: If you remain in the web site you will not be able to submit data and **if you try to submit data you will run the risk of corrupting the database.**

How Input Schedules are Grouped

The following list shows how the Input Schedules are grouped in the FEIS Web site.

Monthly Input Schedules

- Schedule A Input Report
- Schedule B Input Report
- Flash Input Schedule
- Weekly Sales Input
- Local Manager Data Input Schedule
- Schedule A-1 Other Data Input
- Schedule B Other data Input
- Report Card Input Schedule

Underwriter Schedules

- Underwriter Schedule A Input Report
- Underwriter Other Data Input
- Schedule B Input Report
- Schedule B Other Data Input
- Local Manager Data Input Schedule

Quarterly Input Schedules

- Schedule B-1
- Schedule B-2
- Schedule C
- Flag Report – Notes Payable
- Flag Report – Notes Receivable
- Flag Report – Accts Receivable
- Flag Report – Accts Payable
- Flag Report – Accts Payable to LDI

Profit Center Input Schedules

- Adjustments to Losses

Schedule A Input Report

Description	<p>The Schedule A Input Report form is used to submit income statement totals by those offices not using the electronic FEI extract conversion utility.</p> <p>Note: If you have sent an FEI extract file you should not enter Schedule A data via Input Schedules. This will result in the doubling of your balances within the FEI System.</p>
Due Date	<p>Data for this form is due</p> <ul style="list-style-type: none"> • Monthly • By the end of the 10th calendar day <p>Note: At the end of the 10th calendar day, the system is locked, and access is granted only by National Accounting.</p>
Data Entry Guidelines	<p>These guidelines apply to data entry for the Schedule A Input Report form.</p> <ul style="list-style-type: none"> • Enter <ul style="list-style-type: none"> ◆ Whole dollar amounts and no cents ◆ Year-to-date totals for each line in the This YTD Actual column ◆ All balances as positive numbers unless the balance in a particular account is not <i>normal</i> <p>Example: The G/L balance for line 35. Repairs and Maintenance is a credit. Since expenses are usually debits, the balance for this line is not <i>normal</i> and requires you to enter the balance amount as a negative number.</p> • Lines 5 - 7 are “contra” revenue accounts for most of Stewart offices. If your balance is a contra revenue, enter the amount as a negative number.
Report Verification	<p>Press the Recalculate button and verify that the net income total (line 74) calculated by the system is correct before submitting the data.</p>
POV Settings	<p>Use this table to ensure you have the correct POV settings for the Schedule A Input Report.</p>

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or a single branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4.
Category	Actual
Period	Current accounting period
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Schedule B Input Report

Description	<p>The Schedule B Input Report form is used to submit balance sheet totals by those offices not using the FEI Extract Conversion Utility.</p> <p>Note: If you have sent an FEI extract file you should not enter Schedule B data via Input Schedules. This will result in the doubling of your balances within the FEI System.</p>
Due Date	<p>Data for this form is due</p> <ul style="list-style-type: none"> • Monthly • By the end of the 10th calendar day <p>Note: At the end of the 10th calendar day, the system is locked and access granted only by National Accounting.</p>
Data Entry Guidelines	<p>Enter</p> <ul style="list-style-type: none"> • Whole dollar amounts and no cents • All balances as positive numbers unless the balance meets one of the exceptions listed below • Balances as of the current month-end in the current column <p>Note: Enter balances as of a point in time and <i>not</i> the year-to-date net change. This is different from the old FEI system.</p>
Data Entry Exceptions	<p>These exceptions apply to entries made in this report.</p> <ul style="list-style-type: none"> • If the balance you are entering is not <i>normal</i>, you may need to reverse the entry. <ul style="list-style-type: none"> Example: Assets are generally entered as debits. If line 120. Prepaids appears as a credit, enter the expense as a negative number. • Enter these line items as negative numbers: <ul style="list-style-type: none"> ◆ Line 109. Allowance for Doubtful Receivables ◆ Line 118. Accum Depreciation – furniture, etc. ◆ Line 138. Treasury Stock ◆ Line 141. Dividends
Report Verification	<ul style="list-style-type: none"> • Verify that the totals for Total Assets and Total Liabilities and Equity calculated by the system are correct and in balance before submitting the data. • If these totals do not balance, then you must make the necessary corrections manually before submitting the data.
Warning Regarding Retained Earnings	<p>The system automatically populates the Beginning Retained Earnings account with the amount reported as of the prior year-end. If you have made a prior period adjustment to Retained Earnings, the number that appears on the screen may be different from your records. Changes to retained earnings may only be made by National Accounting. Please contact Kim Peterson to request such changes.</p>

Continued on next page

Schedule B Input Report, continued

POV Settings

Use this table to ensure you have the correct POV settings for the **Schedule B Input Report**.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4 .
Category	Actual
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Flash Input Schedule

Description	The Flash Input Schedule is used to submit monthly flash figures.														
Due Date	Data for this form is due no later than Noon on the 4 th working day after each month-end.														
Data Entry Guidelines	<p>These guidelines apply to data entry for the Flash Input Schedule.</p> <ul style="list-style-type: none"> • Key in a combined total for all branches into the main branch. It is not necessary to key values for branches individually. • Enter <ul style="list-style-type: none"> ◆ Whole dollar amounts and no cents ◆ Current <u>year-to-date</u> totals 														
Data Entry Requirements for Normal Balances	<p>Use this table to find the right type of entry for the data you are submitting.</p> <table border="1"> <thead> <tr> <th>If entry category is...</th><th>Then enter the amount as...</th></tr> </thead> <tbody> <tr> <td>Revenue</td><td>Positive</td></tr> <tr> <td>Guaranty Premiums</td><td>Negative</td></tr> <tr> <td>Expenses</td><td>Positive</td></tr> <tr> <td>Net Losses</td><td>Negative</td></tr> <tr> <td>Assets</td><td>Positive</td></tr> <tr> <td>Liabilities</td><td>Positive</td></tr> </tbody> </table> <p>Note: Key the applicable data into every row except the Net Income and press the Recalculate button. The system will automatically calculate this column.</p>	If entry category is...	Then enter the amount as...	Revenue	Positive	Guaranty Premiums	Negative	Expenses	Positive	Net Losses	Negative	Assets	Positive	Liabilities	Positive
If entry category is...	Then enter the amount as...														
Revenue	Positive														
Guaranty Premiums	Negative														
Expenses	Positive														
Net Losses	Negative														
Assets	Positive														
Liabilities	Positive														
Data Entry Exceptions	<p>If the balance you are entering is not <i>normal</i>, you may need to reverse the entry.</p> <p>Example: An FIT expense balance is normally a debit. If you have a credit balance in this account, enter the expense as a negative number.</p>														
Report Verification	Press Recalculate and verify that the net income total calculated by the system is correct before submitting the data.														

Continued on next page

Flash Input Schedule, continued

POV Settings

Use this table to ensure you have the correct POV settings for the **Flash Input Schedule**.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4 .
Category	Flash
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Weekly Sales Input

Description	The Weekly Sales Input form is used to submit weekly premiums and orders.
Due Date	<p>Data for this form is due every month, no later than 11:00 AM on each of these dates:</p> <ul style="list-style-type: none"> • 7th working day • 12th working day • 17th working day • 2 days after the last working day of each month
Data Entry Guidelines	<p>These guidelines apply to data entry for the Weekly Sales Input form.</p> <ul style="list-style-type: none"> • Key in information for the total company into one entity only. It is not necessary to key values for branches individually. • Enter <ul style="list-style-type: none"> ◆ All amounts as positive numbers ◆ Premium totals in <u>thousands of dollars</u> for the current week ◆ Orders for the current week <p>Note: You may go back to a previous week's data and revise as needed. However, after week 4 of each month, the data will be locked and no further revisions will be allowed.</p>
Report Verification	<p>The number of employees, breakeven \$ and breakeven orders are automatically calculated by Hyperion, based on financial and other data from the previous month. Verify report data by performing one of the following tasks:</p> <ul style="list-style-type: none"> • Check that you are in agreement with the calculated Premiums and Orders This Month To Date • Manually calculate to verify your agreement with the breakeven amounts calculated by the system (do this on a test basis). If you have not submitted financial and other data (Schedule A and A-1) for each month, the breakeven amounts cannot be properly calculated by the FEI System.

Continued on next page

Weekly Sales Input, continued

POV Settings

Use this table to ensure you have the correct POV settings for the **Weekly Sales Input** form.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “ Hyperion Organizational Structure ” beginning on page 4 .
Category	Weekly
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Local Manager Data Input Schedule

Description	<p>The Local Manager Data Input Schedule is used to enter data that is automatically assigned to specific reports. Data includes</p> <ul style="list-style-type: none"> • Manager name • Date became manager • Preparer name
Due Date	<p>This information must be entered each month by the 10th calendar day following month-end.</p> <p>Note: The information must be entered each month. It will not carry over from one month to the next.</p>
Data Entry Guidelines	<p>These guidelines apply to data entry for the Local Manager Data Input Schedule.</p> <ul style="list-style-type: none"> • This type of data may be entered for each branch and for the branch totals, allowing a different block of data to appear on branch reports than on reports associated with branch totals. Use base level entity – a branch or an entity ending in “.INPUT”. In addition, you may also enter the information for the total office under the “BR_TOT” entity. This is different from normal data entry (where normally no data can be entered to a parent entity) because the information is “textual” in nature. <p>Example: You may assign a separate manager for each branch as well as a manager or president for the branch total.</p> <ul style="list-style-type: none"> • Enter names and dates exactly as they are to appear on reports <p>Example of Correct Format: Ed Smith 01/05/99 John Doe</p> <p>Note: It is your responsibility to keep this information up-to-date. The names entered are used both for affiliate office reporting and corporate headquarters reporting.</p>

Schedule A-1 Other Data Input

Description The **Schedule A-1 Other Data Input** form is used to enter data other than financial data. This includes such line items as

- Number of associates
- Number of orders received
- Number of files closed

Due Date Data for this form is due no later than the 10th calendar day following each month end.

