

MEMBER MODELLER

AGENTS USER GUIDE FOR THE MEMBER CAPITAL MODELLING SOFTWARE

SEPTEMBER 2023

DISCLAIMER

Users are required to accept the Terms and Conditions and Privacy Statement, prior to accessing the member modelling software for the first time. Details of this are shown in section 2.

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1 INTRODUCTION

The purpose of this manual is to provide a guide on how to use the Member Modelling system.

The Member Modelling software can be used to model the effect on member Economic Capital Assessment (ECA) values, by changing member participations on varying syndicates and MAPAs.

1.1 Help and Support

All users are advised to review the Member Modeller user manual and FAQ section on Lloyds.com before directing queries to Lloyds.

All agent queries should be co-ordinated through an Administrator, to improve the efficiency of the support function. If the Administrator is unable to resolve the query, the initial first line of support is the e-mail helpline (Lloyds-MRC-Help@lloyds.com) which will be manned by the MRC team. All Member Modeller queries should be directed to the Lloyd's support line: 0207 327 5333 quoting "Member Modeller".

1.2 Minimum System Requirements

Users are advised to access the software through Internet Explorer 7/8 (and above) or Firefox 3.5.3 (and above). Other portals may be used but have not been tested by Lloyd's and may result in a loss of user functionality or performance.

1.3 User Permissions

The system has six levels of external users:

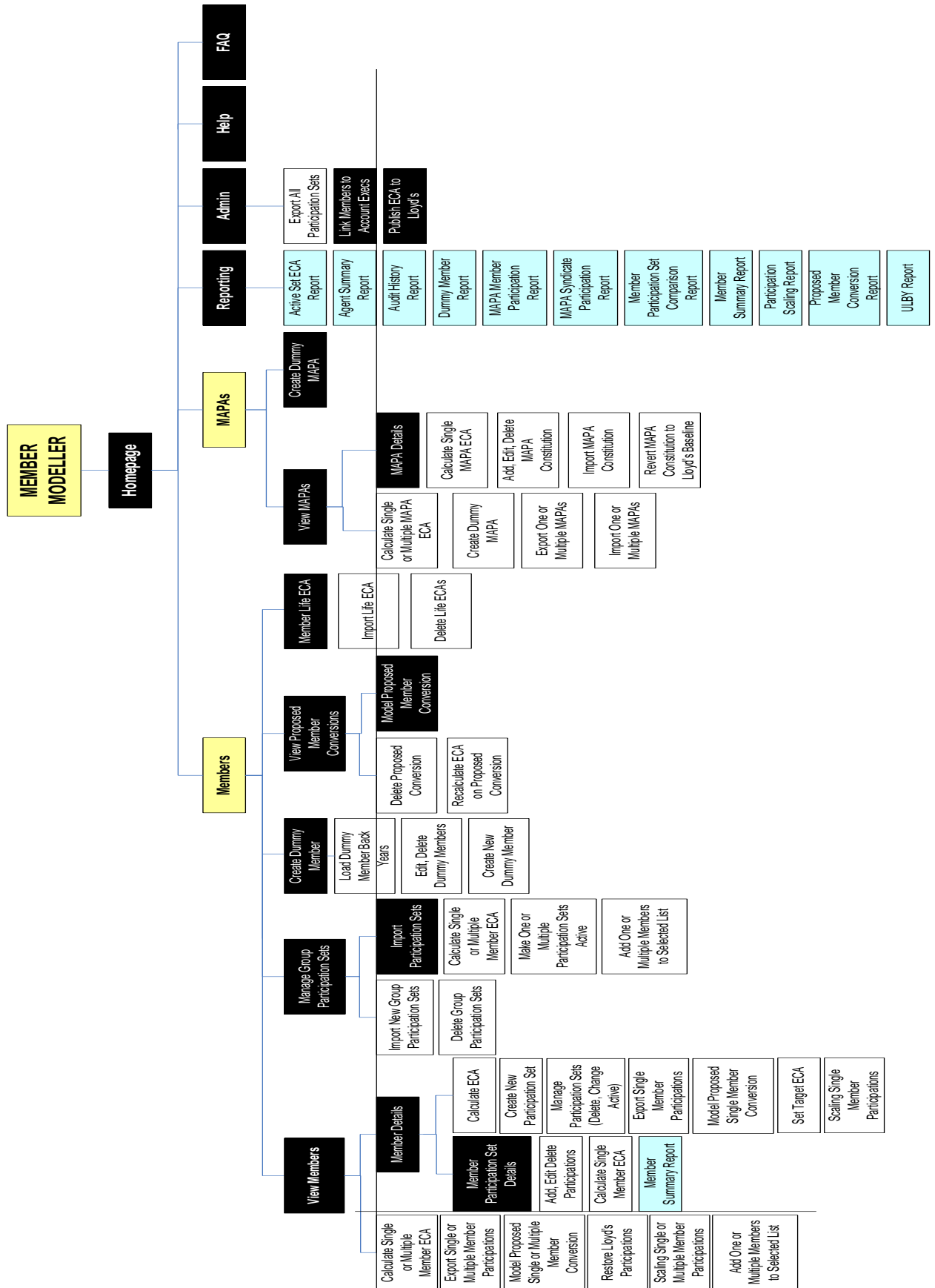
- Member
- Multi-Member
- Member Agent Admin
- Member Agent
- Managing Agent Admin
- Managing Agent

These different user types have different permissions in what functionality they can access and the reports that they can produce.

1.4 Navigating around the System

The site map in the figure below illustrates the structure of the pages in the system and the functionality that can be invoked from them.

Functionality	Year Available		Users					
	CY	PY	MultiMember	Member	ME	MA	ME Admin	MA Admin
Changing between CY and PY Modelling years	✓	✓	✓	✓	✓	✓	✓	✓
Members								
Single Member - create new participation set, blank, copy or import	✓	✓	✓	✓	✓	✓	✓	✓
Multiple Member - Manage group participation sets;import, edit, delete, calculate ECA, make all active	✓	✓	✓	✗	✓	✓	✓	✓
Adding, editing and deleting member on MAPA and/or member on syndicate participations	✓	✓	✓	✓	✓	✓	✓	✓
Calculate single member ECA	✓	✓	✓	✓	✓	✓	✓	✓
Calculate ECA for multiple members	✓	✓	✓	✗	✓	✓	✓	✓
Calculate ECA for multiple participation sets for a single member	✓	✓	✓	✓	✓	✓	✓	✓
Calculate ECA for a participation set group for multiple members	✓	✓	✓	✗	✓	✓	✓	✓
Exporting single or multiple members participations sets	✓	✓	✓	✓	✓	✓	✓	✓
Create, edit delete dummy members	✓	✓	✗	✗	✓	✓	✓	✓
Import back years for dummy members	✓	✓	✗	✗	✗	✗	✓	✓
Exporting all participation sets for all members	✓	✓	✗	✗	✗	✗	✓	✓
Model proposed single member conversion	✓	✓	✗	✓	✓	✓	✓	✓
Model proposed multiple member conversion	✓	✓	✗	✗	✓	✓	✓	✓
Capture member life ECA	✓	✓	✓	✓	✓	✓	✓	✓
Scale single member	✗	✓	✗	✓	✓	✓	✓	✓
Scale multiple members	✗	✓	✗	✗	✓	✓	✓	✓
Portfolio scaling report	✗	✓	✗	✓	✓	✓	✓	✓
Single member - set target ECA	✗	✓	✗	✓	✓	✓	✓	✓
Syndicates								
View Syndicates	✓	✓	✓	✓	✓	✓	✓	✓
MAPAs								
Create, edit, delete dummy MAPAs	✓	✓	✗	✗	✗	✗	✓	✗
Create, edit, delete MAPA on syndicate participations	✓	✓	✗	✗	✗	✗	✓	✗
Restore Lloyd's MAPA on syndicate participations	✓	✓	✗	✗	✗	✗	✓	✗
Import MAPA on syndicate participation set	✓	✓	✗	✗	✗	✗	✓	✗
Export MAPA on syndicate participation set	✓	✓	✗	✗	✗	✗	✓	✗
Calculate notional ECA for MAPAs	✓	✓	✗	✗	✗	✗	✓	✗
Admin								
Setting up and managing users in the system	✓	✓	✗	✗	✗	✗	✓	✓
Publish ECA to Lloyds	✗	✓	✗	✗	✗	✗	✓	✓
Link members to users	✓	✓	✗	✗	✗	✗	✓	✓
Reports								
Member Summary Report	✓	✓	✓	✓	✓	✓	✓	✓
Active Set ECA report	✓	✓	✓	✓	✓	✓	✓	✓
Agent Summary Report	✓	✓	✓	✗	✓	✓	✓	✓
Member Participation Set Comparison Report	✓	✓	✓	✓	✓	✓	✓	✓
Proposed Member Conversion Report	✓	✓	✗	✓	✓	✓	✓	✓
Existing ULBY Conversions Report	✓	✓	✗	✓	✓	✓	✓	✓
Audit History Report	✓	✓	✗	✗	✗	✗	✓	✓
MAPA Member Participation Report	✓	✓	✗	✗	✗	✗	✓	✗
MAPA Syndicate Participation Report	✓	✓	✗	✗	✗	✗	✓	✗
Life ECA Report	✓	✓	✓	✓	✓	✓	✓	✓
Syndicate Summary Report	✓	✓	✓	✓	✓	✓	✓	✓
Syndicate List Report	✓	✓	✓	✓	✓	✓	✓	✓



