

# PPL Next Gen Bulk Upload





#### Introduction

#### Please note this document does not relate to the current platform (known as PPL v3).

The purpose of this document is to provide information and guidance to Broking firms on the bulk upload functionality. Please note that similar capabilities, such as archive placements, is documented separately and can be accessed <u>here</u>.

The topic areas explored in this document are as follows: -

- Objectives and scope of this document
  - > Template check
  - Data validation
- Bulk Upload Overview
- Excel Template
- Bulk Placement Creation
  - Scenario 1: Successful Bulk Upload
  - Scenario 2: Bulk Upload errors identified



#### **Bulk Upload - Overview**

The bulk upload functionality is a method of creating several placement, programme, contract, and section records in one action, for example as part of a regular pre-renewal process. This is an alternative to creating records manually through the UI.

It also allows the upload of multiple limits, excesses, deductibles, and premiums into contract and/or section records contained in the template. The intent is that a broker organisation can create a report from their back-office system in the correct format to streamline the record creation process.

Important. It is only a record creation tool, it does not allow the editing or complementing of existing records.

During bulk upload there are two phases:

- 1. Template check
- 2. Data validation

When the template check is completed and successful then the system will undertake its data validation process.

NB. Placements will only appear in the Staging area if they have errors, if they don't, they will go straight into the Placements listing. From the Placements area they can be re-assigned if required to the 'proper' Broker processing teams.

#### Template check

The template check ensures that the template upload is consistent with PPL template requirements. There are several checks that need to be made against the template. If the Excel template fails any validation criteria, then the user cannot pass the template check and progress to Data Validation.

#### Data Validations

When the high-level validations are completed on the spreadsheet, the system will then check the data. This will be different for each level of the hierarchy and the validations are consistent with those already contained within the system. The system then checks the spreadsheet on a cell-by-cell basis for errors and any errors identified will be displayed on the Staging Placement screen.

All errors will be flagged and need to be rectified in the 'staging' area before a placement is added to the database.



#### Excel Template

PPL has created a standard Excel template for market use: -

- The Excel template conforms to a prescribed format of tabs and columns.
- Each tab contains either placement, programme, contract, or contract section data.
- Not all fields are required to be completed, only the PPL Next Gen platform minimum requirements must be met (see table below).

Field	Level	Field	Level
Client	Placement	Reinsured (if applicable)	Contract
Placement description	Placement	Inception date	Contract and Section
Placement effective year	Placement	Expiry Date	Contract and Section
Organisation	Placement and Contract	Period basis	Contract and Section
Team	Placement and Contract	Class of business	Contract and Section
User	Placement and Contract	Line of business	Contract and Section
Broker code	Contract	Product	Contract and Section
Contract reference	Contract	Region/Country	Contract and Section
Contract description	Contract	Carrier/Underwriter	Underwriter
Cover type	Contract	Written Line	Underwriter
Contract type, e.g., Insurance or Reinsurance	Contract	Stamp	Underwriter
Insured	Contract	UW reference	Underwriter

• Maximum file size of 50MB

A blank Excel template can be requested via pplenquiries@placingplatformlimited.com.



#### **Bulk placement creation**

The following screenshots assist in outlining step by step guidance on how to successfully generate and create a bulk creation statement.

#### Scenario 1 – Successful bulk Upload

From the main placement menu select the 'browse' option located at the bottom of the page, alternative you can drag and drop your file into the same area.

acemer	placements nts Facilities							
Place	ements 👻	Show My Placements only			Reassign 🔫 Filter 🖸	+ Create new pl	lacem	nent
	Client \$	Placement \$	Year ‡	Owner +	Inception date +	Status ‡		
	Goldsmith Inc	Mars Rocket	2022	PU product-owner-broker-SG3 user	15/03/2022	Not started		1
	Tony Moore	Tony's Bucket For Random Testing	2022	PU product-owner-broker-SG3 user	31/03/2022	Not started		
	Dequaire Inc	Stephan's Placement	2022	PU product-owner-broker-SG3 user	07/04/2022	Not started		
	Lockton	DK test	2022	PU product-owner-broker-SG3 user	13/04/2022	Not started		
	Glaxco	Pharma	2022	PU product-owner-broker-SG3 user	20/04/2022	Not started		
	Dequaire Inc	Stephan's Placement	2022	PU product-owner-broker-SG3 user	28/04/2022	In progress		
	BMS Group	Cyber	2022	PU product-owner-broker-SG3 user	16/05/2022	In progress		
	۵	Browse or drop here a xisx or a .docx file to create multiple	placements.			1 to	7 of 7	' ite

Navigate to the folder where your file is located and select the required file.



