

2015

User Guide



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Introduction

This application contains 3 tools:

1) Information tool:

- This module will provide basic information about facultative
- It allows the underwriter to search for a written facultative in the company's historical portfolio, and to compare it with the proposed submission
- It allows the underwriter to display risks on a map
- It also provides a tool that calculates the AVG premium, AVG commission, etc using different filters such as by country, occupancy, etc

2) Abacus tool

This module generates graphs that help underwriter to conclude if the case is in acceptability, criticism or rejection area function of different parameters.

The parameters ahead of the proposal are:

- Activity
- Net Premium Rate
- The Deductible
- TSI

These areas shall be determined based on group of curves of premium rates depending on different levels of deductibles each curve corresponds to a Loss Ratio

3) Rating tool

How to use the system

1. Authentication

The first step to use the system is to log in, User has to use the credentials given by the administrator.

2. Information tool

This tool contains 3 modules:

A . Facultative information

B . Abacus Tool

C .Risks on map

A. Facultative information:

To search for a facultative the user has to select at least the region, then select country and occupancy

Then to display details about a facultative just click on it .To compares it with another one Click on the “Click here to compare with another facultative link”.

FAR EAST	JURONG TOWN CORPORATION - FIRE	MALAYSIA	CONSTR. FIRMS ROADS SITES	4883
<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> </div>				

Details

Insured	JURONG TOWN CORPORATION - FIRE
Region	FAR EAST
Country	MALAYSIA
Occupancy	CONSTR. FIRMS ROADS SITES
Cedent	OVERSEAS UNION INSURANCE LTD
Sum Insured	85662
Our Liability	4883
Interest	
Commission	

[Click Here to Compare With Another Facultative](#)

[Show Claims history](#)

After clicking on the link a table will appear and user has to select a facultative and click on the “compare” button.

FAR EAST

ALLIANCE UNIT TRUST

MALAYSIA

not advised

1133

Choose a Facultative

Region	Insured	Country	Occupancy	our liability
FAR EAST	MALAYSIA LAND PROPERTIES SDN BHD - FIRE	MALAYSIA	not advised	2632
Middle East	Saudi General A/C Unitech (Inclusion of 3 Forklifts wef 06.07.02)	SAUDI ARABIA		2400
FAR EAST	JTC CORPORATION - PL	SINGAPORE	CONSTR. FIRMS ROADS SITES	8223
FAR EAST	JTC CORPORATION - PL	SINGAPORE	CONSTR. FIRMS ROADS SITES	8223
FAR EAST	JTC CORPORATION - PL	SINGAPORE	CONSTR. FIRMS ROADS SITES	8223
FAR EAST	JTC CORPORATION - FIRE	SINGAPORE	CONSTR. FIRMS ROADS SITES	6213
FAR EAST	JTC CORPORATION - FIRE	SINGAPORE	CONSTR. FIRMS ROADS SITES	1250
FAR EAST	ALLIANCE UNIT TRUST MANAGEMENT BHD - FIRE	MALAYSIA	not advised	1133
FAR EAST	JTC CORPORATION - PL	SINGAPORE	CONSTR. FIRMS ROADS SITES	1875
FAR EAST	MORANTE JAYA - FIRE	INDONESIA	not advised	1429

1

2

3

4

5

6

7

8

9

10

Compare

B. Calculation tool

To use this tool the user has to select at least one filter then the result will appear.

arial & Risk

Information Tool

sofienz

Project

Measure

Fac Info

Calculation Tool

Risks On Map

Region

All regions

Country

All countries.

Occupancy

select one...

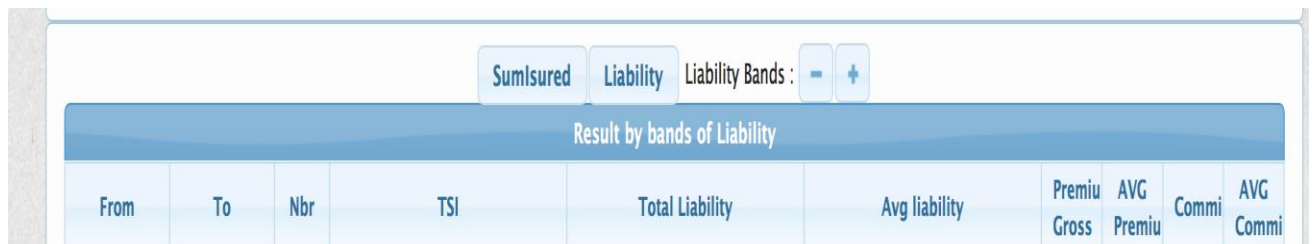
Year

select one...