2 GETTING STARTED

Users are advised to add the Member Modeller software to their list of trusted sites in the Internet Options section. This allows exporting and importing of data to be completed without pop-up blockers and delays occurring. From within the site select the following:

“Tools” → “Internet options” → “Security” → “Trusted Sites” → “Sites” → “Add”

2.1 Registering

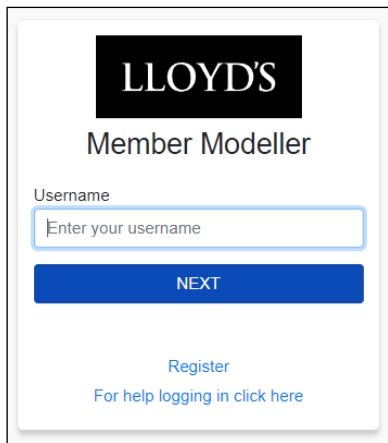
All system users will need a Lloyd's account. To register for a Lloyd's account please complete the application form and submit to the MRC email (Lloyds-MRC-Help@lloyds.com). The application form is located on lloyds.com: <http://www.lloyds.com/The-Market/Tools-and-Resources/Tools-E-Services/Member-Modeller>

2.2 Logging in

Users can log into the Member Modeller system using the email address and password used to register a Lloyd's account.

The system can be accessed directly via the URL <https://mcatweb.lloyds.com> or through Lloyds.com

Every time a user tries to access the system they will be required to securely log in.



Step 1: In the account log in screen enter your email address

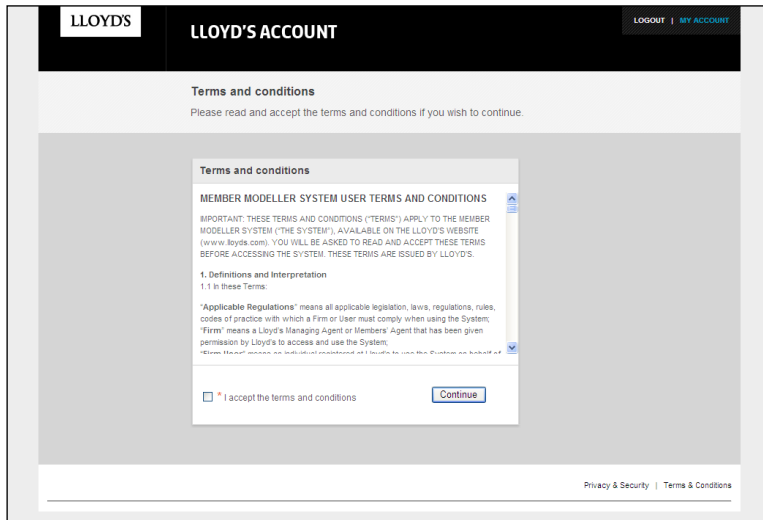
Step 2: Select Next and enter your password

Step 3: Select the Log In button

The first time the user logs into the system they will be required to accept the terms and conditions. After this first log on the first page displayed will always be the Homepage.

2.3 First Logon

On the first logon to the system, users will be required to accept the Member Modeller systems terms and conditions. A full copy of the Member Modeller Terms and Conditions & Privacy Statement are also available on Lloyds.com <http://www.lloyds.com/The-Market/Tools-and-Resources/Tools-E-Services/Member-Modeller>



Step 1: To accept the terms and conditions click the 'I accept the terms and conditions' checkbox

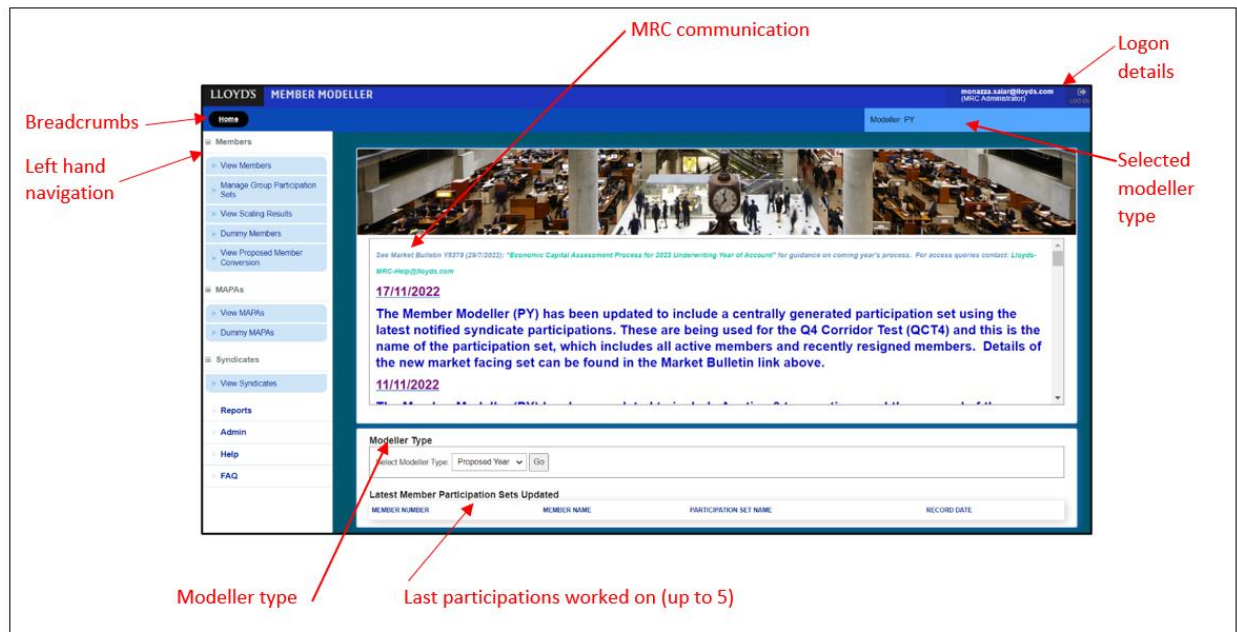


Step 2: Click the 'Continue' button

The Homepage will be loaded.

3 HOMEPAGE

The Homepage is the first page displayed upon successful logon to the system. This is where the Lloyd's MRC team will communicate notifications and updates to the system.



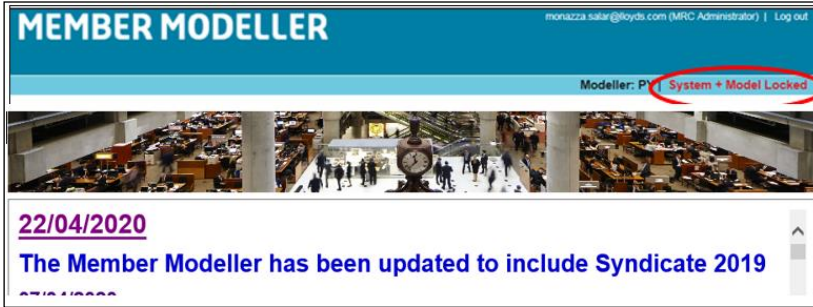
3.1 Manage Modeller Type

Available to: Member, ME Admin, ME, MA Admin, MA

There are two modeller types; Proposed Year and Current Year. The Proposed Year modeller type is used to model member capital requirements for the coming year. The Current Year modeller is used for modelling pre-emptions and mid-year start-ups.

The Modeller Type will default to the last modeller type accessed by each individual user.

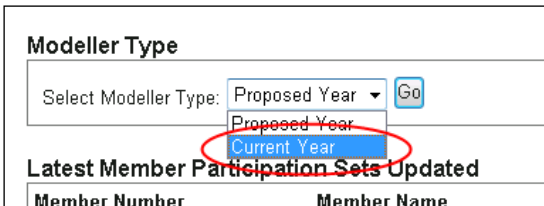
Lloyd's MRC can lock modeller types. If a modeller type is locked, red explanatory text will be displayed underneath the modeller type when it is selected as well as displaying next to the Modeller type (see 3.1.1) in red text.



3.1.1 Changing the Modeller Type from Proposed Year to Current Year

Step 1: On the Homepage in the 'Select Modeller Type' dropdown select 'Current Year'

The Current Year will be highlighted and once selected it will be displayed in the Select Modeller Type field.



Step 2: Select the 'Go' button



After clicking 'Go' the Modeller Type in the top right-hand corner of the page will be changed to "Modeller: CY". This is displayed in the title bar on all pages in the system to show the user which modeller type they are in.



3.2 Latest Member Participation Sets Updated

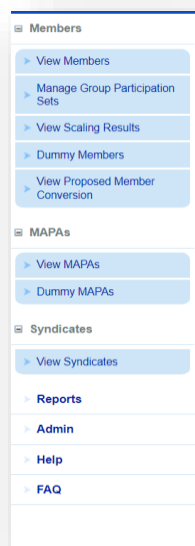
The five last participation sets created / updated by the user logged into the system will be displayed in the 'Latest Member Participation Sets Updated' table at the bottom of the Homepage.

