



ibs Release Note v26.3

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1. Introduction

1.1 Overview

This document contains a list of the changes that are included in ibs v26.3.

1.1.1 Disclaimer

All developments are thoroughly evaluated 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 assess any new release within their own environment before going live.

2. Enhancements

2.1 Accounts

No changes.

2.2 Administration

Brokerage Sharing Accounts (ref. 16352)

Brokerage Sharing Accounts can be created to allow identification of brokerage that is shared between different teams or business units. Previously, each Brokerage Sharing Account had to be associated with a specific ibs Department. However for arrangements that are not related to Department, an 'All' option is now available in the Department selection to avoid confusion in the brokerage reports:

The screenshot shows the 'Account Code Update' window with the following details:

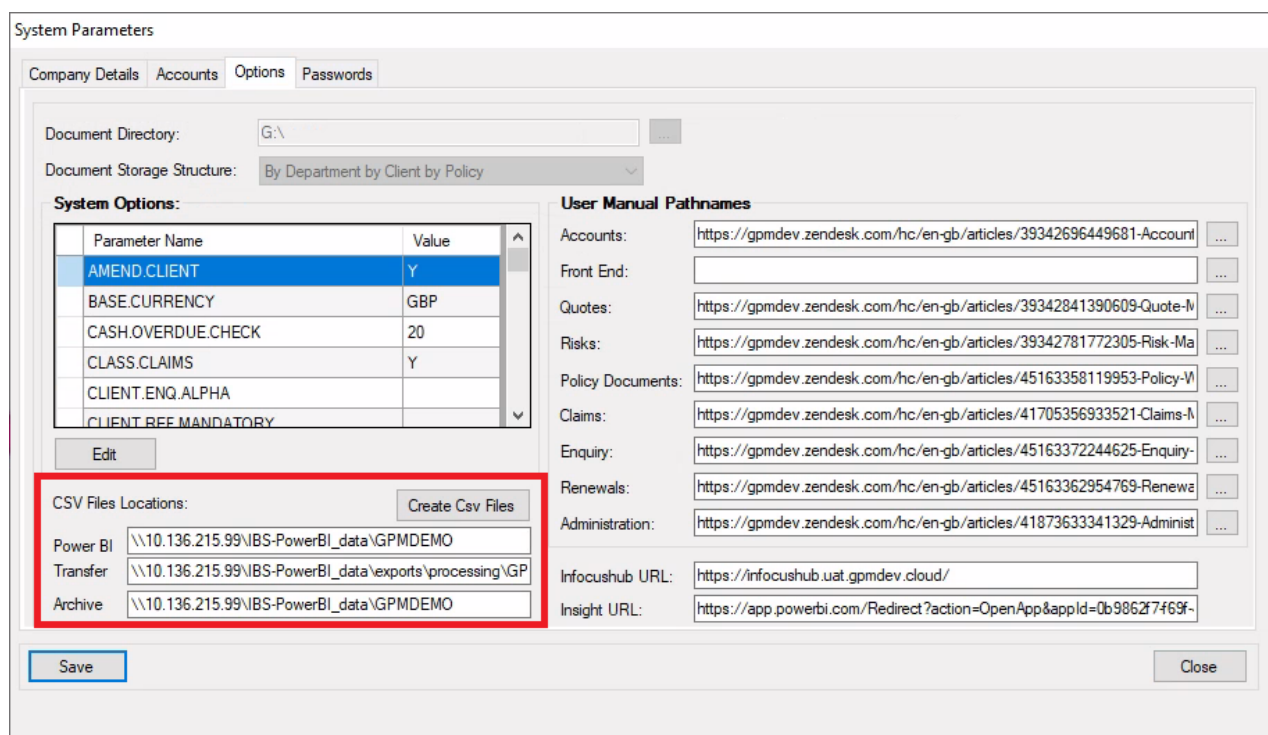
- Code:** MARINEBKGE
- Account Name:** Marine Brokerage Sharing
- Account Type:** Agent/Third Party
- Short Name:** MAINEMKGES
- Business / Trade:** (empty)
- Account Code:** T LB001
- Directory Name:** (empty)
- Geographic Area:** (empty)
- Parent:** ☐ Parent Account: (empty)
- Post Code:** (empty)
- Country:** (empty)
- Telephone No:** (empty)
- Mobile No:** (empty)
- Contact Name:** (empty)
- E-Mail Address:** (empty)
- Additional Info:** (empty)
- Statement Email:** (empty)
- Brokerage Sharing a/c:** ☒ **M - Marine** (highlighted in red)
- Currency:** (empty)
- Syndicate Details:** (empty)
- US Approved:** ☐

