

QUICK REFERENCE CARD

GLOBAL POLICY DIGEST

MANAGE YOUR GLOBAL INSURANCE PROGRAM

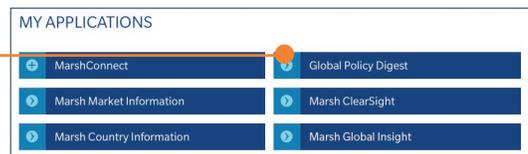
Global Policy Digest (GPD) is a global database where local Marsh servicing teams consolidate policy documentation and prepare standardized summaries enabling risk managers to quickly access the information they need.

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MARSH PORTAL

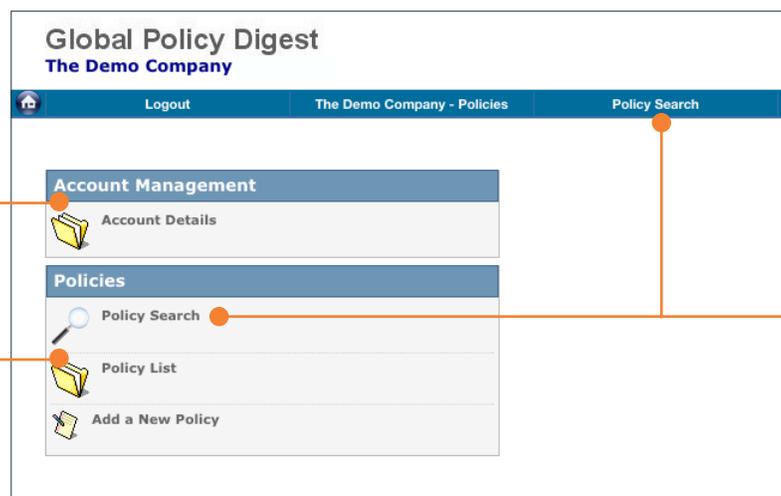
Login to marsh.com and click on the **Global Policy Digest** button.



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.



Policy Search
Opens an advanced search window.

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.

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line	Line of Business	Line of Coverage
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Property	General Liability, Pr	General L
ARG5678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty	Automobile/Motor	Automobile
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Property	General Liability, Pr	General L
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Property	General Liability, Pr	EU/PL, Ge
ARG5678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile
ARG5678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile
ARG5678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Property	General Liability, Pr	EU/PL, Ge
FMCI234FRLOC	France	Active	01 Jan 2015	31 Dec 2015	Property	Property	Flo
LI23456FR	France	Active	01 Jan 2015	31 Jul 2016	Casualty	General Liability	General
FMCI234FR	France	Active	01 Jan 2015	31 Dec 2015	Property	Property	All Risks P
DE45665	Germany	Expired	01 Jan 2013	31 Dec 2013	Property	Property	All Risks P
12345TEST	Germany	Expired	01 Jan 2013	31 Oct 2014	Property	Property	All Risks P
LI23456DE	Germany	Active	01 Jan 2015	31 Dec 2015	Casualty	General Liability	General
LI23456FRLOC	Germany	Expired	01 Jan 2014	31 Dec 2014	Casualty	General Liability	Products R
FMCI234DE	Germany	Expired	01 Jan 2014	31 Dec 2014	Property	Property	All Risks P

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.

Select filter criteria

Limit criteria choice to active selection

Cancel
OK button to run filter

FILTERS (CONT'D)

Tip: You can select multiple columns to filter.

Global Policy Digest
The Demo Company - Policies

Policy Search

Select criteria

Search Criteria: Country of Issuance IN ('Argentina','Australia','Belgium','Egypt')
Product Line IN ('Casualty')
Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Professional Liability','Multinational','Other Casualty',...)
Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automobile/Motor Comprehensive','Automobile/Motor Driver Negligence','Automobile/Motor liab

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line	Line of Business	Line of Coverage
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Property	General Liability, Pr	General Liability, AI
ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty	Automobile/Motor	Automobile/Motor liab
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Property	General Liability, Pr	General Liability, AI
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Property	General Liability, Pr	EL/PL, General Liabil
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile/Motor liab
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile/Motor liab
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty	Automobile/Motor	Automobile/Motor liab
123	Australia	Expired	01 Oct 2013	01 Oct 2014	Casualty	General Liability	General Liability
BE1234-GLFOS	Belgium	Expired	23 Aug 2013	23 Aug 2014	Casualty	General Liability	General Liability, Pr
BE1234-GLFOS	Belgium	Expired	23 Aug 2013	23 Aug 2014	Casualty	General Liability	General Liability, Pr
BE1234-GLFOS	Belgium	Active	01 Jan 2015	01 Jan 2016	Casualty	General Liability	General Liability, Pr
DI123232	Egypt	Expired	01 Jan 2014	31 Dec 2014	Casualty, Property	Automobile/Motor, Pro	Automobile/Motor Comp

View Policy

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

Global Policy Digest
The Demo Company - Policies

Policy Search

Filter: Country of Issuance

All In All Out

Display only the active selection(All:12)

- Argentina (AR)
- Australia (AU)
- Belgium (BE)
- Egypt (EG)
- France (FR)
- Germany (DE)

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**.