Cedant

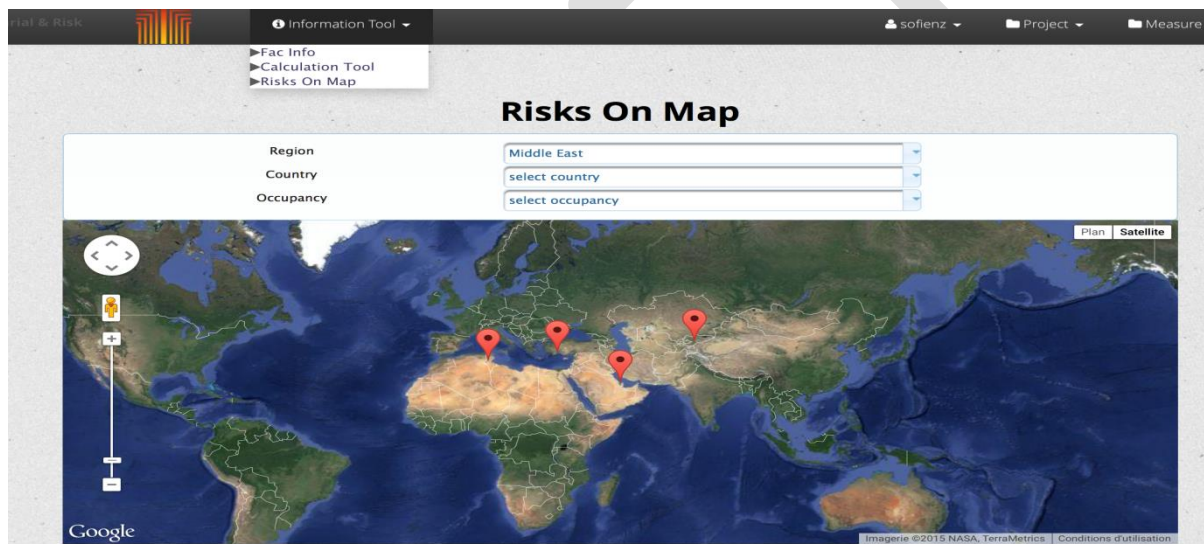
Broker

The result can be classified by bands of liability or sum insured. To change it the user has to click on one of those button shown in the annex below. The user can also increase or decrease this bands by clicking on the + or – buttons.



C. Risks on map

To display risks on map the user should click on the “Risks on map” button under the “Information tool”.

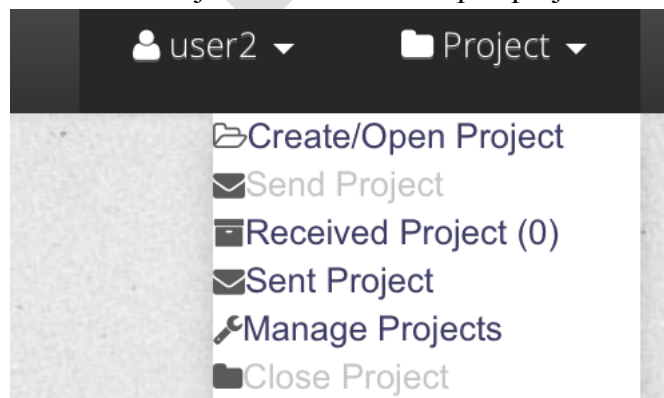


3. Rating Tool (fac)

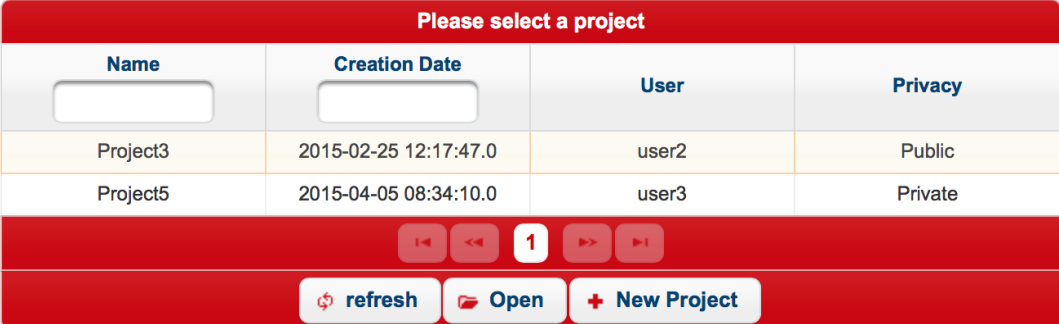
To use the rating tool the user has to create/open a project.

