# FSC Manager

» Reports

# Table of Contents

# Introduction

Reports aggregate and display data in a readable format to help the agency manage their business. Reports can assist with the daily workflow, provide information about monthly and yearly earnings, and help locate clients for specific marketing campaigns. There are several reports created by FSC that can be run from the *Reports* button on the Banner. Users may also use Report Builder to create their own custom reports.

This chapter will explain what kind of information each report contains and includes instructions on setting up custom reports.

# Reports Training

## Reports Screen

The *Reports* button opens this screen. The standard or canned reports are listed in the *Reports* area at the bottom of the screen. Reports are grouped together in categories to help users better understand their functionality.

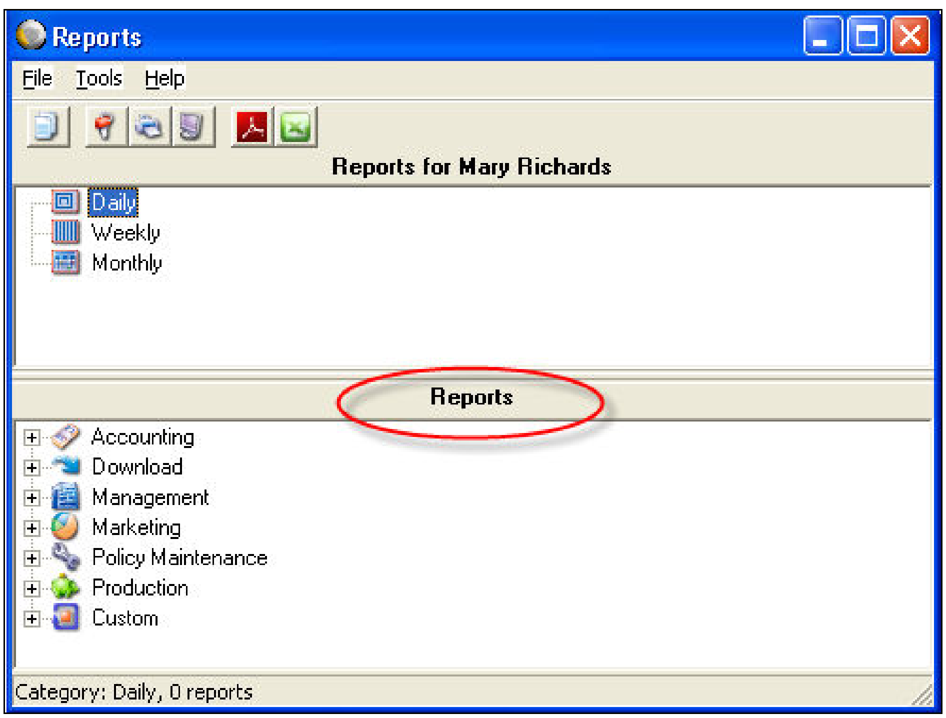



Figure 1: Reports

Click on the **+** to expand the category and see the list of available reports. The report categories and names cannot be changed in this area. The user must view a report parameters screen each time a report is run to verify that the date range is correct and to select any filter, sort, or page break options before printing.

**Report Parameters**

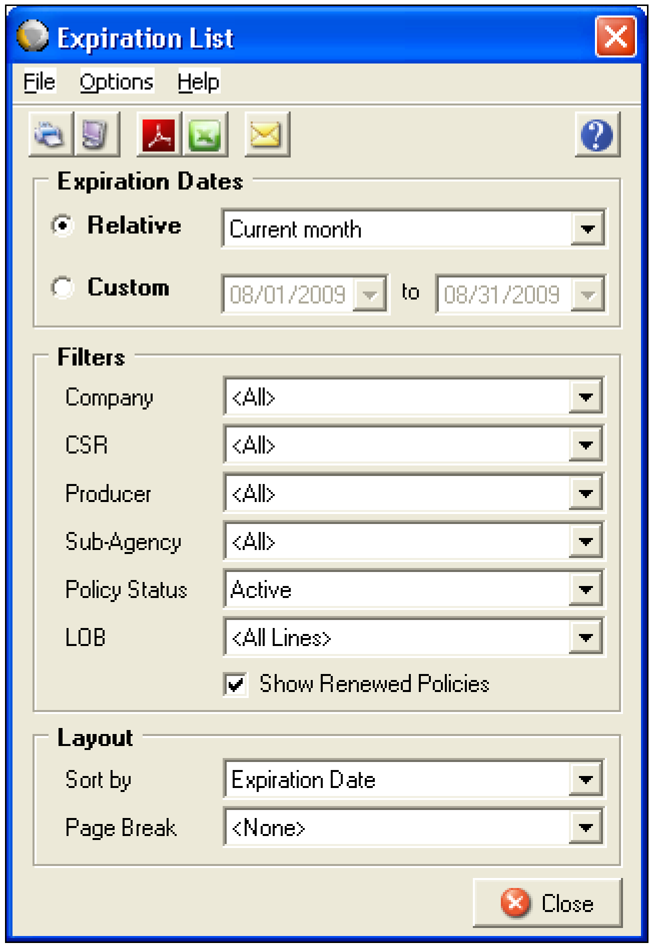



**Figure 2: Report Parameters Screen**

Many reports incorporate a date filter. Any report with a date filter will have two options: *Relative* date and *Custom* date. *Relative* dates allow the user to select a period of time (i.e. this month) and then the report calculates the correct date range. The user can also select a *Custom* date and specify the beginning and end of the date range.

By default, the filter drop downs will only show active items. It is rare that a user would need to filter by an inactive producer, company, sub-agency, or category, and it causes confusion when duplicate items (active and inactive) appear in a drop down filter. However, if this is necessary, click on the *Options* menu and click on *Show "inactive" items in filters*. This will adjust the drop downs to include inactive items.

**Custom Filters**

Many filters contain an option called <Custom>. When the user selects <Custom>, a selection screen will open, the user can check mark in the options that apply and click *OK*. If there is a custom filter that is used repeatedly, follow the steps below to create a saved group for that filter.