C 🟠 🗎 stg.ppInextgen.com/PPL_Placement/Placements						* 🗆 🖨	Incognito	
PPL product-owner-broker-org-SG3				۹ 🌲	PU product-owner-broker-SG3 user Placing Broker	Team product-owner-broker-tea	am-SG3	
t of placements cements Facilities								
Open	×							
- → → ↑ 🖡 « Archive upload → Archive 🗸 🖉 🔎 Search Archiv	/e				Reassign \Xi Filter	+ Create new placer	nent	
Organise • New folder	• 🔳 😗						_	
OneDrive - Dr.# Name     Note: Note: Difference - Dr. Provider     Note: Name     Note: Not	Dat	Year ‡	Owner ‡		Inception date 💠	Status ‡		
4.0 Personal     Archive PPL File Upload Template ObJAtix     Archive PPL File Upload Template v3xlix     Archive PPL File Upload Template v3xlix	14/	2022	PU product-owner-broker-SG3 user		15/03/2022	Not started		
Archive upload     Archive PIC File Upload Template Single Good Test.xlsx     Archive PIC File Upload Template Single Good Xlsx     Archive PIC File Upload Template Single Good xlsx	22/ 22/ 30/	2022	PU product-owner-broker-SG3 user		31/03/2022	Not started		
Deloitte (0365D)     PPLFileUploadTemplate_MongoxIsx	14/	2022	PU product-owner-broker-SG3 user		07/04/2022	Not started		
OneDrive - Deloitt     This PC     30 Objects		2022	PU product-owner-broker-SG3 user		13/04/2022	Not started		
Desktop v c	>	2022	PU product-owner-broker-SG3 user		20/04/2022	Not started		
File name: V All Files (*.*) Open	Cancel	2022	PU product-owner-broker-SG3 user		28/04/2022	In progress		
BMS Group Cyber		2022	PU product-owner-broker-SG3 user		16/05/2022	In progress		
Browse or drop here a sisk or a slock file to c	reate multiple placements	λ.				1 to 7 of	7 items	

PPL will start to perform a synchronisation process, between PPL and the chosen file.

C C	ments × + ☆ iii stg.pplnextgen.com/F				🛧 🗖 🈁 Incognito
				Reassign 👳 Filter 🔘	+ Create new placement
			PU product-owner-broker-SG3 user		Not started 🌲 …
					Not started
			6		Not started
		PPL i	s synchronizing your data file		Not started 🌲
			This process can take several minutes		Not started
		2022	PU product-owner-broker-SG3 user		In progress 🌲 🚥
			PU product-owner-broker-SG3 user		In progress 🌲 …
	<b>6</b> 8				
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If the validation process is a success, the bulk loaded placements will be displayed in a completed display list.

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## PPL Next Gen – Bulk upload

≡ P	PL product-ov	vner-broker-org-SG3			Q 🏚	PU product-owner-broker-SG3 user Placing Broker	Team product-owner-broker-team-SG3
Placeme	Facilities						
Plac	ements -	Show My Placements only				Reassign \Xi Filter 🔕	+ Create new placement
	Client \$	Placement \$	Year \$	Owner \$		Inception date \$	Status +
	XPR228	Sign and close	2019	PU product-owner-broker-SG3 user		01/01/2019	Not started
	Goldsmith Inc	Mars Rocket	2022	PU product-owner-broker-SG3 user		15/03/2022	Not started
	Tony Moore	Tony's Bucket For Random Testing	2022	PU product-owner-broker-SG3 user		31/03/2022	Not started
	Dequaire Inc	Stephan's Placement	2022	PU product-owner-broker-SG3 user		07/04/2022	Not started
	Lockton	DK test	2022	PU product-owner-broker-SG3 user		13/04/2022	Not started 🏚 …



#### Scenario 2 - Bulk Upload errors identified

Once the file has finished its sync process it will perform some validation to identify any errors that exist in relation to the structure of the selected placement file and PPL template requirements. The below example has flagged 4 placements with errors (shown in blue).