Latest Member Participation Sets Updated			
Member Number	Member Name	Participation Set Name	Record Date
D2	Dummy Member 2	Test Participation Set 3	15/06/2010
D3	Dummy Member 3	Test Participation Set 3	15/06/2010
D4	Dummy Member 4	Test Participation Set	15/06/2010
D4	Dummy Member 4	Test P-Set	15/06/2010
D1	Dummy Member 1	Test Participation Set 1	15/06/2010

These participation sets can be used as a shortcut to return to the particular member or participation set. Click on a Member Number or Name to be taken to the Member Details page for the member or click on the Participation Set Name to be taken to the Member Participation Set Details Page for the member's selected participation set.

3.3 Left Hand Navigation

The left-hand navigation is used to access all system functionality.



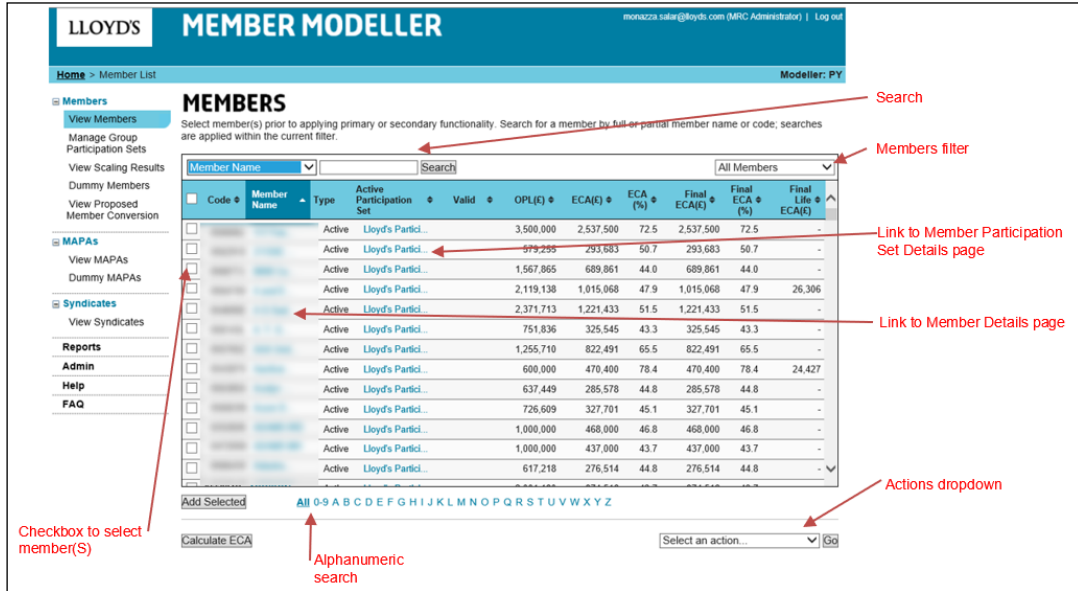
- **View Members** – this link loads the Members page which displays all members that the user's organisation manages. Through this page users can model and manage their members. This now includes the option to also model Life Members.
- **Manage Group Participation Sets** – this link loads the Manage Group Participation Sets page where multiple member participation set imports can be run and existing group member imports can be managed
- **View Scaling Results**
- **Dummy Members** – this link loads the Dummy Members page which is where users can create new dummy members and manage existing members
- **View Proposed Member Conversion** – this link loads the Proposed Member Conversion page. This is where users can view proposed single and multiple member conversions that have been modelled by users within their organisation. Note proposed conversions cannot be created from this page.
- **View Syndicates** – For agents and members, the syndicate hub will display syndicate capacity and ECA amounts for syndicates they currently underwrite. It will allow users to download a 'Syndicate Summary Report' (PDF & XLSX) that will display the YOA breakdown and diversification of the selected syndicate. The 'Syndicate List' report displays a list of applicable syndicates that a user has access to.
- **View MAPAs** – this page loads the MAPAs page which displays all MAPAs that the user's organisation manages. Through this page the user can model and manage their MAPAs
- **Dummy MAPAs** – this link loads the Dummy MAPAs page which is where users can create new dummy MAPAs and manage existing
- **Reports** – this link loads the Reports page where users can run a selection of reports from in Excel or PDF format
- **Admin** – this link loads the Admin page where users can perform administrative functionality such as linking members to other users in their organisation, exporting participations for all members and publishing ECAs to Lloyd's
- **Help** – this link loads the Member Modellers Help page on Lloyds.com
- **FAQ** – this link loads the Member Modellers frequently asked questions page on Lloyds.com

4 MEMBERS

To access the Members page, click on the 'View Members' link on the left-hand navigation

4.1 The Members Page

The Members page displays all members that the organisation of the user logged in has permission to view. The members displayed on the page will default to 'All Members'.



Up to 20 members are displayed in the members table at any given time; these can be viewed by using the vertical scroll bar. Other pages of members can be viewed using the new alphanumeric search option.

4.1.1 Multi-Members – Users with family groups or multiple corporate members.

Available to: ME Admin, ME, MA Admin, MA

This functionality allows one member to login to view multiple member participation sets (Lloyds sets only). This requires a change to the access list/database therefore you need to request this functionality via the helpdesk Lloyds-MRC-Help email. Note: Upon setup the user experience will be different to that of a normal member login and some restrictions apply – see page 6.

4.1.2 Member Filter

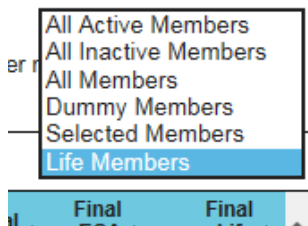
Available to: ME Admin, ME, MA Admin, MA

The Member Filter defaults to display members that have been linked to the user logged in. If the user has no linked members, the table will display All Members. Other filter options include; Active Members, Inactive Members, All Members, Dummy Members and Selected Members. The filter option will persist throughout the session until this is changed by the user.

4.1.2.1 Selecting and Applying a Filter

Step 1: Click on the Member Filter dropdown

The member filter dropdown will display all filter options.



Step 2: Click on a filter option

Clicking on a filter option will automatically apply the filter to the member results displayed in the table. Any searches performed will be performed within the Member Filter applied.

4.1.2.2 The Selected Members List

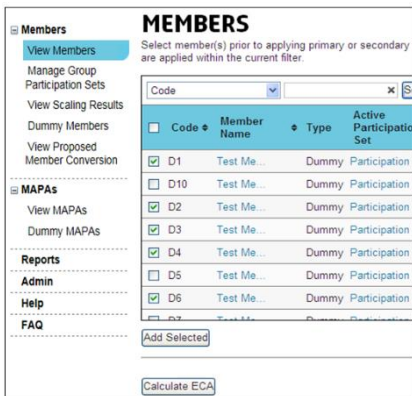
Available to: ME Admin, ME, MA Admin, MA

The selected members list is unique to the user logged in. It is a group of members that have been added into this filter by the user and can be used for example as a group of multiple members to perform a bulk scaling on or bulk ECA calculation.

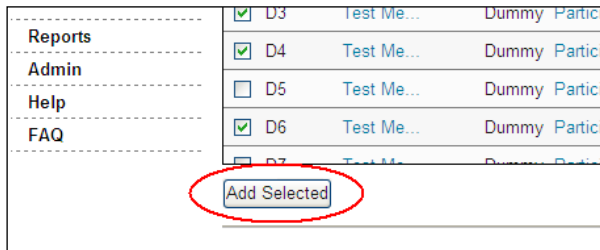
4.1.2.3 Adding Members to the Selected Member List

Step 1: Select members to add by checking one or multiple member checkboxes.

To improve ease of use, it is also now possible to select multiple checkboxes using the 'shift' key.

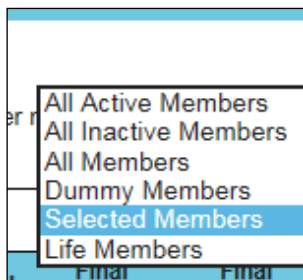


Step 2: Select the 'Add Selected' button



Selecting the 'Add Selected' button will add the selected members to the 'Selected Members' filter. A notification message will be displayed on screen confirming that the members were successfully added to the Selected Members filter. Selections will persist across paging so the system will remember the check boxes on different pages before 'Add Selected' is pressed.

Step 3: Click on 'Selected Members' in the Members Filter



The 'Selected Members' filter will be applied to the members table and only the selected members will be displayed. These members can then all be selected to be included in a multiple member calculation.

4.1.3 Calculate ECA

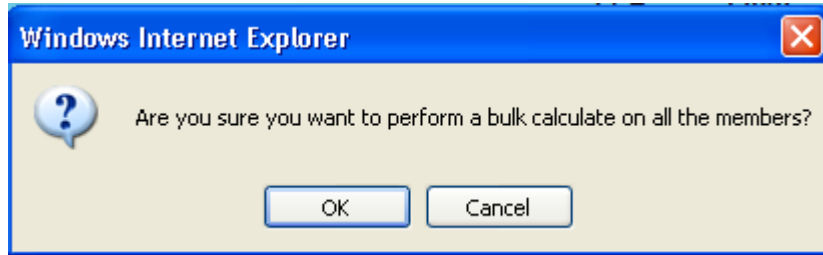
Available to: ME Admin, ME, MA Admin, MA

On the Members page the ECA can be calculated for one or multiple members who do not already have the ECA for their active participation set displayed.