**1.** At the main report screen, go to *Tools->Setup Saved Groups*


Figure 3: Reports – Tools->Setup Saved Groups

**2.** Select a group type from the drop down

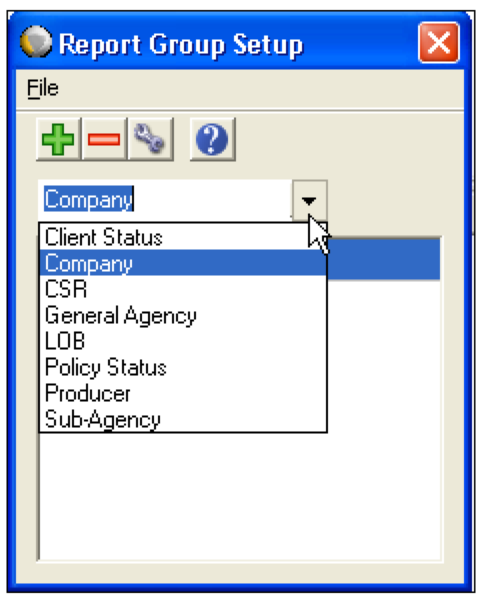



Figure 4: Select a Group

**3.** Click + to add a custom group

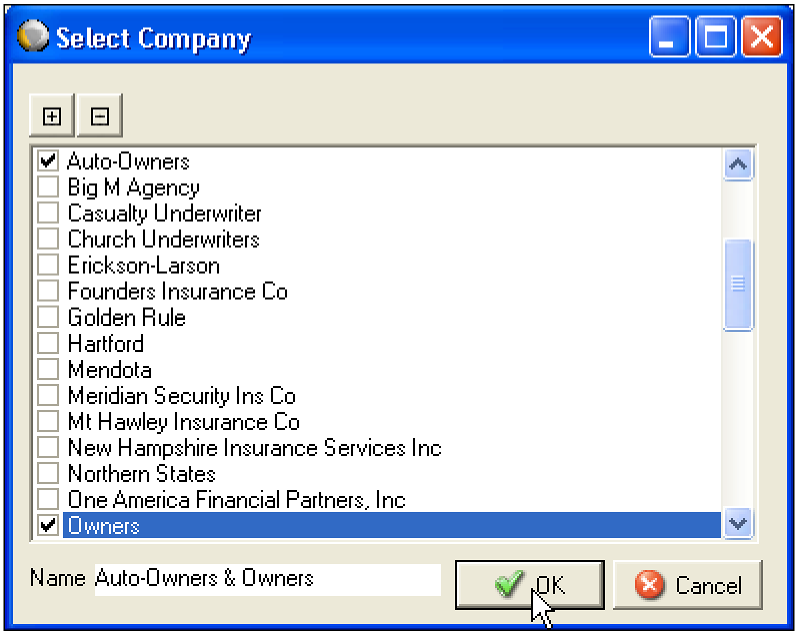



Figure 5: Select Multiple Records for Group

**4.** Check mark the group members

**5.** Give the group a name

**6.** Click *OK* to save and click X to exit.

The custom group will appear in the filter drop down of all applicable reports.

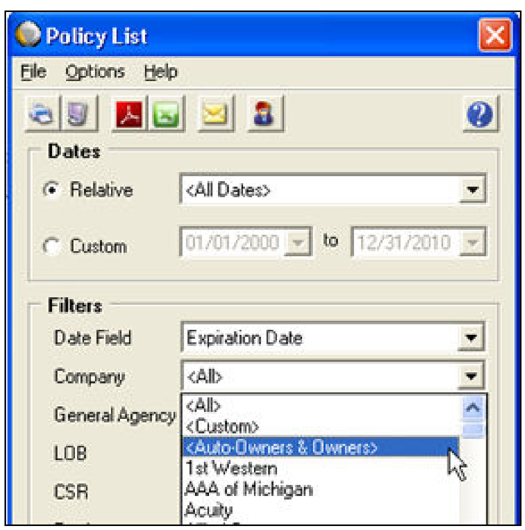



Figure 6: Saved Group Appears in Filter Drop Down

**My Reports Screen**

The top area of *Reports*, referred to as *My Reports* throughout this document, can be customized by each user in the following ways:

- Create a custom list of reports that the user commonly uses
- Rename the reports
- Organize the reports by categories
- Create multiple instances of the same report but with different dates, filters, sort and page break options

The date range, filters, sort and page break options are automatically saved when a report is run from *My Reports*.

Reports can be added to *My Reports* by clicking, dragging and dropping, or by right-clicking and selecting *Add to My Reports*.

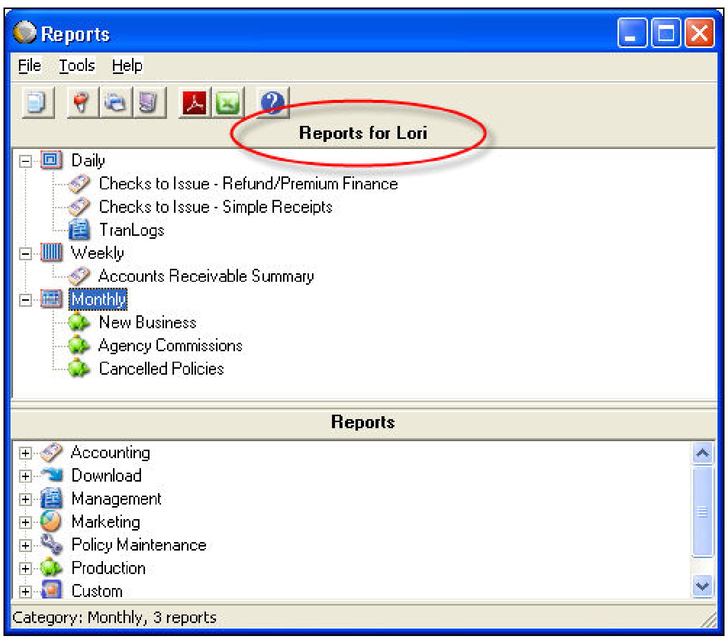



**Figure 3: My Reports**

Once the report has been moved to My Reports, users can do the following:

- Drag and drop reports into categories
- Drag and drop reports to move them up and down the list
- Run the report  (double click)
- Preview the report 

- Print the report
- View the report data in Excel
- View the report in PDF
- Email Report (this can only be done within the report)
- Right-click on report and set frequency
- Right-click on a report and copy (giving a new name)
- Right-click on report and rename
- Right-click on a report and remove from *My Reports*
- Right-click on category and rename
- Right-click and create new category
- Right-click and delete category

## Report Hyperlinks

Reports contain hyperlinks that allow users to navigate directly to information on the report from the report preview. Hyperlinks are identified in blue with an underline (e.g. Client name will open a Client screen).

Many reports will also contain an Open Clients button at the report filter screen. After determining the report criteria, the user may click on this button to load all client screens for everyone that would appear on the report. The user may then scroll from one client to the next.

**On the Download Transaction Report the user can double click a policy listed on the grid to open an individual client or policy. The default will open the policy, but the user can change the default by right clicking on the grid and putting a check mark in *Client Opens with Double Click*.**

## Reports Summary

Below is a list of all reports along with a brief description.

### Accounting

*Accounting Transaction – Detailed* - A breakdown of the Accounting Transaction Summary report. View the detail of all debits and credits for a general ledger account number in a given date range.

*Accounting Transaction Summary* - Recreates the Transaction Report generated by posting transactions to Peachtree/Quickbooks. This report can be used to compare the journal entries in FSC Manager with Peachtree/Quickbooks if the user believes there is a discrepancy.

*Accounts Receivable History* - The history of an individual client's accounts receivable. This is similar to a statement; however, unlike a statement, it includes history invoices.

*Accounts Receivable Summary* **-** This is a summary of all aged accounts receivable, as of the day the report is run. This report cannot be run for a previous date, so it is important to print and save a copy of the report on the last day of the month and the last day of the year. The amount showing in the Balance

Due column should equal the total of the 1100 (Accounts Receivable)+/- 1180 (Pre-Paid on Account) in Peachtree/Quickbooks.

*Checks to Issue – Refund/Premium Finance* - A list of checks that need to be issued in the accounting software due to refunds and premium finance endorsements completed in FSC Manager. When issuing these checks, the user should debit cash and credit the 2060 (Checks to Issue) account.

*Checks to Issue – Simple Receipts* - A list of money that needs to be paid to a carrier on a direct bill policy because the insured made the payment at the agency. This report is generated from Simple Receipts.

*Deleted Simple Receipts* - A list of payments made in the office on direct bill policies that were deleted because they were duplicate entries, entered on the wrong client, or returned due to insufficient funds. This information comes from the Simple Receipt button in Clients.

