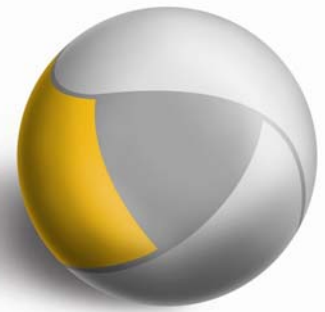


MI Management System Newsletter



January-February-March 2005

Quarterly Newsletter

NUDGMI Formation Work Continues

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John Wickhem, President of NUDGMI (The National Users Development Group for MI), is continuing to work with the national committee to ensure the national organization kicks off 2005 with all the necessary elements in place. According to John, getting an organization started can be quite a challenge as there are many details to be worked out. Some of those details includes incorporating the organization, creating an on-going membership drive, Website creation, and developing the short and long term goals for the group.

John requests, "I am asking **all** MI users to help with identifying members who would be willing to assist with organizing short and long range goals. A basic outline of ideas have been sent to the presidents and affiliated officers of each of the regional MI Resource Groups. I am asking that all MI users review the outline and prioritize the goals. If you wish, you may add your own. Then, send this information to John Wickhem by emailing wickhemins1@charter.net, faxing to (608) 752-6992, or mailing to P.O. Box 1939 Janesville, WI 53547. If you have not seen or need an additional copy of the outline please contact me and I will send a copy. Remember an organization is only as good as its participating members. So, let me hear from you!"

MI encourages all agencies to attend their local Resource Group meetings and to get involved with NUDGMI. These organizations allow agencies to communicate with one voice not only to MI-Assistant, but to Carriers as well.◇

For more information on NUDGMI and the 2005 local Resource Group meetings, visit: <http://www.mi-assistant.com/miassistant/resource+groups/default.asp>

Microsoft XP Service Pack 2

By Bill Sterry, Product Manger
MI-Assistant

What Version?

The most current version of the MI Management System is 5.4.0.7. To find out which version of MI Management System you are running, click Help and then About.

MI has completed testing MI Comparative Rater, MI Management System, and CAP Rater installed on units running Windows XP Service Pack 2. All MI products are fully compatible in this environment provided the hardware/software is at or above the most current MI hardware requirements. Certain settings may require changes for some carrier uploads/bridges to work correctly. For further information regarding these settings please refer to: <http://www.support.microsoft.com/kb/842242>.

The first time an update to an MI product is processed after installing Service Pack 2, a popup window may appear, as shown in the figure. Simply click **Unblock** to continue the update. MI does not test other vendor or Carrier software, please make sure non-MI software that you may be using will also continue to operate properly on XP Service Pack 2.◇



Need Technical Support?

<http://support.mi-assistant.com/>

From The Customer Service Technical Support Archives

*By Jennifer Thompson, Customer Service
MI-Assistant*

Progressive Download

Save money! If you are downloading Progressive policies through IVANS, Progressive is charging a monthly fee to your agency. Progressive now has an option to bypass IVANS and go directly through the Internet. This will remove their monthly fee which is approximately \$15-\$30 per month. To get set up with Progressive Internet Download, contact Progressive Insurance. Make sure that Progressive is directing their download files into C:\Program Files\MI\IMSwIn 2000. Lastly, contact us, and we will make sure that our batch file is set up to process these files with the rest of your download.

New Carriers to Download

We have recently certified the following carriers for download:

- Electric Insurance- personal auto and home
- Orion- personal auto
- Standard Mutual- personal auto and home

If you would like to request download for any of these carriers, contact us at support@mi-assistant.com.

Speedbutton Error

When trying to log into Management System with a new user name, the user receives the following error:

Table does not exist.

File or directory does not exist. File:

C:\program files\mi\imswin 2000\JEN\Speedbuttons.db

If using an ASP system, the error will list the file as:

T:\MSLocal\JEN\Speedbuttons.db

If your Management System is located on a Local Area Network (LAN) within your office , double click **My Computer** on your desktop.

Double click **C:**

Double click **Program Files**

Double click **MI**

Double click **IMSwIn 2000**

Hold the **Ctrl** key down and highlight the three files called **Speedbuttons**.

Right click then select **Copy**

Double click the folder with the three letter ID of the User (i.e. JEN)

Right click then **Paste**

Now the user can log into the system without an error. If using an ASP Management System, contact support to assist with this problem.

