# Managing the Underwriter Dashboard

## Contents

Key Points ..... 2
Dashboard View – Items Received in Last 30 Days ..... 2
Finding Items Received Over 30 Days Ago ..... 3
Dashboard Search ..... 3
Applying Filters ..... 4
Save Filters on the Underwriter Dashboard ..... 4
Reapply a Previously Saved Filter ..... 5
Update an Existing Filter ..... 5
Delete a Saved Filter ..... 5
Sorting ..... 5
Date/Time Received Column ..... 6
Hide Completed Items ..... 6
Hide Notification Requests from Underwriter Dashboard ..... 6

# Managing the Underwriter Dashboard

This document sets out the Underwriter dashboard changes being applied to production for the 24th May. 2024, along with existing features to help you manage your Broker requests.

## Key Points

From the 24th May, Underwriter dashboards will default to the following unless a filter has been saved/applied:

- Only **not completed work items received in the last 30 days** will be shown.
- Notifications or completed work items will not be shown.

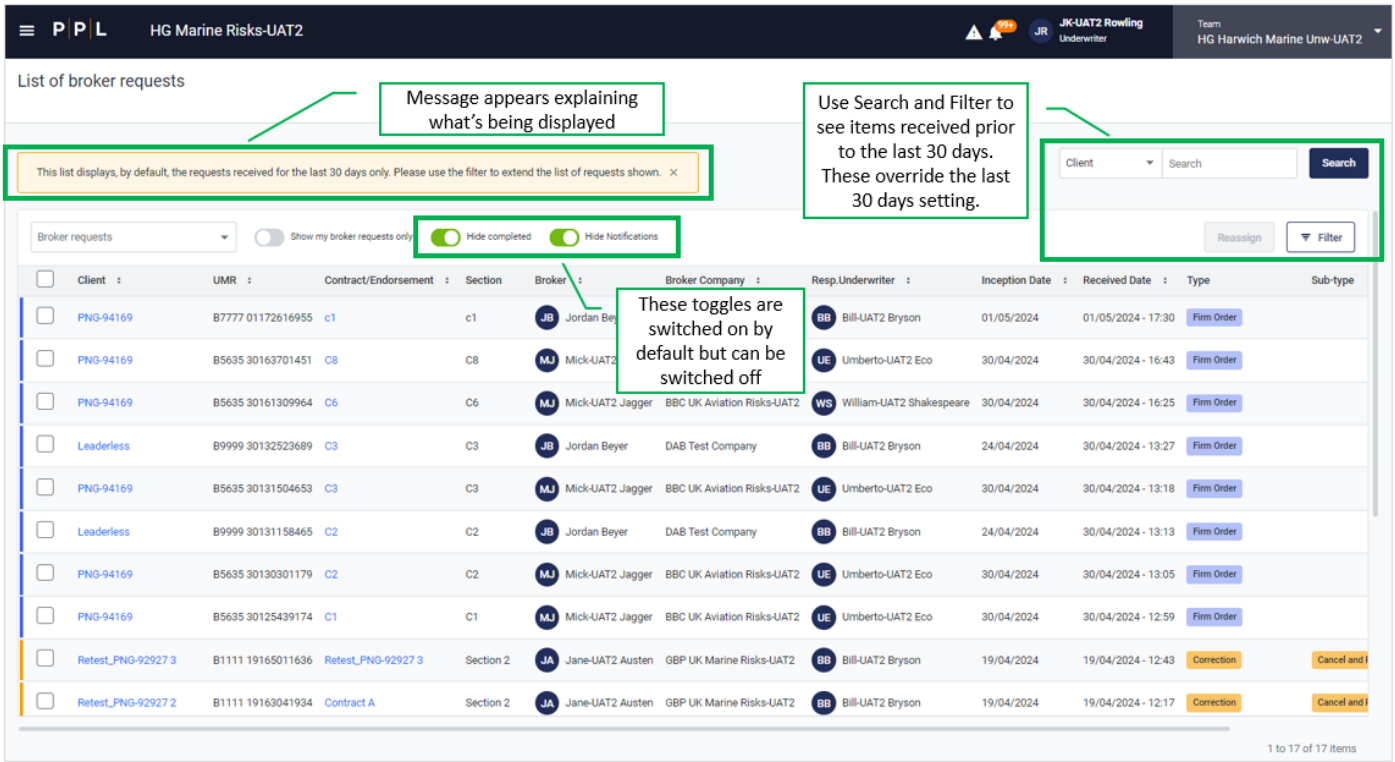
This change will only impact those who have no filters saved/applied. This equates to approximately 70% of all Underwriter users. A full view of notifications, completed items and older items can be accessed by either using the extensive filter functionality, toggles or using the search functionality. Details of how are included below.