Data Entry Guidelines These guidelines apply to data entry for the **Schedule A-1 Other Data Input** form.

- **Warning:** See “Comments” displayed on the input screen for further instruction on how to enter data..
- Enter year-to-date data for all lines except for these lines:
 - ◆ **3. Number of Associates**
 - ◆ **16. % Business**
 - ◆ **17. Market Share Rank**
 - ◆ **23. Turntime**
 - ◆ **24. Turntime Commitment**
 - ◆ **25. STG Contract %**
- Enter the associate count as of the end of the current month for line **82. Number of Associates**

POV Settings Use this table to ensure you have the correct POV settings for the **Schedule A-1 Other Data Input** form.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “ Hyperion Organizational Structure ” beginning on page 4 .
Category	Actual
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Schedule B Other Data Input

Description	<p>The Schedule B Other Data Input form is used to enter other data associated with the Schedule B balance sheet. It is a continuance of Schedule B and includes items such as</p> <ul style="list-style-type: none"> • Escrow bank account balances aggregating (\$) • Escrow detail records reconciled with control account through (mm/yy)
--------------------	---

Due Date	Data for this form is due no later than the 10 th calendar day of each month.
-----------------	--

Data Entry Guidelines	<p>These guidelines apply to data entry for the Schedule B Other Data form.</p> <ul style="list-style-type: none"> • Enter data in sequence into each of the lines shown • Enter numbers <i>exactly</i> as you want them to appear, including typing in the commas where needed. <p>Note: The system <i>does not automatically format</i> numbers within this schedule.</p> <ul style="list-style-type: none"> • Follow the recommended format provided within the parentheses for entering the correct form of data <ul style="list-style-type: none"> ◆ (mm/yy) ◆ (\$x,xxx) • Proofread your entries before submitting
------------------------------	---

POV Settings	Use this table to ensure you have the correct POV settings for the Schedule B Other Data form.
---------------------	---

To set the...	Select...
Entity	<p>A company ending in .INPUT or your branch total entity ending in BR_TOT.</p> <p>Note: Data entry is allowed to the Parent Level in this instance as the Schedule B Other Data is textual in nature.</p>
Category	Actual
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Report Card Input Schedule

Description This form is used to enter the data that prints out in these hardcopy reports:

Report	Report Contents
Report Card – Page 1	Calculation of Cash to Houston
Report Card – Page 2	Delinquencies to Houston
Report Card – Page 3	Calculation of two weeks worth of expense needs

Due Dates Enter the amounts shown on the **Report Card Input Schedule** by the 10th calendar day following each month end.

Date Entry Guidelines These guidelines apply to the **Report Card Input Schedule**:

- Enter
 - ◆ Amounts in whole dollars and no cents
 - ◆ All amounts as positive numbers
- Leave blank all categories that do not apply to your office

Report Verification Press Recalculate and perform these tasks:

- Verify your agreement with total delinquencies as calculated by the system
- Go to Financial Reporting and review **Report Card Pages 1, 2 and 3** to see that the data entered has been carried over properly.

POV Settings Use this table to ensure you have the correct POV settings for the **Report Card Input Schedule**.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4 .
Category	Actual
Period	Current Month.
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, refer to the section on [“Point of View \(POV\) Table and Bar”](#) beginning on [page 14](#).

Underwriter Schedule A Input Report

Description	<p>Underwriters not using the electronic FEI Extract Conversion Utility use this form to enter Schedule A (Income Statement) balances.</p> <p>Note: This form is the same as the Schedule A Input Report used by other Stewart offices, but the fields and data entered are appropriate only to underwriting.</p>
Warning for Use	<p><i>Do not</i> use this form unless you are an underwriter.</p>
Data Entry Guidelines	<p>Guidelines for entering data into this report are the same as for the Schedule A Input Report. The only difference is that you are inputting underwriter data. For more information about data entry guidelines, see the section of this user guide “Schedule A Input Report,” beginning on page 35.</p>

Underwriter Other Data Input

Description The **Underwriter Other Data Input** form is used to enter non-financial data specific to underwriters. This includes such line items as

- Policies received
- Cash paid for losses

Due Date Data for this form is due no later than the 10th calendar day following each month end.

Data Entry Guidelines These guidelines apply to data entry.

- Enter
 - ◆ Year-to-date data for all lines except for line **3. Number of associates**
 - ◆ The associate count as of the end of the current month for line **3. Number of associates**
 - ◆ The number of issuing offices as of the end of the current month for line **5. Number of issuing offices**

POV Settings Use this table to ensure you have the correct POV settings for the **Underwriter Other Data Input** form.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4 .
Category	Actual
Period	Current Month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule B-1

Description	Schedule B-1 is used to input details related to each note payable included in the total notes payable balance recorded on Schedule B lines 123 and 124. This schedule includes both inter-company and outside notes.
Due Date	Data for this form is due <ul style="list-style-type: none"> • Quarterly • By the end of the 10th calendar day
Data Entry Guidelines	These guidelines apply to Schedule B-1 : <ul style="list-style-type: none"> • Before you can input into this schedule, you must first complete the Flag Report for Notes Payable (For more on Flag Reports, see the section on “Flag Reports” beginning on page 53.) • Enter <ul style="list-style-type: none"> ◆ Whole dollars and no cents ◆ Beginning of year balance and additions as positive numbers ◆ Reductions as negative numbers
Data Entry Exceptions	These exceptions apply: <ul style="list-style-type: none"> • Additions and reductions, all dollar amounts and dates will appear exactly as you key them in. Beginning of Year Balances will not. • Enter interest rates with up to two decimal places Example: Enter 6.25 for 6.25%. • Input this schedule only after completing both Schedule B and the Flag Report for Notes Payable
Report Verification	Press Recalculate and perform these tasks: <ul style="list-style-type: none"> • Verify that the ending balance for each individual note agrees with your records. • Review to ensure that you have completed all fields for each note (e.g., payment terms, interest rate, etc.). Note: Information entered previously into these fields will remain until you change it. • Verify that the total of the items entered agrees with the displayed G/L totals (e.g., variance equals zero). If the totals do not match, make the necessary corrections before submitting the data.

Continued on next page

Schedule B-1, continued

POV Settings

Use this table to ensure you have the correct POV settings for **Schedule B-1**.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4.
Category	Actual
Period	Current accounting period
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 15](#).

Schedule B-2

Description	Schedule B-2 is used to input details related to each note receivable included in the total notes receivable balance recorded on Schedule B line 105. This schedule includes both inter-company and outside notes.
Due Date	Data for this form is due <ul style="list-style-type: none"> • Quarterly • By the end of the 10th calendar day
Data Entry Guidelines	These guidelines apply to Schedule B-2 : <ul style="list-style-type: none"> • Before you can input into this schedule, you must first complete the Flag Report for Notes Receivable (For more on Flag Reports, see the section on “Flag Reports” beginning on page 53.) • Enter <ul style="list-style-type: none"> ◆ Whole dollars and no cents ◆ Beginning of year balance and additions as positive numbers ◆ Reductions as negative numbers
Data Entry Exceptions	These exceptions apply: <ul style="list-style-type: none"> • Additions and reductions, all dollar amounts and dates will appear exactly as you key them in. Beginning of Year Balances will not. • Enter interest rates with up to two decimal places Example: Enter 6.25 for 6.25%. • Input this schedule only after completing Schedule B and the Flag Report for Notes Receivable
Report Verification	Press Recalculate and perform these tasks: <ul style="list-style-type: none"> • Verify that the ending balance for each individual note agrees with your records. • Review to ensure that you have completed all fields for each note (e.g., payment terms, interest rate, etc.). Note: Information entered previously into these fields will remain until you change it. • Verify that the total of the items entered agrees with the displayed G/L total (e.g., variance equals zero). If the totals do not match, make the necessary corrections before submitting the data.

Continued on next page

Schedule B-2, continued

POV Settings

Use this table to ensure you have the correct POV settings for **Schedule B-2**.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4 .
Category	Actual
Period	Current accounting period
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule C

Description	Schedule C is used to input details pertaining to inter-company accounts receivable and accounts payable recorded on Schedule B lines 108, 126 and 129.
Due Date	Data for this form is due <ul style="list-style-type: none"> • Quarterly • By the end of the 10th calendar day Note: At the end of the 10 th calendar day, the system is locked and access granted only by National Accounting.
Data Entry Guidelines	These guidelines apply to Schedule C : <ul style="list-style-type: none"> • Before you can input into this schedule, you must first complete the Flag Reports for Inter-company A/R, A/P and A/P to LDI (For information on Flag Reports, see the section on “Flag Reports” beginning on page 53.) • Enter whole dollars and no cents • Enter balances as of the end of the current accounting period Note: Descriptions entered previously will remain in the schedule until you change them.
Data Entry Exceptions	Complete this schedule only <i>after</i> completing both of these: <ul style="list-style-type: none"> • Schedule B • Flag Reports for Inter-company A/R, A/P and A/P to LDI
Report Verification	Press Recalculate and verify that the totals of all the items you entered match the displayed G/L totals (e.g., variance equals zero). If the totals do not match, make the necessary corrections before submitting the data.
POV Settings	Use this table to ensure you have the correct POV settings for Schedule C .

