

# GG-One Software

## iFastrack v8.10 Tutorial

### Reports



This tutorial provides an overview of the iFastrack Report processing for insurance certificate and document reports.

# iFastrack Menu Screen



Select Reports to process insurance certificate and document reports. Reports are created using Crystal reports and appear online in PDF format for viewing, printing and saving. Note that the pop-up feature must be active/enabled on the desktop for the reports to appear.

# Report Selection Screen



**Select Report to Print**

Select Category: \*\* Please Select \*\*  
Documents  
Insurance

Select Type: Listing  
Summary  
Detail

Select Report: Acceptable Certificates Summary  
Active Certificate Summary  
Inactive Certificate Summary  
Unacceptable Certificates Summary

Summary format of all active Certificates that have an unacceptable status.

First select the report category: Documents or Insurance.

Second, select the report type: List (high level summary, one line per vendor), Summary or Detail

Third, select the report. Only reports available for the category and type selected will appear.

The report filter/sort screen will pop up.

# Report Filters/Sorts

| Available Filters                 |                                      | Sort Order            |                       |                       |
|-----------------------------------|--------------------------------------|-----------------------|-----------------------|-----------------------|
|                                   |                                      | First                 | Second                | Third                 |
| Vendor                            | All <input type="button" value="v"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Group                             | All <input type="button" value="v"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Service                           | All <input type="button" value="v"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| XRef                              | All <input type="button" value="v"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ins Status                        | All <input type="button" value="v"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Certificate Name                  | <input type="text"/>                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Number of Letters Sent<br>(9,999) | <input type="text"/>                 |                       |                       |                       |

This screen allows you to filter your report by any of the fields displayed on the screen. Click the Select Report button after filter fields have been selected. The report will appear on your screen in PDF format for viewing. You can print or save the report from the PDF screen. Note: 'due soon' or 'soon to expire' reports that trigger off a date must have the number of days out entered on this screen in the designated box.

Note: reports require 'pop-ups' to be allowed on your desktop settings for the iFastrack web address.

# Sample Document Report Type List – All Active

## DOCUMENT TRACKING

---

|  |               |
|--|---------------|
| Company: Hartford Industries   | June 16, 2010 |
| Report: All Active Documents Listing                                   | 11:45 am      |
| Filter: All Vendors, All Groups, All Services, All XRefs, All Statuses |               |

---

| <u>Vendor</u>        | <u>Document #</u> | <u>Description</u>           | <u>Group</u> | <u>Service</u> | <u>Aprvl Date</u> | <u>Expire Date</u> | <u>Close Date</u> |
|----------------------|-------------------|------------------------------|--------------|----------------|-------------------|--------------------|-------------------|
| Bainbridge Co        | P08644            | Maintain Grounds at site 190 | Consultant   | Lawn Care      | 04/20/2009        | 05/01/2011         |                   |
| Bainbridge Co        | P124408           | Maintain Grounds of Site 100 | Consultant   | Lawn Care      | 07/15/2007        | 09/15/2009         |                   |
| Ewin Electric Supply | New Doc 1         |                              | Contractor   | Electrical     |                   |                    |                   |
| Roberts Lawn Service | 222222            | Project 100                  | Consultant   | Lawn Care      |                   | 11/30/2009         |                   |
| Simpson and Company  | H-901             | Lawn Service                 | Contractor   | Electrical     |                   | 06/07/2011         |                   |

\*\*\*\* End Of Report \*\*\*\*



**End of  
Tutorial**