

About ATS Reports

Using the Menu



Home – List of available reports with an account selection and category selection.

Schedule View – List of Scheduled reports.

Imaged – List of Imaged reports.

About – Application information.

Add/Modify Report – Allows for Deleting, Adding and Category Changes.

Administer – Setup user groups for access to reports by category.

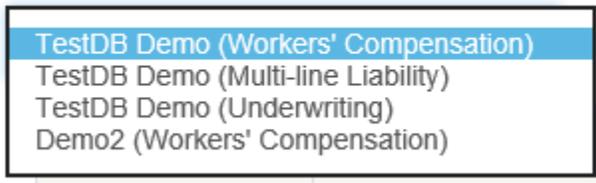
Note: User/Group Security may limit these menu options.

ATS Reports

Account: TestDB Demo (Workers' Compensation) Category: []

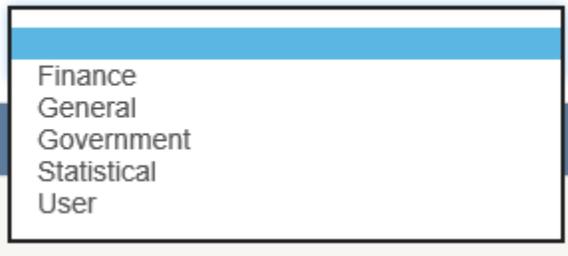
| | Report Description | Report Name | Category | LOB | NoPrompt | Favorite |
|--------|------------------------|----------------|----------|-----|----------|----------|
| Select | AdjPerform | AdjPerform | | WC | False | ♥ |
| Select | Adjuster Work Load B | WCAdjWorkLoadb | | WC | False | ♥ |
| Select | Lag Report | WCAdjusterLag | | WC | False | ♥ |
| Select | Loss Triangles and USP | wgrsupl_NET | | WC | False | ♥ |
| Select | New Cost Center Report | WCANPC3x | | WC | False | ♥ |
| Select | NHAWchk | NHAWchk | | WC | False | ♥ |
| Select | PrimeIP4 | PrimeIP4 | | WC | False | ... |

Account



This dropdown for selection of the data sources available to the user to execute reports in.

Category



This dropdown allows for the selection of report categories the user can select to adjust the list of reports available to the use. Leave blank for a full list.

Grid (List of available reports)

| | Report Description | Report Name | Category | LOB | NoPrompt | Favorite |
|--------|------------------------|----------------|----------|-----|----------|---|
| Select | AdjPerform | AdjPerform | | WC | False |  |
| Select | Adjuster Work Load B | WCAdjWorkLoadb | | WC | False |  |
| Select | Lag Report | WCAdjusterLag | | WC | False |  |
| Select | Loss Triangles and USP | wcgrsupl_NET | | WC | False |  |
| Select | New Cost Center Report | WCANPC3x | | WC | False |  |

Use the select button to execute the desired report.

Click of favorite button for any report you would like to add to your favorites list.

Prompting Page

Once you select a report to run you will be directed to a page that shows you the available prompts associated with the selected report. Some reports are designated as “NoPrompt”. In this case the report either has no prompting or the report will do it’s prompting.

The screenshot shows a web interface for the 'AdjPerform' report. At the top is a dark blue navigation bar with links for 'Home', 'Schedule View', 'Imaged', and 'About'. Below the navigation bar, the title 'AdjPerform' is displayed in blue. The main content area contains two side-by-side date selection controls. The left control is labeled 'Period From' and features a dropdown menu with 'No Setting' selected and a date input field containing '01/01/1980'. The right control is labeled 'Period To' and features a dropdown menu with 'No Setting' selected and a date input field containing '01/26/2018'. Below these controls are three buttons: 'Run Report', 'Schedule', and 'Exit/Close'.

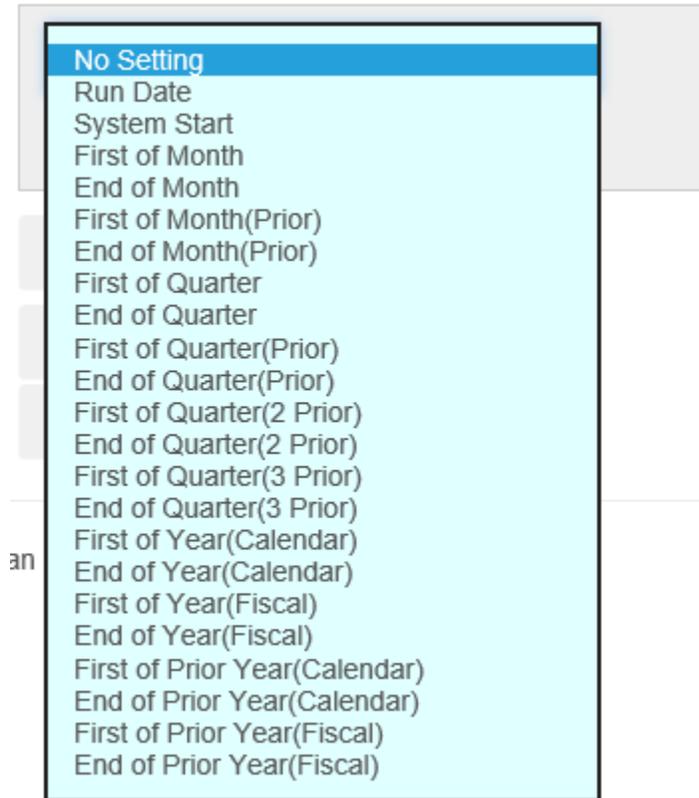
Prompts

Each prompt will default to values specific to the report. Each report allows you to set values and date fields allow for special settings.

