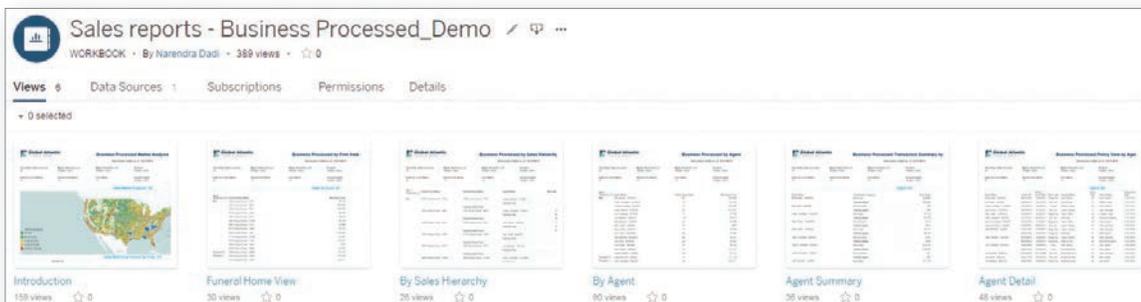


# Getting Started with InSight Analytics

Welcome to InSight Analytics! This guide will walk you through the basic system navigation to help you make the most of your reports.

## NAVIGATING INSIGHT ANALYTICS

- The **Projects** (category) menu takes you to the main InSight menu
- Click the blue title to view the available **Workbooks** (reports) within a project
- Click the View button on the thumbnail or blue title below the Workbook options to display the **Worksheet** (tab) views
- Click the View button on the thumbnail or blue title below the worksheet to view a specific worksheet



- Once in the report, tabs will display across the top of the workbook that contain various views of your data



## INTERACTIVE FEATURES AND ICONS

<p><b>Hover</b></p>	<p>Place your cursor over charts, maps, information icons and data fields for detailed information</p>
<p><b>Sort</b></p>	<p>Hover over column headers or chart titles for the sort icon to appear. Click the icon to sort in ascending or descending order.</p>
<p><b>Information valid as of:</b></p>	<p>Located at the top center of each view, this displays the date the information is current through</p>
	<p>The Global Atlantic logo will take you to the project menu</p>
	<p>This icon allows you to <b>Download</b> images, data, crosstabs or PDF's</p>
	<p>This icon allows you to <b>Revert All</b> data to an unfiltered state</p>
	<p>This icon allows you to <b>Pause Automatic Updates</b>. This keeps data static and disables new data from being pulled into the report. Click the icon again to <b>Resume Automatic Updates</b>.</p>
	<p>This icon allows you to <b>Refresh</b> the data for the view to pull in the most recent data available</p>
	<p>This icon allows you to <b>Subscribe</b> to your reports</p>
	<p>Hover over the <b>Information</b> icon to get helpful tips about the report. This icon is located on most worksheets in the upper-right corner of the screen.</p>

Use the hyperlinks in the upper-left corner to quickly navigate back to the workbook, project folder or home screen



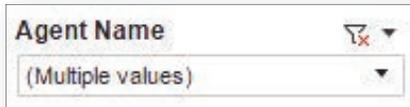
## FILTERING AND CUSTOM DATES

Filters and custom dates allow you to drill down to specific information you want included in your report, providing you with more insight into your business.

**Filters** are located at the top of each view. These are defaulted to (All) which displays all data available.

To filter on specific information:

- Uncheck the (All) option in the dropdown to deselect all options
- Type or scroll to choose your desired selection(s)
- You can select fields from as many filters as you would like to narrow your data down
- To view all the data again, click on the red x next to the filter icon (shown below) or check the (All) option in the filter



**Custom Dates** allows you to define a specific time period. In the Select Date Filter Type dropdown, choose the Use Date Range Below option (this option must be selected in order to change dates) and then either enter or use the calendar function to select the dates you need.