Workstation Setup

If a new computer is installed or replaced on the network, run a workstation setup. This will set up the BDE (Borland Database Engine), copy the necessary files to the local directory and create a desktop icon. It is important that you run the workstation setup from the mapped drive (i.e. F:) rather than going through the Network Neighborhood to find the server.

Double click **My Computer** on your desktop.

Double click your network drive letter (i.e. F:)

Double click **IMSwIn**

Double click **Serverdata**

Double click **Workstation Setup**

Double click **workstationsetup.exe** (exe may not be visible)

This will install BDE and then display a window with two paths. The first will be C:\program files\mi\imswin 2000. The second will be ?:\imswin\serverdata\imsexes.

Click **Continue**.

The program will install and close on it's own. Close My Computer. There will be an icon on the desktop for the MI Management System.

Hardware Requirements

Hardware Requirements have been updated on our web site:

<http://support.mi-assistant.com/public/hardware/>

Hardware_Requirements.pdf

The 2003 Server compatibility issue with Interbase is currently being worked on. The current time frame to resolve the issue the is first quarter of 2005. Agencies running Windows 98 frequently have issues with running out of resources. For this reason, we no longer recommend running Windows 98 on any computers.

Popular Report Request

There have been several requests for a report that will total your client's annual premium and commission and then sort them in order of the highest to lowest premium or commission. This report can be designed in the MI Management System. After the report is designed, the data needs to be exported to Excel and then sorted. For instructions on how to set up this report visit the bold link at the bottom of this page.◇

From Rating Vendor to Agency



On December 31, 2004, Dave Deetz transitioned from vendor to independent insurance agent. Dave, former Director of MI

Resource Groups, is now partnered with Deetz & Associates, Inc., the family-run insurance agency. Dave had been with the agency from 1985 to 1991. Going back to the agency was not in the original plans, however, when the opportunity arose, he felt it really was a part of his long-term career plan. The agency is located in Eleva, Wisconsin.

Most MI Management System users have had the opportunity to either talk or work with Dave in-person. Since 1991, Dave has provided MI Management System customers with technical support, lead the development of the second version of the DOS system, managed the MI Management System department, and most recently, held the position of Director of MI Resource Groups, now held by Bill Sterry. MI-Assistant looks forward to continuing to provide his agency with rating and management solutions and wishes Dave success at Deetz & Associates, Inc.◊

Important Message

QuickBooks 2005 and Peachtree 2005 have been tested on the MI Management System. Both applications will work with the MI Management System. Agencies using Peachtree 2005 will need to contact support to receive a new file to enable continued automated integration.◊

Agency Information Updating

Be sure to update any agency information that may change using the MI website at <http://support.mi-assistant.com/public/>. Click **Update Agency Info**. You must have your MI Account Code and Password to complete this on our website. It is important that we always have your current agency name, address, phone number and email addresses.◊

Putting a Face to a Name



Name: Bill Sterry **Age:** 31

What do you do at MI?

I am the Product Manager for MI Comparative Rater, MI Management System, and CAP Rater products. I am taking over for Dave Deetz as the Director of Resource groups for 2005.

How long have you worked at MI?

7-1/2 years.

Where do you live?

I live in Strum, WI.

Who are the significant others in your life?

My wife Kristy and I have been married for 3 years. Our son Riley was born on February 21, 2004.

What do you like to do besides working at MI?

Life has changed considerably since Riley arrived. Most of my time at home is spent watching my son discover new things. At ten months, he is learning to climb stairs and anything else he can crawl up. With the little spare time I do have I enjoy golfing and working on projects around the house and yard.

What do you like about your job?

I enjoy working at MI because every day presents a different challenge. Getting problems or bugs fixed in the software is great but implementing a new feature for our customers is really exciting. I always eagerly await the first feedback from our Beta agencies when we release a new version of our software. I enjoy reviewing new releases at Resource Group meetings, we always end up showing the group a feature that they did not know existed. I look forward to attending all Resource Group meetings in 2005 to get feedback (good and bad) on the features we will be adding throughout the year.◊

MI Management Training CD

MI Management Training CD

Perfect for new employees and as a training refresher.

Here's what's on the CD

- **Clients**
- **Applications**
- **Locaters**
- **Transactional Filing**
- **Memos**
- **Forms**
- **Imaging**
- **Single Letters**
- **Marketing**
- **Proposal Module**
- **Tasks and Reports**

Email support@mi-assistant.com to purchase the CD.