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office) Note: Data cannot be input to a parent level entity. For more on entity levels, see “Hyperion Organizational Structure” beginning on page 4.
Category	Actual
Period	Current accounting period
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Flag Reports

Description **Flag Reports** are new. They are used to flag or identify other Stewart entities with which you have inter-company balances. This table lists the Flag Reports associated with each of the schedules.

Schedule	Related Flag Report
B-1	Flag Report Notes Payable
B-2	Flag Report Notes Receivable
C	<ul style="list-style-type: none"> Flag Report Inter-company A/P Flag Report A/R Flag Report A/P to LDI

Guidelines for Setting Flags All Flag Reports maintain the selections and flags previously entered until you change them. Be aware that adding a new note or inter-company account requires that you adjust the flag so that the correct partners appear on input schedules for **Schedules B-1, B-2 and C**.

Flag Report Notes Payable Follow these steps to define the format of Schedule B-1 and to flag specific items to appear on your **Schedule B-1 Input** screen.

Step	Action
1	Locate the list of potential inter-company partners in the left column and see the note numbers that appear across the top row.
2	<p>Enter the number “1” in each cell corresponding to the inter-company notes.</p> <p>Example: There are two Notes Payable to STG and a third Note Payable to Stewart Title of Beaumont.</p> <p>Result: In the Flag Report, a “1” appears at these intersections:</p> <ul style="list-style-type: none"> Note 1 and STG Note 2 and STG Note 3 and Stewart Title of Beaumont
3	Leave all other cells blank.
4	Click Submit Report Data to save.

Note: When you open input **Schedule B-1**, you should now see the entities listed that you selected in step 2 above.

Flag Report Notes Receivable Use the same procedures as listed above for **Flag Report-Notes Payable** to set the flags to appear in **Schedule B-2**. The only difference is that you are working with receivables instead of payables.

Continued on next page

Flag Reports, continued

Flag Report Inter-company

Follow these steps to define the format of **Schedule C** and to flag specific accounts payable and accounts receivable items to appear on your **Schedule C Input** screen.

Step	Action
1	Locate the list of potential inter-company partners in the left column and the A/P or A/R accounts that appear across the top row of the Flag Reports .
2	<p>Type a “1” in the cell where an A/R or A/P account intersects with the appropriate entity.</p> <p>Example:</p> <ul style="list-style-type: none"> • There are three Accounts Receivable (2 from STG-General and 1 from Ortem). • There is an Account Payable to Stewart Title of Texarkana. • There is also an Account Payable to Landata Systems <p>Result: In the appropriate Flag Reports, a “1” will appear at these intersections:</p> <ul style="list-style-type: none"> • A/R 1 and STG-General • A/R 2 and STG-General • A/R 3 and Ortem • A/P 1 and Stewart Title of Texarkana • A/P to LDI 1 and Landata Systems
3	Leave all other cells blank.
4	Click Submit Report Data to save.
5	Open input Schedule C to verify that the entities you flagged now appear.

Adjustments to Losses Input Schedule

Adjustments to Losses Input Schedule

For information on Adjustments to Losses Input Schedule, see [“Profit Center chapter, Adjustment to Losses Input Schedule”](#), beginning on [page 78](#).

5

Worldwide Watch

Purpose

The purpose of this chapter is to give you a graphic overview of how well the different regions of the SISCO organization are performing financially and to allow you to further analyze the associated data at regional and district, office or branch levels. It includes

- A map for pinpointing certain positive or negative indicators such as
 - ◆ Increased revenues
 - ◆ Decreased revenues
 - ◆ Net profits
 - ◆ Losses
 - ◆ Orders
- A report that compares all selected financial data for the districts within a specified region
- A display of the current year actuals for a district you want to analyze further
- A Point of View (POV) bar you can use to
 - ◆ Switch to another region, district or office
 - ◆ Set the desired percent of tolerance to use in your analysis

Overview

To maximize the use of this Web site, it is necessary that you understand

- The Regional structure of the SISCO organization
- The Point of View (POV) bar and how it varies from the POV bar found in other areas of the Web site
- Navigation from the Regional map down to the combined regional comparison report and to district, office or branch level financial details

Chapter Contents

Regional Analysis	57
District, Office or Branch Analysis	60
Export and Print Options	62

Regional Analysis

About the Map

The map displayed on the **Worldwide Watch** home page graphically displays the regional structure of the SISCO organization. It is used to analyze a region’s current year percent variances compared to another year for a selected account, period and frequency. It includes two major functions:

- A labeled bullet to pinpoint each region and to click on to drill down to the report level for that region
- A modified POV bar to be used in pinpointing certain positive and negative indicators on the map display and in generating report data for the various associated reports

Screenshot of the World Wide Watch Regional Map

This graphic shows the **Worldwide Watch** home page.



Continued on next page

Regional Analysis, continued

POV Options for the Regional Map

The POV options in **Worldwide Watch** are the gateway to visually and statistically viewing various positive and negative financial indicators. This table lists the available options and describes how each operates.

POV Option	Description								
Tolerance of (%)	<p>Settings of 0% to 20% that allow you to choose the tolerance (% increase or decrease) to apply toward your analysis. Example: To spotlight regions that have had more than a 20% decrease in orders, select a tolerance of 20%. Once this is done, the bullet points on the map will change to one of these colors to show those regions that fall within the selected criteria.</p> <table border="1"> <thead> <tr> <th>This Color...</th><th>Shows...</th></tr> </thead> <tbody> <tr> <td>Red</td><td>(Negative) Those regions that have had a decrease in orders above and beyond the % tolerance.</td></tr> <tr> <td>Green</td><td>(Positive) Those regions that have had an increase in orders above the established % tolerance.</td></tr> <tr> <td>Yellow</td><td>(Neutral) Stet change.</td></tr> </tbody> </table>	This Color...	Shows...	Red	(Negative) Those regions that have had a decrease in orders above and beyond the % tolerance.	Green	(Positive) Those regions that have had an increase in orders above the established % tolerance.	Yellow	(Neutral) Stet change.
This Color...	Shows...								
Red	(Negative) Those regions that have had a decrease in orders above and beyond the % tolerance.								
Green	(Positive) Those regions that have had an increase in orders above the established % tolerance.								
Yellow	(Neutral) Stet change.								
For Actual vs	<p>Selection of any year after 1995 to compare current year data to. Note: The indicators will always compare the current year actual figures to your selection.</p>								
For Account	<p>A list of accounts for that can be used for analysis. These include</p> <ul style="list-style-type: none"> • Total Net Revenues • Total Employee Costs • Income Before Taxes • Profit Margin % • Number of Associates • Losses – escrow, etc. • Orders received – Title Ins • Orders Per Associate 								
For Period	<p>A selection of accounting periods to use in viewing financial data on one of these bases:</p> <ul style="list-style-type: none"> • Monthly • Year-to-Date 								
For Frequency	<p>A selection of accounting frequencies that include</p> <ul style="list-style-type: none"> • Monthly • (Default) M-Year to Date (Monthly, year -to-date) • M-Mo to Date (Monthly, month-to-date) <p>Note: M-Year to Date and M-Category to Date are the same and produce the same results.</p>								

Continued on next page

Regional Analysis, continued

POV Options for the Regional Map (continued)

POV Option	Description
Update	Button used to accept new selections made through the other POV drop-downs and to generate new report data based on revised selection criteria.

How to Select Your POV Options and Interpret Map Results

Follow these steps to use the drop-down lists on the POV bar to establish your settings for analyzing financial indicators for a region.

Note: The POV bar on this page differs slightly from other POV bars found in Spiderman. Most options are the same, but it includes an additional drop-down list for **Tolerance of (%)** in place of **Entity**.

Step	Action								
1	From Tolerance Of , choose the % variance that you want to use for your analysis.								
2	Select For Actual vs to set the year that you want to compare current year data against. Note: You can compare to any year following 1995. The indicators will always compare the Current Year Actuals figures to your selection.								
3	Open the For Account list and choose the account to analyze. Accounts include: <ul style="list-style-type: none"> • Total Net Revenues • Total Employee Costs • Income Before Taxes • Profit Margin % • Number of Associates • Losses – escrow, etc. • Orders received – Title Ins • Orders Per Associate 								
4	From For Period , select one of these accounting periods: <ul style="list-style-type: none"> • Monthly • Year-to-date 								
5	Select For Frequency to choose the frequency. Note: M-Year to Date and M-Category to Date are the same.								
6	Click the Update button. The labeled bullets change color to indicate the regions that exceed your tolerance criterion. Example: When you choose 15% tolerance for Profit Margin % : <table border="1"> <thead> <tr> <th>If the region...</th><th>Then the bullet...</th></tr> </thead> <tbody> <tr> <td>Decreases more than 15%</td><td>Changes to red.</td></tr> <tr> <td>Increases more than 15%</td><td>Changes to green.</td></tr> <tr> <td>Does not exceed tolerance</td><td>Remains yellow.</td></tr> </tbody> </table>	If the region...	Then the bullet...	Decreases more than 15%	Changes to red.	Increases more than 15%	Changes to green.	Does not exceed tolerance	Remains yellow.
If the region...	Then the bullet...								
Decreases more than 15%	Changes to red.								
Increases more than 15%	Changes to green.								
Does not exceed tolerance	Remains yellow.								

