November 2024 Release - Key Features

This document highlights the key new or improved features available in the November 2024 release.

Note: The updates for this release are mainly focused on the new Underwriter Dashboard.

Contents

Brokers and Underwriters – Notifications When Lead/Co-Lead Underwriter Removes Themselves from a Declaration

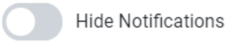
When a Lead or Co-Lead Underwriter on a declaration removes themselves from cover using the **Remove from Cover** option (e.g. due to an expired subjectivity), notifications will be received by the other participants. The Transaction Log entries for the declaration will also be updated to reflect the change.

This change will ensure that the Broker and Underwriter(s) on a declaration are notified accurately of their contract status, through Notifications and Transaction Log entries.

Underwriters – Ability to Mark Endorsement Notifications as Complete

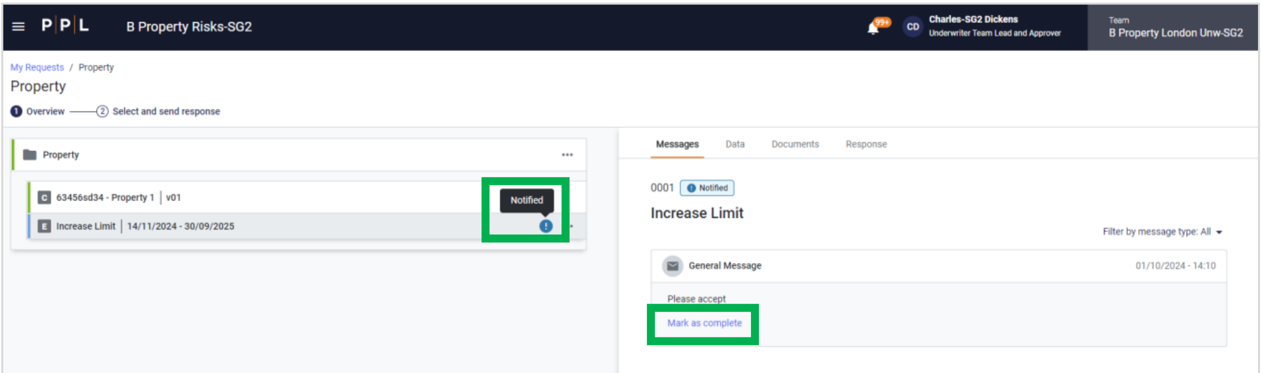
Underwriters can now mark endorsement notifications as ‘Complete’, making it easier to see which notifications have already been dealt with.

1. In your List of Broker requests, ensure that the **Hide Notifications** toggle is off:



2. Select the endorsement Firm Order that has a **status** of ‘Notified’.

3. On the Overview tab, select the required endorsement. The blue icon indicates that it is a ‘notification only’ endorsement.



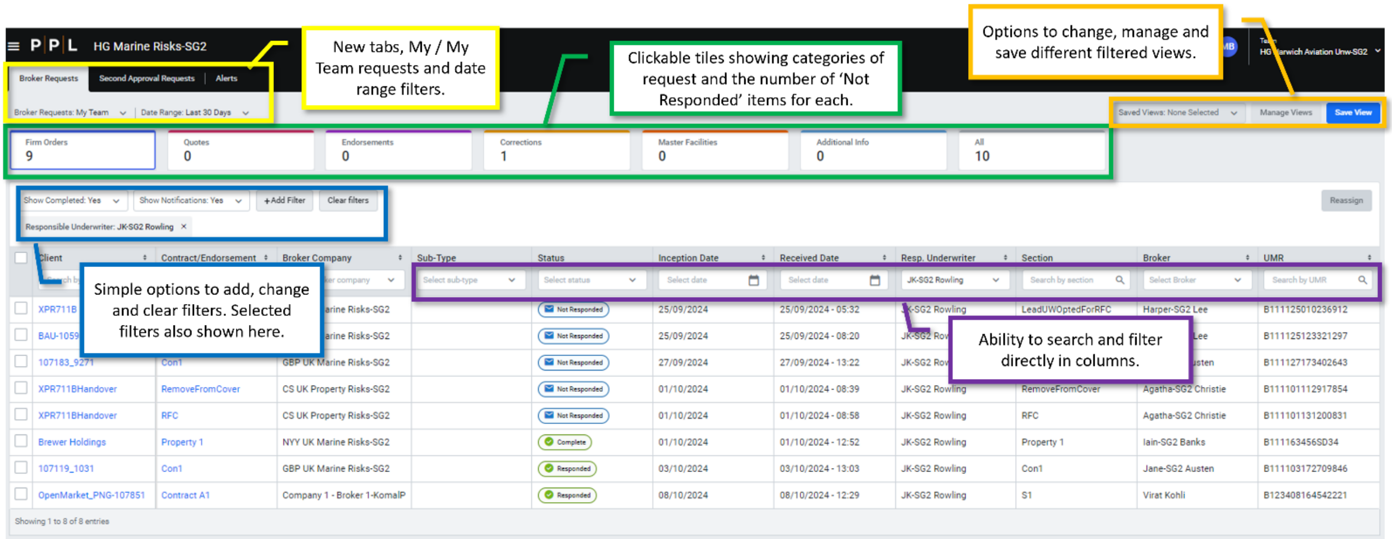
4. On the right of the screen, the **Messages** tab will be selected.
   Select the **Mark as complete** link.

