

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.

MARSH PORTAL

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



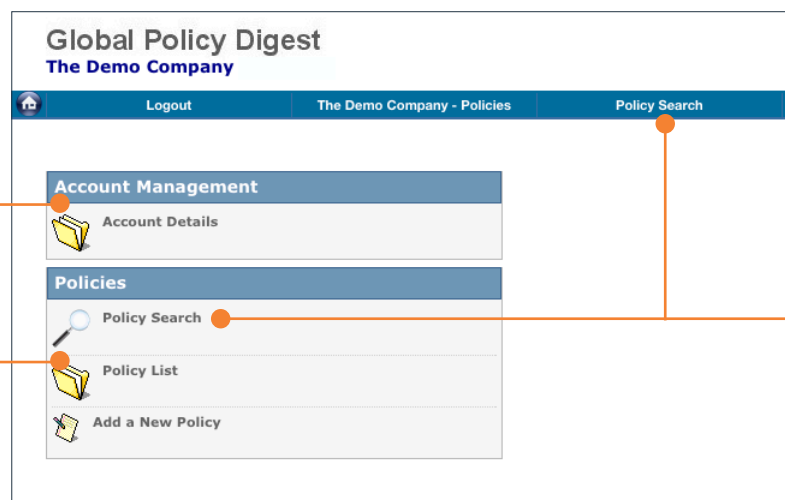
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HOME PAGE

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.

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

Global Policy Digest

The Demo Company - Policies

Policy Search

Select criteria

Search

Policy List

View Policy

Logout

The Demo Company - Policies

Policy Search

Account contact details

Help

Search Criteria

Country of Insurance 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

Save Search

Policy Number

Country of Insurance

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 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

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

Filter

Filter

Filter

Filter

Filter

Filter

Filter

PDF

XLS

First page

Previous page

[View Policy](#)[illegible]

ZOOM IN

	Logout	The Demo Company - Policies	Policy Search	Account contact details		
Search Policy List View Policy Create Reports Zoom in Zoom out	Search Criteria		Product Line IN ('Casualty')			
			Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Professional Services')			
			Line Of Coverage IN ('Automobile Legal Protection','Automobile/Motor','Automobile/Motor Compensation')			
	Save Search					
	Policy Number	Country of Issuance ↑	Status	Inception Date	Expiration Date	Product Line
	ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Property
	ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty
	ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Property
	ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Property
	ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty
	ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty

Then, click **Zoom In**


[Logout](#)

[The Demo Company - Policies](#)

[Policy Search](#)

[Account contact details](#)

[Search Policy List](#)

[View Policy](#)

[Create Reports](#)

[Zoom in](#)

[Zoom out](#)

Search Criteria

Country of Issuance = Argentina
Product Line IN ('Casualty')
Line Of Business IN ('Automobile/Motor','General Liability','Legal Protection','Medical Professional Services')
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

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

Active criteria

First, click on active criteria

Then, click Unzoom

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

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.

Click PDF icon to print

Global Policy Digest
The Demo Company - Policies

Policy Summary

Argentina
ARG1234

Active

General Policy Information & Coverage Details

Policy Overview

Client Name The Demo Company - Policies
Default currency in which the policy was issued

Policy Currency ARS - Argentine Peso

Policy Handling Marsh Office

Marsh Servicing Office Buenos Aires ARGENTINA

Non Marsh Broker Entity

Policy Number ARG1234

Inception Date 01 Jan 2013

Expiration Date 01 Jan 2016

Product Classification

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

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
The Demo Company - Policies

Policy Attachments

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

Global Policy Digest
The Demo Company - Policies

Policy Search

Logout The Demo Company - Policies Policy Search Account contact details

Search Criteria All Records

Policy Number	Country of Issuance	Status	Inception Date	Expiration Date	Product Line	Lin
CSM_TEST	Afghanistan	Draft	09 Jul 2015	09 Jul 2015		
ARG1234	Argentina	Active	01 Jan 2013	01 Jan 2016	Casualty, Property	Gene
ARG55678	Argentina	Expired	23 Aug 2012	23 Aug 2013	Casualty	Auto
ARG1234	Argentina	Expired	30 Dec 2012	30 Dec 2013	Casualty, Property	Gene
ARG1234	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty, Property	Gene
ARG55678	Argentina	Active	01 Aug 2015	01 Jan 2016	Casualty	Auto
ARG55678	Argentina	Active	01 Jan 2015	01 Jan 2016	Casualty	Auto

Create Reports

Select Inputs for Detailed Reports

Report Type: Excel: By Country Summary Distribution: Online Sent by Email

LIST (45 records)

Convert the Currency? Yes No

Currency to Convert to: USD - US Dollar Report File name: gpd_usabc_20150824_1702

Conversion Date Option: Inception Date Fixed Date

Generate Report

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

Total Record Count 45

Currency: USD

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						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	Global Premium Commission - CMP/U
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> <i>(Policy page 1/3)</i>	
Active 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.

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

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

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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