Frequently Asked Questions

Searches

Ref	Questions	Answers	User Guide
S01	**Search Criteria** - Why do my search criteria disappear when I search?	There is an option in the search criteria to '*Keep Search Criteria Open*'. If ticked, the search criteria panel will remain open. If it is unticked, the search criteria will be minimised when the user clicks on the '*Search*' button.	Section 4.1.2.2
S02	**Search Criteria** - My search is not retrieving the data that I expect.	This may be due to the option that has been selected in the dropdown fields to the left of the input fields - i.e. 'Starts With', 'Like' or 'Equals'. The Search function will look for data that starts with the entered characters OR contains the entered characters OR exactly equals the entered characters.	Section 4.1.2.1
S03	**Claim Searches** - What is the difference between the 'Standard' and 'Advanced' Claim Search functions?	The new 'Advanced Claim Search' screen enables users to include a Lloyd's CAT Code, a PCS Code or the Policy Inception Date in their search criteria.	Section 7.3
S04	**Claim Searches & Statuses** - The system has not returned details of an existing claim record.	Users should consider whether they should tick the '*Exclude Closed Claims*' indicator before submitting their search request.	Section 7.2

Frequently Asked Questions

Documents

Ref	Questions	Answers	User Guide
D01	**Document Categories -** How are documents categorised?	Documents are categorised according to the Document Type that the document owner allocates to the document when it is loaded to the IMR. However, all documents that are loaded via the ECF Direct Load function and the Add UCR Document Screen are categorised as Claim Documents.	Section 2.4
D02	**Documents Loaded Before the Switchover to FileNet** - Can I review and/or use documents that were loaded to the previous version of the IMR?	Users should be able to view all of the documents (and supporting data) that they were able to access in the WSMP version of the IMR.	Section 2.6
D03	**Document Symbols** - What do the symbols to the left of the document rows indicate?	The symbols relate to the individual documents. They identify the format of the document (Word, Excel, PDF etc.), whether it is a new document or a document that has been updated within the last 24 hours, whether the document has been checked-out, whether the document is an email which has an attachment, etc.	Section 5.4
D04	**Signing Information Symbols** - Why are there two symbols at the end of the Premium Signing rows?	Clicking on the first of these symbols produces the Policy Details popup screen. Clicking on the second symbol results in the Market Details pop-up screen being displayed.	Section 5.4
D05	**Loading Multiple Documents** - How many documents can I add at once?	It is recommended that users do not attempt to load more than 30 documents in a single operation.	Section 5.5.3

Ref	Questions	Answers	User Guide
D06	**Loading Multiple Documents** - How do I set the properties of documents if I am loading more than one document in a single operation?	Users can create different ‘properties’ for each of the documents that they have selected. The data that the user enters on the Add Document screen will be held against the document that is currently selected in the ‘Files’ field on this screen.	Section 7.9.3
D07	**Document Size Limits** - Is there a limit to the size of a document that I can load to the IMR?	It is recommended that users do not load documents/files that exceed 20MB.	Section 5.5.3
D08	**The 'Document Cart'** - What is the Document Cart used for?	The Document Cart enables users to 'stitch' documents together into a single PDF file. The file can then either be saved to the user's local network drive or printed (by using Adobe Acrobat Reader).	Section 5.8.13
D09	**Selecting Multiple Documents** - I am not sure how to select multiple documents. There no tickboxes to select.	Users can select multiple documents by holding the CTRL button on the keypad and clicking on each of the individual documents (i.e. before selecting one of the options in the 'Actions' drop-down list).	Section 5.8
D10	**Selecting Documents in Error** - I have selected multiple files on the Add Document screen. Can I remove a file before from the list before it is submitted?	The minus (-) button at the bottom of the *‘Files’* field can be used to remove documents that have been selected in error.	Section 5.5.1
D11	**Documents Loaded in Error** - How can I remove a document from the IMR?	Users cannot remove documents from the IMR. If a user realises that they have loaded a document to a UMR or UCR record in error, then they should contact the Xchanging Service Desk and ask for the document to be ‘hidden’.	Section 5.8.15
D12	**Previous Document Versions -** Can I download an older version of a document?	Yes. Select the required document and click on '*Properties*' in the 'Actions' drop-down list. Click on the '*Versions*' tab and then select the version of the document that you want to review/download.	Section 5.8.3.2

Ref	Questions	Answers	User Guide
D13	**Accessing LPANs** - How can I access LPANs?	LPANs can be accessed via a sub-node that is displayed under the ‘Misc/Historical’ documents link in the Navigation Panel. NB: Only brokers and technicians at Xchanging can view LPANs.	Section 5.12
D14	**Accessing 'Further Document Properties'** - Can I still access the detailed information that was previously held against individual documents?	These 'Further Document Properties' can no longer be viewed on the IMR.	Section 2.5.1.7

