Data Collection

Acturis – How to run your monthly upload report once set up

- Select the "reporting" tab

- Click "operational reports"

- Go into the "shared Custom Reports" folder

- Select the "Cobra Monthly" report option (it should be named something like that). Once the report has loaded scroll down to the bottom right-hand corner of the screen and press "run report"

- On the next pop out screen, when doing the Acturis extract, you need to change the dates to 3 years previously. For example, 31/01/2021 (change this to the date you are running the report but keep the year as 2021) and one year forward so in this instance, 31/01/2025

  Please attached an image showing which boxes should be selected in the next pop-up screen before you press the "export" button. It is important that the "Export Report Title" and "Export Filter Details" boxes are unticked and it is set as Excel with plain text.

  Acturis Export Options .png

- Once you have exported this into an excel document, please save it as a CSV (Comma delimited) file

- Save the CSV file to your desktop or a specifically created folder if it's easier to locate the file in that way

- And now it's just a case of logging into the Broker Insights platform https://brokerinsights.com/

- Once logged in, click on Actions on the left-hand side of the screen and then Data Upload. Click Browse, select the CSV file from wherever you have saved it and upload. You should see a green "successful" message come up and the job is done!

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