The dropdown menu for 'Brokerage Sharing a/c' is open, showing the following options:

- M - Marine (highlighted in blue)
- All (highlighted in red)
- N - New business
- C - Commercial
- D - Design
- E - Entertainment and Events
- F - FinPro
- G - Commercial Combined
- H - Household
- I - I test
- J - James Hallam Sport
- K - Test sub divisions
- L - LPR
- M - Marine
- N - Dept N
- P - Professional Indemnity
- Q - Marine
- R - Reinsurance
- S - Cyber
- T - Treaty
- U - Commercial Combined
- W - Web
- Y - Why Department
- Z - Elmore

CSV Output Locations (ref. 16356)

As gpm continue to evolve the inFOCUS INSIGHT reporting platform, it has become necessary to publish multiple instances of the output CSV files. As such the System Parameters screen has been amended to cater for 3 distinct network locations:



The screenshot shows the 'System Parameters' window with the 'Options' tab selected. The 'Document Directory' is set to 'G:\'. The 'Document Storage Structure' is set to 'By Department by Client by Policy'. The 'System Options' table is as follows:

Parameter Name	Value
AMEND.CLIENT	Y
BASE.CURRENCY	GBP
CASH.OVERDUE.CHECK	20
CLASS.CLAIMS	Y
CLIENT.ENQ.ALPHA	
CLIENT.BEE.MANDATORY	

The 'CSV Files Locations' section is highlighted with a red box and contains the following paths:

Location	Path
Power BI	\\10.136.215.99\IBS-PowerBI_data\GPMDEMO
Transfer	\\10.136.215.99\IBS-PowerBI_data\exports\processing\GP
Archive	\\10.136.215.99\IBS-PowerBI_data\GPMDEMO

The 'User Manual Pathnames' section contains the following paths:

Pathname	URL
Accounts:	https://gpmdev.zendesk.com/hc/en-gb/articles/39342696449681-Account
Front End:	
Quotes:	https://gpmdev.zendesk.com/hc/en-gb/articles/39342841390609-Quote-It
Risks:	https://gpmdev.zendesk.com/hc/en-gb/articles/39342781772305-Risk-Ma
Policy Documents:	https://gpmdev.zendesk.com/hc/en-gb/articles/45163358119953-Policy-W
Claims:	https://gpmdev.zendesk.com/hc/en-gb/articles/41705356933521-Claims-I
Enquiry:	https://gpmdev.zendesk.com/hc/en-gb/articles/45163372244625-Enquiry-
Renewals:	https://gpmdev.zendesk.com/hc/en-gb/articles/45163362954769-Renew
Administration:	https://gpmdev.zendesk.com/hc/en-gb/articles/41873633341329-Administ
Infocushub URL:	https://infocushub.uat.gpmdev.cloud/
Insight URL:	https://app.powerbi.com/Redirect?action=OpenApp&appId=0b9862f7f69f-

2.3 Claim

No changes.

2.4 Miscellaneous

User Manual access via Support Hub (ref. 16561)

Access to User Manuals from the menu options within ibs now launches the relevant web-page within gpm's Support Hub. The Support Hub is the home for all ibs user manuals, ensuring availability of the latest versions to all users.

Note: a related change (ref. 16097) has removed the Contents option from the Help menu.

2.5 Quote

Copy Quote (ref. 15983)

A new feature has been added to allow a quote to be copied directly from the Quote Search Results screen.