## Dashboard View – Items Received in Last 30 Days

A new update on 24th May makes a change to the Underwriter dashboard (List of Broker Requests), so that by default it displays **not completed** requests received in the **last 30 days**. A message explaining this appears at the top of the screen.

This change will not impact those underwriters who have filters saved/applied.

The Hide completed and Hide Notifications toggles are switched on by default and switching them off or applying a **Search** or a **Filter** will display items received more than 30 days ago, as applicable.




If you log out with a Search or a Filter applied, it will still be applied the next time you log in, effectively overriding the last 30 days setting.

This update makes it easier to find items and improves the speed at which the dashboard appears.

# Finding Items Received Over 30 Days Ago

As the default setting for the Underwriter Dashboard is now to show items received in the last 30 days, you will need to use the other features such as **Search** and **Filter** on the dashboard if you want to find older items.

The information below explains these features and how to use them.

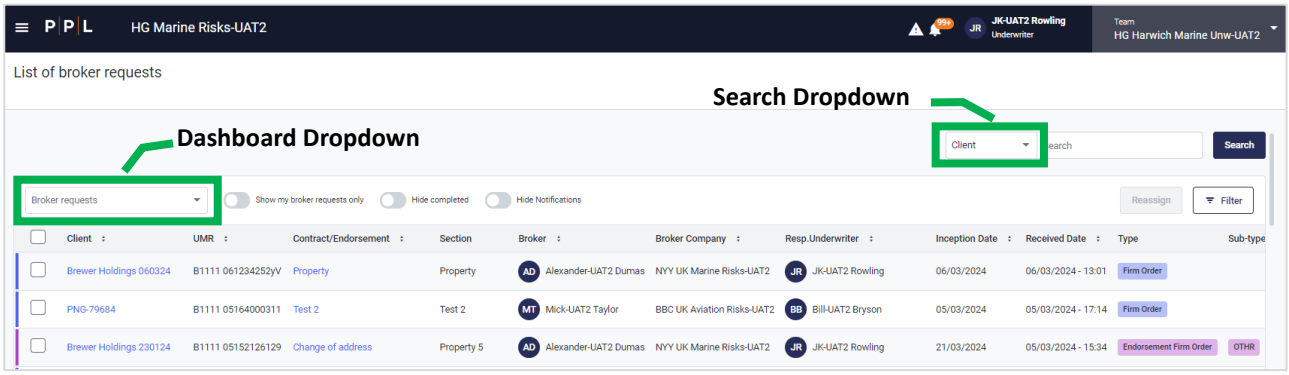
## Dashboard Search

On the List of Broker Requests, there is a search field enabling users to search structured data related to placements e.g. placements, programmes, contracts, endorsements, approval requests, broker requests etc.

This enables Underwriter users to find relevant information faster than previously.