A. Create/Open Project

Go under “Project” then “Create/Open project” .



To open a project the user has to select the project and click on the “open” button.

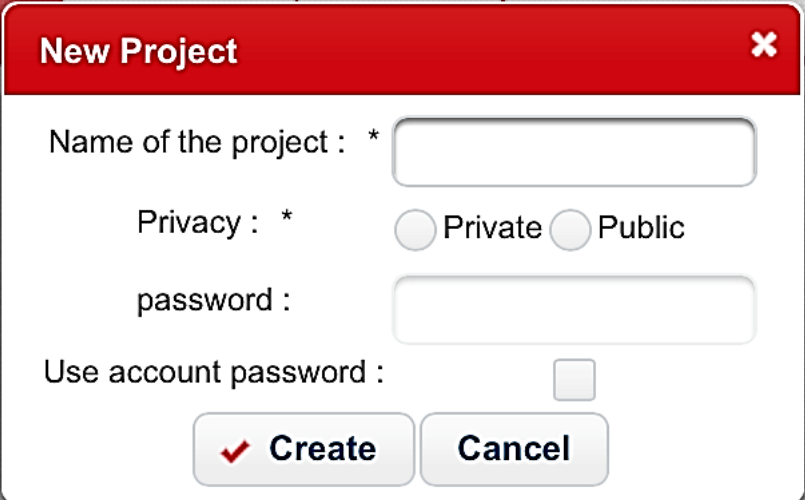


Name	Creation Date	User	Privacy
Project3	2015-02-25 12:17:47.0	user2	Public
Project5	2015-04-05 08:34:10.0	user3	Private

Navigation: [Back] [Forward] 1 [First] [Last]

Actions: [refresh] [Open] [+ New Project]

The user can also create a new project by clicking on the “New Project” button.



New Project [Close]

Name of the project : *

Privacy : * ☐ Private ☐ Public

password :

Use account password : ☐

[Create] [Cancel]

To create a project the user has to specify the name of the project and its privacy. The latter means if the project is accessible to all users or if the project is private. In case it is private the user has to enter a password or select “Use account password”.

B. Use the rating tool

- Offer information:

The first step is to fill the offer information and then to click on “continue” button.

Offer Information	
Underwriter :	User2 test2
Inception Date :	<input type="text" value="02/02/15"/>
Expiry date :	<input type="text" value="02/02/15"/>
Quoted date :	<input type="text" value="10/02/15"/>
Currency :	<input type="text" value="eur"/>
Insured :	<input type="text" value="Trust in"/>
Broker :	<input type="text" value="Trust"/>
Policy (e.g a*-999-a999) :	<input type="text" value="E4-342-R233"/>
Country :	<input type="text" value="Bahrain"/>
Risk Grade :	<input type="text" value="12"/>
Insurance basis :	<input type="text" value="Select one .."/>

- Assets
- Risk assessment

The third step is to do the risk assessment then click continue

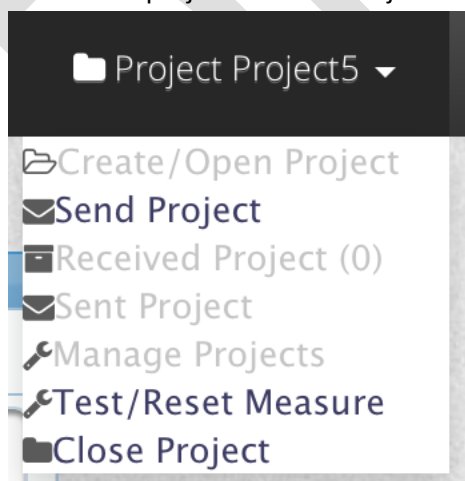
Risks Assessment

General Factors		
Loss Ration	<input type="text" value="select one"/>	0 %
Construction Class	<input type="text" value="select one"/>	0 %
Safety and Security		
Security Guard 24/365	<input type="text" value="Standard"/>	user2
Management Risk awareness	<input type="text" value="Standard"/>	user2
Physical barriers	<input type="text" value="Standard"/>	user2
Access Control and Alarm system	<input type="text" value="Standard"/>	user2
HouseKeeping		
Smoke Control	<input type="text" value="Standard"/>	user2
Welding Control	<input type="text" value="Standard"/>	user2
Fire Prevention Officer	<input type="text" value="Standard"/>	user2
Stock storage practise	<input type="text" value="Standard"/>	user2
Maintenance		