Quote search results (13 records)

Quote No.	Client	(Re)Insured	Class	Status	RE	Lead Uwtr	Insurer Ref
01535	A4321	Midland Leisure Ltd	JRX Commercial				
01534	03094	An Assured Company	General Liability				
01532	AGENT	A US Power Company	Energy	Firm Order			
01533	A1234	Midland Leisure Ltd	Commercial Property				
01531	91025	Lion / Round Table Ventures	JRX Commercial				
01530	ALIB25	HGV Associates	Travel & Liability	Firm Order			
01529	ALIB25	HGV Associates	Travel & Liability	Firm Order			
01518	28525	Midland Leisure Ltd	Event Insurance				
01521	ARK	A Mexican Company	Event Insurance		Template for EV		
01520	AUG01	Various	Event Insurance		Template for EV		
01519	28525	Futon Accountants Ltd	Event Insurance				
01506	28525	Midland Leisure Ltd	Event Insurance				
01516	ALIB25	Able Property Co	Event Cancellation				

A Copy button has been added to the Quote Search Results screen, whether from normal Search, Favourites or Recent Used. Selecting a quote in the results list and pressing the Copy button will display a new, unsaved quote as a duplicate of the selected quote.

2.6 Reporting

Surplus Lines details added to POLICY CSV (ref. 16562)

Surplus Lines details have been added to the POLICY CSV output file:

- Surplus Lines Broker Name
- Surplus Lines Broker State
- Surplus Lines Broker ID
- Surplus Lines Broker Address
- Surplus Lines Broker Number

Cashbook Summary report (ref. 16504)

The Cashbook Summary report has been enhanced such that all bank accounts for all currencies are now presented on a single tab (rather than being split into a tab per currency).

Additional data fields in CLAIMS CSV (ref. 16375)

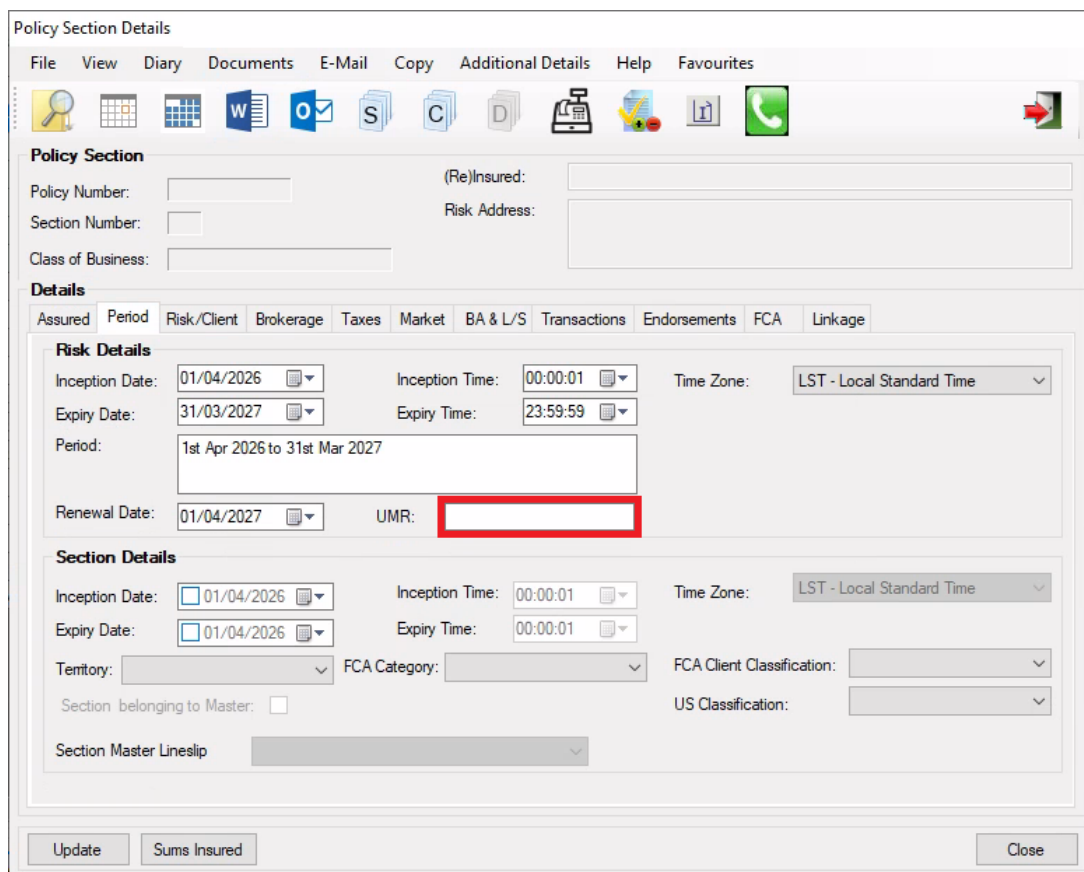
Additional details have been added to the CLAIMS CSV output file:

- Conflict File indicator
- Large Loss indicator
- Problem Claim indicator
- Excess Basis
- PCS Code
- Claim Denial
- Coverage Date
- Amount Agreed Date
- Subrogation Date
- Diary Date

2.7 Risk

UMR per Section (ref. 14968)

It is now possible to record a distinct UMR value per section within a risk. The UMR field remains in the same location on the Period tab, and for new/existing risks the same UMR value will be recorded on all sections by default.



The screenshot shows the 'Policy Section Details' form with the following sections and fields:

- Policy Section:**
 - Policy Number: [Text Box]
 - Section Number: [Text Box]
 - Class of Business: [Text Box]
 - (Re)Insured: [Text Box]
 - Risk Address: [Text Box]
- Details:**
 - Assured: [Text Box]
 - Period: [Text Box]
 - Risk/Client: [Text Box]
 - Brokerage: [Text Box]
 - Taxes: [Text Box]
 - Market: [Text Box]
 - BA & L/S: [Text Box]
 - Transactions: [Text Box]
 - Endorsements: [Text Box]
 - FCA: [Text Box]
 - Linkage: [Text Box]
- Risk Details:**
 - Inception Date: 01/04/2026 [Calendar Icon]
 - Expiry Date: 31/03/2027 [Calendar Icon]
 - Period: 1st Apr 2026 to 31st Mar 2027
 - Inception Time: 00:00:01 [Time Picker]
 - Expiry Time: 23:59:59 [Time Picker]
 - Time Zone: LST - Local Standard Time [Dropdown]
 - Renewal Date: 01/04/2027 [Calendar Icon]
 - UMR: [Text Box] (highlighted with a red border)
- Section Details:**
 - Inception Date: 01/04/2026 [Calendar Icon]
 - Expiry Date: 01/04/2026 [Calendar Icon]
 - Inception Time: 00:00:01 [Time Picker]
 - Expiry Time: 00:00:01 [Time Picker]
 - Time Zone: LST - Local Standard Time [Dropdown]
 - Territory: [Dropdown]
 - FCA Category: [Dropdown]
 - FCA Client Classification: [Dropdown]
 - Section belonging to Master: [Checkbox]
 - US Classification: [Dropdown]
 - Section Master Lineslip: [Text Box]

Buttons at the bottom: Update, Sums Insured, Close.

However a change to the UMR value within a section will now be recorded on that section alone.



All associated functions have been updated to reflect this change:

- Search for risk by UMR
- Copying a risk
- Copying a section
- Renewing a risk
- Quote/Slip documentation
- Underwriter documentation (LPAN, Premium Closing and LCCF)
- CSV output

Note: inFOCUS HUB will shortly be enhanced to support risks with multiple UMRs. Until this enhancement is delivered, the first UMR on a risk will be passed from ibs to HUB.

3. Corrections

Premium Summary CSV (ref. 16556)

The PREMIUMSUMMARY CSV output file has been corrected to resolve an issue with duplicate column names.

Error opening risk (ref. 16549)

Validation has been improved in an attempt to prevent an error 'Object reference not set to an instance of an object' when opening a risk from an associated claim.

Error with tax code configuration (ref. 16542)

A correction has been made to ensure that premiums can be processed when no UK IPT code has been set in the Taxes table.

Decimal places on unsaved placing intermediary (ref. 15931)

A correction has been made to ensure that decimal places are correctly displayed on members behind a placing intermediary on an unsaved risk.