Dates

If you click in the setting portion of the control you will be presented with a dropdown of option. These date option allow for defaulting to various system known values such as the date the report runs, beginning/end of the moth, quarter, year and so on...

Period From



Buttons

Run Report – Executes the report

Schedule – Launches the Schedule report dialog for the selected report. (Select all default options prior to scheduling the report)

Exit/Close – Returns you to the Home page of the report module.

Run Report

Schedule

Exit/Close

Run Report

Once in a report you can page through the report, use the find option, print or export the report.

| Adjuster Performance | | | | | Period: 1/1/1980 - 1/26/2018 | | 1/26/2018 |
|----------------------|------------------|-----------------------------------|-----------------------------|-----------------------------------|------------------------------|--------------|----------------|
| Adjuster Name | # of open claims | # of claims closed in time period | Total # of claims in period | Average # of days claims are open | Total Incurred | Total Paid | Total Futures |
| DBUTLER | 1 | 0 | 1 | 3,384 | \$1,201.00 | \$100.00 | \$1,101.00 |
| DEMO1 | 637 | 44 | 681 | 4,483 | \$6,462,205.78 | \$491,283.34 | \$5,970,922.44 |
| ATS | 12 | 0 | 12 | 3,158 | \$150,820.18 | \$47,186.67 | \$103,633.51 |
| COSADMIN | 1 | 0 | 1 | 2,923 | \$900.00 | \$30.00 | \$870.00 |
| DEMO | 164 | 14 | 178 | 2,648 | \$2,329,312.54 | \$221,402.00 | \$2,107,910.54 |
| COCLMMGR | 1 | 0 | 1 | 3,333 | \$700.00 | \$0.00 | \$700.00 |
| demo2 | 9 | 0 | 9 | 2,121 | \$972,910.00 | \$5,332.50 | \$967,577.50 |

Schedule

Schedule Options

Description: AdjPerform

Trigger: One Time

Next Run Date: 01/26/2018

Time: 09:42 AM

Task ID: [View]

Available Recipient(s):

- Email: ATS System Administrator (Admin)
- Diary: ATS System Administrator(ADMIN)
- Email: American T. Services (ATS@atsrm)
- Diary: American T. Services(ATS)
- Email: Demo FullName (dpavelski@atsrm)
- Diary: Demo FullName(DEMO)
- Email: P O Ports (POPORTS@atsrmis.co)
- Diary: P O Ports(POPORTS)
- Email: Detroit Public Schools (DPS@atsrr)
- Diary: Detroit Public Schools(DPS)
- Email: SusieK (SusieK@atsrmis.com)
- Diary: SusieK(SUSIEK)

Selected Recipient(s):

Other Email Recipient: [Add]

Save Report Image

Use Current Values

Replace Date Values

Save Cancel

Once in the report schedule dialog you can select trigger (when you want the report to execute), select recipients to receive the report via ATS diary or email, Save the report to Image for system retention, Use the current values (defaults you set on the prior prompting page) by checking this option, and replace dates at runtime based on report defaults or the settings for the date that you selected for the dates.

Add or Modify Report

Report Name

Description

LOB

No Prompt Page

Category

This Page allows you to Add, Delete or change the prompting and category settings.

Report Name

Pressing the Search button will bring up a list of the systems reports. Select brings you to the add/modify page for the selected report and delete will remove the report from the list.

| | ReportDesc | Report Name | Category | | LOB | NoPrompt |
|---------------------------------------|------------------------|---------------|----------|---------------------------------------|-----|----------|
| <input type="button" value="Select"/> | claims_fire2 | claims_fire2 | User | <input type="button" value="Delete"/> | GL | False |
| <input type="button" value="Select"/> | testlog | testlog | | <input type="button" value="Delete"/> | GL | False |
| <input type="button" value="Select"/> | PACSumm1 | PACSumm1 | General | <input type="button" value="Delete"/> | GL | True |
| <input type="button" value="Select"/> | testfive | testfive | | <input type="button" value="Delete"/> | WC | False |
| <input type="button" value="Select"/> | Mine | Mine | General | <input type="button" value="Delete"/> | WC | False |
| <input type="button" value="Select"/> | New Cost Center Report | WCANPC3x | Finance | <input type="button" value="Delete"/> | WC | False |
| <input type="button" value="Select"/> | Adjuster Work Load | WCAdjWorkLoad | General | <input type="button" value="Delete"/> | WC | False |

Add/Modify edit page (with report selected)

| | |
|--------------------|--|
| Report Name | <input type="text" value="WCAdjWorkLoad"/> |
| | <input type="button" value="Search"/> <input type="button" value="Add/Upload Report"/> |
| Description | <input type="text" value="Adjuster Work Load"/> |
| LOB | <input type="text" value="WC"/> |
| | <input type="checkbox"/> No Prompt Page |
| Category | <input type="text" value="General"/> <input type="button" value="v"/> |
| | <input type="button" value="Add"/> <input type="button" value="Delete"/> |
| | <input type="button" value="Submit Report"/> |

Checking the No Prompt Page will cause the system to allow the report to use the report writer's native prompting if any prompts exist in the report.

Clicking the Category dropdown will allow for setting the reports category.

The Add button under category allows you to add a new Category. Delete removes the category selected.

Use the Submit Report is when you finish the changes you want to save.

Administration

Category

Finance



Available Groups

Accounting
TestingATSBelen
Test2
EXTERNAL
GL Access
WC Access
SA Access
exttstC
AS Access
Notes Test
TesterC
TesterP
ENDUSERGROUP



Selected Groups

Adjusters

This page is only available to users designated as administrators (see security).

This page allows, by category, the ability to add/remove user groups from available to selected for specific report categories.