**Note**: The search facility is also available in the Archived Placements area of the platform.

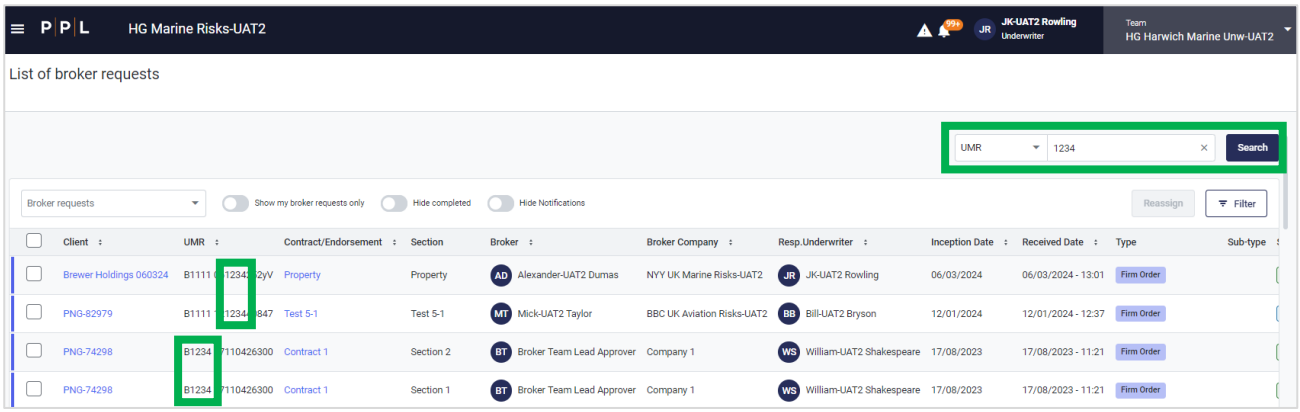
1. If you have access to multiple teams, at the top-right of the screen select the required **Team**.
2. On the **List of Broker Requests**, select either Broker requests or Approval requests from the **Dashboard dropdown** menu.




3. In the **Search dropdown** menu, select the required option (Client, UMR or Contract/Endt).
4. In the search field, enter the required criteria. This can include part of a Client's name, characters from the UMR etc.

   **Note**: The search criteria must contain at least 2 characters and a maximum of 50 characters.

5. Select **Search**.




6. The search results will be displayed.

   **Note**: When switching between teams, any search criteria set will be applied to the new team.

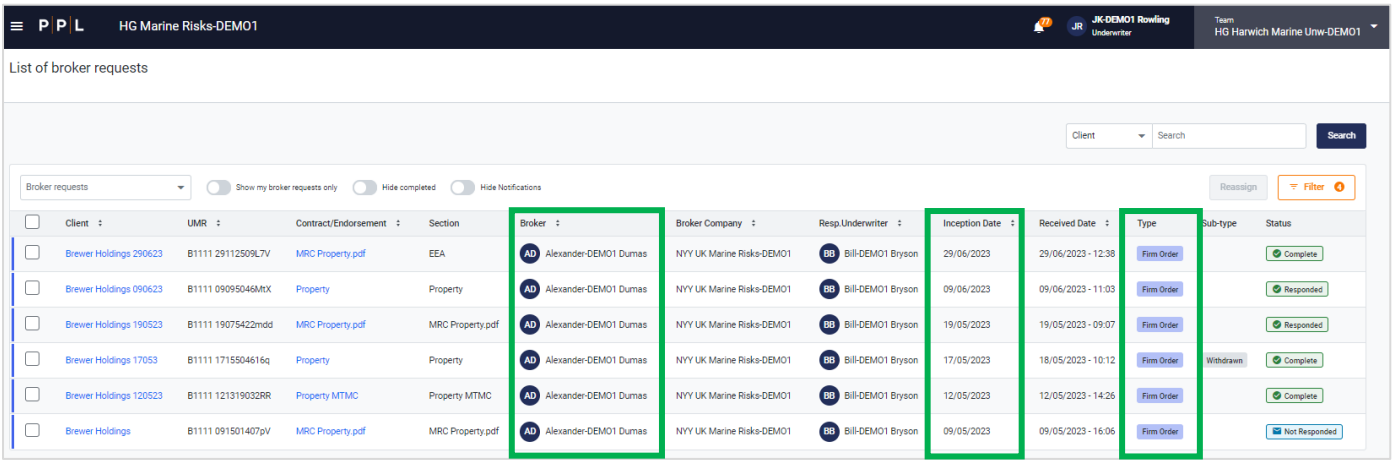
7. When required, select **X** in the Search field to remove the search and reset the dashboard.

