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NEXTGEN

The London Market reimagined
for a **digital future**



PPL Next Gen MI Extracts - Broker

Introduction

The purpose of this document is to provide information and guidance to Broking firms on the MI extracts being made available in PPL Next Gen.

PPL have enhanced the MI Reporting function within the PPL Next Gen platform. This will enable a better and more flexible experience for market firms when extracting data for day-to-day information or supporting in-house MI functions.

The topic areas explored in this document are: -

- **Timelines & assumptions**
- **Key features**
- **Overview**
 - MI homepage
 - Reporting parameters
 - Extract generation
- **MI extracts**
- **Extract header mappings**
- **Frequently asked questions**
- **Questions & feedback**

Timelines & assumptions

It is recommended that any required revisions to your existing MI functions are carried out in advance of February 2023 when the market will start to cut over to PPL Next Gen, and your firm is ready to accept the new data extracts.

To support this, PPL: -

- Have made available an Excel document providing more detailed information about each MI extract.
- Will be holding dedicated MI market testing sessions in January 2023. Dates for these sessions will be released shortly.

Assumptions

It should be noted that PPL should not be considered as an MI hub for reporting requirements. It is the responsibility of each organisation to utilise the extracts provided to inform your own MI needs.

Key features

The following is a summary of the changes developed in PPL Next Gen: -

- A catalogue of 10 extracts, including 7 new ones.
- An MI Reporting interface allowing users to select and run a series of bespoke data extracts direct from the platform, with great ease.
- For each extract, there will be a unique interactive data parameter menu, allowing users to filter data by certain key criteria prior to exporting.
- The ability for users to save custom extracts for future re-use.
- Each compiled extract has the option to be downloaded direct to a user's browser and/or emailed direct to their PPL registered email account.
- All extracts will host two worksheets; the first will contain the core data output and the second worksheet provides a summary of user, extract run-time details and a list of associated criteria used to compile the data.

Overview

Access to MI extracts on PPL Next Gen is via the MI homepage. This is the starting point that hosts both the ‘out of the box’ and user saved extracts. It also includes -

- **Reporting Parameters** - An array of filters to apply criteria against each extract
- **Extract generation** - Ability to run and download an extract

We will explore these features in the following sections.

MI homepage

We have created an interface with a new look and feel, combined with an array of useful functions to allow users to easily extract data.

Access to extracts will be governed by user profiles, so users have visibility and the ability to run those that are specific to their role.

The screenshot displays the 'MI Reporting' interface. At the top, there is a navigation bar with the PPL logo, the text 'BBC UK Aviation Risks-SG2', a notification bell with '99+', and user information for 'Ronnie-SG2 Wood, Placing Broker'. Below the navigation bar, the page title 'MI Reporting' is visible. The main content area features a search bar labeled 'Search Report' and a 'Filter' button. A table lists various report templates with columns for Report Name, Report Type, Report Group, and Progress. At the bottom left, there are 'Expand all' and 'Collapse all' options, and at the bottom right, it shows '1 to 9 of 9 items'.

Report Name	Report Type	Report Group	Progress
Contracts Signed and Closed Details	Template Report	Firm Order	...
Contracts Signed and Closed Summary	Template Report	Firm Order	...
Corrections Details	Template Report	Firm Order	...
Corrections Summary	Template Report	Firm Order	...
Endorsements Details	Template Report	Endorsement	...
Endorsements Summary	Template Report	Endorsement	...
Facility Contracts Signed and Closed Details	Template Report	Facility	...
Firm Orders Details	Template Report	Firm Order	...
Firm Orders Summary	Template Report	Firm Order	...

Reporting Parameters

When determining which extract to create, users have the following parameter options: -

- **Period Range**
 - Date type - e.g., Inception, Expiry, Signed, Written.
 - Export time period - Custom, Daily, Weekly, Monthly, Quarterly, Half Year and Year
 - Select range dates - Calendar to select individual dates or date ranges
- **Organisation Hierarchy**
 - Select companies, branches, and teams for your organisation.
- **Class of Business**
 - All available market classes.