*Direct Bill Invoice History* - The history of an individual client's direct bill invoices. This information comes from invoices on the Direct Invoices tab in Billing Setup.

*Receipts – Agency Bill* - A list of agency bill payments that can be used to fill out a deposit slip. Information comes from Receipts button on the Banner.

*Simple Receipts* - A list of payments made at the agency on direct bill policies. The report is broken down by type of payment: Cash, Check, Money Order, Credit Card, and Debit Card. Information comes from the Simple Receipts button in Clients.

*Voided Receipts – Agency Bill* - A list of receipts from agency bill policies that were voided because they were duplicate entries, entered on the wrong client, or returned due to insufficient funds. This information comes from the Receipts area on the Banner.

## Download

*Download Error/Info Log* - A list of policies that had errors during the download process. This report can also be accessed immediately after the download or by going to *Tasks* and executing *View Company Download Information ->View Error/Info Log*.

*Download Transactions* - A list of all policies downloaded for a date range. This report can be accessed immediately after the download or by going to *Tasks* and executing *View Company Download Information ->View Transaction Log*. The user can use the Open Clients button at the top to open all clients simultaneously from the report. The user can also double click on a policy in the grid to opne an individual client or policy depending on the setting. (The default opens the policy, but the user may change the default by right clicking on the grid and putting a check mark in *Client Opens with Double Click.*)

*Premium Change* - A report of policies that have had a premium change during the download process. Most agencies use this report to identify renewals that have increased by more than a specified percent so they can re-quote the policy before the insured decides to shop for new insurance. The user determines the percent of increase and how many days they would like to look back through the download.

## Management

*Address Book List* - A report of Address Book information. Contact information is optional.

*Client List* - A report of client name, address, phone numbers and email address. Easily exported to Excel for mass mailings.

*Client Rank* - A list of active clients and the total annualized premium and commission generated by their active policies. The report is ranked from highest to lowest based on either premium or commission.

*Company List* - A report of Companies from the System area. Contact information is optional.

*General Agency List* - A report of General Agencies from the System area. Contact information is optional.

*Policy List* - A master list of all active policies with a particular company or all companies.

*Service Link Inquiries* - A report on the number of Service Link (Real-Time) inquiries completed in FSC Manager.

*Tranlog Summary* - A summary of the number Tranlogs done in a date range broken down by category. This report can also grouped by user to see how many Tranlogs individual users are doing in a specified date range.

*Tranlogs* - A report of all Tranlogs made in the system during a given date range.

## Marketing

*Auto And Home Not Umbrella* - This report searches the database for clients that have an auto and a home policy but do not have an umbrella.

*Auto Not Home* - This report searches the database for clients that have an auto policy, but do not have a home policy.

*Business Classification* - Allows agencies to find clients that are classified as a specific type of business. Agencies can assign the type of business on the Client screen under *More Info*. This is useful if a carrier has a specialty market for a specific type of business (i.e. a special program for Plumbers).

*Cross Selling Policy Types* - This report allows the user to search the database for cross selling opportunities.

*Family Member Ages* - A report of family members who fall within a specified age range. Often used for marketing products that may target clients of a specific age (i.e. supplemental health care insurance to individuals over 64 years of age).

*Family Member Birthdates* - A report of family members who have a birthday in a given month. Agencies use this report to send birthday cards to insured's and their family members.

*Home Not Auto* - This report searches the database for clients that have a home policy, but do not have an auto policy.

*Lead Classification* - Allows agencies to track how new customers are hearing about the agency. This information comes from the *Lead* field on the Client screen on the *More Info* tab.

*Prospect Expiration Dates* - Expiration list of policies on Prospects (Prospects are defined as records added to the Client button on the Banner and assigned a status of Prospect). This report searches on the month of the expiration date, not year.

*Prospect List* - A report of prospect name, address, phone numbers and email address. Prospects are defined as records added to the Client button on the Banner and assigned a status of Prospect.

## Policy Maintenance

*Claim Payments* - Claim payment history on a specific client. This information comes from the *Claim Payment* tab of the four loss notices in the system: Auto Loss, Property Loss, Notice of Occurrence and First Report of Injury or Illness.

*Claims* - A list of open and/or closed claims for a given period of time. This information comes from the four loss notices in the system: Auto Loss, Property Loss, Notice of Occurrence and First Report of Injury or Illness.

*Expiration List* - A list of policies due to expire in a given month. The option "*Show Renewed Policies"* allows the report to find policies that were due to expire in the requested month, but have already been renewed. These policies will be designated with a (R) after their expiration date.

*Expired Policies* - Policies where the expiration date has passed but the policy is still listed as active. Research whether the policy should be renewed or cancelled.

*Pending Applications* - A list of policies that have *Pending* or *Future Application* in the policy number that are marked as active. If the policy has not been written, change the status to inactive or quoted. This helps keep the system clean when running other reports and doing marketing.

*Personal Auto Limits* - A list of all policies that have specified auto limits/deductibles.

## Production

*Agency Commissions* - A report of agency commissions per company. This information is generated by users creating invoices in *Billing Setup*. Should the agency choose to reconcile the commissions, this is done from the Comm button on the Banner.

Agency Bill commissions will be handled in *Billing Setup*/*Commission Reconciliation*. *Direct Bill commissions* can be handled in the *Billing Setup*/*Commission Reconciliation* if the agency wishes to reconcile commissions. If the agency does not wish to reconcile, it may be easier and quicker to use the new DB Comm area. Several carriers can download commission statements to the DB Comm area or the agency may manually enter the commissions. There is a separate agency commission statement for the DB Comm area.

*Agency Fees* - Agency fees assigned on a Simple Receipt during a given period of time.

*Annualized Premium Projection* - An estimate of the agency's book of business if all premiums and commissions are annualized. The information is broken down by line of business and shows a percentage of total premium volume for each line of business. This is useful when filling out an application for E & O insurance.

Report Basis Options:

> *Invoice Commissions* - All invoices that were invoiced during the date range (uses Invoice Date)
>
> *Reconciled Commissions* – All invoices that have been reconciled and assigned a Paid Date in the range requested (uses Paid Date).

*Book of Business* – Shows premium and commission earned for each line of business for the month and then year-to-date. This comes directly from the direct and agency bill invoices created in *Billing Setup*. This report is generally printed at the end of each month.

*Cancelled Policies* - Track the number of cancelled policies during a given time period and the amount of premium that is lost. This report will include policies that were re-written because the original policy will be “cancelled” by the initial carrier. This report tracks cancellations based on policy status being cancelled and the cancellation date.

*New Business* - Tracks the number of new policies written during a given time period and the amount of premium that is gained. This report will include policies that were re-written because the policy that is written with the new carrier will be considered “new”. This report identifies new business by its issue date, which is visible from the *Billing Setup* area.

*Policy Demographics by Region* - A breakdown of policy count and annual premium by location (zip, city, state or county).

*Producer Broker Fees* - A report of fees paid to the agency that have been split with the producer. This information is generated from commissionable fees added to Simple Receipts.

*Producer Commissions* - A report of producer commissions with a page break between producers. This information is generated by users creating invoices in *Billing Setup*. Should the agency choose to reconcile the commissions, this is done from the Comm button on the Banner.

