MARSH

QUICK REFERENCE CARD

GLOBAL POLICY DIGEST

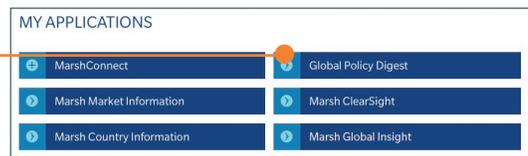## MANAGE YOUR GLOBAL INSURANCE PROGRAM

Global Policy Digest (GPD) is a global database where local Marsh servicing teams consolidate policy documentation and prepare standardized summaries enabling risk managers to quickly access the information they need.

CONTENTS

MARSH PORTAL

Login to marsh.com and click on the **Global Policy Digest** button.

MY APPLICATIONS

MarshConnect	Global Policy Digest
Marsh Market Information	Marsh ClearSight
Marsh Country Information	Marsh Global Insight

HOME PAGE

Account Details
Marsh Producing Office service team and list of client divisions used to sort policies

Policy List
Direct access to a complete list of all policies.

Global Policy Digest
The Demo Company

Logout	The Demo Company - Policies	Policy Search

Account Management

Account Details

Policies

Policy Search

Policy List

Add a New Policy
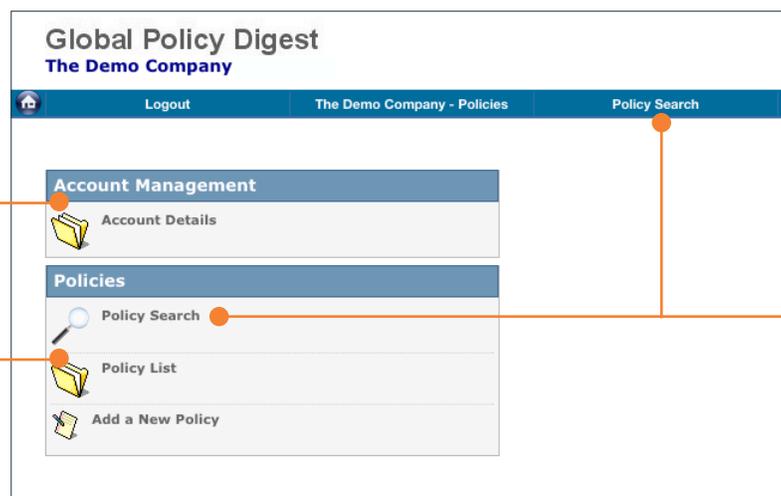
Policy Search
Opens an advanced search window.

MARSH & McLENNAN COMPANIES

POLICY SEARCH

There are many filters available to use to conduct a policy search. Complete the selected fields and then click on the **Policy List** button to generate a list of selected policies.

Saved Search
Run a search on previously saved criteria.

Click Policy List to run a Search

Note: If there are no criteria chosen, the list will show all local policies for that client.

POLICY LIST

The resulting **Policy List** generated will match the filters entered in the previous page. Each Policy is listed as a line item.

To sort the **Policy List**, click the column labels at the top of each column. For example, this list is sorted by Country.

Filter

FILTERS

To further filter the list, click on the **Filter** button below the field containing the data you would like to filter. This will open a new screen that allows you to set further filters based on the data in the set in your list.

Select "In" for the criteria you want included in your list. This makes this selection *active*.

Then click **OK** to run the Filter and view the resulting filtered list of policies.

Active

Cancel

OK button to run filter

Select filter criteria

Limit criteria choice to active selection

FILTERS (CONT'D)

Tip: You can select multiple columns to filter.

Select criteria

View Policy

To revert back to an unfiltered list, click on the Filter button again and click on the **All In** button.

All In removes filter criteria

ZOOM IN

You can also quickly *zoom in* on any particular criteria by first clicking on the cell you want to filter and then click on **Zoom In.**

First, click on criteria cell

Then, click **Zoom In**

The result is a list quickly filtered for the criteria you wish to focus on. From there you can repeat the process for another field, zooming in again.

Select more criteria

Then, Zoom In further

ZOOM IN (CONT'D)

Search

Removing the filters is easily done by individually selecting the criteria you had zoomed in on, and then clicking **Unzoom.**

To quickly clear your filters, click on **Search** in the left navigation bar and from there run a new search with no criteria selected and you will see the full list of policies.

Active criteria

First, click on active criteria

Then, click Unzoom

POLICY SUMMARY

To view a policy, click on the **Policy Number**. This will open a page displaying a summary of that policy.

Click PDF icon to print

Field Help
Get clarification on any field by clicking on the question mark next to it to view a definition.

POLICY ATTACHMENTS

Scroll down to the bottom of the policy summary for the heading **Attachments** to find documents such as the locally issued policy, invoice, binder, and whatever other documentation is available.

DETAILED REPORTS

Detailed Reports can be initiated from within the **Policy List** or **Policy Search** results screen.

First, click **Create Reports**

Select the Report Type you wish to generate, whether you want to convert policy costs to a single currency and other options, your preferred distribution method, and the option to name the report.

DETAILED REPORTS: BY COUNTRY/BY PRODUCT SUMMARIES (EXCEL)

An Excel spreadsheet with listings by Country, then product or vice versa, with premium subtotals.

DETAILED REPORTS: POLICY COST SUMMARY (EXCEL)

An Excel spreadsheet that offers a country roll-up on the total policy costs and number of policies, split by "global" versus "local" policies.