A summary view, detailing the extract criteria is always present within the platform and is also included within the extract.

The screenshot displays the PPL reporting interface. At the top, the navigation bar includes the PPL logo, the user's name 'Ronnie-SG2 Wood', and the team 'BBC Aviation London Brokers-SG2'. The main content area is titled 'Contracts Signed and Closed Details Template Report'. On the left, there is a sidebar with three expandable sections: 'Period Range', 'Organisation Hierarchy', and 'Class of Business'. On the right, the 'Template Report' configuration is shown, including a 'Send Report to my email' checkbox and the following parameters:

Parameter	Value
Date Type	First Signed Date
Export time period	Monthly
Date Range	01/09/2022 - 30/09/2022
Organisation Hierarchy	
Companies	All
Branches	All
Teams	All
Class of Business	
Class of Business	All

Extract generation

All users will have the ability to run a bespoke extract in its default form or tailor the extract via the use of data parameters. If a user tailors an extract, there is an option to save the extract for future use.

It should be noted that: -

- Users have the option to either download an extract to their browser and/or have a copy emailed to their registered email address.
- All extracts once generated will have a holding time of 7 calendar days before the download expires.
- Extracts will be provided in Excel (*.xlsx) format and contain 2 worksheets: -
 - Extract Data - System data as per the criteria selected.
 - Extract Summary - Details of when the extract was run, by which user and criteria selections.
- The rationale for using *.xlsx file format, is due to:
 - The *.csv file format only allows a single sheet output. To output the data and summary sheets, there is a requirement to use *.xlsx format.
 - Users can save an extract as *.csv if they wish for onward processing.

MI Extracts

The following table sets out the MI extracts being provided in PPL Next Gen, and where applicable, details the name of the extract in PPL v3 (the current version of PPL).

PPL Next Gen Extract Name	PPL v3 Extract Name	Extract Description
Archived Firm Orders Details	NEW	<ul style="list-style-type: none"> Detailed extract providing a list of archived firm orders at contract level by organisation hierarchy, contract status and class of business The extract is driven by optional date parameters: Inception, Expiry, Contract Created or First Firm Order Requested
Contracts Signed and Closed Details	NEW	<ul style="list-style-type: none"> Detailed extract providing a list of contracts signed and closed at contract level by organisation hierarchy, placement type of “non-Facility” and class of business The extract is driven by First Signed Date and against contract status: Sign and Close
Contracts Signed and Closed Summary	NEW	<ul style="list-style-type: none"> Summary extract providing a count of contracts signed and closed at contract level by organisation hierarchy, placement type and class of business The extract is driven by First Signed Date and against contract status: Sign and Close
Corrections Details	Broker Firm Order Corrections	<ul style="list-style-type: none"> Detailed extract providing a list of corrections at contract level by organisation hierarchy, placement type, class of business and correction type The extract is driven by optional date parameters: Inception, Expiry, Contract Created or First Firm Order Requested and correction type: Cancel Contract, Cancel Line, Cancel and Replace or Panel Amendment
Corrections Summary	NEW	<ul style="list-style-type: none"> Summary extract providing a count of corrections at contract level by organisation hierarchy, placement type, class of business and correction type The extract is driven by optional date parameters: Inception, Expiry, Contract Created or First Firm Order Requested and correction type: Cancel Contract, Cancel Line, Cancel and Replace or Panel Amendment
Endorsements Details	Endorsement Requests / Responses	<ul style="list-style-type: none"> Detailed extract providing a list of endorsements at contract/section level by organisation hierarchy, placement type, class of business, endorsement type and status The extract is driven by optional date parameters: Endorsement Created or Requested and all endorsement types and status
Endorsements Summary	NEW	<ul style="list-style-type: none"> Summary extract providing a count of endorsements at contract/section level by organisation hierarchy, placement type, class of business, endorsement type and status The extract is driven by optional date parameters: Endorsement Created or Requested and all endorsement types and status
Facility Contracts Signed and Closed Details	NEW	<ul style="list-style-type: none"> Detailed extract providing a list of facility contracts signed and closed at contract level by organisation hierarchy, placement type of “Facility” and class of business The extract is driven by First Signed Date and against contract status: Sign and Close
Firm Orders Details	Firm Orders / Firm Order MI Extract	<ul style="list-style-type: none"> Detailed extract providing a list of firm orders at contract level by organisation hierarchy, contract status and class of business The extract is driven by optional date parameters: Inception, Expiry, Contract Created or First Firm Order Requested
Firm Orders Summary	NEW	<ul style="list-style-type: none"> Summary extract providing a count of firm orders at contract level by organisation hierarchy, contract status and class of business The extract is driven by optional date parameters: Inception, Expiry, Contract Created or First Firm Order Requested