Report Basis Options:

> Invoice Commissions - All invoices that were invoiced during the date range (uses Invoice Date)
>
> Reconciled Commissions, Unpaid – All invoices that have been reconciled and assigned a Paid Date in the range requested, but do not have a Paid Agent Date (uses Paid Date)
>
> Reconciled Commissions, Paid – All invoices that have been reconciled and assigned both a Paid Date and a Paid Agent Date (uses the Paid Agent Date)

Agency Bill commissions will be handled in *Billing Setup/Commission Reconciliation*. Direct Bill commissions can be handled in the *Billing Setup/Commission Reconciliation* if the agency wishes to reconcile commissions. If the agency does not wish to reconcile, it may be easier and quicker to use the new DB Comm area. Several carriers can download commission statements to the DB Comm area or the agency may manually enter the commissions. There is a separate producer commission statement for the DB Comm area.

## How to Create a New Custom Report

As an example, we will create a report called Premium Volume by Client. This will show us the total of annualized premium and commission for each active client and for their active policies.

1. Click the *Reports* button on the banner.
2. Click *Create New Custom Report* button .
3. Select the Table where the data to be reported on is stored. **Usually Clients+Apps, this contains all personal client information and policy information.**


**Figure 4: Reports/Select Table**

**4.** Click *OK*. The user will receive the message, "*Type the Title you want. Fields are pre-selected for you. To maintain maximum speed retrieving data, remove fields that you are not going to use*." Click *OK*.

**5.** Type in the *Title* of your Report.

**7.** Select Tables

*Clients* and/or *Genappinfo* will automatically be selected. Additional tables can be added to the report. The most common tables that agencies use are:

*Clients* – client name, address, phone number, status
*GenAppInfo* – policy number, effective date, expiration date, premium, policy status
*CompanyList* – names of companies
*Producers* – names of producers

However, any table listed under *Tables Available* can be used in a report. To add a table:

**a.** Click on *All Tables* under *Tables Available*. This will provide a list of tables.

**b.** Highlight the table name

**c.** Click on the *Add Table to Selected*. When a table is added, it will display in the *Tables Selected* area.

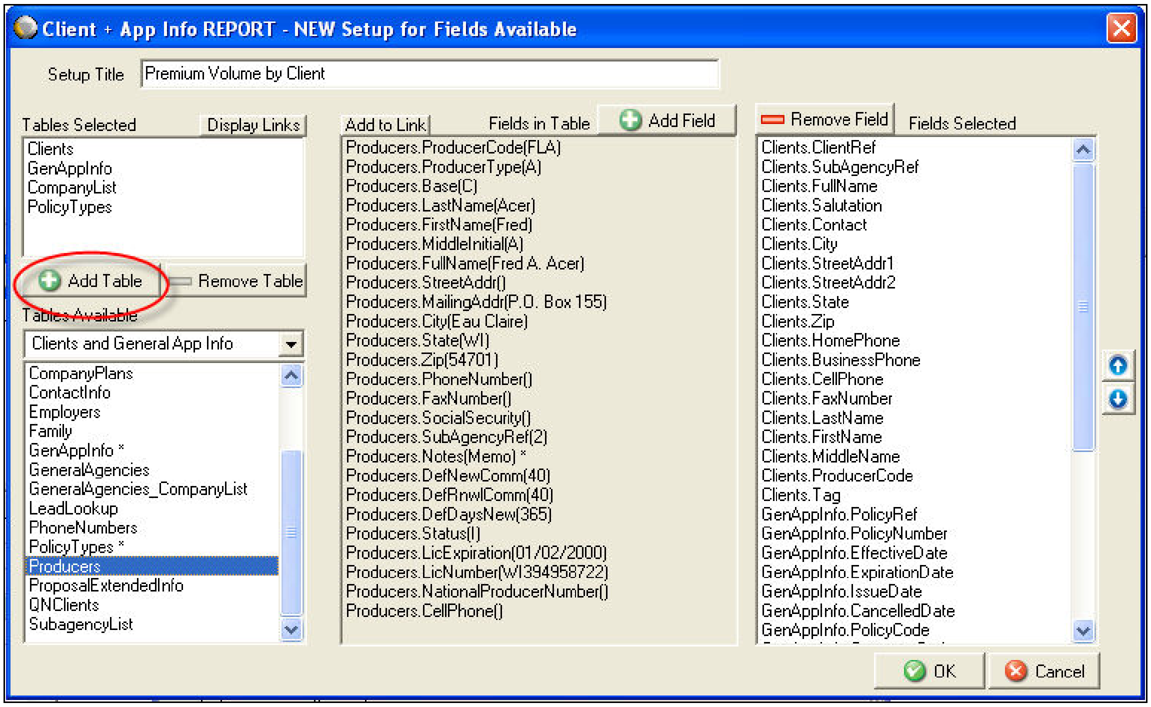



**Figure 5: Select Tables**

**7.** Add Fields

Certain fields will be pre-selected. Fields are selected for two reasons. They are fields that the user wishes to see displayed on the report or the fields help define the search criteria for the group of information that will appear in the report.

Remove fields that are not needed by highlighting them under *Fields Selected* and clicking on the *Remove Fields from Selected* button.

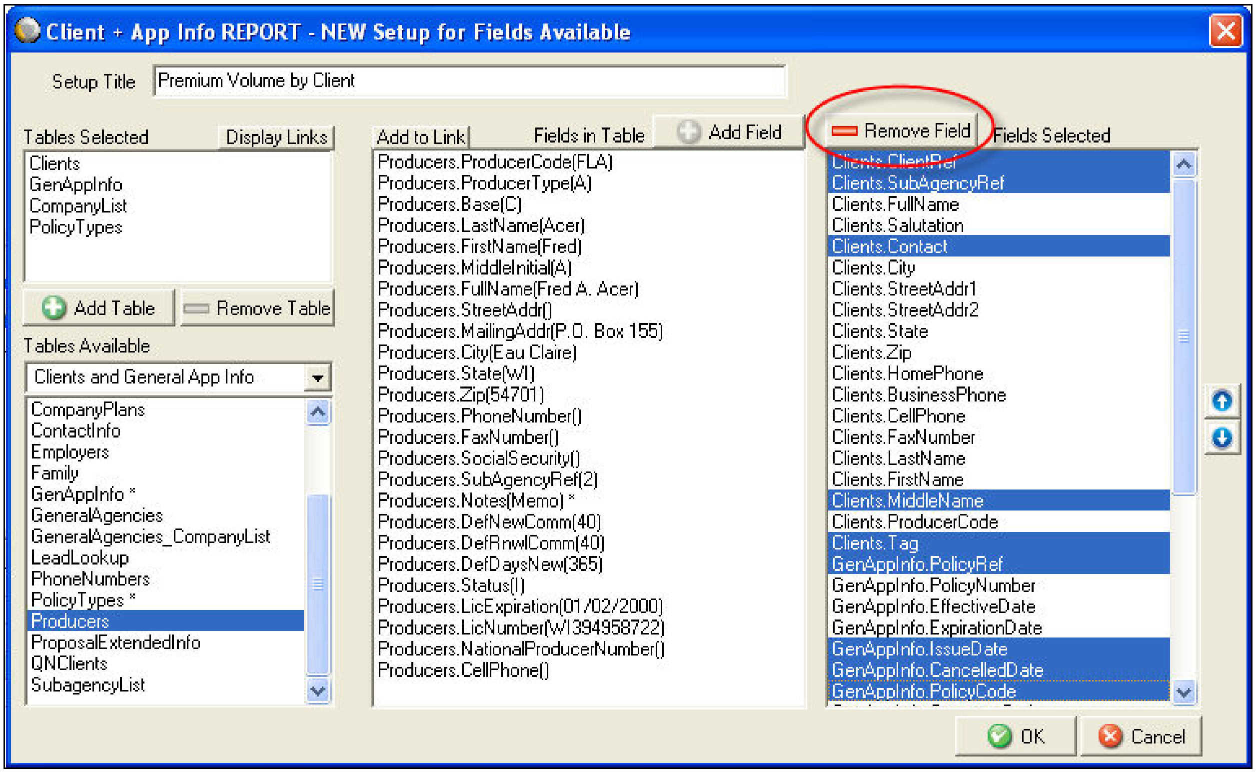



**Figure 6: Removing Selected Fields**

Add any additional fields needed by highlighting a field in *Fields in Table* and then click on *Add Fields to Selected*.

