



# PPL Next Gen Carrier Configuration

## Introduction

The purpose of this document is to provide information and guidance to Carrier firms on their configuration options (organisational set-up) in readiness for cutover to PPL Next Gen in March 2023.

PPL are enhancing the way an organisation can be configured on the PPL Next Gen platform, allowing carriers more flexibility. This document sets out options for you to consider.

*NB. It should be noted that the decision you make prior to cutover will not preclude you from making changes in the future.*

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

- **Timelines & expectations**
  - Encrypted emails
- **Current set-up (v3)**
  - Downloading your existing configuration
- **Transforming your organisation's set-up**
- **New set-up (PPL Next Gen)**
  - Four-level hierarchy
  - Roles
  - Default teams
  - Consortium stamps
  - Line conditions
- **Frequently Asked Questions**
- **Questions & feedback**
- **Appendix**

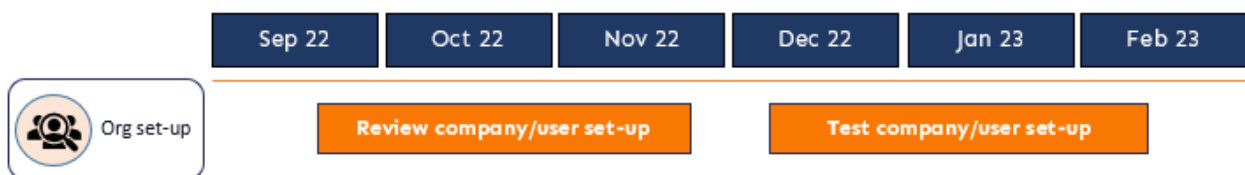
## Timelines & expectations

PPL will be performing the initial transformation of your organisational structure into the format expected by the PPL Next Gen platform. This organisational structure will be sent to you in September 2022.

It is from this initial transformation where you will need to –

- ✓ Review the Excel files for accuracy.
- ✓ Understand the options available to you (outlined in this document)
- ✓ Make any changes (if required)
- ✓ Send back to PPL on, before 21<sup>st</sup> October 2022.

Following the review of your organisational structure, please make any necessary changes and send back to PPL. Once received, your organisation structures will be uploaded to the PPL Next Gen platform prior to cutover in February 2023. ***NB. If a response is not provided to PPL, it will be assumed that your company are happy with the organisational structure.***