Step 1: Click the check box for one or multiple members

Step 2: Click the 'Calculate ECA' button

Step 3: Click the 'Ok' button



The status '*Calculating*' will be displayed against each of the selected members; their ECA results will be returned and displayed as they are calculated.

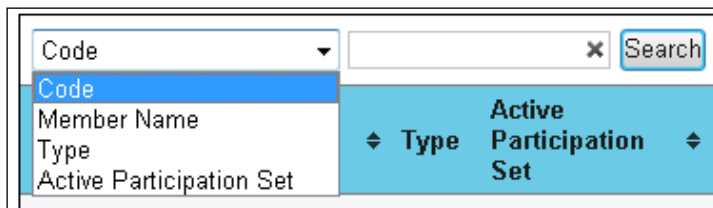
MEMBERS											
Select member(s) prior to applying primary or secondary functionality. Search for a member by full or partial member name or code; search are applied within the current filter.											
										Dummy Members	
<input type="checkbox"/>	Code	Member Name	Type	Active Participation Set	Valid	OPL (£)	ECA (£)	ECA (%)	Final ECA(£)	Final ECA(%)	Life ECA(£)
<input type="checkbox"/>	005	Test Me...	Dummy	Back yr import		600,000	273,000	45.5	273,000	45.5	
<input checked="" type="checkbox"/>	D1	Test Me...	Dummy	Lloyd's Partici...		-	-	-	Calculating		
<input checked="" type="checkbox"/>	D2	Test Me...	Dummy	Lloyd's Partici...		-	-	-	Calculating		
<input checked="" type="checkbox"/>	D3	Test Me...	Dummy	Lloyd's Partici...		-	-	-	Calculating		
<input checked="" type="checkbox"/>	D4	Test Me...	Dummy	Lloyd's Partici...		-	-	-	Calculating		

4.1.4 Search

Available to: ME Admin, ME, MA Admin, MA

The members table can be searched by Member Code, Member Name, Member Type, Active Participation Set Name or Valid. The members table will be searched within the Members Filter applied. For example if the 'Linked Members' filter is applied a member code search will only be performed within the linked members.

Note: To search by Valid enter 'Yes' or 'No' in the search box. 'No' will return a list of members with invalid participation sets.



Step 1: In the Search dropdown select 'Member Name'

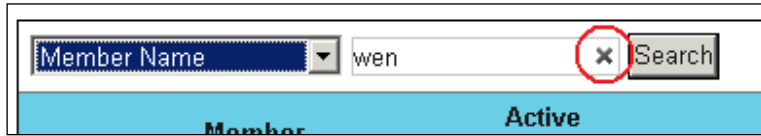
Step 2: In the search field enter a letter or partial name

Note: Wildcard searches can be performed.

Step 3: Click the 'Search' button

All member results matching the search criteria will be returned and displayed in the members table.

Step 4: To clear the search results click on the 'X' in the search field



The search results will be cleared and all members that fall under the current member filter will be displayed.

4.1.5 Modelling Inactive Members

The system has been enhanced to allow, on request, the modelling of inactive members, i.e. those not underwriting in the proposed year. This has been introduced to assist with the management of member conversions and consolidations. The use of this new functionality is administered by Lloyd's. Prior notice must be made to Lloyd's who can allow inactive members to be available to agents.

Please contact MRC (<mailto:Lloyds-MRC-Help@lloyds.com>) for further assistance.

Once the member has been made modellable it can then be selected in the usual way from the view members screen.

4.2 Scaling

The scaling functionality can be used to apply a percentage to one or multiple members modelling year participations. There are two scaling options; 0-125% which scales at 5% increments or up to five user entered scaling percentages.

The 100% scaling equals the member's current position therefore to scale a member's participation set by 5% 105% must be entered. To reduce a members' participation set by 10%, 90% must be entered.

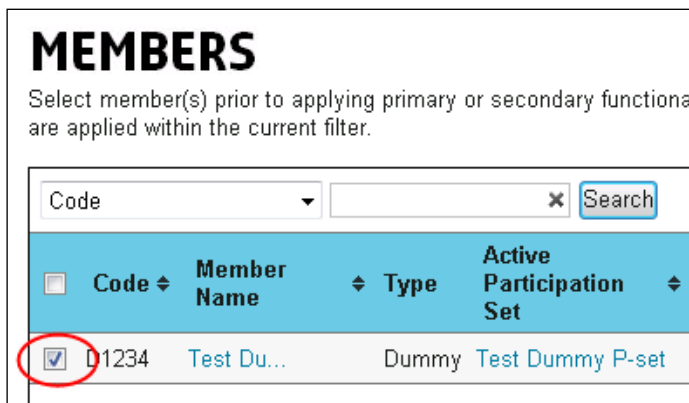
Note: this function is unavailable to Life ECAs.

4.2.1 Single Member Scaling

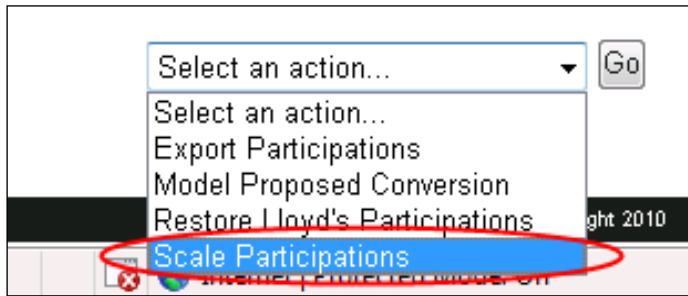
Available to: Member, ME Admin, ME, MA Admin, MA **Note: unavailable to Multi-Members**

Step 1: Click on the checkbox next to the member and their participation set to scale

A single member can be scaled from the Members page or from a selected member's Member Details page. If a member is scaled from the Members page the scaling will be done on their active participation set. From the Member Details page any of the member's sets can be scaled. To select the member and their participation set click on the checkbox to the left of the member



Step 2: Click on the 'Scale Participations' option in the actions dropdown on the bottom right of the page



Step 3: Click the 'Go' button

The Scaling Member Participations page will be loaded.

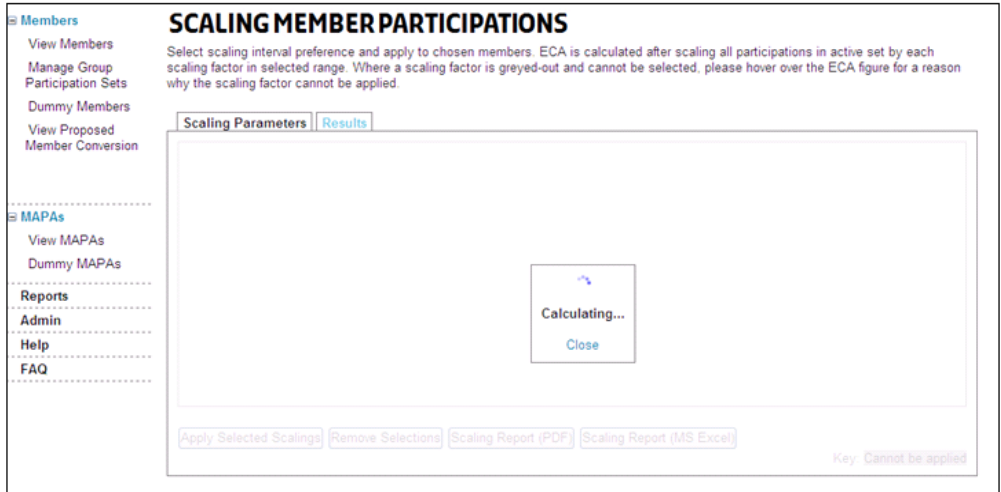
Step 4: Select the scaling option

There are two scaling options. The 0-125% scaling which is run at 5% increments or up to five user entered scaling percentages.

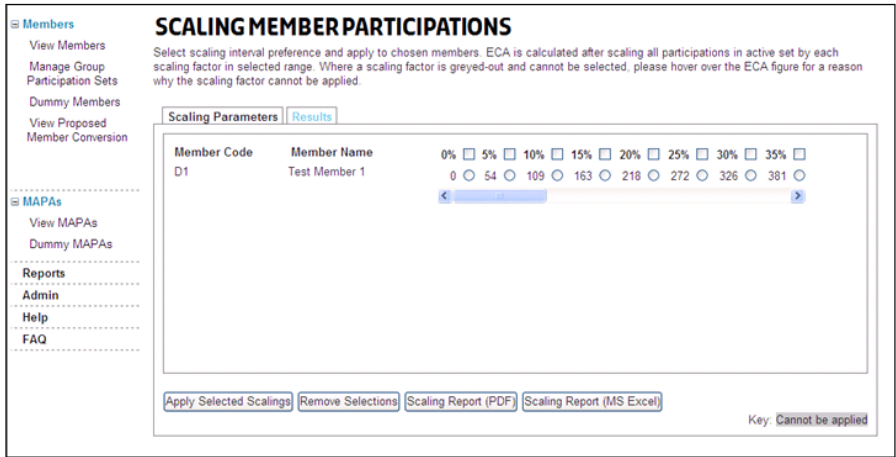
Click the radio button for one of the options. If selecting the user entered scaling percentages the five fields will be enabled – a minimum of one scaling percentage and a maximum of five can be entered in the fields. Note: Running the 5 user entered scaling percentages will be much quicker than running the 0-125% option.