**Drilldowns** are available on some of the views, typically those containing layered hierarchy levels. These are represented by a + sign next to a column header within the report. Hover over the column to see the + sign.

Click on the + sign to expand the selection and click the minus sign to collapse the hierarchy.



Also, many of the summary reports have drill down capabilities that allow you to click on a specific field (i.e. agent, firm or state) and you will automatically be taken to a separate tab within the report that contains the details behind the summary.

Agent Name	Agent Status	Firm Name	Number of Policies (7-30 Days Past due)	Premium Amount Due	Number of Policies (31-60 Days Past due)	Premium Amount Due	Number of Policies (61-90 Days +)	Premium Amount Due	Total Number of Policies	Total Premium Amount Due
Adam, Albert - 04G00	ACTIVE	1270 FUNERAL HOME - 25QM	0	\$0.00	0	\$0.00	1	\$1,400.00	1	\$1,400.00
Total by Agent			0	\$0.00	0	\$0.00	1	\$1,400.00	1	\$1,400.00
Adam, Albert - 02556	WITHDRAWN	1242 FUNERAL HOME - 4BE3	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Total by Agent			0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Adam, Albert - 00544	WITHDRAWN	1203 FUNERAL HOME - 2ICE	0	\$0.00	1	\$200.00	0	\$0.00	1	\$200.00
Total by Agent			0	\$0.00	1	\$200.00	0	\$0.00	1	\$200.00
Adam, Albert - 00500	WITHDRAWN	1227 FUNERAL HOME - 92T3	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Total by Agent			0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Burhoff, Bart - 006AV	ACTIVE	1205 FUNERAL HOME - 20R1	1	\$100.00	0	\$0.00	0	\$0.00	1	\$100.00
Total by Agent			1	\$100.00	0	\$0.00	0	\$0.00	1	\$100.00

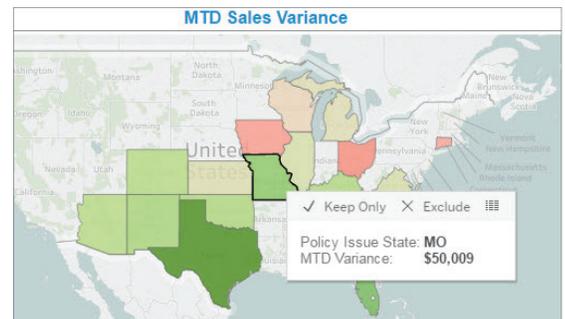
Click on an agent name in the Premium Aging Summary (shown above) to view this detail.

Agent Name	Policy ID	Owner Name	Phone	Insured Name	Issue Date	Previous Payment Date	Paid to Date	Expected Lapse Date	Days Past Plan	Pol Plan Desc	Bill Mode	Inc	Firm Name	Premium Amount	Premium Amount Due
Adam, Albert - 04G00	259475070	Harris Hassel	402-495-4305	Helen, Hahn	12/04/2014	12/04/2014	12/04/2015	03/04/2015	90	3 Pay	MONTH	FI	1270 FUNERAL HO.	\$1,400.00	\$1,400.00
Total by Agent														\$1,400.00	\$1,400.00

Grand Total

For example, clicking on an agent name in the Premium Aging Summary tab will automatically take you to the Premium Aging Detail tab and only display the details for that particular agent's data.