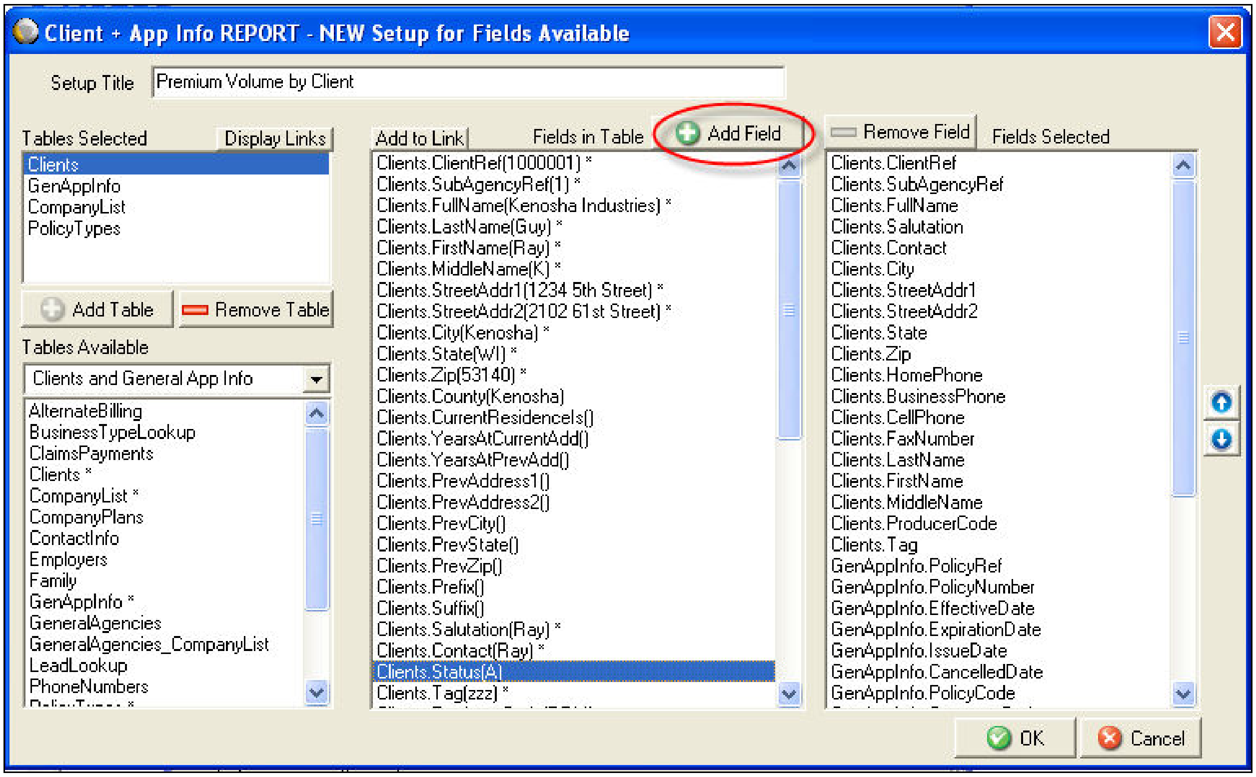



**Figure 7: Adding Selected Fields**

The field listed at the top of *Fields Selected* will determine the order in which the items will display on the report. For Premium Volume by Client use *ClientRef* as the first field, *Name* could be used but it is not a unique field as some clients have the same name. When doing a report to find how many people live in each zipcode, move *Zip* to the top of the list. If doing a report to see how many clients each producer had, move *ProducerCode* to the top of the list.

*GenAppInfo* contains a special field called *PolicyCrossRef*. This field allows the user to cross reference two policy types on the same client. For example, find all clients who have an auto and not a home. If you were trying to locate all clients that have a specific policy type, you could use the field called *PolicyCode*.

**8.** Click *OK* to continue to the next step.

**9.** At this screen, the user will define the group of clients that will show up on the report. This may be referred to as the retrieve spec.

Common retrieval symbols:
**/** means NOT
**=** means EMPTY
**/=** means NOT EMPTY
**;** means AND
**:** means OR
**>** means GREATER THAN
**<** means LESS THAN
**..** means wild card search. Search on partial information such as ..christopher

Date retrievals:
>=01/01/2008 <=12/31/2008
{TODAY}
>{TODAY+30} <{TODAY+60}
MM/DD/YY means current month, current day, current year
MM/../.. means current month, any day, any year

**<u>Two fields that should generally be considered are the *Client* and *GenAppInfo Status* fields. These are two separate fields. A value of *A* stands for active.</u>**