■ PPL product-	owner-broker-org-SG3			۹ 🌲	PU product-owner-broker-SG3 user Placing Broker	Team product-owner-broker-team-SG3			
List of placements									
Placements Facilities									
S The upload has 4 placements with errors	. Click here to correct the errors.								
Placements	Show My Placements only				Reassign = Filter	+ Create new placement			
Client \$	Placement \$	Year ‡	Owner \$		Inception date 🗘	Status 💠			
Goldsmith Inc	Mars Rocket	2022	PU product-owner-broker-SG3 user		15/03/2022	Not started 🏚 …			
Tony Moore	Tony's Bucket For Random Testing	2022	PU product-owner-broker-SG3 user		31/03/2022	Not started 🌲 🚥			
Dequaire Inc	Stephan's Placement	2022	PU product-owner-broker-SG3 user		07/04/2022	Not started			
Lockton	DK test	2022	PU product-owner-broker-SG3 user		13/04/2022	Not started			
Glaxco	Pharma	2022	PU product-owner-broker-SG3 user		20/04/2022	Not started			

Once the error hyperlink has been selected any errors that exist will be displayed on the Staging screen list, as shown below. Simply select the placement that you wish to view to further understand the identified error.

Once errors have been corrected, they will be cleared off the list and you will be returned to the normal menu.

Staging pla	cement list					
All placements	with errors				🛢 Delete	e All
ID \$	Client \$	Placement \$	Year ‡	Owner \$	Uploaded on \$	
PL01	Teste new year	placement new year	2022	DEV14-Hilary Mantel	22/04/2022 15:22	•••
PL02	Teste new year1	placement new year1	2022	PU product-owner-broker-SG3 user	22/04/2022 15:22	•••
PL03	Teste new year2	placement new year2	2022	PU product-owner-broker-SG3 user	22/04/2022 15:22	•••

In the example below there are multiple errors that have been flagged, the node tree on the left side indicates which parts of the placement the errors correlate to. This example has flagged that the Placement details show that there are errors relating to the Organisation, Team, and Placement Owner.

NB. Where an error is contained in dropdown field, the original entry from the template is retained in the dropdown list to assist the user in finding the correct entry.

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## PPL Next Gen – Bulk upload

Submit changes	Placement Details
placement new year2	Client name
	Teste new year2
test contract without programme	Placement description
S1	placement new year2
	Placement effective year 2022
	Organisation
	DEV14-CSK - London 🔹
	The organisation is invalid Team
	DEV14-CSK Retail Property Brokers
	The team is invalid Placement owner
	DEV14-Hilary Mantel 💌
	The owner is invalid

Correcting the data in the three fields to the suggested format of 'product owner broker – branch/team/user SG3' and selecting 'update', will remove the red error banner from the node tree, as shown below.

Submit changes	Placement Details
placement new year2	Client name
	Teste new year2
test contract without programme	Placement description
🖹 S1	placement new year2
	Placement effective year
	2022
	Organisation
	product-owner-broker-branch-SG3 +
	Team
	product-owner-broker-team-SG3
	Placement owner
	product-owner-broker-SG3 user
placement new year2	
test contract without programme     Image: S1	



The same applies to the next node down 'test contract without programme'. By selecting this node, you will be presented with flagged errors on the 'Contact Details' form, once all these fields have been adjusted to the correct option from the dropdown list (example shown in blue below), the user should select 'update'.

NB. The contract reference field below has also flagged a format validation issue in that the length of the reference is too long.

placement new year2	
Submit changes	Contract details
placement new year2	Broker team
	DEV14-CSK Retail Property Brokers 🔹
test contract without programme	You cannot create a contract owned by a different team to the placement
S1	DEV14-CSK Retail Property Brokers product-owner-broker-team-SG3 Broker code
	Unable to validate broker code. Fix feam errors first.
	Contract reference
	24140211225433215486
	Please select correct broker team

All previously flagged errors on the node tree have now been rectified/cleared.

Staging placement list / placement new year2 placement new year2	
	Submit changes
placement new year2	
test contract without programme	
🖹 S1	

If you want to remove a loaded placement containing errors, then do so by deleting individual records by selecting the ellipse form the right-hand side of the screen (...) and then continuing to select "Delete".





Alternatively, you are also able to delete all records, by selecting the "Delete All" function, where you will be presented with a warning before you confirm.

Warning!		×
Are you sure you want to delete all ?		
All placement data will be deleted including any attached documents.		
	Cancel	Confirm

#### Feedback

If you have any questions or queries relating to this document, or any other enquiry relating to PPL, please contact your PPL Relationship Manager directly or email <u>pplenquiries@placingplatformlimited.com</u>.