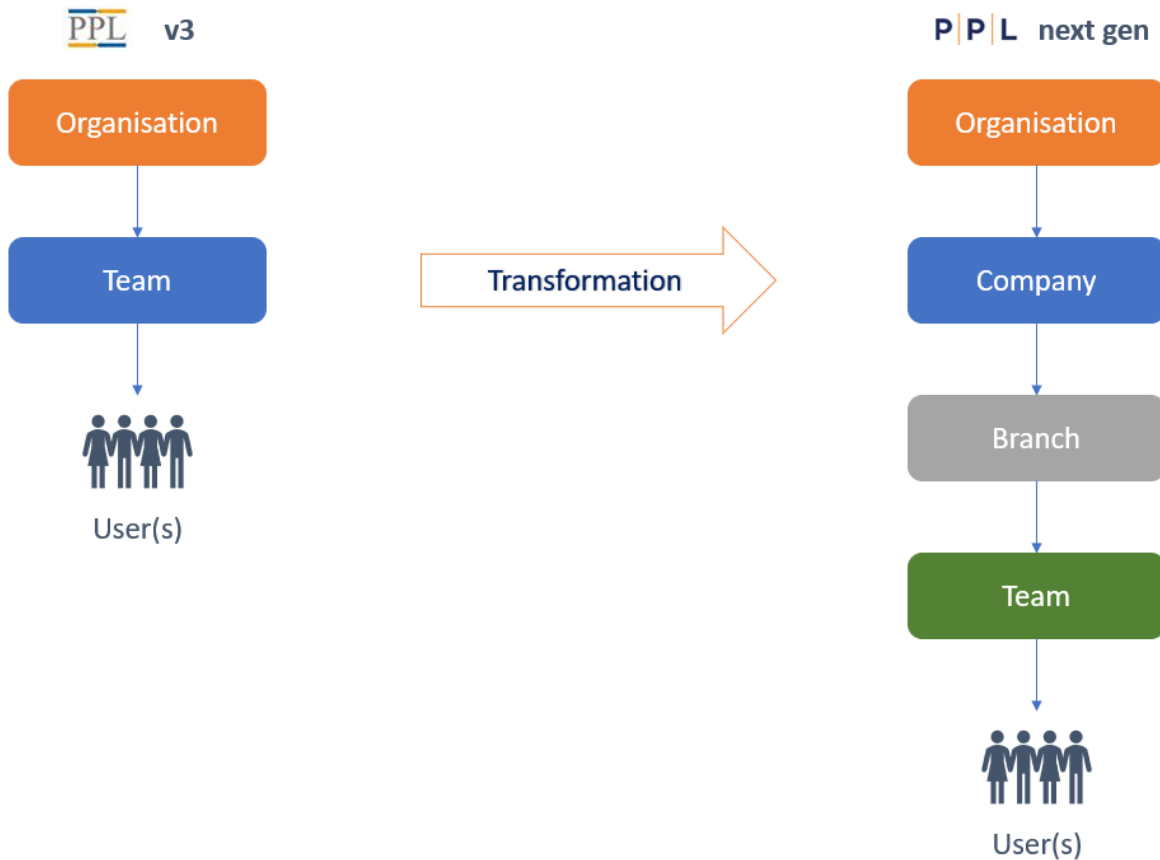


## *Encrypted emails*

PPL will be sending your configuration files in Excel via encrypted email. If your organisation does not use Outlook and/or cannot open encrypted email, please contact us so we can password protect the Excel file and re-send.

## Current set-up / hierarchy

In the current platform (v3), carrier organisations are structured in a 2-tier hierarchy. PPL Next Gen is introducing a new four-tier hierarchy to allow for greater flexibility in how organisations can be set-up.



## *Downloading your existing configuration*

If you are a Super User on v3, you can download your existing configuration from the Report's menu. If you are not a Super User or want to know who the Super User is for your organisation, please contact [psupport@pplnextgen.com](mailto:psupport@pplnextgen.com).

**NB.** The concept of a 'Super User' does not exist in PPL Next Gen. If users need to access to PPL Next Gen for MI purposes, they need to be added to the relevant company/team.

To assist with your transformation, we have included your existing 'Super User' team in the Carrier Hierarchy Excel, so you know the users that currently have this permission.

## Transforming your organisations set-up

Your PPL Next Gen configuration will be contained within the following files: -

- **Carrier hierarchy.** This contains your organisational set-up.
- **Broker Visibility.** This contains your stamp preferences.

The logic we have used is detailed in the Appendix of this document, and the main assumptions are as follows –

- **Organisation name.** This has been applied to your Organisation, Company, and Branch name. This reflects the 2-tier hierarchy which exists on PPL v3.
- **Roles.** ‘Manager’ will now be ‘Underwriter’ and ‘Reader’ will now be ‘Underwriter Assistant’.
- **Points of contact.** PPL will use the names we hold in our internal system of record.
- **Blank fields.** These will need to be populated, unless marked as optional.

## PPL Next Gen set-up / hierarchy

The following section details how each level of the new four-level hierarchy is structured in PPL Next Gen, and the options it gives your organisation.

### *Organisation*

This is the parent company e.g., Chubb or Beazley.

- Whilst it is used for the Configuration set up and for MI Reporting from this level, it only displays in Billing and for reporting and does not impact or display for any other aspect of the platform.
- Line conditions are set up at this level.
- You cannot reassign placements at this level.

### *Company*

This is the legal entity e.g., Chubb Europe or Chubb UK and is linked to the stamps that you would like available. You can report at this level.

- You cannot reassign work (e.g., placement, firm order, endorsements) at this level.
- Stamps are linked to this level.
- Company name will be displayed with the stamp display name on the security pages/documentation.
- You cannot see work from a different company under the same organisation unless you belong to a team in both companies.
- When a Broker selects one of your Underwriters, they will select them at Company level.
- A user can exist in more than one Company with the same email address.
- Logos are set at this level (also at stamp level)

### *Branch*

This enables you to group your teams e.g., for Chubb Europe this may be Chubb UK, Chubb Frankfurt, and Chubb Paris.

- You can reassign work at this level.