District, Office and Branch Analysis

How to Drill Down to District Level Reports

To drill down beyond the Regional Map and display a **Worldwide Watch** district-level report, select the region you want to analyze and click on its colored bullet.

Result: This displays a **Worldwide Watch** comparison report of all districts within the selected region. Drawing from your most recent POV settings, the report shows totals, \$ and % variances for each district within the selected region.

Note: Districts without financial data will not be listed on the report.

Screenshot of District-Level Reporting

This graphic is a sample of a **Worldwide Watch** report comparing all districts for the region and criteria you selected.

Worldwide Watch Total Net Revenues (\$000's)			
	Current Year Actuals	1998 Actuals	Variance \$ Variance %
Clements District		7,068	(7,068) 0
Tyler District		7,947	(7,947) 0
Warren District		7,140	(7,140) 0
Dunbar District		7,671	(7,671) 0
Mahoney District		18,562	(18,562) 0
Lester District		38,177	(38,177) 0
Region B		86,566	(86,566) 0

Note: The figures for the comparison year (which in this graphic is 1998 Actuals) display in blue on your screen and are used to drill down further to see financial details for those offices within the selected district.

Continued on next page

District, Office and Branch Analysis, continued

How to Drill Down to Detailed Financial Data

Follow these steps to drill down even further to financial data in lower levels of the organization.

Step	Action								
1	To view a Worldwide Watch report on the totals for the offices in the selected district, click on any of the Actuals that appear in blue. Note: Again, offices without financial data will not be listed on the report.								
2	Click again to view a report for the branches in that office.								
3	View financial comparisons and totals for another region, district or office using these steps: <table> <tr> <th>Step</th><th>Action</th></tr> <tr> <td>1</td><td>Use the POV bar drop down list at the top of the current report page to select a new region, district or office.</td></tr> <tr> <td>2</td><td>Change any other relevant POV settings.</td></tr> <tr> <td>3</td><td>Repeats steps 1 and 2 of this main table to drill down through the desired financial displays.</td></tr> </table>	Step	Action	1	Use the POV bar drop down list at the top of the current report page to select a new region, district or office.	2	Change any other relevant POV settings.	3	Repeats steps 1 and 2 of this main table to drill down through the desired financial displays.
Step	Action								
1	Use the POV bar drop down list at the top of the current report page to select a new region, district or office.								
2	Change any other relevant POV settings.								
3	Repeats steps 1 and 2 of this main table to drill down through the desired financial displays.								

Note: You may return to the **Worldwide Watch** home page (map) at any point by selecting the green **Worldwide Watch** button in the **Financial Information System** menu.

Export and Print Options

Printing and Exporting Options

Worldwide Watch is intended as a view only area, but options to export report data into Excel and to print displayed reports are included for your convenience.

Options include:

- The Internet Explorer **Print** button
- A **Print** button located to the right of the POV bar (opens **Adobe Acrobat**)
- An **Excel** button on the POV bar (opens **MS Excel**)

Exporting to Excel

This process is simple. Within any of the report screens, click on the Excel button that appears to the right of the POV bar.

Result: This opens an **Excel** spreadsheet and displays the data exported from the report window you were in.

Excel Print Warning

Once report data is exported into an Excel spreadsheet, the data becomes static and is no longer dynamically linked to the Hyperion database. As a result, data that is changed within the FEIS Web site after you have exported will not automatically be updated in **Excel**.

Note: All report formatting is lost when using the **Excel** option to print.

How to Print a Worldwide Watch Report

Follow these steps to print a hard copy of the displayed **Worldwide Watch** report.

Step	Action						
1	<p>Perform one of these actions:</p> <table> <tr> <th>If...</th><th>Then...</th></tr> <tr> <td>Using the Internet Explorer Print button</td><td>The system sends data directly to the printer and produces a landscape version of what is displayed on your screen.</td></tr> <tr> <td>Using the Print button located to the right of the POV bar</td><td> <p>The system is prompted to open Adobe Acrobat where you can</p> <ul style="list-style-type: none"> • Select the print button within Acrobat • Select your print options from the Print dialog box that appears on-screen and click OK to print <p>Note: The default format is landscape.</p> <ul style="list-style-type: none"> • Select any menu option button in the Financial Information System menu bar to exit Adobe Acrobat </td></tr> </table>	If...	Then...	Using the Internet Explorer Print button	The system sends data directly to the printer and produces a landscape version of what is displayed on your screen.	Using the Print button located to the right of the POV bar	<p>The system is prompted to open Adobe Acrobat where you can</p> <ul style="list-style-type: none"> • Select the print button within Acrobat • Select your print options from the Print dialog box that appears on-screen and click OK to print <p>Note: The default format is landscape.</p> <ul style="list-style-type: none"> • Select any menu option button in the Financial Information System menu bar to exit Adobe Acrobat
If...	Then...						
Using the Internet Explorer Print button	The system sends data directly to the printer and produces a landscape version of what is displayed on your screen.						
Using the Print button located to the right of the POV bar	<p>The system is prompted to open Adobe Acrobat where you can</p> <ul style="list-style-type: none"> • Select the print button within Acrobat • Select your print options from the Print dialog box that appears on-screen and click OK to print <p>Note: The default format is landscape.</p> <ul style="list-style-type: none"> • Select any menu option button in the Financial Information System menu bar to exit Adobe Acrobat 						
2	Repeat step 1 to print any other Worldwide Watch reports.						

Purpose	The purpose of this chapter is to provide basic information for ranking entities based on criteria selected by the user. It also describes how to print reports directly from the viewing area or export data into an Excel spreadsheet.
Overview	<p>To view a ranking report, it is necessary that you understand how to:</p> <ul style="list-style-type: none">• Drill down to the appropriate region, district, or company report level• Access the POV Table and set the desired point of view• Redisplay the selected report• Export data into an Excel spreadsheet for hardcopy use
Chapter Contents	<p>Navigating Ranking Reports 64</p> <p>POV Options 65</p> <p>Exporting and Printing Ranking Reports 66</p>

Navigating Ranking Reports

Report Benefits This report is used to rank entities from best to worst. Managers will find it helpful to be able to perform different types of rankings using up-to-date financial data. Example: Ranking all offices within a particular **State** or **Region**, based upon an account such as **Total Net Revenues** or **Total Employee Costs**.

Report Format The columns on the report show these items:

- The rank
- Current year data
- Data from the year being analyzed against the current year
- The dollar (\$) change for each entity
- The percent (%) change for each entity

Report Limitations For states or regions with a large list of entities, the report displays the top twenty (20) entities for the criteria you specify. For states or regions with smaller lists, it displays as many entities as exist.

Drill-Down Capabilities The report has a built-in drill-down functionality so that you can move down to the lowest level of the entity structure you wish.

How to Use the Drill Down Function Use these steps to drill down from a high level ranking report to more and more detailed information.

Step	Action
1	Use the POV Table to set your POV for the report you want to see. (For more information on POV setting for these types of reports, see the section on “POV Options” beginning on page 58.)
2	Click on the blue text on each displayed report screen and move from the ranking of Regional Total Net Revenues to the associated branch-level financial details.

Returning to the First Report If you have drilled down to another level of the **Ranking** reports and want to return to the first report, click on the green **Ranking** button located on the **Financial Information System** menu bar. This will return you to the first report.

POV Options

Ranking Report POV Options

Use the table below when making changes to your POV settings for a Ranking report.

If changing...	Then...
Entity	You may select a Region, District, State or any parent-level entity. Recommendation: Start with a high-level entity and then use the drill-down feature of the report to go to a different level of entity.
Category	Select a category for the comparison ranking. You may choose to compare to: <ul style="list-style-type: none"> • The current year budget (BUDGET) • The prior year actual (PRIORACT) • Any other historical year
Period	Select the accounting month that you want to analyze data in.
Frequency	You may analyze data for either: <ul style="list-style-type: none"> • Current month only (M.MTD) • Year to date (M.YTD)
Account	You may choose any account in the POV Table to use in your analysis, but the following list are accounts preferred for analysis. <ul style="list-style-type: none"> • Total Net Revenues • Total Employee Costs • Losses-escrow • Total Expenses • Net Profit • Profit Margin • Number of Associates • Number of Files Closed • Number of Orders

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Changing POV Options

Use the **POV Table** displayed at the top of the report you are viewing at any time to switch to another Region, District or office.

Exporting and Printing Ranking Reports

**How to Export
Ranking Report
Data**

Use the **Excel** icon at the top left of the report to download the report data into **Excel**.

**How to Print a
Report**

Use the print icon displayed at the top left side of the report to print a copy of the ranking report data.