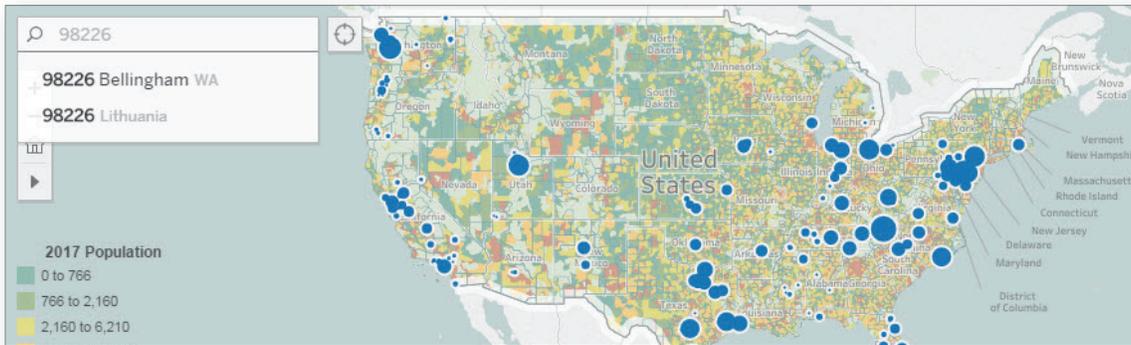
Click on any state to view the detail data for that state



## MAPS

Searching by zip code or city and state lets you drill down to a street level, allowing you to see exactly where your business is coming from.

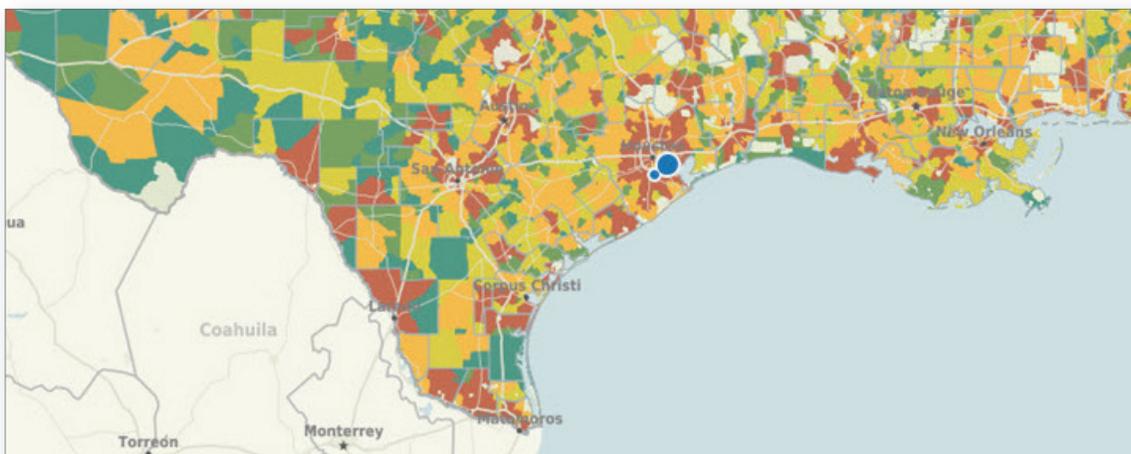
- Search maps by hovering over the upper-left corner of the map.
- Click on the magnifying glass and type in the desired zip code or city.
- A drop-down menu will appear with the best suggestion. Click on the best option from the menu.



- A city-level map will appear, with blue dots showing the policy locations
- Zoom out to expand your area, or zoom in further to street-level views

Zooming into maps can provide geographical information on your business.

- *Blue dots represent data points.* Click on a data point to zoom in and filter the data below the map. Click the data point again to zoom out and remove filter.
- Double-click on an area of the map to zoom in and repeat to zoom in further.
- Hold down left mouse icon and move your cursor over an area of the map or data point to view detailed data.
- Use the icons in the upper left-hand corner of the map to zoom in (+), zoom out (-), select a specific area (screen) and undo (home).
- The map above shows the overall data set. The map below shows a zoomed view with the Texas territory selected and filtered. Select the **Revert All** icon or **Home** icon to undo drilled down views and remove filters.