Step 5: Click the 'Calculate' button

The user will be navigated to the Results tab. A progress spinner will be displayed and the results returned once they have completed calculating. Note: The value displayed on screen represents the Pure ECA before the application of the prevailing minimum. The reported figures via the results tab and the reports section display the Final ECA value (with minimum applied).



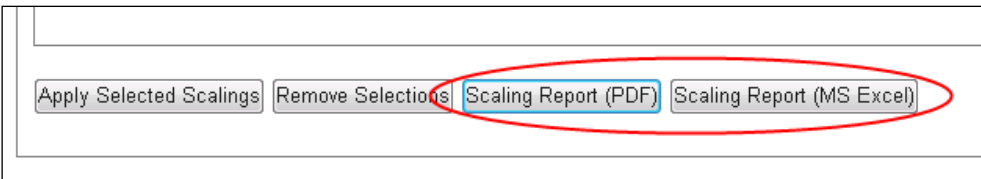
Once the scaling results have been calculated and returned:



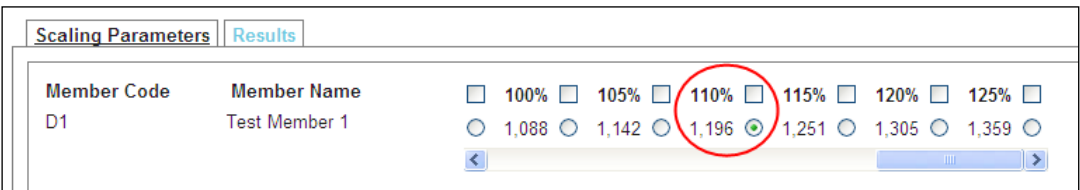
Note: Once the Scaling page is navigated away from, the user cannot return to the results. The results are not saved.

Step 6: Generating the Scaling report by clicking on one of the 'Scaling Report' buttons

The scaling report can be produced in either Excel or PDF format.



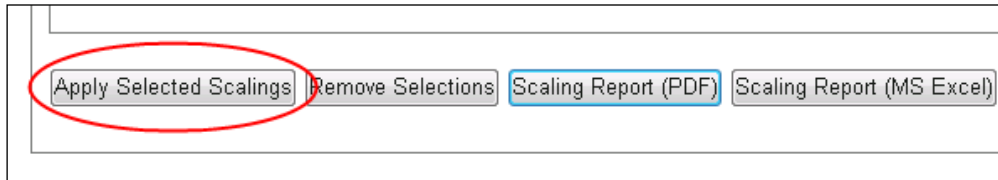
Step 7: To select a scaling percentage to apply to the member's participation set check the radio button to the right of the ECA result



A scaling percentage cannot be selected and applied if the member's set being scaled is the Lloyd's Participation Set; if another user has edited the members set whilst it is being scaled thus invalidating the calculation; or if the scaled participations exceed the syndicate or MAPA capacity. If sets cannot be scaled the results will be greyed out.

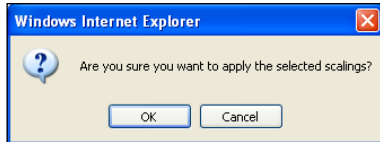
Scaling Parameters		Results	
Member Code	Member Name	125% <input type="checkbox"/>	8,999% <input type="checkbox"/>
D1	Test Member 1	10,502,873 <input checked="" type="radio"/>	756,122,845 <input type="radio"/>

Step 8: To apply the selected scaling percentage click the 'Apply Selected Scalings' button



A window will be displayed requesting confirmation of action.

Step 9: Click on the 'OK' button



A notification will be displayed on screen that the member's participation set has been successfully scaled. The ECA results for the scaled set will have been cleared and will require re-calculation.

4.2.2 Multiple Member Scaling

Available to: ME Admin, ME, MA Admin, MA

Step 1: Select multiple members to scale on the Members page

MEMBERS

Select member(s) prior to applying primary or secondary functionality. Search for a member by full or partial member name or code; searches are applied within the current filter.

Code Search Dummy Members

<input type="checkbox"/>	Code	Member Name	Type	Active Participation Set	Valid	OPL (£)	ECA (£)	ECA (%)	Final ECA (£)	Final ECA (%)	Life ECA (£)
<input checked="" type="checkbox"/>	D1	Test Me...	Dummy	Participation Sets		1,158,550	483,116	41.7	483,116	41.7	-
<input type="checkbox"/>	D10	Test Me...	Dummy	Participation Sets		382,019	196,740	51.5	196,740	51.5	-
<input checked="" type="checkbox"/>	D2	Test Me...	Dummy	Participation Sets		581,173	257,460	44.3	257,460	44.3	-
<input checked="" type="checkbox"/>	D3	Test Me...	Dummy	Participation Sets		1,284,884	621,884	48.4	621,884	48.4	-
<input checked="" type="checkbox"/>	D4	Test Me...	Dummy	Participation Sets		1,485,813	634,443	42.7	634,443	42.7	-
<input type="checkbox"/>	D5	Test Me...	Dummy	Participation Sets		777,239	370,744	47.7	370,744	47.7	-
<input checked="" type="checkbox"/>	D6	Test Me...	Dummy	Participation Sets		1,174,945	492,302	41.9	492,302	41.9	-

Add Selected

Calculate ECA Select an action... Go

Step 2: Click on the 'Scale Participations' option in the actions dropdown on the bottom right of the page

MEMBERS

Select member(s) prior to applying primary or secondary functionality. Search for a member by full or partial member name or code; searches are applied within the current filter.

Code Search Dummy Members

<input checked="" type="checkbox"/>	Code	Member Name	Type	Active Participation Set	Valid	OPL (£)	ECA (£)	ECA (%)	Final ECA (£)	Final ECA (%)	Life ECA (£)
<input checked="" type="checkbox"/>	D1	Test Me...	Dummy	Participation Sets		1,158,550	483,116	41.7	483,116	41.7	-
<input type="checkbox"/>	D10	Test Me...	Dummy	Participation Sets		382,019	196,740	51.5	196,740	51.5	-
<input checked="" type="checkbox"/>	D2	Test Me...	Dummy	Participation Sets		581,173	257,460	44.3	257,460	44.3	-
<input checked="" type="checkbox"/>	D3	Test Me...	Dummy	Participation Sets		1,284,884	621,884	48.4	621,884	48.4	-
<input checked="" type="checkbox"/>	D4	Test Me...	Dummy	Participation Sets		1,485,813	634,443	42.7	634,443	42.7	-
<input type="checkbox"/>	D5	Test Me...	Dummy	Participation Sets		777,239	370,744	47.7	370,744	47.7	-
<input checked="" type="checkbox"/>	D6	Test Me...	Dummy	Participation Sets		1,174,945	492,302	41.9	492,302	41.9	-

Add Selected

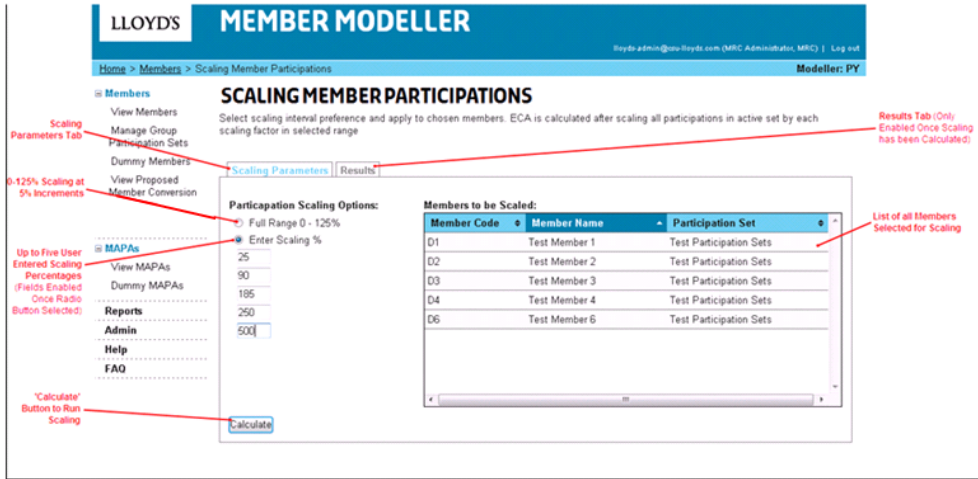
Calculate ECA Select an action... Go

- Select an action...
- Select an action...
- Export Participations
- Model Proposed Conversion
- Restore Lloyd's Participations
- Scale Participations**

Step 3: Click on the 'Go' button

The Scaling Member Participations page will be loaded.