5. A confirmation message will appear, the status of the endorsement response will change to **Complete** and the ‘Mark as complete’ link will disappear. The blue ‘Notified’ icon will also change to the green ‘Completed’ icon.
   There are no further actions required.

The status of the endorsement on the List of Broker requests will change to ‘Complete’. This will then be hidden if the **Hide completed** toggle is switched on:

<u>Note:</u> The ‘Mark as complete’ option will also appear on notifications received before this feature was developed.

Underwriters – New Dashboard Layout



Overviews of the key features available on the new Underwriter Dashboard are shown in the image above These features and others are described in more detail in the sections below.

Underwriters – New Requests and Alerts Tabs

Broker Requests, Second Approval Requests and Alerts are now available on separate tabs at the top left of the screen, making it easier for Underwriters to find and access the relevant items.

Broker Requests is the default tab that appears when you login. If you are set up in PPL as a Second Approver, select the **Second Approval Requests** tab to view the requests for you and the other Approvers in your team.

The **Alerts** tab displays the Notifications that you and your Team (if you use a Team mailbox) have received, in chronological order with the most recent at the top.

Selecting this displays the same information as selecting the Notifications icon  at the top right of the screen.

Underwriters – New Dashboard Filters and Views

The new Underwriter Dashboard now has updated Filter options and the ability to Save and Manage the Views of the Dashboard.

This change makes it easier for Underwriters to apply, save and re-use filters on their Dashboard.

Dashboard Filter Dropdowns

On the new Dashboard there are a number of new Filter dropdowns. The options for these are shown below:

Broker Requests: Select My Requests to display requests where you are the Responsible Underwriter. Select My Team to display requests for your whole team.

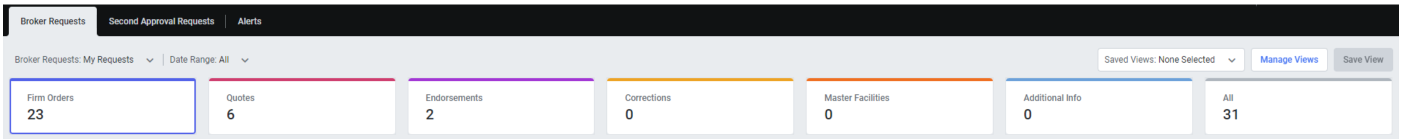
Date Range: Select from Last 30 Days, Last 60 Days, Last 90 Days or All to display requests received in the appropriate range.

Show Completed: Select whether to display requests with a Status of Complete.

Show Notifications: Select whether to display requests that are Notification only.

Saved Views: Select whether to apply a filter that you have previously saved, or to deselect any applied filters.

Dashboard Tiles

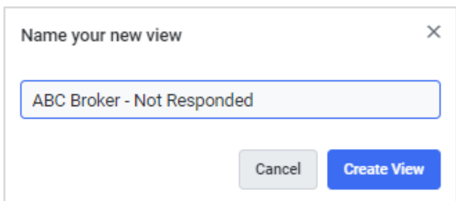


The new tiles that appear at the top of the Dashboard enable you to filter your Dashboard by the types of requests, by selecting the required one. The numbers on the tiles indicate the number of outstanding items of each type.

Save Dashboard Views

Underwriters can save the filters currently applied to their dashboard as a view, making them easy to reapply and manage at any time.

