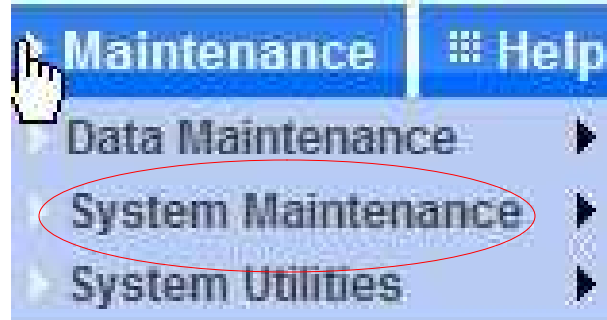


iFastrack v8.09 Tutorial

System Maintenance

This tutorial provides an overview of the iFastrack System Maintenance Section including adding Companies and Users, setting User access rights and Program defaults.

Maintenance Selections



The Maintenance Menu provides access to three maintenance activities:

- Data Maintenance – Build cc Lists, Insurance Rqmt Categories and fields, Groups, Services
- System Maintenance – Enter Program Defaults, Companies, Users and Access Rights
- System Utilities – View Audit Log, Import/Export Data

Select System Maintenance.

Enter System Controls



System Maintenance is used to set Program default values, enter Users access rights and company level data.

Program Setup

Edit System Settings

Days Between Letters: 30

Days Prior to Expiration: 45

Follow-up Email Subject Line: Certificate of Insurance - Non compliance

Follow-up Email Body Text: Attached is a letter indicating any non-compliance issues - Please read

Sql Time Out: 900

Company Licensed To: GG-One Software, Inc

License Count: 1000

License Key is Valid!

License Key: SLX7C-SLX7C-SLX7C-SLX7D-SLX7B-SLX7B-SM129-T7AHK-SLZU

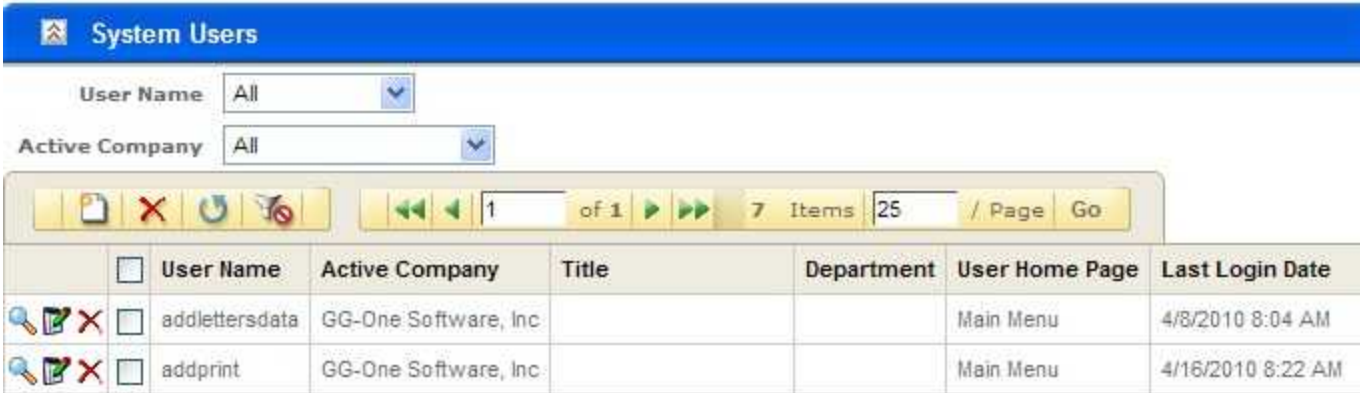
Validate Key

To upgrade your license, cut and paste the new license key from your email into the License Key box.



iFastrack comes with several default setup values which can be changed. Days Between Letters is the number of days from when a letter is printed before it reappears to be printed as a reminder letter. Days Prior to Expiration is the number of days from today for selecting insurance policies soon to expire. If emailing insurance follow-up letters, the default email subject and body text can be changed. Sql Time Out is the number of seconds before sql tasks timeout. This may need to be increased for large databases or slower servers to allow certain functions to complete.

The company License Key is provided at time of purchase and entered during the first iFastrack access into an Activation box. If additional company licenses are purchased, a new key is provided and entered here.

Users Screen



The screenshot shows a web application interface titled "System Users". It features two dropdown menus for "User Name" and "Active Company", both set to "All". Below these is a toolbar with icons for search, delete, refresh, and a "7 Items" indicator. A pagination bar shows "1 of 1" items and "25 / Page Go". The main content is a table with the following data:

	<input type="checkbox"/>	User Name	Active Company	Title	Department	User Home Page	Last Login Date
	<input type="checkbox"/>	addlettersdata	GG-One Software, Inc			Main Menu	4/8/2010 8:04 AM
	<input type="checkbox"/>	addprint	GG-One Software, Inc			Main Menu	4/16/2010 8:22 AM

The Users screen lists each User setup for access to iFastrack. Users can be added, edited and deleted from this screen. The User Home Page is the page the user accesses upon login and from the Home link at the top of each page.

