

# SmartOffice 2009 BGA Webinar Series

## BGA Reporting: Advanced Reporting Concepts

*Welcome! This Webinar will be 30 minutes in length.*

**Dial-in: 712-432-3900**

**Pin: 984124**



# Agenda

AGENDA		
April 9, 2009	Topic	Time
	<b>Welcome and Introduction</b>  Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	<b>Advanced Reporting Concepts for BGAs</b>  Marlon Urias, Manager, Support & Training Services E-Z Data	20 minutes
	<b>Q&amp;A Session</b>  <i>BGA Participants</i>	5 minutes

# Using iLINC 10

## > iLinc Version 10

The screenshot displays the iLinc 10 interface for a "BGA Webinar Series" session. The window title is "iLinc | BGA Webinar Series" and the menu bar includes "File", "Edit", "Controls", "Tools", "Session", and "Help". The top status bar shows "Dial In Number: 218-486-7200" and "Passcode: 171058".

The main content area is divided into three sections:

- Attendees:** Shows a video feed of "Meg Rose" with a "0 / 1" indicator.
- Session Details:**
  - Session Name: BGA Webinar Series
  - Leader: Meg Rose
  - Date/Time: 02/26/2009 02:00 PM
- Audio Details:**
  - Primary Dial-In: 218-486-7200
  - Passcode: 171058

On the right side, there is a "Sharing" panel with options: "Share your Desktop", "Share a Region", "Share an Application", "Draw on a Whiteboard", "Send Quick Invitation", "Send Invitation via IM (copy)", and "Record Session".

At the bottom, there is a "Chat" window with "Public" and "Private" tabs and a text input field. A red arrow points to this chat window from the left side of the slide.

The Windows taskbar at the bottom shows the "start" button and several open applications: "4 Microsoft...", "2 Yahoo! Me...", "Webinars", "Microsoft Pow...", "iLinc - Window...", and "iLinc | BGA We...". The system clock shows "3:07 PM".

# 2009 Webinar Series

## > Builds on format and growth of 2008 Series

- 30 minute sessions with high-impact, quick takeaways (***practical tips for marketing, sales, relationship-building and agency management***)
- Learn new tricks (sooner than later)
- Teach yourself new habits
- Focus on core competencies of wholesale brokerage
- E-Z Data “Virtual University” Concept
- Visit [www.ezdata.com/bga](http://www.ezdata.com/bga) for a 2009 Schedule!



# BGA Reporting – Webinar Series

Feb 12: Using Production Reports Effectively (recorded: [ezdata.com/bga](http://ezdata.com/bga))

March 26– Introductory Reporting Concepts

**TODAY-- Advanced Reporting Concepts**



# Core and Explore

## > Core



- Where to Find Basic Training and Help
  - Understanding the Fundamentals
  - Understanding the Purpose of Report Categories
- Working With What's Already There
- Deciding How Dynamic Reports Can Help You...
  - Track Underwriting Activity
  - Report Production by Carrier, LOB, Advisor, etc.
  - Provide Services
  - Facilitate Workflow Improvement

# Core Resources for SmartOffice Reporting Fundamentals

SmartOffice Training and Help System



## SmartOffice 6 Training Center

Here you will find resources for all of your training needs including:

-  [Training & Fast Classes](#)
-  [Live Web-based Training](#)
-  [User Guides](#)
-  [On-Site Training](#)

Please be aware that you can access the SmartOffice Help System, Training Center, Support Center, and User Guides by clicking the Hyperlinks menu.