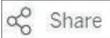
## EXPORTING REPORTS

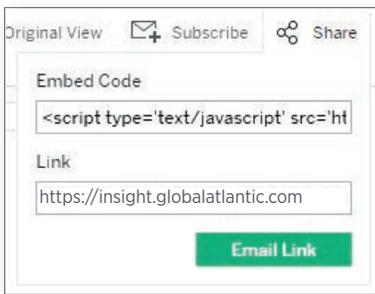
Exporting allows you to select data in the view and open in other programs. Choose one of the export selections from the **Download** icon within the reports.

- **Image** – Take a snapshot of the current view and download a picture file.
- **Data** – Click on a table to enable the Data option. Export that particular set of data to a new window and allow for text file download.
- **Crosstab** – Export data in a CSV file. Click on a chart or table to enable the crosstab option.
- **PDF** – Take a snapshot of the current view and export a PDF file.

## EMAILING REPORTS

InSight allows you to email reports to share with others. The user must have security access to view the report.

1. In the upper-right corner, click on the Share icon  Share
2. Click the **Email Link** button, or copy and paste the web address in the Link section into an email



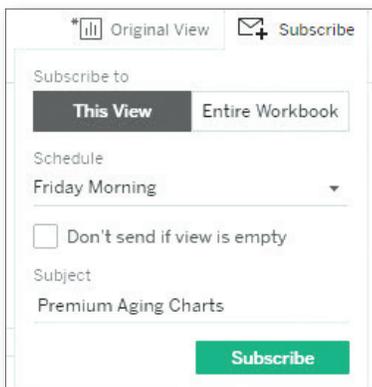
## SCHEDULING/SUBSCRIBING TO REPORTS

You can subscribe to your reports so they are emailed to you on a set schedule. This option captures the default view only; filtered selections cannot currently be scheduled.

*Please note: You will only be able to view the data displayed on the screen. To scroll and see the rest of the data, click on the report and log in to InSight.*

1. Once in a view, click  **Subscribe** (in the upper-right corner of the screen).
2. Choose to subscribe to a single view (tab) that you are currently viewing, or the entire workbook.
3. Under the schedule section, click the arrow to the right and select a subscription schedule. If you do not wish to receive emails for reports not containing data, click the box to choose the option for Don't send if view is empty.
4. You can update the **Subject** line with the report name if desired to help you identify the report when your subscription email is delivered.
5. Click **Subscribe**.
6. Once subscribed, you will receive a snapshot of the report via email. When you click on the snapshot, the workbook will open in InSight and you will then be prompted to sign in.

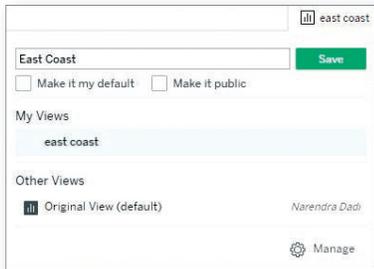
Note: Your reports will be sent to the email address used to create your InSight User ID.



## SAVING AND MANAGING CUSTOM VIEWS

You can save filtered views within workbooks or zoom into maps to use in the future without having to filter the data again.

1. After filtering the report, click on  **Original View** in the upper-left corner of the screen.
2. Name your custom view and click Save.
3. To make this view your default click the **Make it my default** box
4. If it is not set as your default, to switch to this view the next time you log into the report, click on the **Original View** icon again and choose the view you want to display.
5. Choose **Original View** under the Other Views section to see the unfiltered default report view.
6. Click on the **Manage Custom Views** icon in the view settings to rename or delete custom views.



## ADDITIONAL HELP

- For general questions regarding InSight email us at [InSight@gafg.com](mailto:InSight@gafg.com).
- Access training materials and other InSight resources on the [reporting page](#) of the preneed portal.
- Contact Sales Support at (866) 449-3722, option 1 or [preneedsales.support@gafg.com](mailto:preneedsales.support@gafg.com).
- For Technical Support contact [eTech@gafg.com](mailto:eTech@gafg.com) or (866) 449-3722, option 2 then option 1.

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