7

Region Reports

Purpose	The purpose of this chapter is to give you basic information on customizing and viewing up-to-date online regional reports. It also describes how to print reports directly from the viewing area or export data into an Excel spreadsheet.
Overview	<p>Region Reports allows you to view the most current financial or other data from your region. Three standard reports are already available for use in FEIS. Additional custom reports may be written by Region Controllers to display additional information that you want to view.</p> <p>To view a region report, it is necessary that you:</p> <ul style="list-style-type: none">• Select the desired region• Modify POV settings as needed• Select the desired report
Chapter Contents	<p>Using Region Reports 68</p> <p>Selecting Reports to View 69</p>

Using Region Reports

Purpose	Region reports are used to provide region management with customized reporting on regional data. Three standard reports have been provided as starter models, but new reports can be created by the Region Controller to display any other desired information.								
Benefits	<p>The Region Controller can customize a region report to access any specific type of information that is stored in the Hyperion database.</p> <p>Example: Total number of employees per month for the Region</p>								
Information Source	<p>Region reports can display any financial or other information that has been entered into the Hyperion database through FEIS's Input Schedules or through any G/L data in an extract.</p> <p>Data can be viewed (depending on the security rights of the end-user) for all categories, periods, entities, and accounts that exist within the reporting system. This includes financial accounts, other data, weekly sales data, and Profit Center information.</p>								
Who Can Create Custom Reports	Region Controllers are responsible for creating custom reports. If you are not a Region Controller and you have a specific reporting request, please contact your Region Controller to arrange to have the report written for you. Approval of such requests will be at the discretion of Region Management.								
How to Create Custom Reports	<p>Follow these steps to create a custom report.</p> <table border="1"> <thead> <tr> <th>Step</th><th>Action</th></tr> </thead> <tbody> <tr> <td>1</td><td>Determine the information needed in a new custom report.</td></tr> <tr> <td>2</td><td>Create the report using Hyperion Report Writer. Note: Custom reports required by region management will be written by the Region Controller.</td></tr> <tr> <td>3</td><td>Contact Kim Peterson in National Accounting to have the report added to the Web site.</td></tr> </tbody> </table>	Step	Action	1	Determine the information needed in a new custom report.	2	Create the report using Hyperion Report Writer. Note: Custom reports required by region management will be written by the Region Controller.	3	Contact Kim Peterson in National Accounting to have the report added to the Web site.
Step	Action								
1	Determine the information needed in a new custom report.								
2	Create the report using Hyperion Report Writer. Note: Custom reports required by region management will be written by the Region Controller.								
3	Contact Kim Peterson in National Accounting to have the report added to the Web site.								

Selecting Reports to View

Standard Report Options

Use this table to determine which of the standard reports you want to review.
Note: Any other reports required by region management will be written by the Region Controller and forwarded to Kim Peterson in National Accounting for addition to the Web site.

To see a report on	Select....
Monthly Flash Data Submitted	Flash Input Summary Report
Weekly Sales Data Submitted	Weekly Sales Summary
Monthly Financial Results by Office	Region Monthly Report

Note: The **Flash Input Summary Report** and the **Weekly Sales Summary** are compiled from the data submitted in the **Flash Input Schedule** and the **Weekly Sales Input Schedule**. The **Regional Monthly Report** is compiled for various sources including **Schedules A, B, A-1, and Report Card**.

How to Use Region Reports

Follow the steps in this table to use the Region Reports options.

Step	Action
1	Select Region Reports from the Financial Information System menu bar.
2	Select a region from the list displayed on screen. Note: The regions that you can view are limited by your security access.
3	Select a report from the list of report options displayed on screen. Note: Three standard reports are initially available and individual Regions may add others as needed.
4	Modify POV settings as needed. Note: You do not need to modify the POV when you run the three standard region reports. The correct POV has already been set up for them.
5	Review the report data.

Printing and Exporting Options

Region Reports is intended as a view only area, but several options to print reports or export report data into Excel are included for your convenience. For information on these options, see the section [“Printing Reports and Exporting Data,”](#) beginning on [page 31](#).

Excel Print Warning

Once report data is exported into an Excel spreadsheet, the data becomes static and is no longer dynamically linked to the Hyperion database. As a result, data that is changed after being exported will not automatically be updated in the database.
Note: All report formatting is lost when using the **Excel** option to print.

Purpose	The purpose of this chapter provide an overview of the Profit Center, its statement and reports and give an explanation of how data is input and retrieved.
Overview	<p>To maximize the use of this Web site, it is necessary that you understand</p> <ul style="list-style-type: none">• The Profit Center Organizational Structure• Changes to the Profit Center and their impact• Application of the related input schedule• How to examine the reports
Chapter Contents	<p>Organizational Structure 71</p> <p>Profit Center Changes..... 73</p> <p>Adjustment to Losses Input Schedule..... 78</p> <p>Reports..... 79</p>

Organizational Structure

Key Users

The Profit Center Statement (PCS) is designed to allocate income and expenses to all of these entities:

- Region Managers
 - District Managers
 - Agents
-

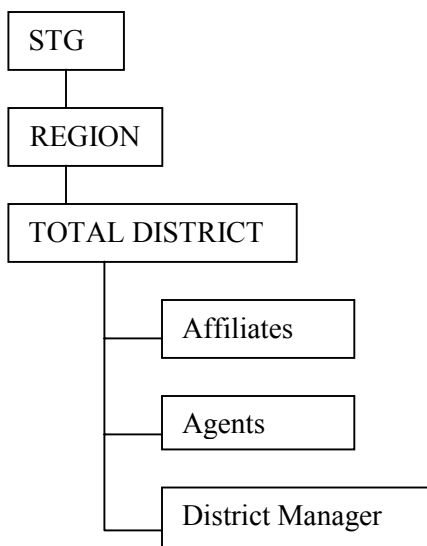
Basic Profit Center Structure

These are the three organizational structures that fall within the overall Profit Center application:

- STG
 - Multistate
 - NTS
-

The STG Hierarchy

This graphic displays the hierarchy of entities within the STG organization.



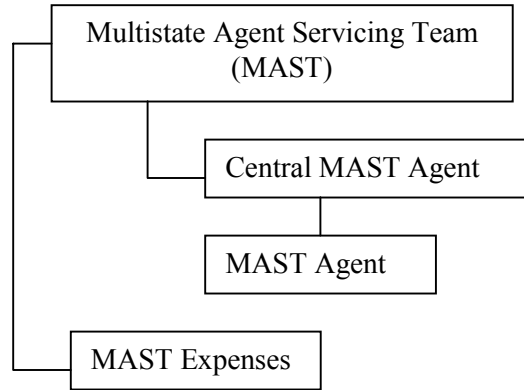
Note: Affiliates and agents are listed by state.

Continued on next page

Organizational Structure, continued

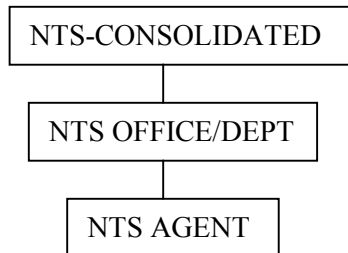
The Multistate Hierarchy

This graphic displays the hierarchy of entities within the Multistate Agent Servicing Team (MAST). This structure is necessary in order for National Accounting to prepare a consolidated PCS by Mast Agency.



The NTS Hierarchy

This graphic displays the hierarchy of entities within National Title Service. This structure is necessary in order for National Accounting to prepare a NTS PCS for all direct issue Agent IDs to be repeated on both the NTS and the District PCS.



Profit Center Changes

Operational Changes

This table lists the old way certain financial elements were handled, the new way they will be maintained and fit in with the revised Profit Center Statement (PCS), and the overall effects of the change.

Old	New	Effects
The Employee ID was the primary source of allocation.	Both Agent ID and Employee ID serve as the primary source of allocation.	Will enable us to show the total profitability by agent on the PCS. Reason: Many agents are serviced by a different district than the one assigned. For example, a region manager of Audit Services may incur expenses on behalf of an agent. If the expense is coded to the agent ID # in CODA, it will be charged to the Agent and therefore the district.
Premiums were reported as district totals only.	Premiums will be reported by agent.	Will enable us to see total premiums by agent on the PCS.
Relocation of agents to a different district manager causing all of the premiums to be moved with the agent.	Premiums will now be linked to the date the agent is moved to a different district manager.	If an agent is relocated to another district, the new district's PCS will only reflect premiums (and expenses) from the date the agent was moved. Note: Last year data will reflect this change.
Policy Loss Adjustments were previously sent in by mail. Note: All losses that appear as NLD on PL-1 are manually changed to Region Manager.	Policy Loss Adjustments will now be entered via the FEIS Web site. Note: All losses that appear as NLD on PL-1 will automatically be added to Region Manager and will require an adjustment if necessary.	Will enable more timely entry of adjustments into the database.

Continued on next page

Profit Center Changes, continued

Operational Changes (continued)

Old	New	Effects
All expenses were not allocated to the PCS.	All expenses will now be allocated to the PCS based on Agent and Employee ID.	Will enable the allocation of these expenses (not previously allocated): <ul style="list-style-type: none"> • Title Plant Expenses, where applicable • Miscellaneous Expenses • Expenses on Title Plant Operations
National Title service Agent's premiums were not included at district level.	New agent IDs are being set up to reflect premiums at the district level.	NTS agents will be a sub-entity of the district, and their premiums and expenses will be included on the PCS. Note: These premiums will not be seen on Schedule X-L.

Revisions to PCS Line Descriptions

The Profit Center Statement (PCS) now has more detailed line items. This table lists the old line item entry and the newer line entries that have taken the place of the old ones.

Note: This report has been revised to look and operate more like the Schedule A Income Statement.