### New to SmartOffice?

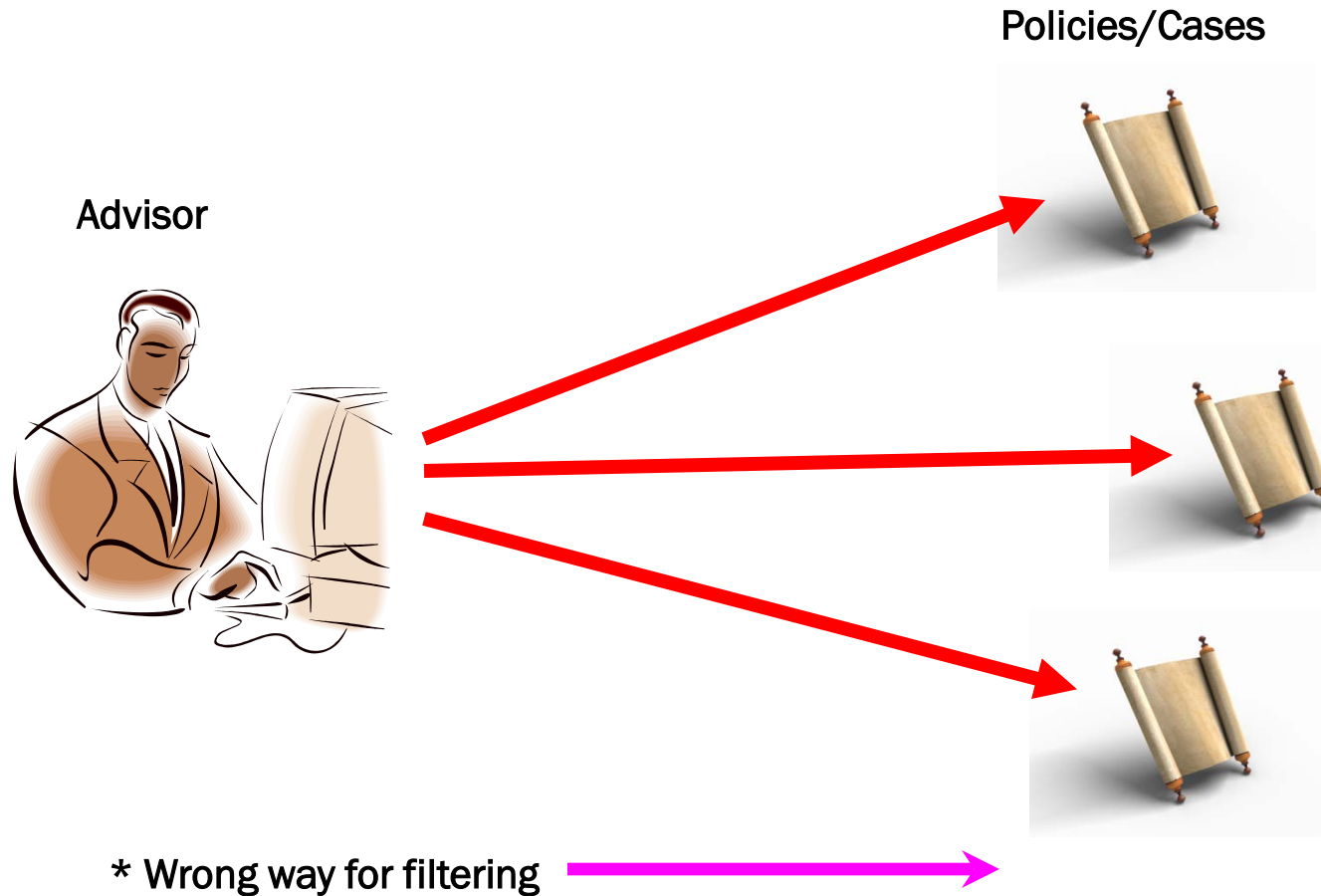
Please visit our [Getting Started with SmartOffice](#) page. Here you will find everything you need to get started including information on Tra contact data and more. In addition, watch the Getting Started Class and download the Getting Started User Guide to familiarize yourself

# Advanced Reporting Concepts

- > System Filters (Advanced Filters)
- > Filter on fields that are not in the main table
- > Today's Example:
  - > ***Advisors with No Cases In the last Year***
- > Other Examples:
  - Advisors with Expired Contracts
  - Policies with Transactions or Riders
  - Advisors with (or without) Addresses or Emails
  - Policies that have Servicing Agents
  - Dual Filters: Advisors with Expired Contracts and New Cases



# Advanced Reporting Concepts



# Takeaways from Today's Session

1. Sometimes you want to filter on fields that are not in the primary table (i.e., Advisors with certain cases)
2. System filters let you filter for things that **don't** exist
3. System filters only work in Dynamic Reports
4. Don't forget to use the Favorite Reports Feature
5. Can't I filter on Policies where the date is **not** in the last year? No! These policies don't even exist!

# Plan to Attend the BGA CPC 2009!

- > September 13-15, 2009
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > BGAs, Carrier and Vendor Partners
- > User Driven - Input from BGA Advisory Council on meeting content
- > Take Me Out to the Ball Game...



More INFO at [www.ezdata.com/bga](http://www.ezdata.com/bga)

# Next BGA Webinar April 23rd

## Quarterly Update on BGA Wish List Development Items

Sherri Isaacson and Stacey Gabaldon  
**4.23.09 at 2pm ET**

Watch for E-mail Invite Coming Soon!

# We Want Your Input

## *How Can We Be a Better Business Partner?*

Suggestions for topics or to request further business development and partnership opportunities?

E-mail: [meg.rose@ezdata.com](mailto:meg.rose@ezdata.com)

Direct phone: 404-486-9866

*Thank you for your time  
and your business.*