Frequently Asked Questions

Document Actions

Ref	Questions	Answers	User Guide
DA01	**Recently Viewed Records** - How can I access recently visited items like UMRs?	You cannot see recently viewed documents or records now (as you could in the previous version of the IMR). However, users can keep multiple search tabs open for any type of search request. The search results will remain open until the user closes the tab.	Section 4.1.2.3
DA02	**Checking-Out Documents -** What do the Check-Out and Check-In features do?	Checking out a document allows a user to open and edit/update the content of the document - i.e. this enables the user to create a new version of the document and load this to the same UMR/UCR record within the IMR.	Sections 5.8.7 & 5.8.8
DA03	**Editing Document Properties** - How can I edit the properties that are displayed on the IMR for a document that I loaded earlier?	Users with the required access rights can edit the properties that are held against a document on the IMR by selecting the document and clicking on the *'Edit Document'* option in the 'Actions' drop-down list.	Sections 5.8.14 & 7.10
DA04	**Use of 'Link' and 'Send Link'** - What is the difference between the '*Link*' feature in the Actions drop-down list and the '*Send Link*' button on a Contract or Claim screen?	The '*Link*' feature in the Actions drop-down list displays a link to an individual document whereas the '*Send Link*' button enables a user to send a link to a UMR or UCR record.	Sections 5.7 and 5.8.10
DA05	**Filtering -** How does the 'Filter' feature work?	The 'Filter' function enables users to search for specific documents or just display a sub-set of the documents – e.g. documents that have a specific name.	Sections 5.8.17, 7.7 & 7.8

Frequently Asked Questions

Work Packages

Ref	Questions	Answers	User Guide
WP01	**Creating Work Packages** - How can I check that a work package has been successfully created on the IMR?	A search request can be submitted via the Work Package Search screen. If the work package has been successfully completed then the user will be taken to the Work Package Details screen.	Section 6.2
WP02	**Editing Existing Work Packages** - How can I edit an existing work package?	Brokers can amend an existing work package by entering the Work Package Reference and selecting the '*Add/Remove Documents*' option in the 'Work Package Action' panel of the A&S Direct Load Options screen. NB: It is only possible to edit work packages before the package has been allocated to an XIS technician for processing or following the receipt of a query from a technician. If the work package has been rejected by an XIS technician, then the '*Resubmit*' option should be selected in the 'Work Package Action' panel.	Section 8.4
WP03	**Withdrawing Work Packages** - How can I remove a work package?	Users can withdraw a work package that they have previously submitted by selecting the '*Withdraw*' option in the 'Work Package Action' panel of the A&S Direct Load Options Screen. NB: Users can only withdraw work packages before they have been assigned to a technician at Xchanging.	Section 8.4.5
WP04	**Work Package Documents** - What is the difference between Work Package Documents and Slip Documents?	The 'Work Package Documents' panel on the Work Package Details screen holds the documents that the broker submitted for that particular work package. The 'All Slip Documents' panel holds all the documents that have the category of 'Slip' that have been loaded to the IMR for that UMR.	Section 6.2.3

Frequently Asked Questions

Claims

Ref	Questions	Answers	User Guide
C01	**Claims Awaiting Action** - How can I access details of 'Claims Awaiting Action'?	Details of 'Claim Awaiting Action' cannot be accessed from the IMR. The ECF2 application should be used.	Section 2.5.2.2
C02	**Conflict of Interest (Individual)** - How can I declare that I have a conflict of interest in a claim?	You cannot now declare that you have a conflict of interest within the IMR. The ECF2 application should be used.	Section 7.15.1
C03	**Conflict of Interest (Organisation)** - How can I declare that my organization has a conflict of interest in a claim?	You cannot now declare that your organisation has a conflict of interest within the IMR. The ECF2 application should be used.	Section 7.15.2
C04	**Market Responses -** How can I see the 'Market Response Details' for a Claim?	This information can be accessed via the Market Response Summary and Details screens with the ECF2 application.	Section 2.5.2.1
C05	**Cross-Market Comments** - How can I view comments that carriers have added to a claim?	Clicking on the '*View Comments*' button at the top of the screens that display claim summary and claim transaction details will take you to the Cross-Market Comments screen.	Section 7.14
C06	**Document Classifications** - How can I add a classification to a claim document?	The document will be associated with the classification that is selected on the 'Add UCR Document' screen. Users with the required access rights can also add or change the classification of a document that has previously been loaded to the IMR by selecting the document and accessing the 'Edit UCR Document' screen via the 'Actions' drop-down list.	Sections 7.9.5, 7.10, 7.11 & 9.3
C07	**DFV** - How can I access the Document File Viewer?	The Document File Viewer (DFV) can only be accessed via the ECF2 application.	Section 11.6