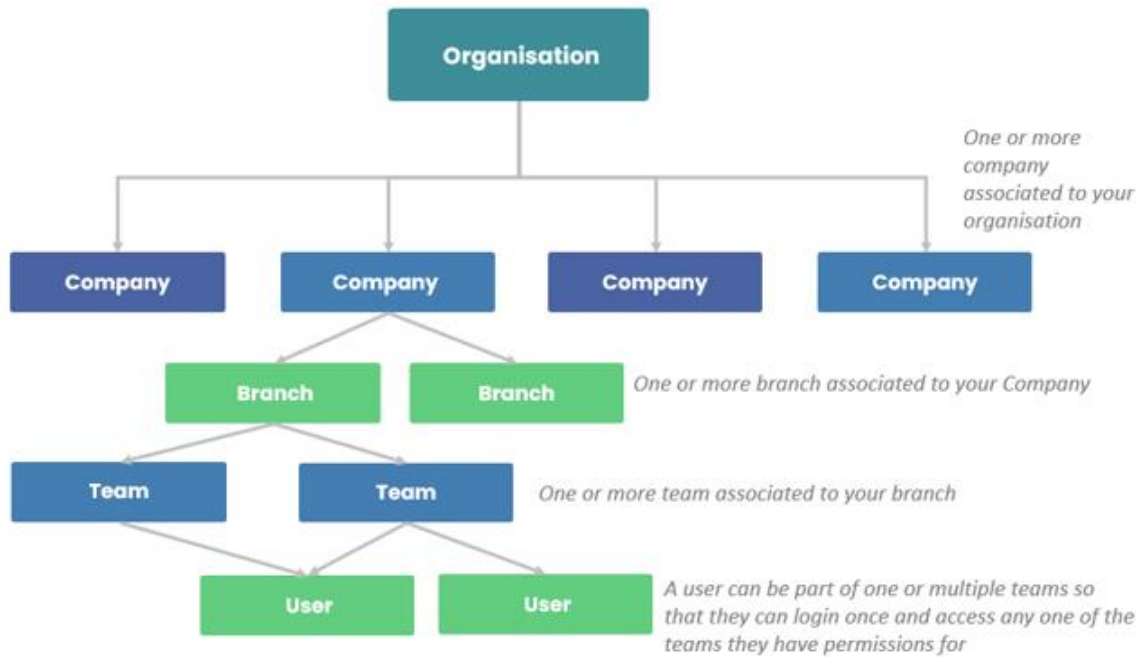
### *Team*

This enables you to split out your teams and would normally be by class of business e.g., Marine or Casualty.

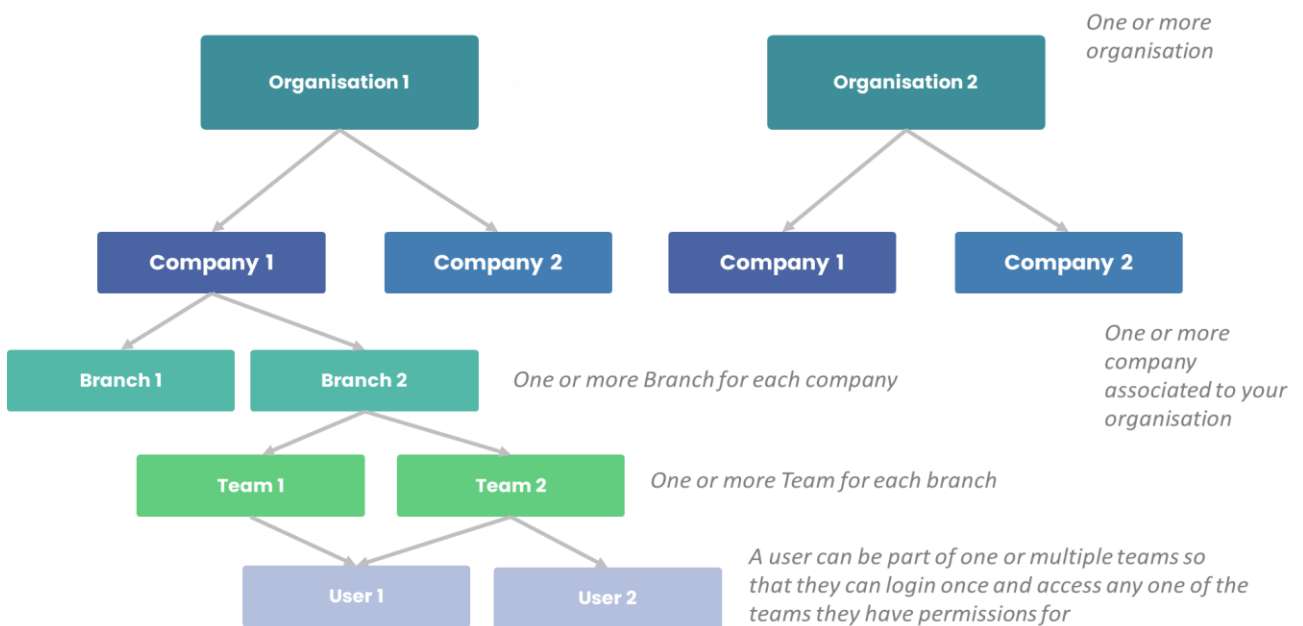
- You can reassign work at this level.
- You use your Team ‘drop down’ to toggle between different teams you belong to
- Users are linked to this level.