Users – Add Screen

Add System User

* User Name: SSpade

* Password: ●●●●

First Name: Sam

Last Name: Spade

Title: Insurance Analyst

Email: sspade@abcco.com
(Required for emailing letters)

Department:

User Home Page: ** Please Select **

- ** Please Select **
- Certificate Search
- Document Search
- Main Menu
- Vendor Listing

Save Cancel

When adding a new user, the User Name and Password is required. If the User will be sending emails from the system (i.e. emailing insurance follow-up letters), an email address must be entered. You can select which screen appears first when a user logs into iFastrack from the User Home Page list (default is the main menu). The Home button at the top of each screen will go to the user's designated home page. Note: be sure to add the user to the company access list (see Company Access in System Maintenance). Edit User record, select the Active Company for login and assign the Access Rights.

Users – Edit Screen

Part 1 – General Information

Edit User

User Name	SSpade	First Name	Sam
Last Name	Spade	Title	Insurance Analyst
Email	sspade@abcco.com	Department	
Active Company	GG-One Software, Inc	User Home Page	Main Menu

Access Levels Company Access

Access Levels

1 of 1 1 Items 25 / Page Go

Access Level
Maint - Data : Access Data Maintenance - Add/Edit/Delete

Save Cancel Change Password

The User Edit screen has two parts on the same screen. In Part 1, change general information about the user. Click the Change Password button to access the Password screen. The Active Company drop down box lists all the companies the user has been assigned rights to access (see Company Access for assigning user's access to more than one company for multiple company level licenses). Select the company the user accesses when logging in. You can also select which screen appears first when a user logs into iFastrack from the User Home Page list (default is the main menu). The Home button on the top of each screen will bring the user to this page from anywhere in the software.

Users – Edit Screen

Part 2 – Assign Access Rights

The screenshot displays the 'Access Levels' section of a user edit screen. At the top, there are two tabs: 'Access Levels' (selected) and 'Company Access'. Below the tabs is a blue header bar with the text 'Access Levels'. Underneath the header is a navigation bar with a document icon, a red 'X' icon, a page number '1 of 1', a '3 Items' indicator, a '25 / Page' dropdown, and a 'Go' button. The main content area is a table with the following data:

Access Level	
<input type="checkbox"/>	Maint - Data : Access Data Maintenance - Add/Edit/Delete
<input type="checkbox"/>	Vendor : Vendor - Add/Edit/Delete; Print Reports.
<input type="checkbox"/>	Letters - Print : Print follow-up letters including reprint/sessions

Part 2 of the User Edit screen is for assigning system Access Level rights. A user can have multiple access rights. Add each access right for the user. Access rights apply to all Companies levels assigned to the user.

Users – Edit Screen

Part 3 – Assign Company Access Rights

Access Levels Company Access

Company Access

1 of 1 2 Items / Page Go

Company	
X	GG-One Software, Inc
X	Holly Fields

Part 3 of the User Edit screen is for assigning Company Access Level rights. The user must be given access to at least one company level, but can have access to multiple company levels (only applies if multiple company levels were purchased as part of the software license). This can also be done in the Company Access screen.

Company Data Screen

<input type="checkbox"/>	Company Name	Contact	Title	Letter	Envelope/Label
<input type="checkbox"/>	GG-One Software, Inc		Insurance Manager	Default Follow-up Letter	Default Envelope
<input type="checkbox"/>	Holly Fields			Holly Fields Letter Template	Default Envelope
<input type="checkbox"/>	Millies Marshmallows		Insurance Manager	Windor Old	Avery 5160 Address Label

The Company Data screen lists all company levels entered for the system. Note: the iFastrack license comes with one company level. Additional company levels can be purchased at any time. Vendor data is maintained within a Company Level and User access can be restricted by Company. Companies can be added, edited and deleted from this screen.

Company Data – Add/Edit Screen

Edit Company Data

* Company Name: GG-One Software, Inc

Address 1: 104 Richardsons Brook Dr.

Address 2:

City: Kennett Square

State/Prov: PA ZIP Code: 19348

Country:

Phone: eg: (555) 123-4567
610-444-5944 Fax: eg: (555) 123-4567
610-444-2024

Signature: Phyllis Recca

Title: Insurance Manager

Email: precca@ggonesoftware.com

Letter: Default Follow-up Letter
Select Letter to be used for printing Company wide Follow-up Letters.
You can over-ride this at the Group level by selecting a Follow-up Letter in Groups.

Envelope/Label: Default Envelope

Min Acceptable A.M. Best Rating: A+

Although Company Name is the only required field, the company address and contact information is printed on the insurance follow-up letters and should be filled out based on who should receive the insurance certificates within the company. This information can be overridden at the Group level (see Groups in the Data Maintenance section). The letter and envelope templates should also be selected for printing insurance follow-up letters. If a new template is created in the Letters section, the new template must be selected in this screen. If monitoring A.M. Best Ratings, select the minimum acceptable rating here.

Company Access – User List

<input type="checkbox"/>	User	Company
<input checked="" type="checkbox"/>	addlettersdata	GG-One Software, Inc
<input checked="" type="checkbox"/>	addprint	GG-One Software, Inc
<input checked="" type="checkbox"/>	addprint	Millies Marshmallows
<input checked="" type="checkbox"/>	Administrator	GG-One Software, Inc
<input checked="" type="checkbox"/>	Gene	GG-One Software, Inc
<input checked="" type="checkbox"/>	johnr	GG-One Software, Inc
<input checked="" type="checkbox"/>	johnr	Millies Marshmallows
<input checked="" type="checkbox"/>	johnr	Holly Fields

The Company Access User List screen shows all users and the companies they have been given rights to access. Add or delete users from this screen.

Company Access – Add User



Add Company Access

* User

* Company

To give a user access to a company, select the user and company from the drop down boxes.

**End of
Tutorial**