

# **iFastrack v8.09 Tutorial**

## **System Utilities**

This tutorial provides an overview of the iFastrack System Utilities Section including reviewing the Audit Log and Import/Exporting Data.

# 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 Utilities.

# System Utilities



System Utilities is used to review Audit reports, recheck policy expirations, import/export data, view the list of available reports and view the system message log. The Audit Log is currently under construction and only includes changes to the Vendor data.

# Re-evaluate Certificates



Re-Evaluate Certificate Statuses

Company Hartford Industries

Date 4/19/2010 8:14 AM

Run Ok

The first user to log into iFastrack for the day triggers the automatic policy date review routine which updates the policy expiration status for all vendor certificates for the company level. Policy expiration status is also updated each time the certificate record is edited. To update the policy expiration status and reset insurance requirements if changes were made in maintenance, select Re-evaluate Certificates and click Run. This feature is also used to recheck A.M. Best carrier ratings when a new A.M. Best ratings file is imported.

# Import Data



Data can be imported into iFastrack using an Excel format. Select Import Vendor/Certificate Data to import vendor and insurance information or select Import A.M. Best Data to import the A.M. Best ratings file. The System Import Data Log displays any errors during the import process.

# Import Vendor Data



**Import Vendor/Certificate Data**

- Press the below *Browse button* to locate the Excel file to Import.
- Press *Import button* to Import the new Vendor Records.

Data can be imported into iFastrack using an Excel format. Vendor contact information, Group, Service is available for Import for the Vendor record. Insurance information such as policy expirations and limit amounts can also be imported into the insurance record. See the User Guide for the Excel file layout and list of fields.

# Import A.M. Best Ratings File

Purge current A.M. Best Ratings file first or  
update existing file?

Purge Update Existing



Import A.M. Best Data

- Press the below **Browse button** to locate the Excel file to Import.
- Press **Import button** to Import the A.M. Best Data.
- If importing a replacement A.M. Best ratings file, run **Re-Evaluate Certificates** under System Utilities to check for ratings changes.

Browse...

Import OK

A.M. Best ratings data must be imported into iFastrack to use the A.M. Best check feature. The company must subscribe to A.M. Best. With the subscription (annual renewal), A.M. Best provides the company with a CD containing ratings information. The CD is loaded onto the company's computer and then exported to Excel for import into iFastrack. See the User Guide for directions on how to export the A.M. Best ratings file.

Before importing, either purge all the current A.M. Best data or select Update Existing. Next, select the A.M. Best Excel file exported from the CD which was loaded to the desktop.

# Export Data



Data can be exported to an Excel format. Select either vendor data or insurance certificate data.

# Export Vendor Data

**Export Vendor Data**

Search for

Vendor:

Xref:

Group:

Service:

Vendor Status:

1 of 1 4 Items 50 / Page Go

Company	Vendor	Xref	Group	Service	Contact	Title	Address	Address2	City	State	ZIP	Country	Phone	Fax	Extension	Email	Contact
ABC Company	Landow Lawn and Plow		Unit 15	Lawn Care	Office Manager		650 Rice Road		Harrington	PA	19023		610-798-3455				Print
ABC Company	Martin's Landscaping	P4566	Unit 10	Lawn Care	Management Office		230 Lincoln	Suite 2B	Kennett Square	PA	19348		610-444- ----				Print

All vendor data is displayed on the screen. Select any desired filters, then click the green X in the tool bar. The list (including data on all pages), will be converted to an Excel spreadsheet and displayed on the screen.

# Export Certificate Data

**Export Certificate Data**

Search for

Vendor: All

Certificate: All

Document: All

Cert\_Ref: All

Group: All

Service: All

Ins Status: All

Certificate Status: All

1 of 1 16 Items 50 / Page Go

Company	Vendor	Certificate	Document	Cert_Ref	COI_Date	Group	Service	Category	Ins_Status	Cert_Status	Policy	Expires	Policy_Status	Expired_S
ABC Company	Landow Lawn and Plow	General				Unit 15	Lawn Care	Standard	Ok	Active	Excess		Policy Ok	
ABC Company	Landow Lawn and Plow	General				Unit 15	Lawn Care	Standard	Ok	Active	General Liability	11/1/2010	Policy Ok	
ABC Company	Landow Lawn and Plow	General				Unit 15	Lawn Care	Standard	Ok	Active	Workers Comp	12/31/2010	Policy Ok	

All vendor certificate data is displayed on the screen. There is one row per policy listed on the insurance record with data from the certificate and policy listed in columns. Select any desired filters, then click the green X in the tool bar. The list (including data on all pages), will be converted to an Excel spreadsheet and displayed on the screen.

# Reports List Editor

SYSTEM REPORTS

Category: All  
Type: All  
System Report: All

39 Items 50 /Page GO

<input type="checkbox"/>	Report Name	Description	Category	Type	Level
<input type="checkbox"/>	Acceptable Certificates Detail	Detail format of all active Certificates that have...	Insurance	Detail	System
<input type="checkbox"/>	Acceptable Certificates List	Listing format of all active Certificates that hav...	Insurance	Listing	System
<input type="checkbox"/>	Acceptable Certificates Summary	Summary format of all active Certificates that hav...	Insurance	Summary	System
<input type="checkbox"/>	Action Items - Tracking Date Expired	Document action items with expired tracking dates....	Documents	Detail	System
<input type="checkbox"/>	Action Items - Tracking Date Soon-to-Expire	Document action items with tracking dates that exp...	Documents	Detail	System
<input type="checkbox"/>	Action Items Due Soon	Document action items due soon.	Documents	Detail	System
<input type="checkbox"/>	Action Items Past Due	Document action items past due	Documents	Detail	System
<input type="checkbox"/>	Active Certificate Detail	Detail format of all active Certificates from an a...	Insurance	Detail	System
<input type="checkbox"/>	Active Certificate List	Listing format of all active Certificates from an ...	Insurance	Listing	System
<input type="checkbox"/>	Active Certificate Summary	Summary format of all active Certificates from an ...	Insurance	Summary	System
<input type="checkbox"/>	All Active Documents Detail	Detail format of all active documents.	Documents	Detail	System
<input type="checkbox"/>	All Active Documents Listing	Listing format of all active documents.	Documents	Listing	System
<input type="checkbox"/>	All Active Documents Summary	Summary format of all active documents.	Documents	Summary	System
<input type="checkbox"/>	All Inactive Documents Detail	Detail format of all inactive documents.	Documents	Detail	System
<input type="checkbox"/>	All Inactive Documents Listing	Listing format of all inactive documents.	Documents	Listing	System

The report list editor displays all reports available in the system. This function is used by GG-One Software technical developers for adding new reports and editing the report names. This information is 'view only' for customers.

**End of  
Tutorial**