Frequently Asked Questions

Security

Ref	Questions	Answers	User Guide
S01	**Security Administrators** - What is a security administrator?	This is the person in a broker's or a carrier's office who is responsible for providing staff with access to Xchanging's systems.	Sections 7.5.3 & 7.15.3
S02	**Restricting Access to Claim Records -** How do I, as a Security Administrator, restrict the access that one of our users has to a claim record on the IMR?	The 'Manage' function (accessed via a link at the top of the Claims Summary screen) can be used to restrict individual users' access to claim records. Selecting the '*No Access*' option against the user's name will result in the user being prevented from accessing the claim documents and viewing the cross-market comments.	Sections 7.5.3.1 & 7.16
S03	**Restricting Document Access -** How can I ensure that only certain parties can access a document?	When using the A&S Direct Load function, the ECF Direct Load function and the Native IMR, users can select a 'Confidential Document' tickbox and indicate via an ACL pop-up screen which of the parties should be allowed to access the document that the user is loading to the IMR.	Sections 5.5.4 & 7.9.4
S04	**Restricting Document Access** - Can I apply the same security when loading multiple documents to the IMR?	When loading multiple documents in a single operation, the 'Confidential Document' indicator will needed to be ticked and the ACL pop-up screen will need to be completed for each of the documents that are being uploaded.	Sections 5.5.3 & 8.3.3.2
S05	**Third-Party Access** - How can I provide a 'Third Party' with access to UMR and/or UCR records in the IMR?	Users with the required security rights can provide third-party organisations with access to UMR and/or UCR records by clicking on the 'Add Third Party' icon on the left-hand side of the IMR screens.	Section 11.2
S06	**Mid-Term Broker Changes** - My organisation has just taken-over some business from another broker. How can I gain access to the contract and claim records and supporting documents?	A completed MTBC Request Form should be submitted to the Xchanging Service Desk. Staff at Xchanging will then update the access rights for the records within the IMR.	Section 11.4

Ref	Questions	Answers	User Guide
S07	**Mid-Term Market Changes** - We have just replaced one of the carriers on a contract. How can I enable the new carrier to view the documents on the IMR?	A new original premium transaction has to be processed in these circumstances. The Access Control Lists (ACLs) that are held against the IMR records are updated once the new transaction has been processed.	Section 11.5

Frequently Asked Questions

Miscellaneous

Ref	Questions	Answers	User Guide
M01	**Accessing On-line Help -** How can I access information and help from within the IMR?	Clicking the '?' symbol in the top right-hand corner of any screen within the IMR results in a screen opening in a new window that provides the user with access to the IMR User Guide, a number of training videos and other supporting material. If the user hovers the cursor over the '?' symbol next to any of the individual data entry fields then a help 'bubble' will be displayed that provides advice on how/when the field should be completed.	Section 12.3.1
M02	**Favourites** - How do I add a document to my Favourites?	Select the document you want and then choose '*Add to Favourites* ' from the 'Actions' drop-down menu. (It is not possible to add multiple documents in a single operation.)	Section 11.3.
M03	**Favourites -** How can I access my Favourites?	You just need to click on the yellow star icon at the top of the Navigation Panel on the left-hand side of the screen.	Section 11.3.
M04	**Subsequent Signings** - How can I access details of the additional and return premium transactions that have been processed on the UMR that I am reviewing?	The Carrier Signing Number & Dates (CSNDs) that are displayed in the Original Premium Signings Information panel on the Contract Details screen acts as hyperlinks. Clicking on this link will open a screen that displays details of any subsequent AP and/or RP transactions that have been processed against the CSND.	Section 5.9
M05	**Impact Upon DRI Services** - My organisation uploads and/or downloads documents to/from the IMR via the use of DRI messages. How does the introduction of the new IMR impact DRI services?	The introduction of the new version of the IMR will have no impact upon any of the existing 'Inbound' or 'Outbound' DRI services - including the ECF Write Back service.	Section 10

Ref	Questions	Answers	User Guide
M06	**System Availability** - I am unable to log-on to the IMR at the moment. How can I determine whether there is a general problem with the IMR?	Users can review the availability of a range of different applications and services by clicking the 'Xchanging Service Status' link on the IMR Login Screen.	Section 3.3.1
M07	**Password Changes** - How can I change my password?	Users can access the Change Password Screen by clicking on the dropdown arrow next to the user name in the top right-hand side of any of the main IMR screens.	Section 3.2.2
M08	**Expanding Screen Panels** - How can I expand the panels on the screens within the IMR?	Users can expand or collapse each of the panels by clicking on the panel heading. There are also arrows positioned in the left-hand side of each of the panels that enable users to expand the user's view of the panel. Users can also drag and drop column borders to increase or decrease column widths.	Section 4.3
M09	**Links to the IMR** - Are there any links to the IMR from other applications?	Users can access the IMR from a number of other applications such as the Claim Agreement Screens in the ECF2 application.	Section 11.8.1
M10	**Links to Other Applications** - Can I access other applications from within the IMR?	Users can access the Lloyd's Account Enquiry system and the 'Tracker' application via links that are provided with the IMR.	Section 11.8.2