

## Data Collection

### OPEN GI Systems WITH Report Net – How to run your monthly upload report once set up

- Log onto the System using the required administration rights
- Navigate to 'Core Correspondence / Diary / Insurer Accounts', accessible from the drop-down option on any menu
- Choose the option 'Database Enquiry'
- Choose 'Reports'
- Choose the previously saved report parameters, this should be saved as B11
- Click 'OK' to execute the selection – click 'No' to 'Do you want to amend this?'
- If 'ReportNet' is installed and available, type in PC:Extract at the printer prompt, press 'Ok' twice: If prompted to open the file, please do so and save it to your local PC (ie. outside of the Open GI system)
- Once you have the data as a text file, select CTRL & A together to highlight all the data and then copy and paste this onto a spreadsheet
- Using the attached Text to Columns PDF file instructions, split the data into different columns, rather than it being in only 1 column

#### [Text to Columns Guide - Open GI.pdf](#)

- Please save it as a CSV (Comma delimited) file
- Save the CSV file to your desktop or if you have created a specific 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!

#### Open GI Monthly Upload Instructions 05/03/24