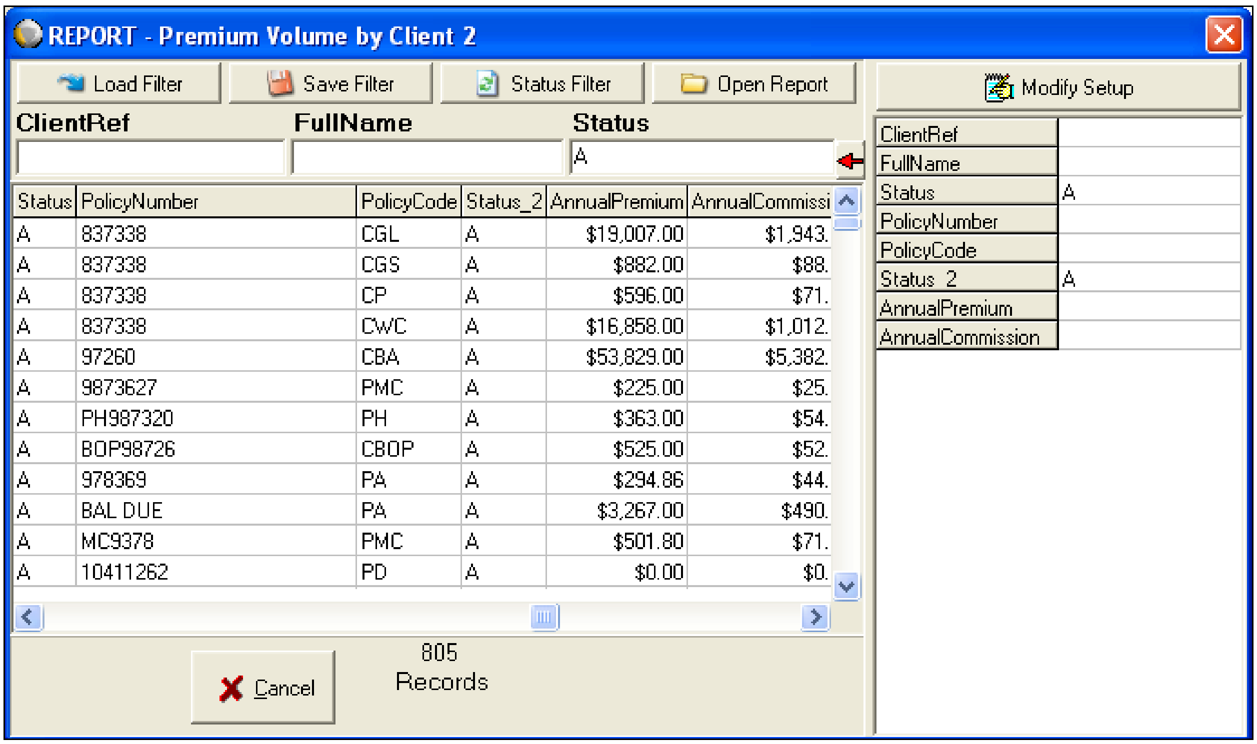



**Figure 8: Retrieve Request**

**10.** Click Open Report to design the layout.

**<u>Groups</u>**
Groups allow you to calculate a subtotal for a "group" of data. In the example *ClientRef* will be the group used to determine how much annual premium and commission is earned for each client. Groups also allow the user to "group" information together. To create a report of all clients for each producer, use *ProducerCode* as the group. **<u>Usually the group should match the first field of the locater because it also determines the sort order.</u>**

a. Click *Report->Groups*

b. Select a field that defines the group. To get a subtotal for each client, it would be *ClientRef*. To get a subtotal for each agency, use *SubAgencyRef*, if the user wants a subtotal for each producer, select *ProducerCode*.

c. Click *Add*

d. If you would like it to page break between subtotals, put a check mark in *Start new page*.

e. Click OK

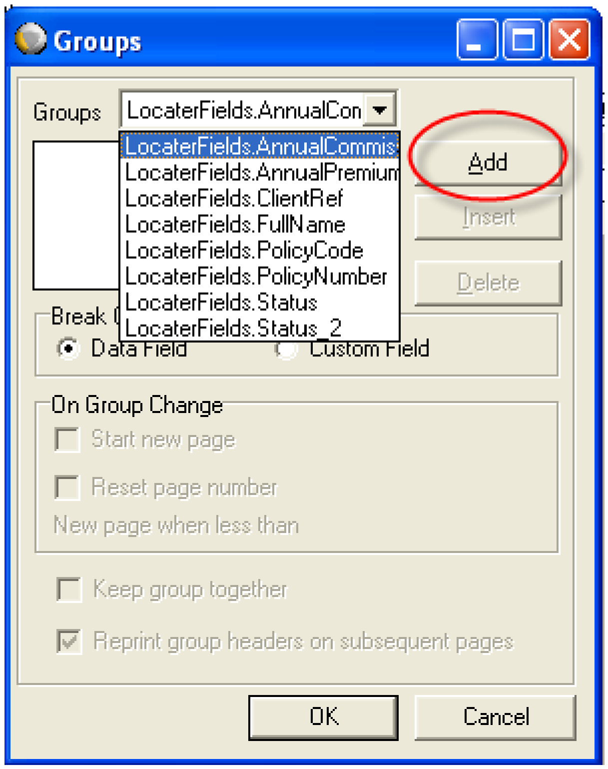



**Figure 9: Add a Group**

## Headers/Detail/Footer/Summary

Headers are the area where labels for fields in the report are generally placed. Information that should only be seen once in the report can also be placed in the header. For example, in the report, the client's name doesn't need to be seen next to each policy, so it would go in the header.

Detail is the body of the report. Place the fields across the page as they should appear on the report.

The Footer is generally where calculations that subtotal information for a group should be placed.

The Summary is where a calculation to get a grand total of all of the groups would appear. To add a Summary, click *Report->Summary*.

## Adding/Deleting Fields

Fields will automatically populate into the Detail band on the report. Fields can be moved simply by clicking and dragging them to the location preferred. To delete a field, highlight the field and hit the delete key on the keyboard. To add a field, click on the DB Text button. Click in the location where the field will be added on the report. This will create a DB Text box. Then select a field from the drop down to use in the DB Text box.

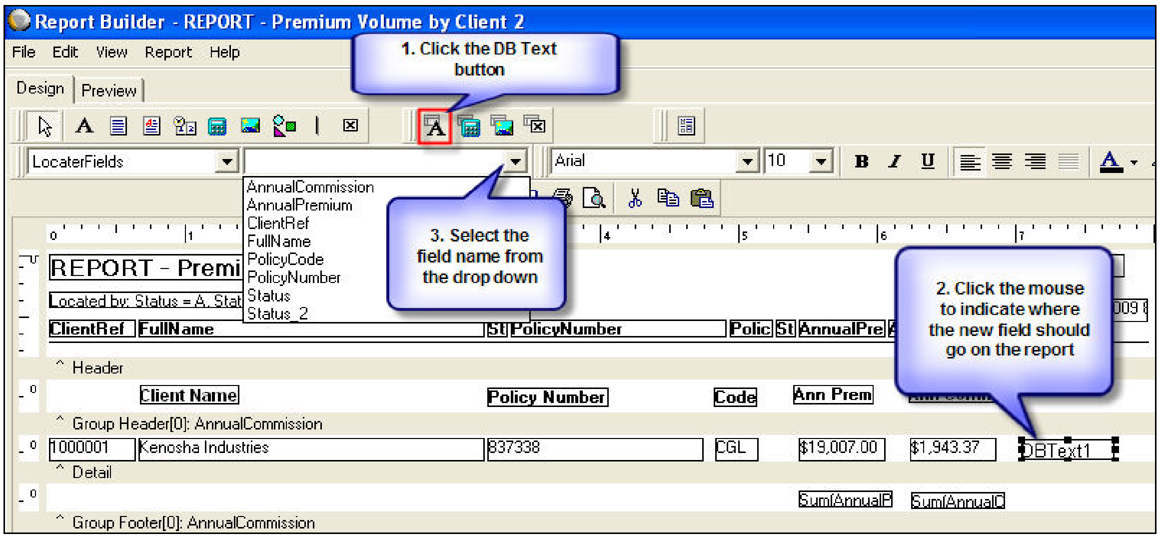



Figure 10: Adding a Field

## Adding/Deleting Labels

Labels generally appear in bold and can be moved by clicking and dragging them. To delete a label, highlight the label and hit the delete key on keyboard. To add a label, click on the Label button. Click in the location where the label will be added on the report. This will create a Label box. Then type a label description in the text box above. To edit an existing label, highlight the label and edit the text in the text box above.

