

# Informer™ Case Study

## J.W Terrill Insurance Provides Management Team with Self-Service Reporting Capabilities

### Situation

J.W Terrill needed to reduce the time spent on creating and distributing reports and then customizing them for individual managers and supervisors.

### Success

J.W Terrill selected Informer for its automated scheduling and distribution capabilities, Live Excel integration capabilities and multiple output options. Informer's calculated columns, drill down analytics and charting capabilities have provided J.W Terrill with a reporting solution that is powerful, yet easy to use.

### Challenge | Reduce Time Spent Creating and Customizing Reports

J.W. Terrill provides a complete range of property & casualty and employee benefit products and services to organizations of all sizes. The agency is using Vertafore's Sagitta® agency management system, and had been manually creating and distributing all reoccurring reports and using Excel to customize the reports and create user-specific reports. They would then manually distribute the reports via email attachments.

"Reoccurring reports were eating up an average of three days each month," said Kathie Ryan, Training Coordinator at J.W. Terrill. "Not to mention the time that we were spending in other departments."

The agency was also having trouble finding a third-party solution available to Sagitta OnLine agencies and it appeared Vertafore had no plans to upgrade the report scheduling capabilities within Sagitta.

"We were looking for a new reporting solution that would free up valuable resources we needed to work on other projects," says Ryan. "We were spending so much time making sure reports were run on time and follow-ups were scheduled."

### Solution | Empower Management with Self-Service Reporting

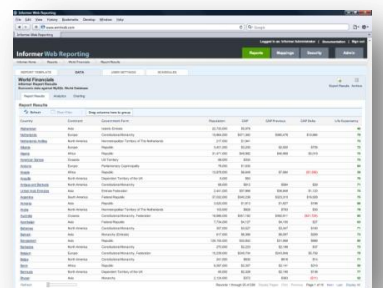
J.W Terrill selected Informer software for its ease of use, automated scheduling and distribution capabilities, Live Excel integration capabilities and multiple output options. Informer's calculated columns, drill down analytics and charting capabilities have provided J.W Terrill with a reporting solution that is powerful, yet easy to use.



"Informer offered us a very easy interface to learn as it translates very well to those who already have Sagitta Report Building knowledge."

Kathie Ryan, Training Coordinator

J.W. Terrill



Entrinsik, Inc.  
7501 Creedmoor Road  
Suite 102  
Raleigh, NC 27613

tel :: 888 703 0016  
fax :: 919 848 4829

www.entrinsik.com

"Informer offered us a very easy interface to learn as it translates very well to those who already have Sagitta Report Building knowledge," says Ryan.

Informer provided J.W. Terrill with automated scheduling and distribution via email. Integrating Informer with Live Excel enabled the management team at J.W. Terrill to access and customize reports on their own without IT assistance for some of the routine report requests.

"Informer offered us the opportunity to provide managers with some self-serve options without having to train them on new software by using the Live Excel reports."

## Results | Desktop Integration Quickly and Easily Delivers Real-time Data

Informer has allowed managers and supervisors at the agency to get access to specific up-to-date information with the push of a button and it allows them to sort, slice and dice data on the fly. "We didn't have to teach them how to use Informer, just some simple steps in Excel," says Ryan.

"Informer is VERY easy to use and has allowed us to tackle more complex reports and provide calculations within the reports that go to users who are not that adept at Excel formulas," says Ryan. "All of our recurring reports now auto-run and auto-distribute without delays due to any absences or vacations."

## Contact us for a FREE trial

For a demonstration of Informer Web Reporting or a free 30 day trial call us today at 888-703-0016 or email at [sales@entrinsik.com](mailto:sales@entrinsik.com).

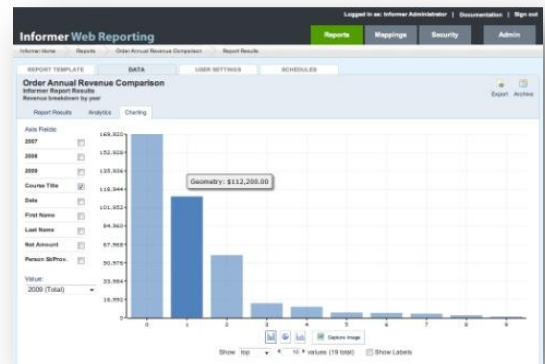
## About Entrinsik

Since 1984, Entrinsik has been developing, implementing, and supporting database solutions that enable organizations to maximize performance and improve bottom lines by tracking, understanding, and managing information.

With tens of thousands of users across various industries, Entrinsik's Informer Web Reporting software delivers real-time access to multiple data sources simply and easily using a built-in Web-based query engine to provide a single point of secured information access for ad hoc reporting, report customization and analysis.

Entrinsik's SEMtek ERP software now drives many of the nation's largest professional and continuing education profit centers.

For a product demonstration or a free 30 day trial, call 888-703-0016 or email [sales@entrinsik.com](mailto:sales@entrinsik.com).



"Informer offered us the opportunity to provide managers with self-serve options without having to train them on new software by using the Live Excel reports. All of our recurring reports now auto-run and auto-distribute without delays due to any absences or vacations."

Kathie Ryan, Training Coordinator

J.W. Terrill



Entrinsik, Inc.  
7501 Creedmoor Road  
Suite 102  
Raleigh, NC 27613

tel :: 888 703 0016  
fax :: 919 848 4829

[www.entrinsik.com](http://www.entrinsik.com)