What's Next?

Version 5.5.0.1

- Priority field for follow-ups
- Emailing of auto ID cards
- Emailing of images made easier
- Double clicking in locater opens up records
- Memo and follow up fixes and enhancements



Resource Group Contacts and Meeting Locations

Visit <http://www.mi-assistant.com/miassistant/resource+groups/default.asp>

\$149

MI Management Training Center

By Shane Vetterkind, Marketing Coordinator
MI-Assistant

MI Management System Training Center course Levels 1, 2 & 3 will be held March 15, 16, & 17, 2005. Registration is now open to all agencies from Illinois, Indiana, Iowa, Minnesota and Wisconsin. The courses are classroom style to ensure participants receive the most out of the learning experience.



Level 1 covers the basic system overview with troubleshooting and answers to user questions. The basic system overview includes Clients, Applications/Forms, Locaters, Memos, Tranlogs, Imaging/Efiling, Integration.

Level 2 covers marketing and policy accounting including Marketing, Reports, Tasks, Policy Accounting including Direct Bill and Agency Bill.

For questions regarding this training, or for registration, contact our Technical Support Team.

(715) 287-4262
support@mi-assistant.com

Level 3 covers accounting integration including Commission Reconciliation, Getting Started with Accounting including: Setting beginning balances, Setting up QuickBooks Company, and Integration with QuickBooks. QuickBooks Overview includes Check Writing, Deposits, Journal Entries and Financial Statements.



Hot Topics

Clearing Up the Clutter

By Scott R. Johnson
PC Solutions, Inc.

If piles of papers are threatening to overtake your workspace, consider the benefits of a document scanner. Not only can these machines help clear out some of the clutter, when properly utilized, scanners can create a more efficient workflow, increase customer service and eliminate the need for those massive, overfilled file cabinets.

While purchasing a scanner on the surface seems like a straightforward task, there are a few hidden twists to be aware of before you dig into your technology budget. Take a few minutes to consider some easy to answer questions:

- Who will use the scanner(s)?
- How many people will use the scanner(s)?
- How many documents will be scanned each day?
- How many pages will be in each document?

Next, consider a few more subjective questions, to better define the type of scanner you'll need:

- How fast should it be?
- Is an automatic duplex function necessary?
- How much space can the scanner occupy?
- What resolution capability is necessary?
- Is a scanner connected to a workstation sufficient, or is a high-speed network scanner necessary?

The good news – there really is no “wrong” answer to these questions. The bad news –there is no definitive “right” answer either. Each agency has a different set of needs requiring a different scanner. There may even be a need for different scanners within each office. Regardless, there is always a product to satisfy your requirements.

When assessing your scanner purchase, here is a list of features to consider.

- Automatic Document Feeder
- OCR and PDF Conversion Software
- Physical Size Requirements
- Scanning Speed
- Color Capability
- Duplex Capability (Single Pass Duplex or Double Pass Duplex)
- Photo Scanning Capability

Following are some available scanners and their approximate price:

Fujitsu Scansnap F15110EOX
600x600 dpi, 8 1/2 x 14 Scanning Capacity, 15 pages per minute, Automatic Document Feeder, Single Pass Duplex, 11.2 x 5.7 x 5.9 inches.
Fujitsu Web Price \$495.00

HP ScanJet 8250
4800x4800 dpi, 8 1/2 x 14 Scanning Capacity, 15 pages per minute, Automatic Document Feeder, Double Pass Duplex, 22.6 x 15.7 x 7.7 inches.
HP Web Price \$899.00

Canon ImageRunner 2010F
(Network Copier, Printer, Fax and Scanner) – 600x600 dpi, 11 x 17 Scanning Capacity, 20 pages per minute, Automatic Document Feeder, Manual Duplex, 29-1/2" x 24-1/4" x 24-7/8" inches.
Canon List Price \$6,947.00

Obviously, there is a broad range of prices, and an even broader range of features. Each scanner has unique advantages and disadvantages, but doing some research upfront helps ensure you'll find the right scanner the first time.

If you have any questions about these, or other scanners, contact Scott Johnson at PC Solutions.◇

612-588-7501 or 800-542-5063
sjohnson@pcstechnology.com