Extract Header Mappings

The following table details all PPL Next Gen extract headers, together with their equivalent header in PPL v3 (current platform) and the associated data field within Next Gen. For more detailed information as to what headers are used in each extract, please refer to the accompanying [Excel document](#).

NB. Where possible, we have retained the original extract headers from the previous platform, but in some instances, there has been a need to amend some headers, so that they correspond to the data field within the new platform.

Key:

- No change to report header
- Change to report header
- New data field
- Calculated data field
- Derived data field

PPL Next Gen Report Header	PPL v3 Report Header	PPL Next Gen UI Field
Agreement Party Type	Endorsement Party Type	Endorsement Agreement Parties
Backload Reason	Method Of Placement	Backload Reason
Broker Branch	Broker Branch	Branch Name
Broker Company Name	Broker Company Name	Organisation
Broker Contact	Broker Contact	Placing Broker
Broker Email Address	Broker Email Address	Email Address
Broker Last Placing Action Date	Last Placing Action Date (Broker)	Saved to Transaction Log
Broker Team	Broker Team	Broker Team
Carrier Branch	Carrier Branch	Branch Name
Carrier Company Name	Carrier Company Name	Organisation
Carrier Contact	Carrier Contact	Underwriter
Carrier Email Address	Carrier Email Address	Email Address
Carrier First Response Date	Insurer First Response Date	Saved to Transaction Log
Carrier Last Placing Action Date	Last Placing Action Date (Underwriter)	Saved to Transaction Log
Carrier Team	Carrier Team	Team
Class Of Business (Contract)	Class Of Business	Class of Business
Class Of Business (Section)	Class Of Business	Class of Business
Client Name	Client Name	Placement Description
Contract Created Date	Firm Order Created Date	N/A
Contract Description	Contract / Layer Desc	Contract Description
Contract Status	Contract / Layer Status	Status
Contract Type	Business Type	Contract Type
Contract Version Number	UMR Version ID	Contract Version Number
Contracts Signed and Closed	N/A	N/A
Correction Type	Correction Type	N/A
Corrections	N/A	N/A
Country (Contract)	Country	Country
Country (Section)	Country	Country
Cover Type	Contract Type	Cover Type
Default Contact	N/A	Default Contact
Endorsement Action	Endorsement Action	Endorsement Action
Endorsement Action Date	Endorsement Action Date	Saved to Transaction Log
Endorsement Action Performed By	Endorsement Action Performed By	Saved to Transaction Log
Endorsement Agreed Date	Endorsement Agreed Date	Endorsement Agreed Date
Endorsement Agreement Practice	Agreement Practice	Endorsement Agreement Practice
Endorsement Created Date	Endorsement Created Date	Endorsement Created Date