We believe the new four level hierarchy provides the opportunity for market firms to either merge or separate their top-level organisations, as displayed in options A & B below.

Option A – Single organisation



Option B – Multiple organisations



## Roles

The new roles are detailed in the following table.

Description	Underwriter				Admin
	Underwriter (Team lead and approver)	Underwriter	Underwriter (Monitored)	Quote/Endorsement underwriter	Underwriter Assistant
	Prepare quote response	✓	✓	✓	✓
Prepare firm order response	✓	✓	✓	✗	✓
Prepare endorsement response	✓	✓	✓	✓	✓
Send quote response	✓	✓	✓	✓	✗
Send firm order response	✓	✓	✓	✗	✗
Send endorsement response	✓	✓	✓	✓	✗
Select 2 <sup>nd</sup> approver	Optional	Optional	Required	Optional	✗
Approve other responses	✓	✗	✗	✗	✗

We have mapped the existing roles in v3 to the new roles in PPL Next Gen as follows –

- Manager *will now be* Underwriter.
- Reader *will now be* Underwriter Assistant

**NB. Please take this mapping into consideration when reviewing your new organisational set-up, to ensure you assign the correct roles.**

## Default teams

Where a user belongs to more than one team (per company), they will need to choose where all their work (e.g., placements, firm orders, and endorsements) are sent. This is achieved by populating the 'Is Default' field in the Carrier Hierarchy Excel file. However, a user can reassign to the other teams they are a member of.

**NB. We have selected the first team in the Carrier Hierarchy Excel file as the user's default team; please change as required.**

## Consortium Stamps

In the PPL v3, the Stamp Display Name field contained the whole display name, and on PPL Next Gen this will persist for all stamps, except for Consortium and Coverholder 9000/4000 series stamps.

For Consortium Stamps in PPL Next Gen, the Stamp Display Name field will contain the Consortium name only. The year of account (YOA), capacity provider and allocations will be captured in separate fields/rows in the carrier hierarchy Excel spreadsheet. These fields will then be combined to form the final stamp display on the security details pages produced by PPL Next Gen.

**NB. Stamps that do not currently display their capacity on PPL due to the 255-character limit on PPL v3, have been updated using the DXC booklet.**

## *Line conditions*

Line conditions can now be applied at the stamp level. To achieve this, a new row needs to be created in the Carrier Hierarchy Excel spreadsheet for each line condition to be applied to a stamp.

## *Global line conditions*

These will be added as standard across all organisations within the platform, and therefore do not need to be added to your configuration. They are as follows –

- Line to stand.
- Each declaration to be referenced separately.

## Frequently asked questions

**Q: If I don't want to make any changes, do I need to send you the Excel file back?**

A: No, you can simply send an email to [support@pplnextgen.com](mailto:support@pplnextgen.com) confirming you are happy with the transformation.

**Q: Do I need to mark-up any changes before sending back?**

A: Please make any changes directly to the document. Please can you ensure the formatting, structure and terminology used remains the same as what is provided. Please do not use any abbreviation or shorthand.

If you feel your answer does not match the structure provided, please contact your Relationship Manager or [support@pplnextgen.com](mailto:support@pplnextgen.com)

**Q: How will the joiners & leavers process work between when I send back my changes and February cutover?**

A: PPL will endeavour to ensure that all users are kept in sync, however we kindly request that you keep [support@pplnextgen.com](mailto:support@pplnextgen.com) informed of joiners, movers & leavers so all records are up to date.