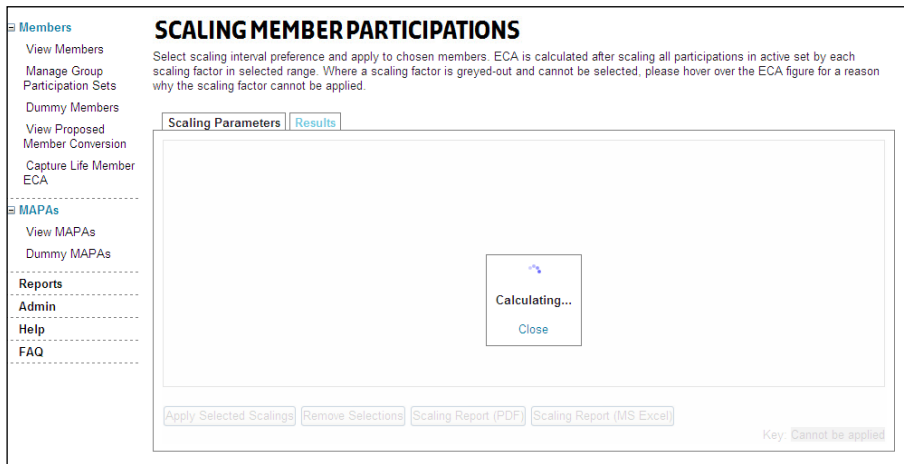
Step 4: Select the scaling option



There are two scaling options. The 0-125% scaling which is run at 5% increments or up to five user entered scaling percentages. Click the radio button for one of the options. If selecting the user entered scaling percentages the five fields will be enabled – a minimum of one scaling percentage and a maximum of five can be entered in the fields.

Step 5: Click the 'Calculate' button

The user will be navigated to the Results tab. A progress spinner will be displayed and the results returned once they have completed calculating. Note: The value displayed on screen represents the Pure ECA before the application of the prevailing minimum. The reported figures via the results tab and the reports section display the Final ECA value (with minimum applied).



Note: Large multiple member scaling calculations will take a long time. On average a 100 member 0-126% scaling will take around 35 minutes – 50 minutes. A 100 member scaling with 5 user entered percentages will take roughly 10 - 15 minutes. Once the scaling results have been calculated, they will be returned and displayed on the page.

LLOYD'S MEMBER MODELLER

Home > Members List > Scaling Member Participations

Modeller: PY

SCALING MEMBER PARTICIPATIONS

Select scaling interval preference and apply to chosen members. ECA is calculated after scaling all participations in active set by each scaling factor in selected range. Where a scaling factor is greyed-out and cannot be selected, please hover over the ECA figure for a reason why the scaling factor cannot be applied.

Member Code	Member Name	90%	150%	200%
D1	Test Member 1	465,062	584,720	712,436
D2	Test Member 2	245,420	320,513	395,570
D3	Test Member 3	587,628	777,799	948,822
D4	Test Member 4	607,357	779,350	935,276
D6	Test Member 6	473,014	592,700	702,355

Buttons: Apply Selected Scalings, Remove Selections, Scaling Report (PDF), Scaling Report (MS Excel)

Key: Cannot be applied

Note: Once the Scaling page is navigated away from, the user cannot return to the results. The results are not saved.

Step 6: Generating the Scaling report by clicking on one of the 'Scaling Report' buttons

The scaling report can be produced in either Excel or PDF format.

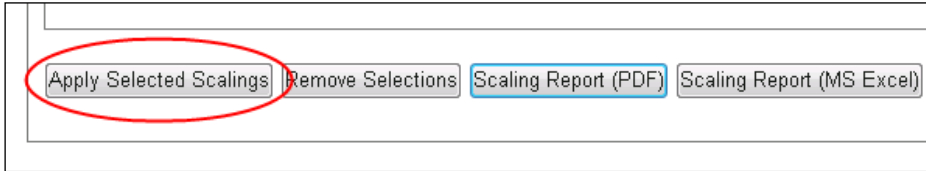
Step 7: To select a scaling percentage to apply check the radio button to the right of the ECA result or to select all scalings in a column check the checkbox next to the scaling percentage

Selecting radio buttons for different scalings:

Selecting the scaling percentage checkbox to select all:

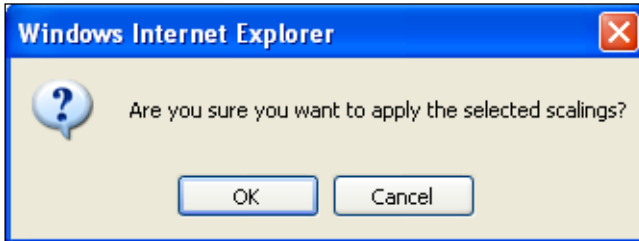
A scaling percentage cannot be selected and applied if the member's set being scaled is the Lloyd's Participation Set, if another user has edited the members set whilst its being scaled thus invalidating the calculation or if the scaled participations exceed the syndicate or MAPA capacity. If sets cannot be scaled the results will be greyed out.

Step 8: To apply the selected scaling percentage click the 'Apply Selected Scalings' button



A window will be displayed requesting confirmation of action.

Step 9: Click on the 'OK' button



A notification will be displayed on screen that the member's participation set has been successfully scaled. The ECA results for the scaled set will have been cleared and will require re-calculation.

4.3 Model Proposed Conversions

Available to: Member, ME Admin, ME, MA Admin, MA

Note: The system will now recognise when the active set changes for donor members in a proposed conversion. When this happens, the system will mark the conversion as requiring recalculation. Previously, the conversion had to be recreated with the revised participations.

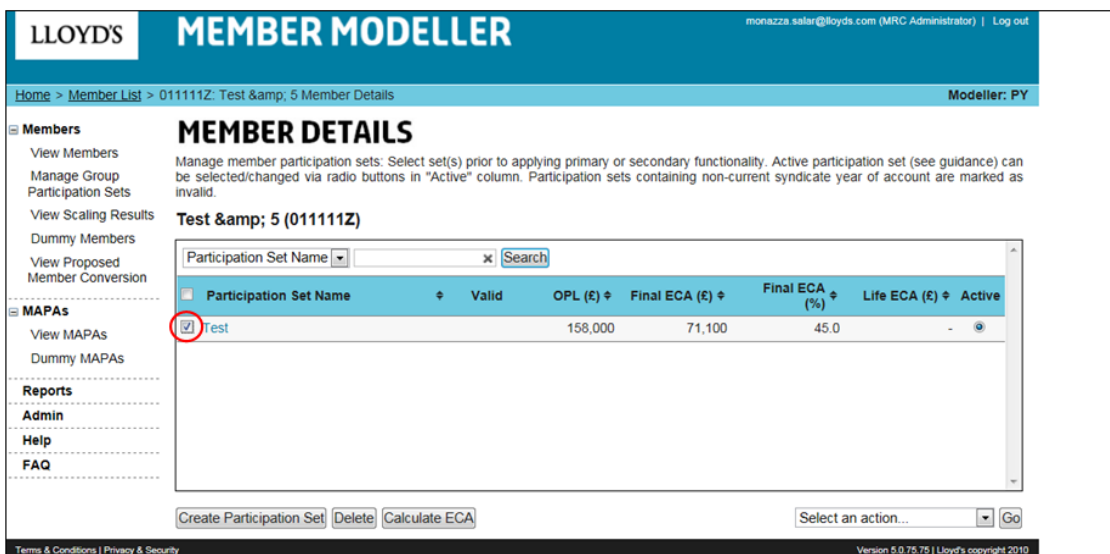
Single and multiple member proposed conversions can be modelled in the system. Existing or dummy members can be used in conversions

4.3.1 Modelling Single Member Proposed Conversions

Note: unavailable to Multi-Members

Step 1: Click the checkbox next to the member and their participation set to model

A single member can be modelled from the Members page or from a selected member's Member Details page. If a member is modelled from the Members page the conversion will be done on their active participation set. From the Member Details page any of the member's participation sets can be selected to be modelled. To select the member and their participation set click on the checkbox to the left of the member.



Step 2: Click on the action dropdown on the bottom right of the page and select 'Model Proposed Conversion'

LLOYD'S MEMBER MODELLER monazza.saler@lloyds.com (MRC Administrator) | Log out

Home > Member List > 011111Z: Test & 5 Member Details Modeller: PY

MEMBERS

- View Members
- Manage Group
- Participation Sets
- View Scaling Results
- Dummy Members
- View Proposed Member Conversion

MAPAs

- View MAPAs
- Dummy MAPAs

Reports

- Admin
- Help
- FAQ

MEMBER DETAILS

Manage member participation sets: Select set(s) prior to applying primary or secondary functionality. Active participation set (see guidance) can be selected/changed via radio buttons in "Active" column. Participation sets containing non-current syndicate year of account are marked as invalid.

Test & 5 (011111Z)

Participation Set Name Search

<input type="checkbox"/>	Participation Set Name	Valid	OPL (£)	Final ECA (£)	Final ECA (%)	Life ECA (£)	Active
<input checked="" type="checkbox"/>	Test		158,000	71,100	45.0	-	<input type="radio"/>

Create Participation Set Delete Calculate ECA

Select an action...

- Select an action...
- Export Participations
- Model Proposed Conversion**
- Set Target ECA
- Scale Participations

Terms & Conditions | Privacy & Security 31/10/2010

Step 3: Click on the 'Go' button

The Model Proposed Conversion page will be loaded.

Step 4: Enter a name for the conversion in the 'Conversion Name' field

LLOYD'S MEMBER MODELLER

bo.yu@lloyds.com (MRC Administrator) | Log out

Home > Members > Proposed Member Conversion > Convert Members Modeller: PY

MODEL PROPOSED MEMBER CONVERSION

The donor members share % has been automatically calculated based on the donor member participations. Click on the field to edit the donor members share. The total donor member share percentage must equal 100%.