PPL Next Gen Report Header	PPL v3 Report Header	PPL Next Gen UI Field
Endorsement Effective From Date	Endorsement Effective From Date	Endorsement Effective From Date
Endorsement Effective To Date	Endorsement Effective To Date	Endorsement Effective To Date
Endorsement Name	Endorsement Name	Endorsement Name
Endorsement Reference	Endorsement Ref	Endorsement Reference
Endorsement Requested By	Endorsement Requested By	Saved to Transaction Log
Endorsement Requested Date	Endorsement Requested Date	Endorsement Requested Date
Endorsement Settlement Due Date	Endorsement Settlement Due Date	Endorsement Settlement Due Date
Endorsement Status	Endorsement Status	Endorsement Status
Endorsement Type	Endorsement Type	Endorsement Type
Endorsements	N/A	N/A
Expiry Date (Contract)	Expiry Date	Expiry Date
Expiry Date (Section)	Expiry Date	Expiry Date
Facility Lines	N/A	Facility Lines
Facility Order	N/A	Facility Order
Facility Permitted Territory	N/A	Facility Permitted Territory
Facility Proposed Line	N/A	Facility Proposed Line
Firm Order Contracts	N/A	N/A
Firm Order Lines	N/A	N/A
Firm Order Rejected Date	Line Declined Date	Saved to Transaction Log
Firm Order Requested By	Firm Order Action Performed By	Saved to Transaction Log
Firm Order Requested Date	Firm Order Action Date	Saved to Transaction Log
Firm Order Role	Dec Offslip / Dec Role	Firm Order Role
First Firm Order Requested Date	First Firm Order Requested Date	Saved to Transaction Log
First Signed Date	Signed Line To Stamp Date	N/A
Inception Date (Contract)	Inception Date	Inception Date
Inception Date (Section)	Inception Date	Inception Date
Insured	(Re) Insured	Insured
LIC 2 Lead	N/A	Icon on Create Placement (L2)
LIC Lead	LIC Lead	Icon on Create Placement (L1)
Line Conditions	Line Condition(s) Applied	Line Conditions
Line Of Business (Contract)	Line Of Business	Line of Business
Line Of Business (Section)	Line Of Business	Line of Business
Lines Bound	N/A	N/A
Lloyd's 2 Lead	N/A	Icon on Create Placement (anchor squared)
Lloyd's Brussels Number	Lloyd's Brussels Number	Agency Code
Lloyd's Lead	Lloyd's Lead	Icon on Create Placement (anchor)
Lloyd's Syndicate Number	Lloyd's Syndicate Number	Agency Code
LORS Code	LORS Code	LORS Code
Master Facility Contract Description	Master Facility Contract / Layer Desc	Contract Description
Master Facility Contract Reference	Master Facility Contract / Layer Ref	Contract Reference
Master Facility Contract Type	Master Facility Contract Type	Contract Type
Master Facility Country	Master Facility Country	Country
Master Facility Expiry Date	Master Facility Expiry Date	Expiry Date
Master Facility Inception Date	Master Facility Inception Date	Inception Date
Master Facility Programme Description	Master Facility Programme Desc	Programme Description
Master Facility Region	Master Facility Region	Region
Master Facility Role	Master Facility Role	Firm Order Role
Master Facility Section Description	Master Facility Section Desc	Section Description
Master Facility Version Number	Master Facility Version Desc	Contract Version Number
Notification Days	Notification Days	Within number of working days
Notify Followers	Notify Followers	Notification to followers?

