gpm

integrated broking system

ibs Release Note v25.3

Contents

1. Introduction

1.1 Overview

This document contains a list of the changes that are included in ibs v25.3.

1.1. Disclaimer

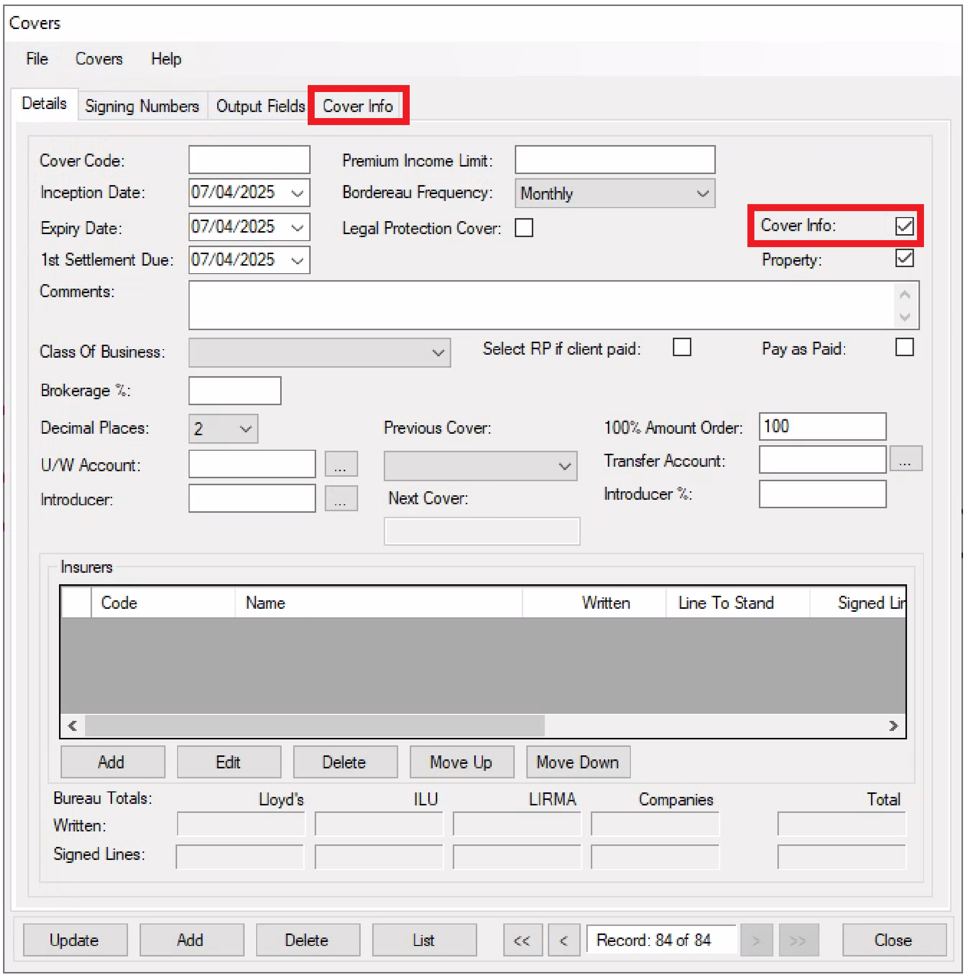
All developments are thoroughly tested by gpm in a range of test environments to ensure that ibs works as expected. This release of ibs is supported on versions of Windows and Office 365 that are currently under support by Microsoft. We strongly recommend that all clients thoroughly test any new release within their own environment before going live.

2. Enhancements

2.1 Administration

Rename 'Terrorism Cover' functions in Covers (ref. 11901)

Within the Covers screen, the 'Terrorism' option has been renamed as 'Cover Info'. This applied to both the tick-box and the associated tab:



This terminology now matches the Cover Info tab visible on risks attached to Covers where this function is activated.

2.2 Accounting

No changes.

2.3 Claim

No changes.

2.4 Miscellaneous

No changes.

2.5 Quote

No changes.