Global Policy Digest
The Demo Company - Policies

Policy Search

Search Criteria: Product Line IN ('Casualty')
Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Profession...)
Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automobile/Motor Comp

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Prop
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty

Zoom in Zoom out

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

Global Policy Digest
The Demo Company - Policies

Policy Search

Search Criteria: Country of Issuance = Argentina
Product Line IN ('Casualty')
Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Profession...)
Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automobile/Motor Comp

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Prop
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty

Zoom in Zoom out

Then, Zoom In further

ZOOM IN (CONT'D)

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.

Search

Search Criteria

- Country of Issuance = Argentina
- Product Line IN ('Casualty')
- Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Profession')
- Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automobile/Motor Comp')

Save Search

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Prop
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Prop
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty

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.

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

Global Policy Digest
The Demo Company - Policies

Policy Search

Policy Summary

Argentina
ARG1234

Active

General Policy Information & Coverage Details

Policy Overview

Client Name	The Demo Company - Policies	Policy Number	ARG1234
Default currency in which the policy was issued		Inception Date	01 Jan 2013
Policy Currency	ARS - Argentine Peso	Expiration Date	01 Jan 2016
Policy Handling	Marsh Office		
Marsh Servicing Office	Buenos Aires ARGENTINA		
Non Marsh Broker Entity			

Product Classification

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

Click PDF icon to print

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.

Global Policy Digest

Policy Search

Change Site

Custom Fields

Program Layer	Primary
Client Policy Reference	123456

Attachments

File	Category	Attachment Description	Attached By	Date
Primary GL Policy - 5M.doc	Policy	GL for copper mine	Paul Harvey	04 Sep 2015
ACE Seguros 2015 Invoice.docx	Invoice	Carrier premium invoice	Paul Harvey	04 Sep 2015

Record History

Document creation date	04 Sep 2015	Created By (Name)	Paul Harvey
Last Modified	04 Sep 2015	Updated by (name)	Paul Harvey
Set as active date	04 Sep 2015	Set as active author	Paul Harvey

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.

The screenshot shows the 'Global Policy Digest' interface for 'The Demo Company - Policies'. A table of policies is displayed with columns for Policy Number, Country of Issuance, Status, Inception Date, Expiration Date, and Product Line. A 'Create Reports' dialog box is open, allowing users to select a report type (e.g., 'Excel: By Country Summary'), choose a distribution method (Online or Sent by Email), and specify conversion options like 'Convert the Currency?' and 'Conversion Date Option'. A 'Generate Report' button is visible at the bottom of the dialog.

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

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

The Demo Company - Policies									
Detailed Policy Information (By country, by product)									
Report Period:		All time			Currency: USD				
Total Record Count		45							
Afghanistan									
Product Line	Coverage(s)	Named Insured(s)	Policy Status	Policy Number	Inception Date	Expiration Date	Lead Insurer	Lead Insurer Group	Policy Issuance
		Demo Company Australia	Draft	CSM_TEST	9-Jul-15	9-Jul-15			
Argentina									
Product Line	Coverage(s)	Named Insured(s)	Policy Status	Policy Number	Inception Date	Expiration Date	Lead Insurer	Lead Insurer Group	Policy Issuance
Casualty	Automobile/Motor	The Demo Company	Expired	ARG55678	23-Aug-12	23-Aug-13	La Meridional Compañia Argentina De Seguros S.A.	CHARTIS	Admitted
Casualty	Automobile/Motor	The Demo Company	Active	ARG55678	1-Aug-15	1-Jan-16	La Meridional Compañia Argentina De Seguros S.A.	CHARTIS	Admitted
Casualty	Automobile/Motor	The Demo Company	Active	ARG55678	1-Jan-15	1-Jan-16	La Meridional Compañia Argentina De Seguros S.A.	CHARTIS	Admitted

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					Total Count	Local Lines Premium (excl Commission) - Pure Local Policies	Local Lines Commission - Pure Local Policies	Premium/Commission - Global
	CMP - Master	CMP - Underlyer	DIC / DIL	Local Policy	Umbrella				
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 <i>(General Liability, Property)</i>	
Active				<i>(Policy page 1/3)</i>	
ARG1234					
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

Logout
The Demo Company - Policies
Policy Search
Account conta

Search

Policy List

View Policy

Create Reports

Zoom in

Zoom out

New Policy

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

Save Search

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

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.

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