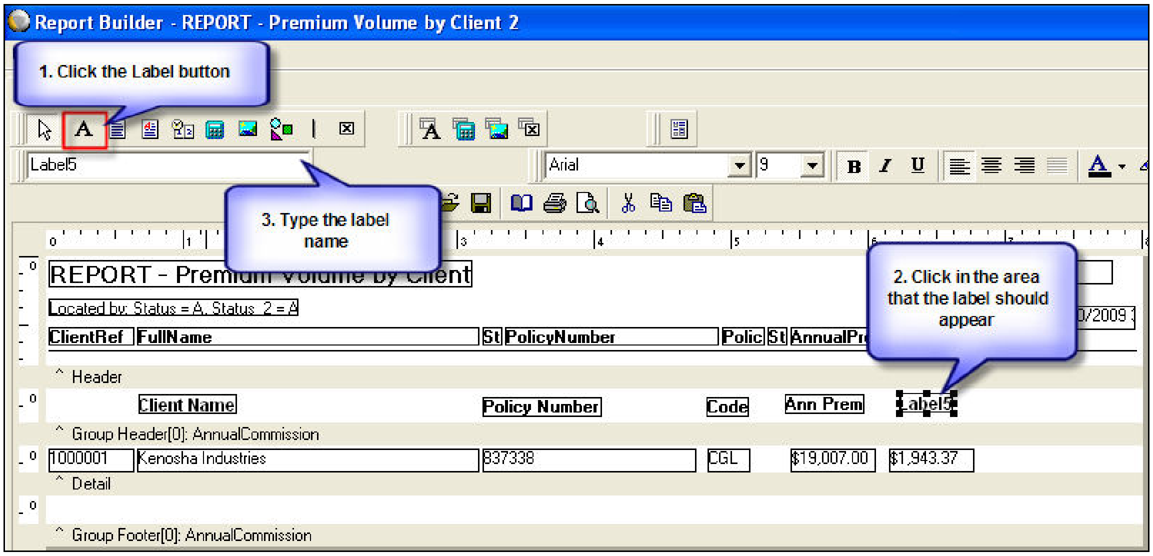



Figure 11: Adding a Label

Fields containing decimal points are best displayed using right justification. Click on the field and click on the Right Justify button on the toolbar.

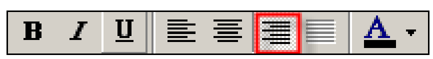


Figure 12: Right Justification

## Calculations

Calculations give a sum or a count of a specified field. Calculations should be placed in the Group Footer and the Summary. To add a calculation, click on the DB Calc button. Click in the location where the calculation will be added on the report. This will create a Sum box. If you would prefer for it to count records rather than add, right click on the field and left click on *Calculations*. Select *Count* from the *Calc Type* drop down. Finally, select the field that will be added or counted from the drop down box above.

In calculated fields that contain dollars and cents, right click on the calculation and left click on *Display Format*. Select a format that will show the value with a decimal point and click *OK*.

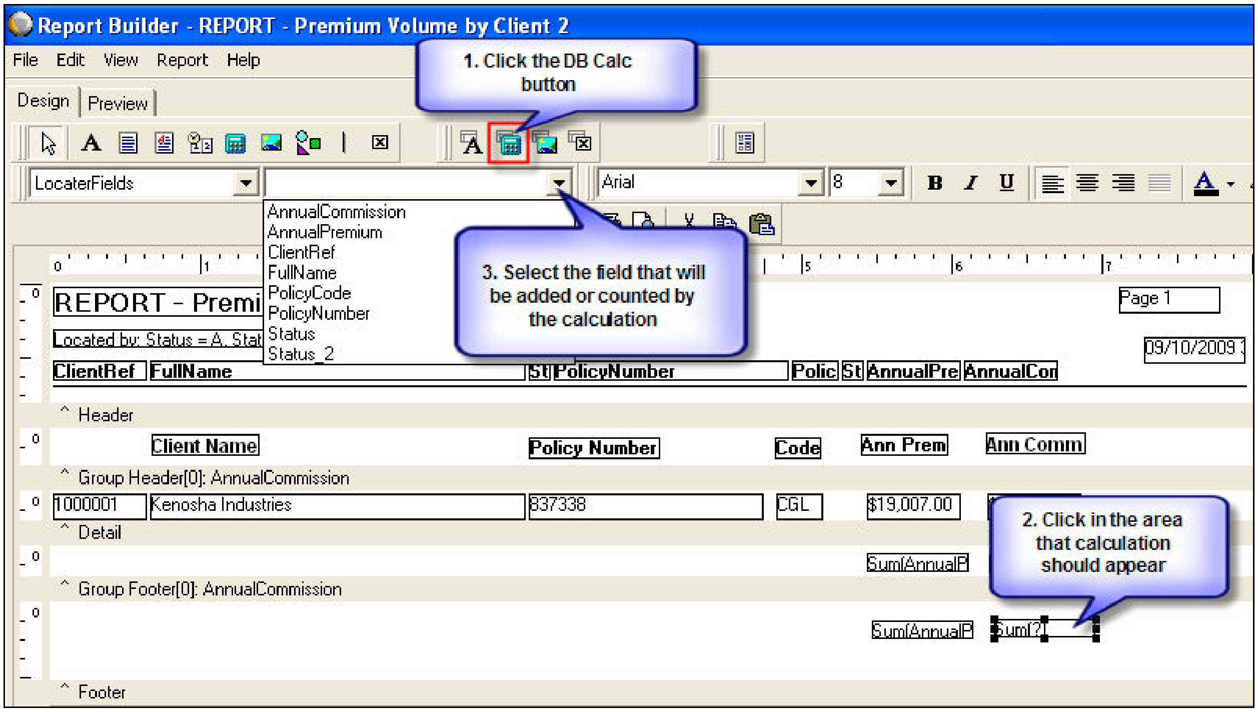



**Figure 13: Adding a Calculation**

11. Click the *Preview* tab to view a print preview of the report.

**REPORT - Prospect List** Page 1

Located by: Status = P 09/17/2007 4:11:25

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **FullName** | | **Salutation** | **Contact** | | | **City** | | |
| **StreetAddr1** | | **StreetAddr2** | | **St Zip** | **HomePhone** | **BusinessPhone** | **CellPhone** | |
| **LastName** | **FirstName** | **MiddleName Producer** | **PolicyNumber** | | **EffectiveDa** | **ExpirationD** | **IssueDate** | **CancelledD** |
| **PolicyComp CompanyName** | | | **St ClientRef** | | | | | |
| Duncan, Donna | | Dawn | Dawn | | | Eleva | | |
| | | 123456 Cherryvale Road | | WI 54738 | 715-287-2225 | 715-287-5552 | | |
| Duncan | Donna | HOU | PENDING | | | | | |
| PH SEC Secura Insurance | | | P 1000278 | | | | | |
| Duncan, Donna | | Dawn | Dawn | | | Eleva | | |
| | | 123456 Cherryvale Road | | WI 54738 | 715-287-2225 | 715-287-5552 | | |
| Duncan | Donna | HOU | PENDING | | 07/03/2007 | 01/03/2008 | | |
| PA ACU Acuity | | | P 1000278 | | | | | |
| Smith, John | | Johnny | Susan | | | Sabael | | |
| | | 123456 Cherry St. | | NY12864 | 715-555-5555 | 715-555-5555 | 555-555-5552 | |
| Smith | John | JPP | PENDING | | | | | |
| PH | | | P 1000282 | | | | | |
| Smith, John | | Johnny | Susan | | | Sabael | | |
| | | 123456 Cherry St. | | NY12864 | 715-555-5555 | 715-555-5555 | 555-555-5552 | |
| Smith | John | JPP | PENDING | | 08/10/2007 | 02/10/2008 | | |
| PA ATO Auto Owners | | | P 1000282 | | | | | |
| Wright, Gary L. & Cheryl | | Gary & Cheryl | Gary & Cheryl | | | Eleva | | |
| | | N193210 Lake Str. | | WI 54738 | 715-940-4183 | | | |
| Wright | Gary | L. & Cheryl RRM | PENDING | | 06/19/2007 | 06/19/2008 | 05/19/1982 | |

Figure 14: Report Preview

**12.** Click the printer icon to send the report to the printer.

**13.** When exiting the report it will prompt to save the report and retrieve request, yes will save this report for future use.