C. Send the project

These are steps to follow to send a project:

- Click "send project " under "Project "

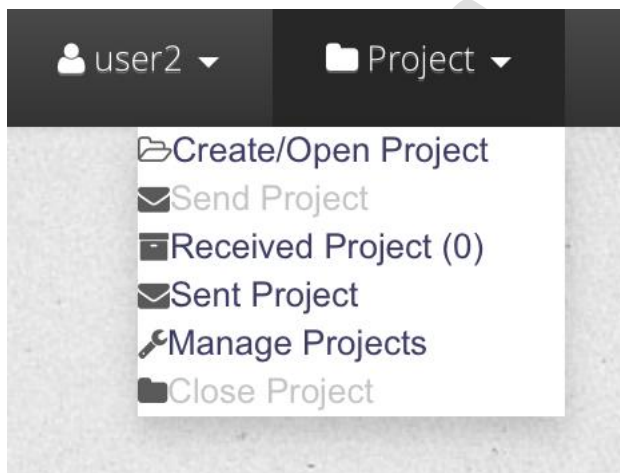


- Enter the message, subject and destination then click on the send button
- Project can be also send by email as a PDF report by selecting “Send Via Email”.

Send project	
Name of the project :	Project5
To* : *	<input type="text"/>
Message : *	<input type="text"/>
Subject :	<input type="text"/>
Send Via Email : <input type="checkbox"/> <input type="button" value="✓ Send"/>	

D. Open received project

Click on “Received project” button.



To open a project select it and click on the “Open” button.

Show : ☒ All ☐ Read ☐ Unread

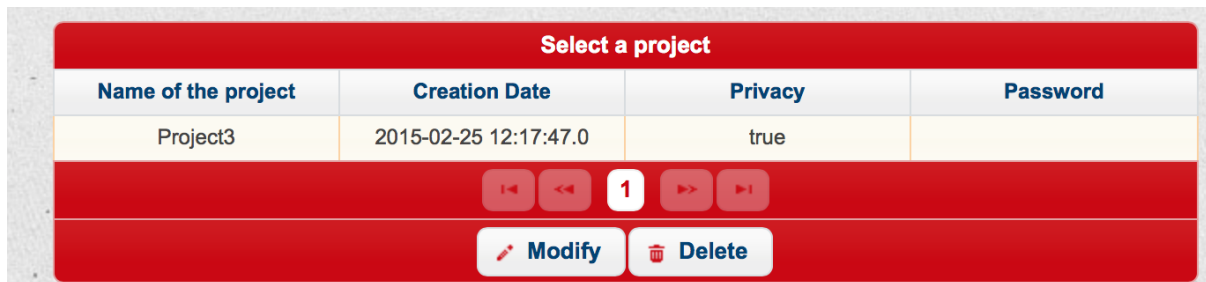
ProjectBox			
From	Project Name	Message	Date
zribi sofien	Project3	zer	2015-04-01 12:51:03.0

E. Manage projects

To manage projects click on “Manage projects” under “Project”.

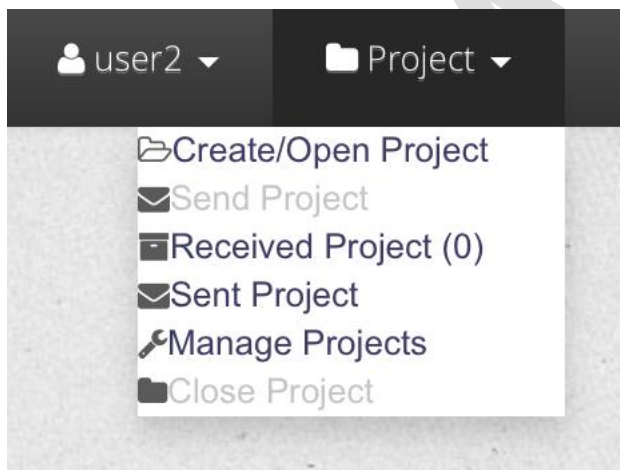
The user can delete or modify a project.

To delete or modify a project select it then click on “Modify” or “Delete” button.



F. Sent projects

To view sent project click on “Sent projects” under “Project”.



4. Rating tool (Act)

DRAFT