Conversion Parameters Results

Conversion Name:

Donor Members	Donor Member Share %
Test Member 2	100

Edit

Total Donor Member Share %

Calculate ECA

Step 5: Click on the 'Calculate ECA' button

The user is navigated to the Results tab. A progress spinner is displayed whilst the results are being calculated.

LLOYD'S MEMBER MODELLER

bo.yu@lloyds.com (MRC Administrator) | Log out

Home > Members > Proposed Member Conversion > Convert Members Modeller: PY

MODEL PROPOSED MEMBER CONVERSION

The donor members share % has been automatically calculated based on the donor member participations. Click on the field to edit the donor members share. The total donor member share percentage must equal 100%.

Conversion Parameters Results

Single Member Conversion Calculating

Recipient	OPL(£)	ECA(£)	ECA(%)	ULBY Result(£)	Min. ECA(£)	Min. ECA(%)
Proposed Conversion	-	-	-	-	-	-

Donors	Share(%)	Pre-conversion ECA(£)	ULBY Credit(£)	Post-conversion ECA(£)
Test Member 2		257,705		

Calculating...

Close

Save Conversion

Date Created: 22/06/2010 Created By: bo.yu@lloyds.com

Once the results are calculated they are displayed on the Results tab.

LLOYD'S MEMBER MODELLER

Home > Members > Proposed Member Conversion > Convert Members

Modeller: PY

MODEL PROPOSED MEMBER CONVERSION

The donor members share % has been automatically calculated based on the donor member participations. Click on the field to edit the donor members share. The total donor member share percentage must equal 100%.

Conversion Parameters | Results

Single Member Conversion

Recipient	OPL (£)	ECA (£)	ECA (%)	ULBY Result (£)	Min. ECA (£)	Min. ECA (%)
Proposed Conversion	581,173	155,123	26.7	102,582	232,469	40.0

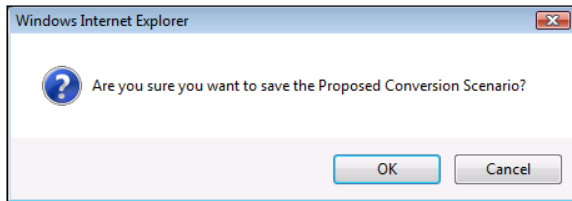
Donors	Share (%)	Pre-conversion ECA (£)	ULBY Credit (£)	Post-conversion ECA (£)
Test Member 2	100	257,705	66,694	169,276

Save Conversion

Date Created: 22/06/2010 Created By: bo.yu@lloyds.com

Step 6: To save the conversion click on the 'Save Conversion' button

Step 7: Click on 'OK' to save the conversion or 'Cancel' to not save it



Selecting 'OK' will navigate the user to the saved conversion on the View Proposed Conversion page.

LLOYD'S MEMBER MODELLER

Home > Members > Proposed Member Conversion

Modeller: PY

PROPOSED MEMBER CONVERSION

Search by donor member name or code or conversion name. Click on the name of the conversion to access the details of the conversion. To create a conversion go to the Members page, select the appropriate members and choose Model Proposed Conversion from the functionality drop-down.

Conversion Name [x] Search

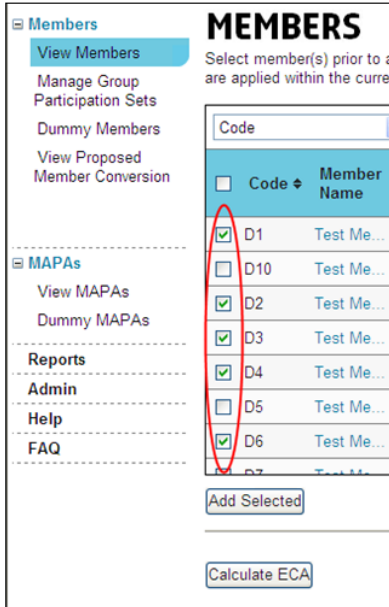
Conversion Name	Date Created	Created By	Recipient OPL (£)	Recipient ECA (£)	%	Donor Members
<input type="checkbox"/> Single Member Conversion	22/06/2010	bo.yu@lloyds.com	581,173	155,123	26.7	Test Member 2

Delete Recalculate ECA

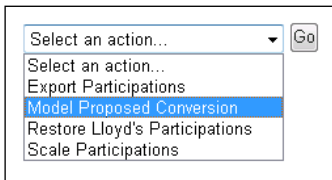
Step 8: To return at anytime to the saved conversion click on the 'View Proposed Conversion' link in the left hand navigation.

4.3.2 Modelling Multiple Member Proposed Conversions

Step 1: Click the checkbox next to the members to model



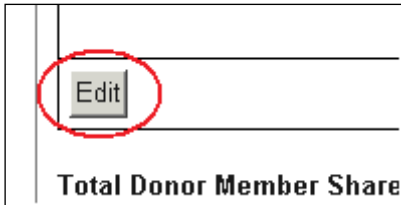
Step 2: Click on the action dropdown on the bottom right of the page and select 'Model Proposed Conversion'



Step 3: Click on the 'Go' button

Step 4: Enter a name for the conversion in the 'Conversion Name' field

Step 5: Click on the 'Edit' button to edit the donor member shares



The Donor member table will be opened up to editing the share % values.

Step 6: Edit the donor member shares by typing in the 'Donor Member Share %' fields

Conversion Parameters Results

Conversion Name:

Donor Members	Donor Member Share %
Test Member 1	29
Test Member 10'	32
Test Member 11	39

Save Cancel

Total Donor Member Share % 100

Calculate ECA

The donor members' shares are automatically calculated based on the percentage of their modelling year participations making up the recipient member. The shares can be changed however the sum of the donor member share must always equal 100%. If the sum of the donor member shares does not equal 100% when the user saves the changes they will get a notification message.

Total Donor Member Share % must be 100%

MODEL PROPOSED MEMBER CONVERSION

The donor members share % has been automatically calculated based on the donor member participations. Click on the field to edit the donor members share. The total donor member share percentage must equal 100%.

Conversion Parameters Results

Conversion Name: Multiple Member Test Conversion

Donor Members	Donor Member Share %
Test Member 1	29
Test Member 10'	12
Test Member 11	39

Save Cancel

Total Donor Member Share % 80

Calculate ECA

Step 7: Click on the 'Save' button to save changes or the 'Cancel' button to lose all changes

The donor members table will be closed to editing.

Step 8: Click on the 'Calculate ECA' button

The user is navigated to the Results tab. A progress spinner is displayed whilst the results are being calculated.

Share(%)	Pre-conversion ECA(£)	ULBY
	257,705	

Calculating...

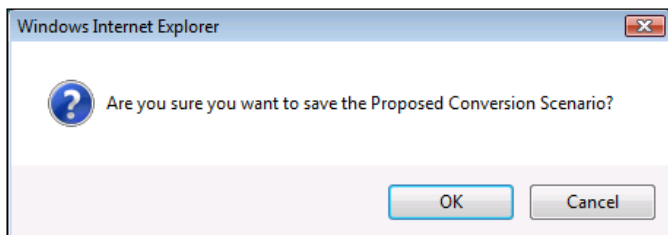
Close

Once the results are calculated they are displayed on the Results tab.

Conversion Parameters		Results				
Multiple Member Test Conversion						
Recipient	OPL (£)	ECA (£)	ECA (%)	ULBY Result (£)	Min. ECA (£)	Min. ECA (%)
Proposed Conversion	11,434	2,739	24.0	182	4,574	40.0
Donors	Share (%)	Pre-conversion ECA (£)	ULBY Credit (£)	Post-conversion ECA (£)		
Test Member 1	29	937	94	248		
Test Member 10	32	1,497	104	53		
Test Member 11	39	1,341	126	154		
<input type="button" value="Save Conversion"/>						
Date Created: 18/06/2010 Created By: lloyds-admin@csu-lloyds.com						

Step 9: Click on the 'Save Conversion' button

Step 10: Click on the 'Ok' button to save the conversion or the 'Cancel' button to not save it



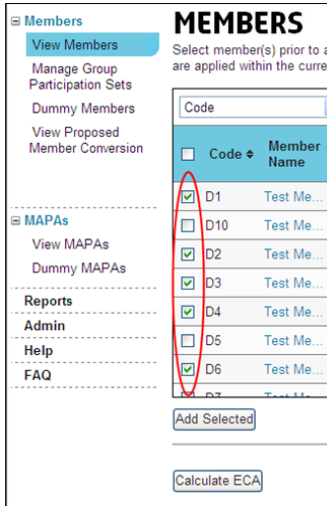
Saved conversions can be viewed on the View xConversions page accessible via the left hand navigation.

