LLOYD'S

Delegated Data Manager (DDM):

Release 3.4 Enhancements

Date	Mon 14 Dec 2020

These 17 enhancements have been categorised as 'Complex', 'Medium' and 'Simple' to indicate the level of expected guidance and support required for users.

Complex

1. **Aggregate Limit Tab – Update**
   Introducing increased flexibility to the way in which Aggregate Limits can be set up in Tide.

2. **Increased Validations**
   Increase the number of validations in relation to mathematical validations to create warnings.

3. **Manual currency Rate of Exchange Processing**
   The ability to specify the Rates of Exchange to be applied to Premium fields where a bordereau contains Risks where the Coverholder Settlement Currency and Broker Settlement Currency vary, during Transformation.

4. **Advanced Row Manipulation in Questionnaire**
   This functional specification describes the enhancement to Tide to facilitate the processing of bordereaux in the scenario described in enhancement 14. This change enables a user to aggregate the data across multiple rows into a single combined row before the point of the bordereau being processed, in order for Tide to consume a single row per risk, per standard functionality.

Medium

5. **Consortium and Member Details**
   This enhancement will give market users the option of adding Consortia to the *Markets* tab on a Contract section in Tide.

6. **Revise Bordereau Sheet Structure**
   This enhancement allows a user to reassess the sheet structure and selection rules of a Questionnaire using a new bordereau. This negates the need to create a new Questionnaire to cater to an update in sheets presented within a bordereau, i.e., a new sheet presented when 'Only Specified Sheets' is used as the sheet selection rule.

7. **Monitoring or Breach Rule Categorisation**
   This enhancement will enable a User to specify a category or Bespoke Rule type. The options are *Contractual* or *Monitoring*.

8. **Reuse Contract Rules**

   This enhancement will provide the ability to save Bespoke Contract or Section Rules as Rule Templates for future selection by other users of the same Company.

9. **Coverholder User Interface Access**

   This change will restrict a user belonging to a Coverholder from viewing sensitive commercial data pertaining to Brokerage on the Contract and removing the simplified submission screen from use within Tide.

Simple

10. **Contract Analysis – EPI – Update**

    This enhancement enables data in the Contract Analysis – EPI Chart to be:
    Distributed based on Risk Inception Date
    Presented with one or many previous YOA Contracts from within the Folder.

11. **Contract Analysis – Loss Ratio Analysis – Update**

    This change will enable users to categorise data in the Loss Ratio Contract Analysis area using up to 3 Tide Field levels.

12. **Risk Summary Screen – Update**

    Tide is to offer an option of exporting data from all bordereau types (Risk, Premium and Claims) that pertains to a single risk. This option will be located in the Risk Summary modal.

13. **Single Locations step in Questionnaire**

    This requirement will enable multiple types of locations and their corresponding Bordereau columns to be mapped to Tide fields within a single Locations step in questionnaire.

14. **Multi Select Regulatory Client Classification**

    This enhancement will change the method of data capture or Regulatory Client Classification within a Contract. Currently, this is captured via a single-select dropdown field at the Contract level. This will now be a multi-select dropdown field at Section level within a Contract.

15. **Regulator Field in Contract and Bordereaux Screen**

    This enhancement will enable a user to filter to view Contracts or Bordereaux where at least one Section contains a Market that is regulated by a Regulator Company. For example, this will enable users to filter for Contracts or Bordereaux that are associated with the LBS Regulator.

16. **Retain Grid Filters**

    Within a user's session of Tide, any filters selected within certain grids will be retained. So, if they revisit a grid, any previously applied filters will still be selected and active.

17. **Error Screen Grids**

    This enhancement will present all error screens currently presented as tables as grids during Transformation, with associated sorting and filtering capability.