

## Data Collection

### OPEN GI Systems WITHOUT Report Net – How to run 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 NOT installed and available, type in :T.Extract at the printer prompt
- Once it has finished "printing" (albeit not printing as such), return to the main menu, click on 'Control' found in the bottom corner of the screen, on the left
- Hit 'Run Command' and type in TWIX :T.EXTRACT C:\OPENGI\EXTRACT.TXT S
- Once the command has finished, open up Windows File Explorer and browse to Local Disc (C:) - then go into the Open GI folder and you will see the Extract text document ready for conversion to Excel
- 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 to a specially created 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!

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