This old line...	Is replaced by these lines...
60 Other Employee Costs	23 Payroll Taxes
	25 401K
	26 Group Insurance
	27 Other Employee Costs
	• Medical exams drug testing
	• Taxable benefits and awards
	• Forgery watch awards
	• Other
	• Company event banquets
	• Staff meals
	• PACE recognition
	• Scholastic assistance
	• Training – Employee Services
	• Training, seminars, leadership, claim college
	• Placement fees
	• Region/District Managers Meetings

Continued on next page

Profit Center Changes, continued

Revisions to PCS Line Descriptions (continued)

This old line...	Is replaced by these lines...
61 Business Promotion	39 Advertising, Business Promotion
	• Advertising
	♦ Trade Journals
	♦ Magazines
	♦ Directories
	♦ Newspaper
	♦ Other Media Advertising
	♦ Media Advertising – NTS
	♦ Business Development ST Forms
	♦ Customer Bus Development Items
	♦ Cust Bus Relations Stewart Form
	♦ Calendar Expenses
	♦ Calendar Income
	♦ Photo News
	♦ STG Annual Report
	♦ Spotlights
	• Expenses on direct Issues
	• Business Development
	♦ Other Entertainment and Promotion
	♦ Entertainment – Meals
	♦ Non-deductible Business Development
	♦ Seminar Expenses
	♦ Seminar Income
	♦ US Homes/Stewart Seminars
	♦ Metal Letters
	♦ Stewart Times
	♦ Stewart Plaid Coats
	♦ Special Projects
	♦ Miscellaneous
	♦ Flowers
	♦ Texas TIPS
	♦ Sponsorships – TLTA
	♦ Sponsorships – TAB
	♦ Sponsorships – TAR
	♦ Sponsorships – TMBA

Continued on next page

Profit Center Changes, continued

Revisions to PCS Line Descriptions (continued)

This old line...	Is replaced by these lines...
62 Travel	40 Travel and Vehicle
	• Travel
	♦ Airfare
	♦ Hotel Accommodations
	♦ Ground Transportation
	♦ Travel Meals
	♦ Miscellaneous
	♦ Non-deductible Spousal Travel
	• Vehicle
	♦ Auto Expense
	♦ Auto Allowance
	♦ Other
65 Supplies, Vehicle and Other	34 Computer (LDI)
	36 Depreciation and Amortization
69 Misc Expenses	37 Title Plant Expenses
	38 Attorney Fees
	41 Insurance
	43 License, Fees, Examinations
	44 Agent Servicing
	45 Acctg, Professional Fees
	47 Supplies, Delivery
	♦ Postage
	♦ Delivery
	♦ Copy Supplies
	♦ General Office
	♦ Repairs and Maintenance
	49 Other
	♦ Contributions
	♦ Director Fees
	♦ Director's Expenses
	♦ Penalty
	♦ Other
	♦ LDI-SYS Depreciation Rebills
	♦ Bank Fees and Service Charges
	50 MAST Allocation Expense

Continued on next page

Profit Center Changes, continued

Line Changes Specific to STC Operations

This table lists the old line item entry and the newer line entries that have taken the place of the old ones within STC Operations.

This old line...	Is replaced by these lines...
154 Salaries/Bonuses	79 Salaries and Bonuses
	80 Taxes, 401K
	81 Other Employee Costs
	◆ Other
	◆ Company Event Banquets
	◆ Staff Meals
	◆ Training
	◆ Quality Program
	◆ Presidents Training Seminar
	◆ Stewart Benefit Trust
155 Escrow Losses and Other	82 Escrow Losses
	◆ Loss Adjustment Expense
	◆ Settlements
	◆ Other
	◆ Escrow Losses
151 Bus/Promo/Other	83 Advertising, Business Promotion
	◆ Other Entertainment and Promotion
	◆ Entertainment – Meals
	◆ Miscellaneous
155 Escrow Losses and Other	84 Travel, Telephone
	◆ Travel
	◆ Vehicle
	◆ Telephone
	86 Supplies, Delivery. Other
	◆ Postage
	◆ Delivery
	◆ Copy Supplies and Expense
	◆ Auditing and Accounting Fees
	87 Cost of Capital

Adjustment to Losses Input Schedule

Description	<p>The Policy Loss Adjustment Input Schedule report form is used to submit adjustments to Policy losses loaded into the Profit Center Statement (PCS) from the Policy Loss VAX system (i.e., from the PL-1).</p> <p>Note: Region Controllers adjust these losses based on both the Region and District Managers' hire dates.</p>
Due Date	<p>All data must be entered into the Input Schedule monthly, no later than the 6th working day of the month. A copy of the reports, with adjustments noted, is then sent to National Accounting in Houston.</p>
Accessing Entities	<p>You will not have to select an Entity from the POV bar. Automatic access to all the entities that you have a security for are already available on the input schedule you select.</p>
Input Schedule Layout	<p>When you open the Input Schedule all entities under your security access will be shown in the rows. This input schedule contains three columns, two with data already displayed and one where you would enter the required data to be input. This table lists the column name and describes the content of each.</p>

Column Name	Description
Policy Losses	This field is already populated with data from the Policy Loss System.
Adjustment to Losses	Data entry column for you to key in all adjustments.
Total Losses	This field opens with pre-calculated data. Use the Recalculate button to update the field after you enter any new data.

Reports

Types of Reports Available

There are currently three reports available through the Profit Center Web site. These include:

- Expanded Profit Center Statement (on-line analysis version)
- Profit Center Statement (print version)

Expanded Profit Center Statement

This statement shows the summaries of all line items and also contains an “expand” option that allows users to drill down to more detail at the entity and account level. All entities and accounts that are expandable display a plus sign (+) icon next to each line that enables you to see more detail. Clicking on the plus sign displays more detailed information to the right of entity or below for acct.

Note: Expanded details are based on the entity selected in the current POV setting.

POV Settings for the Profit Center Statement

Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Any Entity available within one STG organization (i.e., on agent in one district region) Note: Before selecting a specific entity, use the More Filters button to select a specific organization from the bottom Filter box.
Category	Actual
Period	Any month you want to view
Frequency	M.CTD (Month/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Filtering Options

These options provide different kinds of filtering:

- **More Filters** – To select new organizations to focus on, and produce a new list of entities in the **Entity** list box.
- **Max Entries** – To reduce the number of entities listed in the **Entity** list box.
- **Filter** – To enter the first 3 digits of a sub-group of entities and display only that list in the **Entity** list box.

Note: For more information on the **Max Entries** and **Filter** boxes, see “[Additional POV Options](#)” beginning on [page 19](#).

How to Use the More Filters Option

For those locations with a long **Entity** pick list in their **POV Table**, it is recommended that you use the entity **More Filters** option to reduce the size of your pick list. Follow these steps to access and select a new filter setting.

Step	Action
1	From within a displayed Profit Center Statement, select the POV Table button to open the Change Point of View page.

Continued on next page

Reports, continued

How to Use the More Filters Option (continued)

Step	Action								
2	Click on the Entity Lookup button to the right of the Entity text box to open the working tables and filters associated only with entity (the Select Entity page). Note: The entity box defaults to display all Profit Center organizations that you have security clearance to view.								
3	Use the More Filters button to drill down to the More Filters for Entity page.								
4	In the bottom Filter box, select a specific organization that will help narrow the Profit Center list of entities to a more specific grouping of entities such as MAST profit center organizations or NTC profit centers. Note: The list of filtering options is linked to the level of security access that each region, office or branch is assigned and will display only those options tied to your level of security access.								
5	Perform these actions: <table border="1"> <thead> <tr> <th>If you have...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Selected filters on the More Filters for Entity page</td><td>Scroll to the bottom of the page and click on the Done button. Result: This accepts any new selections you made in the More Filters for Entity page and returns you to the Select Entity page. The Entity list box displays a new list of entities based on the filter(s) selected.</td></tr> <tr> <td>Reset other filters</td><td>Click on the Done button. Result: This returns you to the Change Point of View page.</td></tr> <tr> <td>Changed other POV settings on the Change Point of View page</td><td>Click on the Done button. Result: This returns you to your original report page and displays financials as they relate to newly filtered POV settings.</td></tr> </tbody> </table>	If you have...	Then...	Selected filters on the More Filters for Entity page	Scroll to the bottom of the page and click on the Done button. Result: This accepts any new selections you made in the More Filters for Entity page and returns you to the Select Entity page. The Entity list box displays a new list of entities based on the filter(s) selected.	Reset other filters	Click on the Done button. Result: This returns you to the Change Point of View page.	Changed other POV settings on the Change Point of View page	Click on the Done button. Result: This returns you to your original report page and displays financials as they relate to newly filtered POV settings.
If you have...	Then...								
Selected filters on the More Filters for Entity page	Scroll to the bottom of the page and click on the Done button. Result: This accepts any new selections you made in the More Filters for Entity page and returns you to the Select Entity page. The Entity list box displays a new list of entities based on the filter(s) selected.								
Reset other filters	Click on the Done button. Result: This returns you to the Change Point of View page.								
Changed other POV settings on the Change Point of View page	Click on the Done button. Result: This returns you to your original report page and displays financials as they relate to newly filtered POV settings.								

Continued on next page

Reports, continued

**Profit Center
Statement
(Printable Copy)**

This statement opens a duplicate of the Expanded Profit Center Statement report, but without the ability to “expand” for more detail. This version shows the summaries of all PCS line items and gives you the ability to export summarized data and to print the report that the expanded version does not provide.