2.6 Reporting

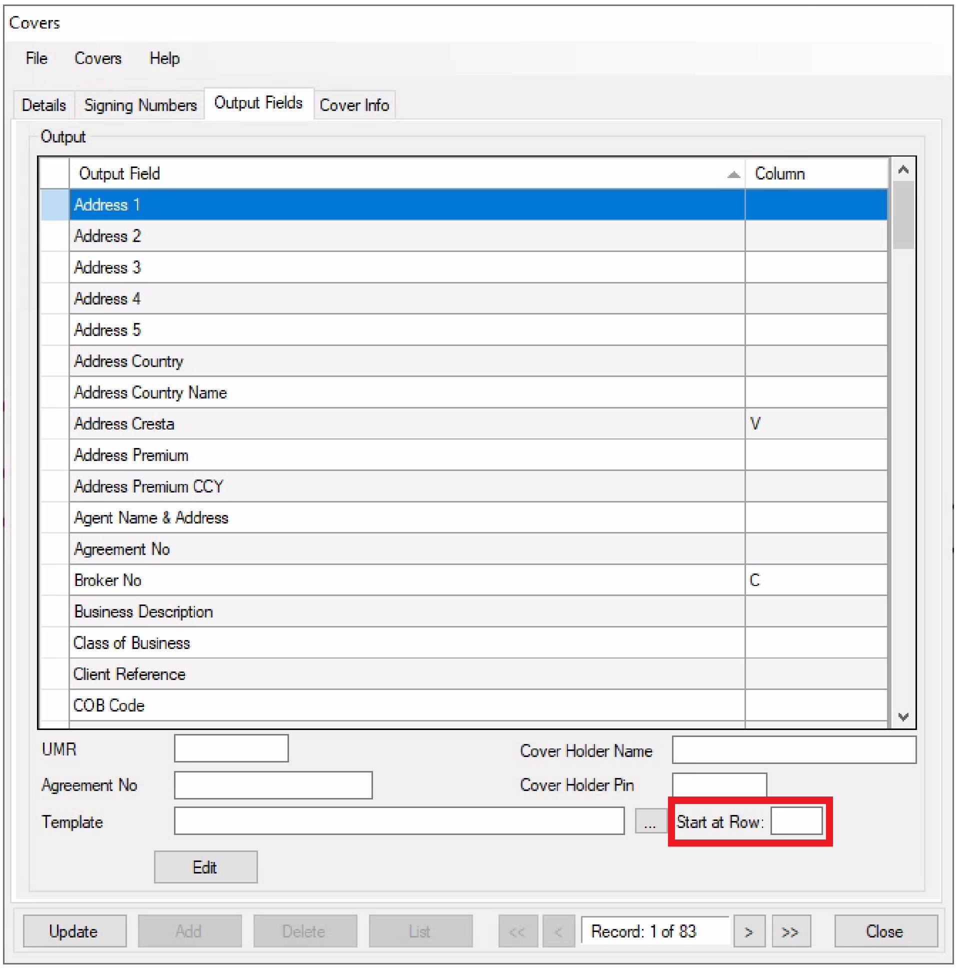
Split out Fees in PREMIUMSUMMARY CSV output (ref. 14261)

The PREMIUMSUMMARY.CSV output file already contains Claims Paid (the sum of Paid Claims and Paid Fees) and Claims Outstanding (the sum of Outstanding Claim and Outstanding Fee). 4 additional columns are now output to evidence the individual indemnity and fee amounts:

- Fees Outstanding
- Fees Paid
- Claims Outstanding_1 (i.e. excluding Fees Outstanding)
- Claims Paid_2 (i.e. excluding Feed Paid)

Starting output row for Cover Bordereau Reporting (ref. 11727)

To enable greater flexibility, Cover bordereau reports can now be configured to begin the output at a specific row. The Output Field tab now contains a Start at Row field in which a specific value can be recorded:



The absence of a value in this field will continue to commence the output at row 4.

2.7 Risk

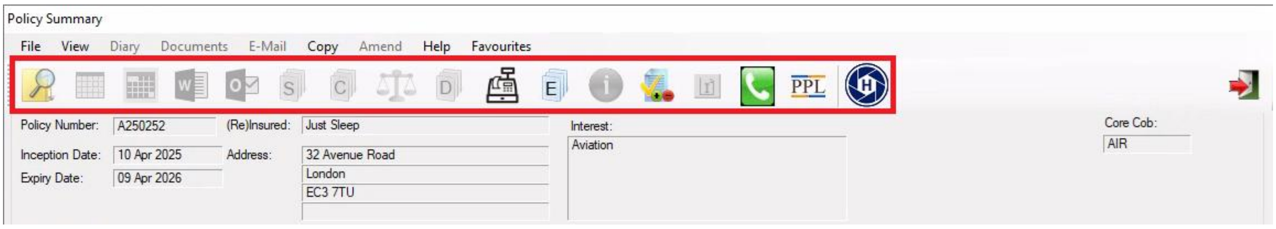
Gross Premium assignment on multi-section Excess of Loss risks (ref. 12731)

ibs has been updated such that, on Excess of Loss risk types, the calculated gross premium amount will be applied to all sections involved in the premium. Previously this would only happen for single section premiums but will now be applied to all sections on a multi-section risk.

Open locked risk on read-only mode (ref. 14180)

ibs has been enhanced such that, on attempting to open a risk that is already open by another user, it will be opened in read-only mode. A message will still be displayed advising that the risk is locked:

However on clicking OK, the risk will then be opened in read-only mode i.e. with all update functions disabled:



Client Reference bookmark on Debit Notes (ref. 14236)

A new 'ClientReference' bookmark is now available to output the Reference vale from the Risk/Client tab on a risk. This bookmark may be used on Client and Third Party debit/credit documents.

UMR bookmarks on slips and endorsements (ref. 14246)

A new set of bookmarks is now available to output the UMR letters from a risk. These bookmarks may be used within the header for slip and endorsement documents.

UmrChar1 → UmrChar17

3. Corrections

Auto Renewal error reading Names file (ref. 14292)

ibs has been corrected such that the Automatic Renewal function no longer requires Account Executives to be set up as 'Nominal/Broker' entries within the Account Codes function. As such the 'Error reading Namefile for account handler xxxxx' will no longer occur.

Drag/drop large file names into DMS (ref. 14215)

A screen warning message is now displayed when dragging files into the ibs Document Management System function if the size of the filename, when combined with the folder and sub-folder names into which it is being dragged, exceeds the maximum allowed by Microsoft Windows.