PPL Next Gen Report Header	PPL v3 Report Header	PPL Next Gen UI Field
Participation Status	Insurer Status	Status
Placement Description	Placement Desc	Placement Description
Placement Status	Placement Status	Placement Status
Placement Type	Placement Type	N/A
Premium	Premium	Premium
Premium Currency	Premium Currency	Premium Currency
Premium Type	Premium Type	Premium Type
Product (Contract)	Product	Product
Product (Section)	Product	Product
Programme Description	Programme Desc	Programme Description
Programme Status	Programme Status	Programme Status
Proposed Written Line Fixed/Range	Proposed Line %	Proposed Written Line Fixed/Range
Quote Role	Dec Offslip / Dec Role	Quote Role
Range Proposed Written Line % Range Maximum	Proposed Line Range To %	Range Proposed Written Line % Range Maximum
Range Proposed Written Line % Range Minimum	Proposed Line Range From %	Range Proposed Written Line % Range Minimum
Region (Contract)	Region	Region
Region (Section)	Region	Region
Reinsured	Original Policy Holder	Insured
Rejection Reason	Insurer Firm Order Rejection Reason	Rejection Reason
Retrocedent	N/A	Insured
Section Description	Section Desc	Section Description
Section Lead	N/A	Icon on Create Placement (silver star)
Section Reference	Section Ref	Section Reference
Signed Down Order %	Order %	Order %
Signed Line	Signed Line % To Stamp	Signed Line
Slip Lead	Slip Lead	Icon on Create Placement (gold star)
Stamp Name	Stamp Name	Stamp
Subjectivity Applied	Subjectivity(s) Applied	N/A
Subjectivity Status	Subjectivity(s) Status	Subjectivity Status
Total Signed	Total Carrier Signed Line %	Signed Line
Total Written	Total Carrier Written Line %	Total Written
UMR	UMR	N/A
Underwriter Reference	Stamp Ref	Stamp
Written Date	Written Line To Stamp Date	Saved to Transaction Log
Written Line	Written Line % To Stamp	Written Line
Written Line Basis	Order Basis	Written Line Basis
XIS Code	XIS Code	Agency Code
XIS Lead	XIS Lead	Icon on Create Placement (XIS)

Frequently asked questions

Q: What sort of reporting criteria is available to me?

A: There is a standard set of parameters available to each extract; Period Range, Organisation Hierarchy and Class of Business. Within each of those parameters, you can customise them to drive your output, for example, a custom date range using inception date, against select members of my team and certain classes of business.

Q: Am I restricted to running my extract to a certain period?

A: The period range available offers an array of export options. For any given MI extract, the minimum output range is one day, whilst the maximum output is one year. In addition, there are options to run reports for weekly, monthly, and quarterly ranges as well as the ability to run against custom date ranges.

Q: How do I view an extract once generated?

A: Each compiled extract has the option to be downloaded from the MI Homepage, direct to a user's browser and/or emailed direct to their PPL registered email account, when you check the email option within the extract parameter view.

Q: How are the extract outputs structured?

A: Extracts will host two worksheets; the first will contain the core data output and the second sheet provides a summary of user, extract run-time details and a list of associated criteria used to compile the data.

Q: Do I have to re-create extracts with bespoke criteria?

A: No. The platform offers the ability to save custom extracts for future re-use. When you select an extract and apply your own parameters, just before the extract is generated, you will be prompted to save the extract with a unique name, so you can come back to it later and either run it as-is or you can amend the parameters.

Q: How many custom extracts can I save on the platform?

A: There is no limit as to how many custom extracts you can save, but they must be saved with a unique name each time you save. **Tip:** Give your custom extracts a meaningful name, so they are both easily identifiable and provide you with what the extract provides

Q: How do I find a particular custom extract if I have many saved?

A: In the MI Homepage, there is a search feature at the top of every page. Just start typing and the page automatically starts filtering the list of reports with each letter you type.

Q: Can I develop my own extracts within the platform?

A: No. The platform does not offer this functionality. Try to think of the MI Reporting function as a source of data, by which you can extract certain datasets that you can then utilise for your own reporting needs, by way of either using your own MI knowledge or your organisations dedicated MI team.

Q: Do you have an API where I can extract my data on regular basis?

A: Not yet, but it is on our roadmap as a future enhancement.

NB. The PPL roadmap is governed by the PPL User & Operations Sub-Committee, made up of market participants. This group make recommendations to the PPL Board on roadmap priorities and changes.

Questions & Feedback

If you have any questions or queries relating to this document, or any other enquiry relating to PPL, please contact email support@pplnextgen.com.