

## Data Collection

### Applied Epic – How to run your monthly upload report once set up

- Go to 'My Reports' and find the 'Broker Insights Cobra'
- Please check that within the criteria, all of the date options say 'All' (if you put a date range in, this can crash the Applied Epic system!)
- To extract, go to Delivery Options and press the pencil icon on the left. Leave printer blank and then save to disk as a Microsoft Excel Workbook within your preferred location
- Then go to Actions in the top bar within Applied Epic and Generate Report to create the file
- Ensure all column headers are in the first row please delete any rows above the column headers such as 'Report Title'
- If the effective date and expiration dates have times in it, please format these to only show the dates. Highlight both columns, right click and then select Format Cells – select Date and click OK
- Please save the file as a CSV (Comma delimited) file
- 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!

### Applied Epic Monthly Upload Instructions 05/03/24