

## AMS360 Performance Reports

Below is a list of reports to monitor working from home

- **Authentication Information Report**

Description: Shows login information over a selected period.

Location: Toolbox – Classic Reports

Notes: This report is exportable to Excel – From the Report Selection window, after making the report selections, Click on File – Create CSV

- **Activity List Report**

Description: Shows all activities logged by your agency for customers and policies.

Location: Toolbox – Classic Reports.

Notes: This report is exportable to Excel – From the Report Selection window, after making the report selections, Click on File – Create CSV.

- **Custom Activity Report**

Description: This report returns the same information as the Activity List Report plus additional parameters. It includes Customer and Policy Notations as well as the ability to group your results.

Location: Toolbox – Classic Reports.

Notes: This report is exportable to Excel – From the Report Selection window, after making the report selections, Click on File – Create CSV.

- **Suspense Report**

Description: This report returns information that shows all Suspense logged, tracked and closed by the staff. It is helpful in tracking that tasks are performed in a timely manner.

Location: Toolbox – Classic Reports.

Notes: This report is exportable to Excel – From the Report Selection window, after making the report selections, Click on File – Create CSV.

- **Audit Trail**

Description: The Audit Trail tracks user's access at the Customer and Policy levels.

Location: Administration Center – Utilities Menu (On Left)

Notes: This is exportable to Excel via the Button on the screen.

\*Should you require access to Audit Trail, please have your manager and/or agency principal send in a request to [raishelp@renaissanceins.com](mailto:raishelp@renaissanceins.com) authorizing us to provide you with access. We will process the request in the order we receive it.