If...	Then...
Exporting to Excel	Select the Excel icon in the corner of the screen.
Printing a hard copy	Select the PDF printer icon in the corner of the screen to create a PDF version of the report and add the Adobe Acrobat toolbar from which you can print a hard copy.

9

Hardcopy Reports

Purpose	The purpose of this chapter is to provide basic information for setting your reporting Point of View (POV) and for printing various financial reports.
Overview	<p>To obtain a hard copy of any of the available financial reports, it is necessary that you</p> <ul style="list-style-type: none">• Access the POV Table and set the point of view for your office• Select a report to print• Press the Adobe Acrobat print button
Chapter Contents	<p>POV Settings for Reports 83</p> <p>Using Adobe Acrobat to Print 88</p> <p>Printing Reports 89</p>

POV Settings for Reports

Print Warning If used in the Hardcopy Reports area, the Internet Explorer **Print** button prints only a blank page. To print out any report, you *must* use the **Print** option from the Adobe Acrobat tool bar.

POV Settings The POV settings define the data selection parameters for all your reports. Notice that when you open **Hardcopy Reports**, the POV is populated with the same settings from your last FEIS **Entity** selection. The only place that you may modify the POV settings is on the **Hardcopy Reports** selection page.

Schedule A Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Any entity
Category	Actual Note: Schedule A will only display the current and prior year data, regardless of which category you select. To report on prior years you must use Schedule A-Prior .
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Schedule B Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Any entity
Category	Any category
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section “[Point of View \(POV\) Table and Bar](#),” beginning on [page 14](#).

Continued on next page

POV Settings for Reports, continued

Schedule B-1

Use the table below to check POV settings for this report

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Any category
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule B-2

Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Actual
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule C

Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Actual
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Continued on next page

POV Settings for Reports, continued

Schedule A-1 Other Data

Use the table below to check POV settings for this report

To set the...	Select...
Entity	Any entity
Category	Any category
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Underwriter Schedule A

Use the table below to check POV settings for this report

To set the...	Select...
Entity	Any entity
Category	Any category
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule A-1 Underwriter Other Data

Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Any entity
Category	Any category
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Continued on next page

POV Settings for Reports, continued

Flash Report

Use the table below to check POV settings for this report

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Flash
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Weekly Sales Data Report

Use the table below to check POV settings for this report.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Weekly
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Schedule A - Prior

Use the table below to check POV settings for this report

To set the...	Select...
Entity	Any entity
Category	PRIORACT for prior year, PRIOR 2 for two years prior and so on...
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Continued on next page

POV Settings for Reports, continued

Report Card – Pages 1, 2 and 3

Use the table below to check POV settings for the pages of this report.

To set the...	Select...
Entity	Base level entity (e.g., a company ending in .INPUT or your main branch office)
Category	Actual
Period	Any month
Frequency	M.CTD (Monthly/Category To Date)
Account	N/A. The displayed account does not affect POV settings.

Note: For further information on Point of View, see the section [“Point of View \(POV\) Table and Bar,”](#) beginning on [page 14](#).

Using Adobe Acrobat to Print

How Adobe Acrobat Fits In

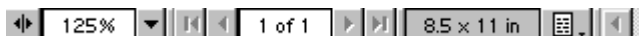
The **Print** option on the Adobe Acrobat tool bar is used to print your reports. It is attached to the Hardcopy window of your intranet page and automatically opens when you select a report.

Adobe Acrobat brings two new items to the active window:

- A Tool Bar which looks like this:







- The Status Bar which looks like this:



Limited Availability of Command Bar Buttons

Although the tool bar contains many buttons, the functionality of the Web Site limits their use. The buttons listed in this table are the ones you will see and use.


Button	Drop Down Description	Function
	Saves a copy of the file	Saves the file to a directory location defined by the user.
	Hand Tool (H)	Adobe's version of a screen pointer. It changes to a pointing index finger when you move it over an area of the screen where you can make a selection.
	Zoom In Tool (Z)	Enlarges the view of the report.
	Print	Prints the selected report.

Note: For further information about the remaining Adobe Acrobat options and their use, refer to an official Adobe Acrobat resource.

Printing Reports

How to Print Reports

Follow these steps for printing reports.

Step	Action								
1	Check the POV settings at the top of the screen and modify as needed.								
2	Select a report.								
3	Wait for Adobe Acrobat to open and display the selected report.								
4	To start printing and display the print options dialog box, select the Print button from the Adobe Acrobat command bar. 								
5	Select your print options from the Print dialog box that appears on-screen, and click OK to send the report to the assigned printer.								
6	Perform one of these actions: <table border="1"> <thead> <tr> <th>If...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Printing another report</td><td> <ul style="list-style-type: none"> Click Hardcopy Reports to redisplay the list of reports Repeat steps 1-5 </td></tr> <tr> <td>Exiting Hardcopy Reports</td><td>Select any of applicable menu option from the Financial Information System Menu</td></tr> <tr> <td>Exiting FEIS Web site</td><td> Select File and Close from the menu at the very top left of your screen. Result: The system <ul style="list-style-type: none"> Closes the current Web site Exits the intranet and internet Returns you to where you were before you entered the internet </td></tr> </tbody> </table>	If...	Then...	Printing another report	<ul style="list-style-type: none"> Click Hardcopy Reports to redisplay the list of reports Repeat steps 1-5 	Exiting Hardcopy Reports	Select any of applicable menu option from the Financial Information System Menu	Exiting FEIS Web site	Select File and Close from the menu at the very top left of your screen. Result: The system <ul style="list-style-type: none"> Closes the current Web site Exits the intranet and internet Returns you to where you were before you entered the internet
If...	Then...								
Printing another report	<ul style="list-style-type: none"> Click Hardcopy Reports to redisplay the list of reports Repeat steps 1-5 								
Exiting Hardcopy Reports	Select any of applicable menu option from the Financial Information System Menu								
Exiting FEIS Web site	Select File and Close from the menu at the very top left of your screen. Result: The system <ul style="list-style-type: none"> Closes the current Web site Exits the intranet and internet Returns you to where you were before you entered the internet 								

Purpose	The purpose of this chapter is to provide information regarding the access and use of various documents that are available through the FEIS Web site.
Overview	To access and print information from the available documents, it is necessary that you understand <ul style="list-style-type: none">• The use of the Financial Information System menu bar• How Adobe Acrobat is used to print
Chapter Contents	Location and Description..... 91 Printing User Guides 92

Location and Description

On-line Accessibility

Currently, there are two User Guides and a Change Request Form that can be accessed electronically through the FEIS Web site. They are there as resources. When working in the Web site, the user guides are documents that can be easily opened and searched for information or procedures that may help in task completion. Please search the guides for information on general questions you may have **prior** to contacting National Accounting. The change request form is used to submit requests for changes to the Web site.

Document Types and Description

This table lists the name of each document and describes its overall use.

Name	Description
FEIS Web Site User Guide	This user guide is an on-line copy of the FEIS Web site procedure manual. It provides general Web information and specific details for the various FEIS Web site options. It also provides procedural steps for using those options.
SISCO Accounting Guide	This user guide is the National Accounting Guide procedure manual for accounting personnel and controllers. It is intended to provide the necessary details for completing of financial task and meeting reporting deadlines.
Change Request Form	This form is used to request your changes or modifications relating to the FEIS Web site. Once the form is filled in, it is then submitted to National Accounting. Instructions for submitting the form are shown on the form itself.

User Guide Location

To access a user guide, select the green **User Guides** button found in the **Financial Information System** menu bar. This opens a Read-Only version of the selected user guide.

Note: User guides can be opened at any time and from any page of the FEIS Web site that displays the **Financial Information System** menu bar.

Change Request Schedule

Modifications submitted on the Change Request Form take place according to this schedule:

Change Requests...	Will be completed...
Submitted by the 15 th calendar day	In that month
Received after the 15 th calendar day	The following month

Printing User Guides

Printing

Follow the steps in this table to print a hard copy of either user guide.

Step	Action
1	On the SISCO FEIS User Guides home page, click on the user guide you want to print. Result: This launches Adobe Acrobat that, in turn, opens a Read-Only version of the selected user guide.
2	Select the printer icon in the Acrobat toolbar at the top of the document.
3	Set the desired print options in the open Print dialog box.
4	Once you have set the desired print options, click on OK to print.

Note: For more information on **Adobe Acrobat** icons and the using the Acrobat toolbar to print reports and documents, see the section of this user guide “[Using Adobe Acrobat to Print](#),” beginning on [page 88](#).

Purpose	The purpose of this chapter is to provide an overview of the additional pieces of non-financial information associated with your company that are available through this Web site.				
Overview	<p>The more information you have about the company you are working with, the better you will understand their financial needs and goals. Company Information was established in this Web site as a place to maintain, view and print miscellaneous, up-to-date, pieces of company data. This data includes your company's</p> <ul style="list-style-type: none">• Board of Directors• Organization Chart• Proxy Letter• Company Shareholders• Office Goals				
Chapter Contents	<hr/> <table><tr><td>Submitting Company Information</td><td>94</td></tr><tr><td>Using Company Information Options</td><td>96</td></tr></table> <hr/>	Submitting Company Information	94	Using Company Information Options	96
Submitting Company Information	94				
Using Company Information Options	96				

Submitting Company Information

Types of Company Information

This table lists the types of company information that can be displayed in the Company Information Web site and gives a description for each type.