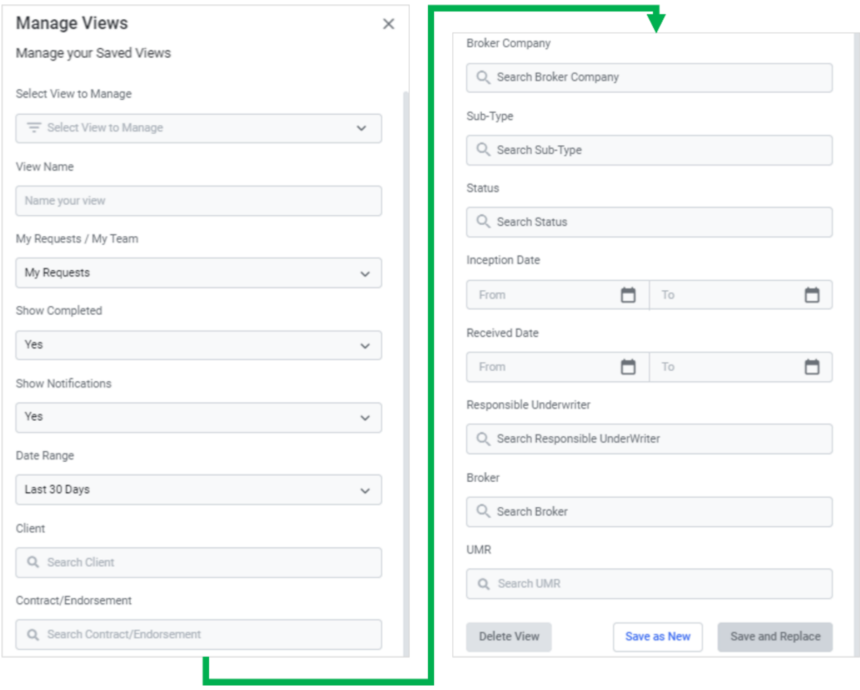
1. Use the filter, sort and search options to display the required items on your dashboard.
2. If you want to re-use the selected options again, at the top right of the screen select **Save View**.
3. In the screen that appears, enter a name for the view and select **Create View**.
4. To use the filter, at the top right of the screen select the **Saved Views** dropdown and choose the required one. The filter will be applied to the dashboard.



Manage Dashboard Views

When you have saved one or more views of your Dashboard, you can use the **Manage Views** button to edit the criteria selected for each of your views. This gives you full flexibility over the results that each of your views display.

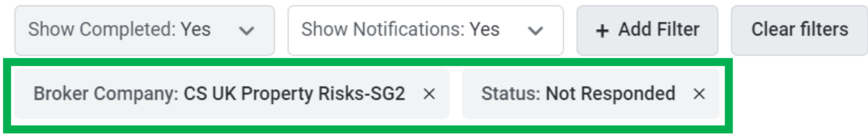
1. At the top right of your Dashboard, select **Manage Views**.
2. In the **Select View to Manage** field, choose the view you want to edit.
3. Make the required changes and select either **Save as New** or **Save and Replace**.



You can also select **Delete View** here to remove any you no longer require.

Add New Filter

1. On the Underwriter Dashboard, select the **Add Filter** button.
2. In the Apply Filters screen, enter the criteria for the filter and select **Apply Filters**.
   The Dashboard will display the appropriate requests and the chosen criteria will appear in the Filter panel, as shown below:



Edit Applied Filter

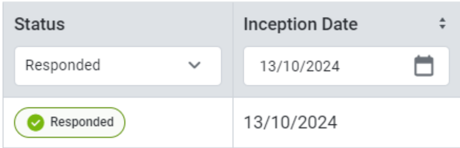
Applied filters can be edited in the ways shown below:

- Select **Add Filter** and make the required edits to the filter fields. Once complete, select **Apply Filters**.
- In the Filter panel, select the ‘x’ for an applied filter to remove it.

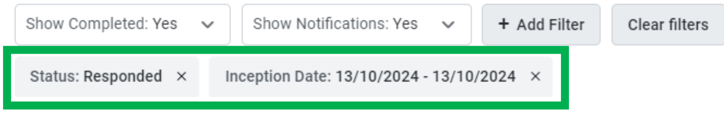
- Select **Clear filters** to remove all of the applied filters. This button is also available in the Apply Filters screen.

Note: Dashboard filters and views are ‘sticky’ and will remain applied when you exit and return to the dashboard.

Individual Column Search



Each column on the new Underwriter Dashboard has a search field under the column heading, enabling Underwriters to rapidly search for or select criteria for that column.



The Dashboard will display the appropriate requests and the chosen criteria will appear in the Filter panel, as shown on the right.

<u>Note:</u> The **Type** column will only appear if you have selected the **All** tile at the top right of the screen.

Reassign Broker Requests

Broker requests can be reassigned from the Underwriter Dashboard if a colleague needs to become the Responsible Underwriter for it. You can still work on requests that you are not the Responsible Underwriter for, but you will be doing so ‘on behalf of’ the Responsible Underwriter.

To reassign Broker requests:

1. On your dashboard, use the search or filter options to find the requests you wish to reassign.
2. On the left of the screen, use the checkboxes to select the required requests.
3. On the right of the screen, select **Reassign**.
4. In the panel that appears, select the required **Branch**, **Team** and **User** to reassign to.
5. Select **Reassign**. The request will be reassigned to that person and they will receive a notification of the reassignment.

Dashboard Help

There is a dedicated Help button available at the bottom right of the new Underwriter Dashboard, providing simple tips on using the new features.

<u>Note:</u> Selecting the ‘X’ on the button will give you the option to remove the button permanently.