## Applying Filters

Filters can be used by Underwriters to find not completed items that are over 30 days old. Filters available include Inception Date, Received Date, Broker or a combination of the information available on the dashboard.
When logging off, an applied filter will remain applied when you next logon. To apply a filter:

1. On the dashboard, select the **Filter** button.
2. Select a field you want to filter by and either search for the required item or select it from the list.
3. Repeat for other fields. Once you have selected the criteria for this particular filter, select **Save**.

In the example below, the Underwriter's dashboard has been filtered by the **Broker** Alexander Dumas, an **Inception Date** between 01/05/2023 and 31/07/2023 and a **Type** of Firm Order:




## Save Filters on the Underwriter Dashboard

Underwriters can now save up to 20 filters on their list of Broker requests. To do this:

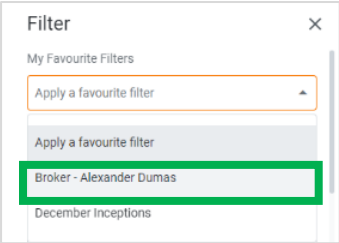
1. On the list of Broker requests, select the **Filter** button.
2. In the Filter screen that appears, select the required field(s) for this filter and enter information or select options to set your criteria e.g. UMR, Broker, Status etc.
3. Scroll to the bottom of the Filter screen and select Save/Update Favourite.
4. Leave the **Save As** field as 'New and enter a **Filter name** (up to 40 characters).
5. Select **Save**.

   **Note:** When saving a favourite filter, the value in the dashboard drop-down (Broker Requests or Approval Requests) is also saved.

6. The list of Broker requests will be filtered, as indicated by the Filter button Filter 1
7. Repeat the process for any additional filters.

**Note:** If the Underwriter sits across multiple teams, the filter can be viewed by the Underwriter across all their teams. The filter(s) won't however be seen by other team members as they are user specific.
Saved filters will also remember the order of the columns on the dashboard and any toggles that have been applied, for example the Hide notifications toggle.

### Reapply a Previously Saved Filter




1. Select the Filter button.
2. Select the **My Favourite Filters** drop-down field and select the required filter.

The selected filter we be applied.

**Note:** Filters are 'sticky' so any applied ones will remain applied the next time you log in.

### Update an Existing Filter

1. Apply the required filter.
2. Select the Filter button.

   Filter 1

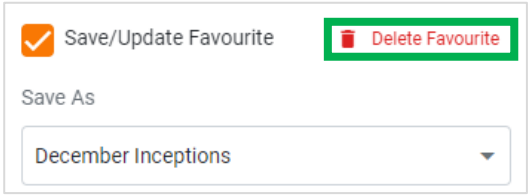
3. Make the required changes to the filter criteria then Scroll to the bottom of the Filter screen and select Save/Update Favourite.
4. In the **Save As** field, either select **New** and give the filter a name or select the name of an existing filter.
5. Select **Save**.

### Delete a Saved Filter

1. Apply the required filter.
2. Select the Filter button.

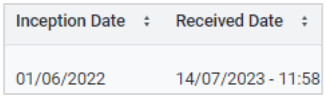
   Filter 1

3. Select Save/Update Favourite.
4. In the **Save As** field, select the filter to be deleted.
5. Select **Delete Favourite**.




## Sorting

Select the column headings containing up/down arrows to sort the data by that column. Selecting the column heading again will change the sort direction.