**Q: Can you send me an extract of the new file once it has been uploaded to PPL Next Gen?**

A: Yes, we will be able to provide this from December 2022 onwards.

**Q: Do I need to encrypt the email I send to PPL containing any changes?**

A: Yes, it is recommended that you use encryption when sending your organisation's data to PPL.

**Q: Why do you need to know if we're a member of a trade organisation?**

A: This is for billing purposes and bears no impact on functionality or display within the platform.

**Q: What is a Technical User?**

A: This is new to PPL Next Gen. A technical user will not log into the platform, instead will use APIs to conduct business.

**Q: What does a Point of Contact role allow a user to do on the platform?**

A: These contacts are not used or displayed anywhere on the Next Gen platform by users. This is solely for the PPL Support Team to have quick access to the main contacts at each firm e.g., User/Stamp approvers.

## Questions & 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 [support@pplnextgen.com](mailto:support@pplnextgen.com).

## Appendix – Carrier Hierarchy

The following table details how we have transformed your organisations configuration, using our version of your User Configuration Extract into the PPL Next Gen format.

Extract	Data Source	Source Data Sheet	Source Date Field	Target Data Field	Transformation	Old Value	New Value
<b>Organisation</b>	Ebix Weekly Org Report	N/A	N/A	Carrier or off-platform Carrier?	Apply default value	N/A	“Carrier”
		User Configuration Team per row	GroupId	Organisation Name	Remove duplicate values	N/A	N/A
	N/A	N/A	N/A	Effective From	Apply default value	N/A	“Go-live date”
<b>Company</b>	Ebix Weekly Org Report	User Configuration Team per row	GroupId	Organisation Name	Remove duplicate values	N/A	N/A
			GroupId	Company Name	Remove duplicate values	N/A	N/A
	N/A		N/A	Effective From	Apply default value	N/A	“Go-live date”
	NextGen Mapping	Mapping data for Next Gen	PPL Members	Which Association?	Replace existing values with default values	“IUA Member” “LMA Member” or “LMA Member Service Company”	“IUA International Underwriting Association” “LMA – Lloyd’s Market Association”
<b>Branch</b>	Ebix Weekly Org Report	Use Configuration Team per row	GroupId	Organisation Name	Remove duplicate values	N/A	N/A
			GroupId	Company Name	Remove duplicate values	N/A	N/A
			GroupId	Branch Name	Remove duplicate values	N/A	N/A



Extract	Data Source	Source Data Sheet	Source Date Field	Target Data Field	Transformation	Old Value	New Value
	N/A	N/A	N/A	Effective From	Apply default value	N/A	"Go-live date"
<b>Team</b>	Ebix Weekly Org Report	User Configuration Team per row	GroupId	Organisation Name	Remove duplicate values	N/A	N/A
			GroupId	Company Name	Remove duplicate values	N/A	N/A
			GroupId	Branch Name	Remove duplicate values	N/A	N/A
			Departments	Team Name	Remove duplicate values	N/A	N/A
	N/A	N/A	N/A	N/A	Effective From	Apply default value	N/A
<b>User</b>	Ebix Weekly Org Report	User Configuration Team per row	GroupId	Organisation Name	Remove duplicate values	N/A	N/A
			GroupId	Company Name	Remove duplicate values	N/A	N/A
			GroupId	Branch Name	Remove duplicate values	N/A	N/A
			Name	First Name and Last Name	Split forename and surname	N/A	N/A
			Departments	Linked Team Name	Remove duplicate values	N/A	N/A
			UserRole	Role	Replace existing values with default values	"Manager" "Reader"	"Underwriter" "Underwriter Assistant"
	N/A	N/A	N/A	N/A	Is Technical User	Apply default value	N/A

## PPL Next Gen Carrier Configuration

Extract	Data Source	Source Data Sheet	Source Date Field	Target Data Field	Transformation	Old Value	New Value
<b>Line Conditions</b>	Ebix Weekly Org Report	Underwriter Line Conditions	Underwriter Organisation	Organisation Name	Remove duplicate values	N/A	N/A
			Condition	Line Conditions	Remove duplicate values	N/A	N/A