Company Information Type	Description
Board of Directors	A listing of all current members of the offices' Board of Directors
Organization Chart	A flow chart showing the organizational layout of individual associates at the office whose chart is displayed
Proxy Letter	A letter showing the authorization of an individual within each office designated to vote that office's stock on behalf of STC and Stewart Morris, Jr.
Company Shareholders	A listing of all current shareholders of the company's stock
Office Goals	A document describing the current management goals for the office. Goals are updated once per quarter.

Update Responsibility

Each individual office is responsible for providing the initial information for the **Company Information** Web site. It is also their responsibility to keep this information current. Any time there is a change, new information should be submitted to Houston to replace the old, outdated version on the Web site.

How to Prepare Board of Directors and Shareholders Listings for the Web

Follow these steps to prepare your Board of Directors listing, Company Shareholders listing, *and* the Office Goals for use in the FEIS Web site:

Step	Action						
1	Develop separate documents using Microsoft Word .						
2	Save each document with an .htm extension. Note: Documents saved with a .doc ending cannot be translated for Web use.						
3	Perform one of these actions in order to correctly name the file. <table border="1"> <thead> <tr> <th>If you...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Have branch offices set up in Hyperion</td><td>Name the files using the label for the branch total entity. Example: AMARILLO_BR_TOT.htm</td></tr> <tr> <td>Do not have branch offices in Hyperion</td><td>Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.htm</td></tr> </tbody> </table>	If you...	Then...	Have branch offices set up in Hyperion	Name the files using the label for the branch total entity. Example: AMARILLO_BR_TOT.htm	Do not have branch offices in Hyperion	Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.htm
If you...	Then...						
Have branch offices set up in Hyperion	Name the files using the label for the branch total entity. Example: AMARILLO_BR_TOT.htm						
Do not have branch offices in Hyperion	Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.htm						

Note: If you do not know your office label or if you are unclear about these instructions, please contact Kim Peterson in National Accounting before sending the files.

Continued on next page

Submitting Company Information, continued

How to Prepare an Organization Chart for the Web

Follow these steps to prepare your Office organization chart for use in the FEIS Web site:

Step	Action						
1	Develop the document using Microsoft PowerPoint .						
2	Save the document with a .ppt extension. Note: Documents saved with a .doc ending cannot be translated for Web use.						
3	Perform one of these actions to correctly name the file. <table border="1"> <thead> <tr> <th>If you...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Have branch offices set up in Hyperion</td><td>Name the files using the label for the branch total entity. Example:AMARILLO_BR_TOT.ppt</td></tr> <tr> <td>Do not have branch offices in Hyperion</td><td>Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.ppt</td></tr> </tbody> </table>	If you...	Then...	Have branch offices set up in Hyperion	Name the files using the label for the branch total entity. Example: AMARILLO_BR_TOT.ppt	Do not have branch offices in Hyperion	Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.ppt
If you...	Then...						
Have branch offices set up in Hyperion	Name the files using the label for the branch total entity. Example: AMARILLO_BR_TOT.ppt						
Do not have branch offices in Hyperion	Name the file using your full entity label, including the substructure. Example: FAIRFAX.INPUT.ppt						

Note: If you do not know your office label or if you are unclear about these instructions, please contact Kim Peterson in National Accounting before sending the file.

E-mail Addresses for Submitting Information

This table specifies the different types of lists and charts needed to populate the **Company Information** Web site and provides appropriate e-mail addresses for submitting the information to Houston for posting on the FEIS Web site.

Type of List or Chart	E-mail Address
List of Board of Directors Members	HYPBOD@stewart.com
Organization Charts	HYPORG@stewart.com
List of Company Shareholders	HYPSHARE@stewart.com
Office Goals	HYPGOALS@stewart.com

Note: The Proxy Letter is prepared in Houston and is not required to be sent by the office.

Using Company Information Options

How to Use Company Information

Follow these steps to use the **Company Information** option.

Step	Action										
1	Select Company Information from the Financial Information System menu.										
2	Modify POV settings to reflect the following: <ul style="list-style-type: none"> • Entity - Use either a base level entity ending in .INPUT or a branch total entity ending in BR_TOT. • Period – Select the current period. 										
3	Select the company information you want to see from the list of available choices by clicking on the title of the document.										
4	Perform one of these actions. <table border="1"> <thead> <tr> <th>To...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>View information only</td><td>No action is required.</td></tr> <tr> <td>Print information</td><td>Select File and Print or press the print button on the internet browser menu bar to send the item to the designated printer.</td></tr> <tr> <td>Save the information</td><td> <ul style="list-style-type: none"> • Select File and Save as from the internet browser menu bar • Save the file to a local directory of your choice </td></tr> <tr> <td>Exit the option</td><td> <ul style="list-style-type: none"> • Select the Company Information button to return to the selection page • Select any other button from the Financial Information System menu • Select File and Close to exit the Web site and internet </td></tr> </tbody> </table>	To...	Then...	View information only	No action is required.	Print information	Select File and Print or press the print button on the internet browser menu bar to send the item to the designated printer.	Save the information	<ul style="list-style-type: none"> • Select File and Save as from the internet browser menu bar • Save the file to a local directory of your choice 	Exit the option	<ul style="list-style-type: none"> • Select the Company Information button to return to the selection page • Select any other button from the Financial Information System menu • Select File and Close to exit the Web site and internet
To...	Then...										
View information only	No action is required.										
Print information	Select File and Print or press the print button on the internet browser menu bar to send the item to the designated printer.										
Save the information	<ul style="list-style-type: none"> • Select File and Save as from the internet browser menu bar • Save the file to a local directory of your choice 										
Exit the option	<ul style="list-style-type: none"> • Select the Company Information button to return to the selection page • Select any other button from the Financial Information System menu • Select File and Close to exit the Web site and internet 										

12 Troubleshooting Errors

Purpose	The purpose of this chapter is to give you insight as to the different error messages you might see on the screen while you are using the FEIS Web site and what action you can take to either troubleshoot your way through them or contact someone for support.
Overview	Errors will occur. Expect them, and be prepared to handle them.
Chapter Contents	Handling Error Messages 98

Handling Error Messages

Using the Refresh Button

Some errors occur because of the way that data is being sent to and stored in the database. When an error occurs, the first thing to try is the **Refresh** button. This clears the computer's memory and restores the screen with up-to-date data.

Troubleshooting Errors

Using the FEIS Web site and its database opens the possibility of receiving error messages. This table lists some of the error messages you may receive, tells where they might occur, what causes them, and what to do to troubleshoot your way out of them.

Error Type	Message	Received Where	Received When	Action to Take (Sequential)
HTTP	Unable to locate file. Check URL.	Company Information	<ul style="list-style-type: none"> There is no connecting link to the item you selected The requested document does not exist 	<ol style="list-style-type: none"> Verify the entity selected Verify that the documents you are attempting to access have been submitted to National Accounting for posting to the Web Call National Accounting
Red High-lighting	Unable to write to the database.	Within any of the Input Schedules	Entering data at the same time that the database is in use by the System Administrator or another user on the same entity	<ol style="list-style-type: none"> Exit the Schedule completely Wait 5 minutes and try re-entering the data Call National Accounting if the problem persists
–	Time Out.	Within any of the Input Schedules	The current report is open and you move to another application or page without submitting the report data entered	<ol style="list-style-type: none"> Click the Input Schedules button on the Financial Information System menu Re-enter the report you were in
Code 8	Unable to launch the report.	<ul style="list-style-type: none"> Hardcopy Reporting Input Schedules Financial Reports 	<ul style="list-style-type: none"> The POV setting is wrong There is an unexpected problem with the selected report 	<ol style="list-style-type: none"> Verify that you have made the correct POV settings Call National Accounting if the problem persists
–	Could not open report due to invalid user POV. Please verify your current Point of View values.	<ul style="list-style-type: none"> Hardcopy Reporting Input Schedules Financial Reports 	The POV setting is wrong	<ol style="list-style-type: none"> Verify that you have made the correct POV settings Call National Accounting if the problem persists

Glossary

A/P	Stands for Accounts Payable.
A/R	Stands for Accounts Receivable.
Active Window	Where multiple on-screen windows are displayed, the active window is the one you are currently working in.
Command Bar	A menu where each selection tells the computer to carry out some sort of action.
Drill Down	Moving down through different layers of interrelated details within a single Web site.
Entity	Entities are offices in the legal structure, Region Managers, District Managers or offices within the regional structure.
Filter	A tool used to sift through available fields of data in the database in order to obtain a more focused list of options.
G/L	General Ledger.
Inactive Window	Any window other than the one currently being worked in. An inactive window can be partially or totally hidden behind another window and remains inactive until the user selects it.
Internet	The worldwide collection of networks and gateways.
Intranet	A network designed for information processing within a company or organization.
Login	The process of entering both your username and password into a computer before you begin working.
Logoff	The process of ending your computer session; also called log out.
Network	A group of computers and associated devices (printers, scanners, etc.) that are connected by communications facilities.
Password	A security measure used to restrict access to computer systems, sensitive files, and Web areas.
PCS	Profit Center Statement.

Continued on next page

Glossary, continued

POV	Point of View table or bar that describes the data you are currently looking at.
URL	Stands for Uniform Resource Locator that is a path or address to a Web site on the internet or intranet.
Username	The name by which a user is identified to a computer system or network.
Window	<p>In software applications that mimic the type of interface found in Microsoft Windows, the screen can be divided into several windows, each displaying something different.</p> <p>Example: One window may show a list of items and the window next to it may show a page of a document.</p>