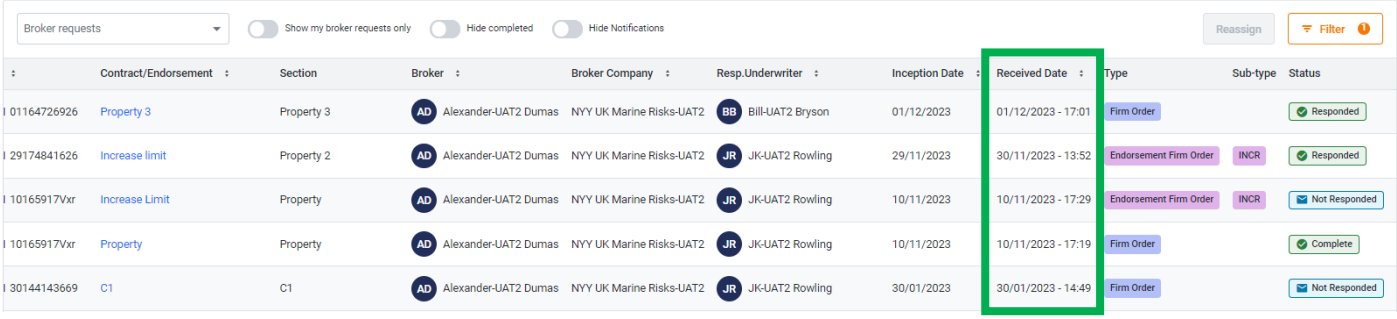



Filters, sorting and selecting Broker or approval requests are also all 'sticky'. This means that your selections will remain if you navigate away from the screen, or log out and back into PPL.

**Note:** The options mentioned above are applied at user, rather than team level.

## Date/Time Received Column

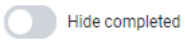
A new **Received Date** column has been added to the right of the Inception Date column, showing both the date and time the request was received:

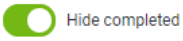



The column can be sorted by clicking the column heading, and the **Filter** also contains options to filter the list using **Received Date – From** and **Received Date – To** fields.

## Hide Completed Items

From 24th May, all 'Completed' items will be hidden by default. Underwriters can hide/unhide completed items from their list of Broker requests by using the toggle shown below:

Completed items shown - 


Completed items hidden - 

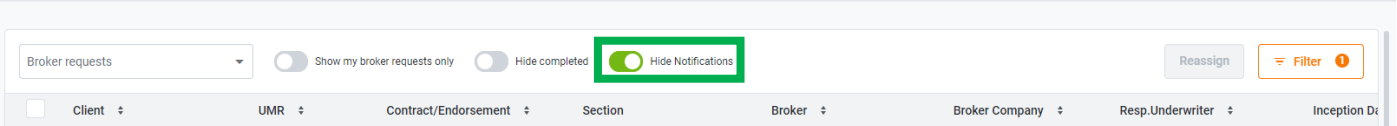

This is available to use with all items other than approval requests. This, the **Show My Placements only** and **Hide Notifications** toggles will remember your preference when you next log in.

**Note**: As with Filters, the Hide Completed toggle setting is 'sticky' meaning that if you switch it off it will remain switched off the next time you log in.

## Hide Notification Requests from Underwriter Dashboard

From 24th May, Notifications will not be visible on the new default dashboard. Underwriters can unhide notification items in their list of Broker requests by selecting the toggle above the column headings as shown below:

List of broker requests




All requests with a status of 'Notification' will be hidden by default. Selecting the toggle again will turn it off and the setting will remain the next time you log in.

**Note:** All notifications will still be visible in the Notifications Dashboard (accessed by clicking on the bell icon at the top of the screen) and it is recommended to use this for managing notifications. A corresponding email will have been sent for each of the notifications on this dashboard, and the notifications can be marked as read or deleted entirely.