**14.** The report can be printed from the *Preview* tab, or after executing the report by selecting the *Print* option.

## How to Modify a Report

There are some *Custom Reports* in the Reports section that can be customized and used for agency needs.

**1.** Run the report.

2. Click *Modify Setup* to add/remove selected fields (see the *Creating a New Report* section of this document for directions).
3. The retrieve request can be modified for different report purposes(see *Creating a New Report*).

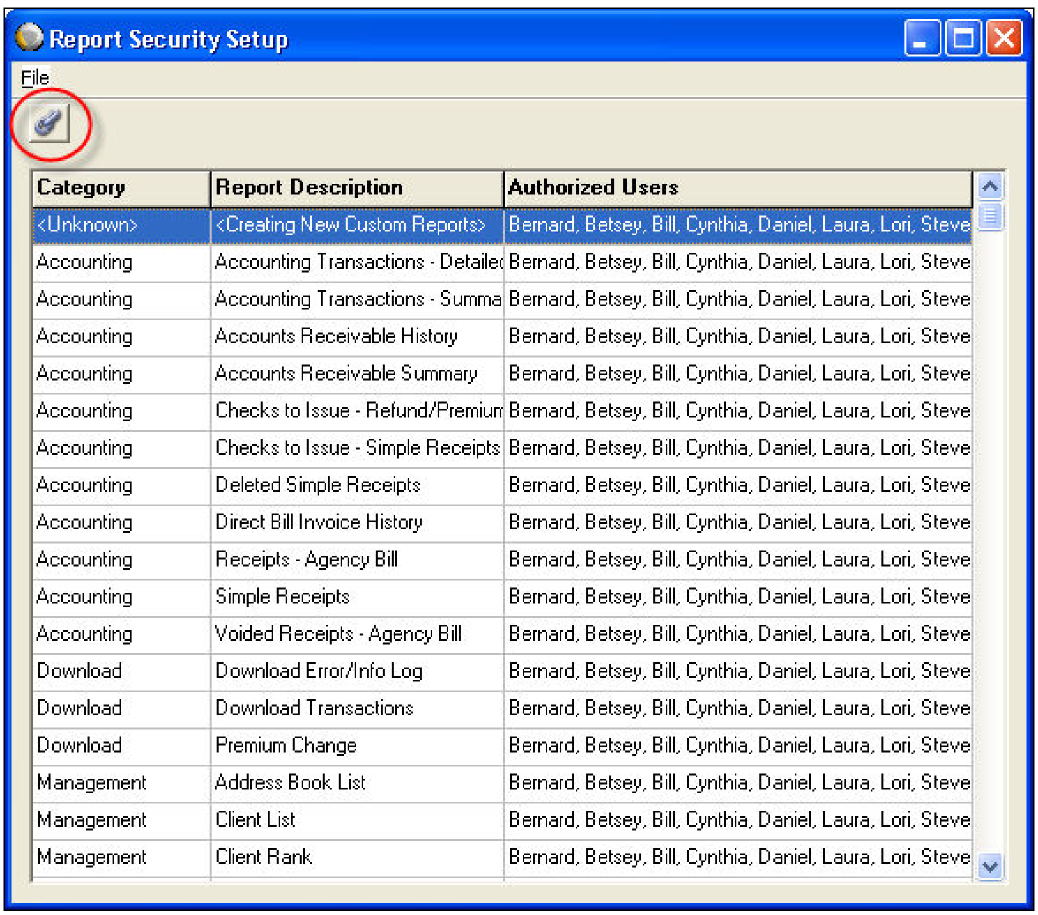
4. The *Design* tab will modify the report's appearance and *Preview* shows the print preview.

## Report Security

Security can be applied to individual reports. ***<u>When the system is updated to version 9.1, all reports will be available to all users until security is set by a level 1 user.</u>*** Only a level 1 user (Administrator) may set report security.

<u>Changing Report Security</u>

- » Report security is available at the top of the *Report* screen under *Tools->Setup Report Security*.
- » The administrator will see a list of all reports by category and a list of user names that are allowed to use and reports.




| Category | Report Description | Authorized Users |
|---|---|---|
| <Unknown> | <Creating New Custom Reports> | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Accounting Transactions - Detailed | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Accounting Transactions - Summa | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Accounts Receivable History | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Accounts Receivable Summary | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Checks to Issue - Refund/Premium | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Checks to Issue - Simple Receipts | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Deleted Simple Receipts | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Direct Bill Invoice History | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Receipts - Agency Bill | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Simple Receipts | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Accounting | Voided Receipts - Agency Bill | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Download | Download Error/Info Log | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Download | Download Transactions | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Download | Premium Change | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Management | Address Book List | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Management | Client List | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |
| Management | Client Rank | Bernard, Betsey, Bill, Cynthia, Daniel, Laura, Lori, Steve |

**Figure 15: Setup Report Security**

» Highlight a report and click the *Set Security* button 

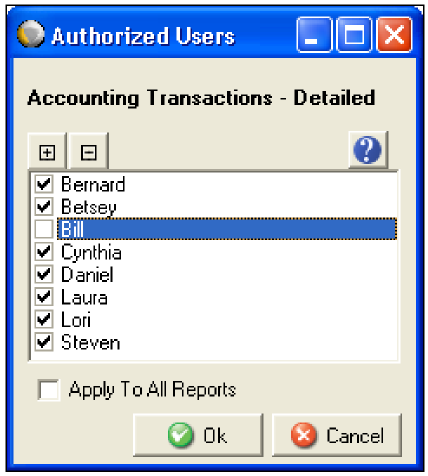



Figure 16: Authorized Users

» The names that are checked have permission to run the report

» The plus and minus button allow the administrator to check or uncheck all names

» The administrator may also check and uncheck names individually

» If the administrator wishes to apply the same security to all reports, place a check mark in *Apply To All Reports*

» Security settings can also restrict users from creating custom reports (this option is listed at the top of security screen)

When the administrator has removed a user from the list of authorized users, the report will still appear on the user's Reports screen, but it will display with a red link icon and the user will be unable to run the report.

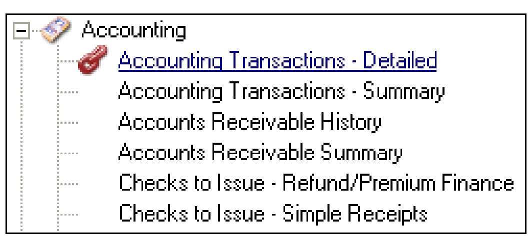



Figure 17: Not Authorized to Run Report

When new users are added to the system, they automatically have access to all reports until the administrator removes them from each individual report.

# Obtaining Support

If you have any questions about this training, please contact FSC Customer Support.  Thank you and enjoy using FSC Manager!

West Coast Customer Support: 800-433-2550
Midwest Customer Support: 800-401-2895
Email: fscmanagersupport@fscsolutions.com

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