The Demo Company - Policies
Country Policy & Cost Summary

Report Period: All time   **Currency:** USD
Total Policy Count 45

| Country | Total Number of Policies | | | | | | Premium/Commission | | |
	CMP - Master	CMP - Underlyer	DIC / DIL	Local Policy	Umbrella	Total Count	Local Lines Premium (excl Commission) - Pure Local Policies	Local Lines Commission - Pure Local Policies	Glob Prem Comi CMP/Un
Afghanistan	0	0	0	0	0	1	0	0	
Argentina	1	0	0	6	0	7	5,441	672	
Australia	0	0	0	1	0	1	9,623	0	
Belgium	0	0	3	0	0	3	0	0	
Egypt	0	0	0	0	2	2	0	0	
France	0	2	0	1	0	3	22,408	2,241	
Germany	0	5	0	2	0	7	28,730	3,007	
Hong Kong	0	0	0	2	0	2	3,208	321	
India	0	0	0	1	1	2	40,928	39,290	
Spain	0	0	0	0	2	2	0	0	
Switzerland	6	0	0	0	0	6	0	0	
United Kingdom	0	2	0	4	3	9	353,520	0	
TOTALS	**7**	**9**	**3**	**17**	**8**	**45**	**463,857**	**45,531**	

DETAILED REPORTS: POLICY SUMMARY — FULL OR SINGLE PAGE (PDF)

A formatted PDF report that provides all or just key policy fields.

The Demo Company - Policies
Argentina
Casualty & Property
(General Liability, Property)

Active
ARG1234
(Policy page 1/3)

General Policy Information & Coverage Details

Inception Date:	01-Jan-2013	Compulsory Policy:	Yes
Expiration Date:	01-Jan-2016	Policy Issuance:	Admitted
Policy Number:	ARG1234	Placement Type:	Local Policy
Country of Issuance:	Argentina	Policy Handling:	Marsh Office
Policy Currency:	ARS	Marsh Servicing Office:	Buenos Aires ARGENTINA
Product Line:	Casualty & Property	Layer:	Primary/Ground-up
FOS Countries:	--		

Product Line	Line Of Business	Line Of Coverage
Casualty	General Liability	General Liability
Property	Property	All Risks Property

Named Insureds & Insurers

Broad Name Insured: Wipro Argentina and all local subsidiaries

Named Insureds

Insured Name	Country	Division	First Named Insured
The Demo Company	Argentina	Shipping	✓

Insurers/Carriers

Insurer/Issuing Paper	Insurance Group	% Participation	Lead Insurer
ACE Seguros SA	ACE	100.00000	✓

Carrier Comments: --

Limits & Deductibles

Limits

Product Line	Description	Limit
Casualty	Limit: Each claim	1,000,000.00 ARS
Casualty	Limit: Aggregate limit	3,000,000.00 ARS
Property	Limit: All Risks Prop	100,000.00 ARS
Property	---Sublimit: BI	60.00 Days

Deductibles

Product Line	Description	Deductible
Property	Each occurrence	1,000.00 ARS
Casualty	Zero Deductible Policy	--

QUICK REPORTS

Quick Reports can be initiated from within the **Policy Search** results screen.

Global Policy Digest
The Demo Company - Policies

Policy Search

Search	Logout	The Demo Company - Policies	Policy Search	Account conta

Search Criteria

Status IN ('Active')
Product Line IN ('Casualty')
Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Med
Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automob

Search
Policy List
View Policy

Save Search

Create Reports

Zoom in
Zoom out

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016
BE1234-GLFOS	Belgium	Active	01 Jan 2015	01 Jan 2016
L123456FR	France	Active	01 Jan 2015	31 Jul 2016
L123456DE	Germany	Active	01 Jan 2015	31 Dec 2015
L123456	Switzerland	Active	01 Jan 2015	31 Dec 2015
Filter	Filter	Filter	Filter	Filter

New Policy

PDF ☐ ☑ ☐ ☐ ☐
XLS ☑ ☐ ☑ ☑ ☑

First, check off all the fields/columns of data that you would like to include in your Quick Report.

Click either PDF or XLS to produce your Quick Report in the selected format.

	A	B	C	D	E	F
1	**MARSH**	2015/09/09 - 18:46 GMT	The Demo Company - Policies			
2						
3	Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Line of Coverage
4	ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	General Liability, All Risks
5	ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Automobile/Motor liability
6	ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	General Liability, All Risks
7	ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	EL/PL, General Liability, All
8	ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Automobile/Motor liability
9	ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Automobile/Motor liability
10	ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Automobile/Motor liability
11	ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	EL/PL, General Liability, All
12	123	Australia	Expired	01 Oct 2013	01 Oct 2014	General Liability
13	BE1234-GLFOS	Belgium	Expired	23 Aug 2013	23 Aug 2014	General Liability, Products
14	BE1234-GLFOS	Belgium	Expired	23 Aug 2013	23 Aug 2014	General Liability, Products
15	BE1234-GLFOS	Belgium	Active	01 Jan 2015	01 Jan 2016	General Liability, Products
16	DI123232	Egypt	Expired	01 Jan 2013	31 Dec 2013	All Risks Property, Business
17	DI123232	Egypt	Expired	01 Jan 2014	31 Dec 2014	Automobile/Motor
18	FMC1234FRLOC	France	Active	01 Jan 2015	31 Dec 2015	Flood
19	L123456FR	France	Active	01 Jan 2015	31 Jul 2016	General Liability

Additional help resources are available on the Marsh Portal. For further information, please contact your local Marsh representative. For support or technical assistance, please contact marshportalsupport@marsh.com.