4.4 Export Participations

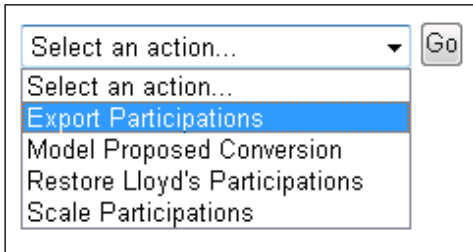
Available to: Member, ME Admin, ME, MA Admin, MA

Participation sets can be exported via the Members page for one or multiple members. For a single member participation sets can also be exported via the Member Details page. **Note: The Export participations option will now include Life participations where appropriate.**

Step 1: Select one or multiple members by clicking on the checkbox to the left of the members code

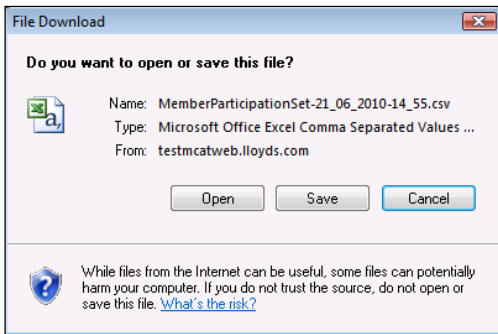


Step 2: Select the actions dropdown at the bottom right of the page and click on 'Export Participations'



Step 3: Click on the 'Go' button

Step 4: Click on the 'Open' button to open the export in MS Excel, click on the 'Save' button to save the file or click on the 'Cancel' button to cancel the export



The file is in .CSV format.

4.5 Member Details Page

To access the Member Details page click on the member name on the Members page.

<input type="checkbox"/>	Code	Member Name	Type	Active Participation Set
<input type="checkbox"/>	005	Test Me...	Dummy	Back yr imp
<input checked="" type="checkbox"/>	D1	Test Me...	Dummy	Lloyd's Part
<input checked="" type="checkbox"/>	D2	Test Me...	Dummy	Lloyd's Part
<input checked="" type="checkbox"/>	D3	Test Me...	Dummy	Lloyd's Part
<input checked="" type="checkbox"/>	D4	Test Me...	Dummy	Lloyd's Part

The Member Details page displays all participation sets held for the selected member in the modeller type and is where they can be managed.

LLOYD'S MEMBER MODELLER

Home > Member List > D1: Test Member 1 Member Details

Modeller: PY

MEMBER DETAILS

Manage member participation sets: Select set(s) prior to applying primary or secondary functionality. Active participation set (see guidance) can be selected/changed via radio buttons in "Active" column. Participation sets containing non-current syndicate year of account are marked as invalid.

Test Member 1 (D1)

Participation Set Name	Valid	OPL (£)	Final ECA (£)	Final ECA (%)	Active
Test Participation Sets		648	62,784	9,688.8	<input type="radio"/>
Test Participation Set 2		648	104,882	16,185.4	<input type="radio"/>
Test Participation Set 3	X	56,203	-	-	<input type="radio"/>

Actions: Create Participation Set | Delete | Calculate ECA

Actions Dropdown: Select an action... (Go)

- Select an action...
- Export Participations
- Model Proposed Conversion
- Set Target ECA
- Scale Participations

4.5.1 Active Participation Set

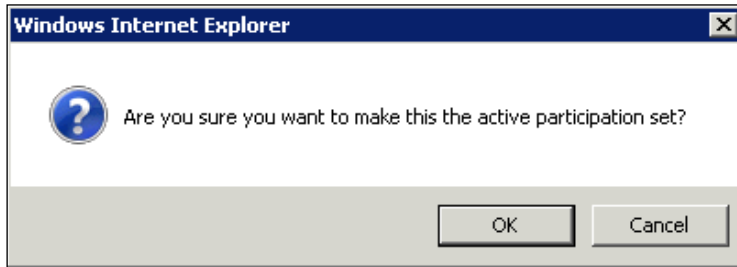
A member can only have one active participation set in each modeller type. The member's active set is the set displayed on the Members page. It is the set that will be used in any multiple member calculations. A member's active set is the set that has the 'Active' radio button selected.

Note: At the start of each modelling year the Lloyd's Participation Set will be the members active set.

4.5.1.1 Changing the Active Set via the Member Details Page

Step 1: Click on the 'Active' radio button for one of the member's sets which is not active

Step 2: Click on the 'OK' button to change the active set



This will make the selected participation set the member's new active set. A confirmation message will be displayed on screen confirming that the active participation set was successfully updated.

4.5.2 Creating a New Participation Set

New Participation sets can be created for single member's via the Member Details page, see section 4.9 for creating sets for groups of members.

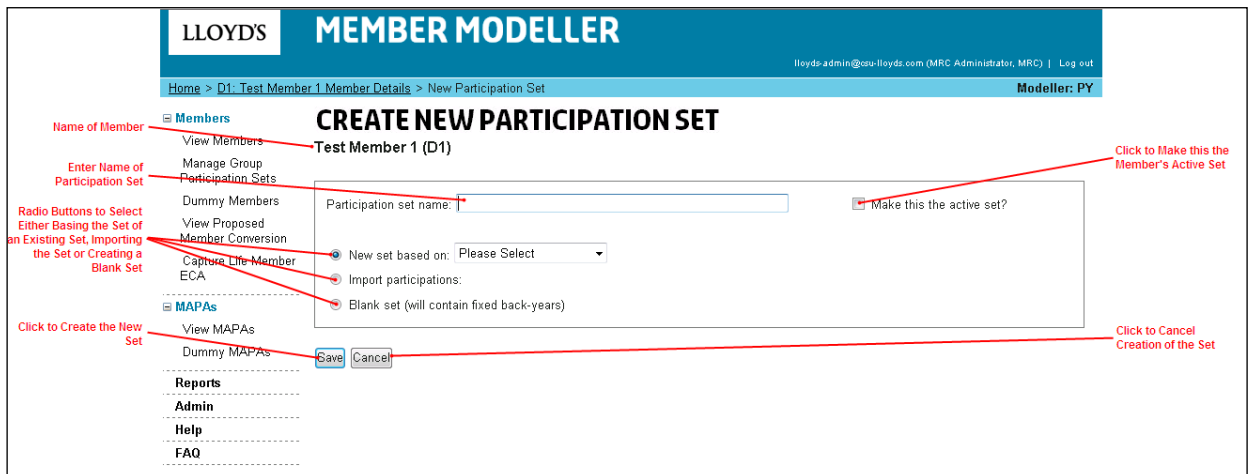
Step 1: To create a new participation set for a single member click the 'Create Participation Set' button on the Member Details page



The Create New Participation Set page will be loaded. There are three ways a new participation set can be created:

- Basing the set on an existing participation set for the Member
- Importing the set
- A blank set

All new sets will contain the member's open back years.

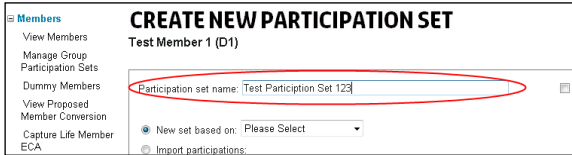


4.5.2.1 Creating a New Participation Set - Based on an Existing Set

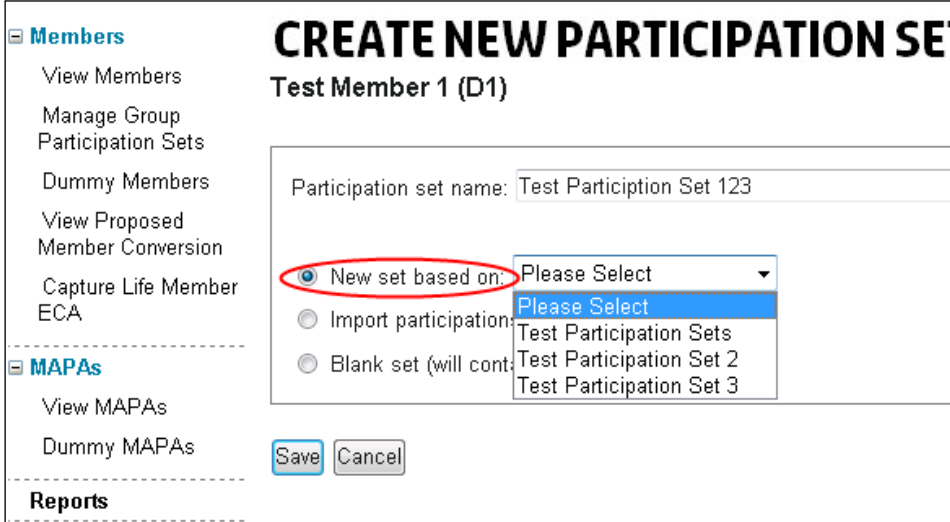
Available to: Member, ME Admin, ME, MA Admin, MA

Step 1: Click on the 'Create Participation Set' button on the Member Details page

Step 2: Enter a name for the participation set in the 'Participation Set Name' field

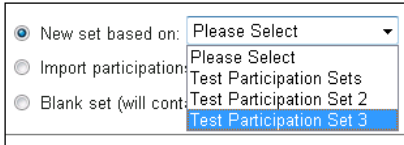


Step 3: Select the 'New Set Based on' radio button

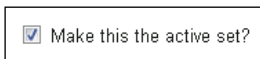


Step 4: Select the set from the dropdown

The 'New set based on' dropdown will display all existing participation sets for the member in the modeller type.



Step 5: To make the new set the member's active participation set click on the checkbox 'Make this the active set?'



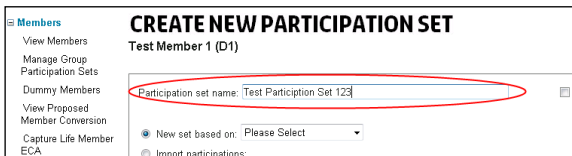
Step 6: Click on the 'Save' button

This will create the new set. The user will be navigated to the Member Participation Set Details page for the new set.

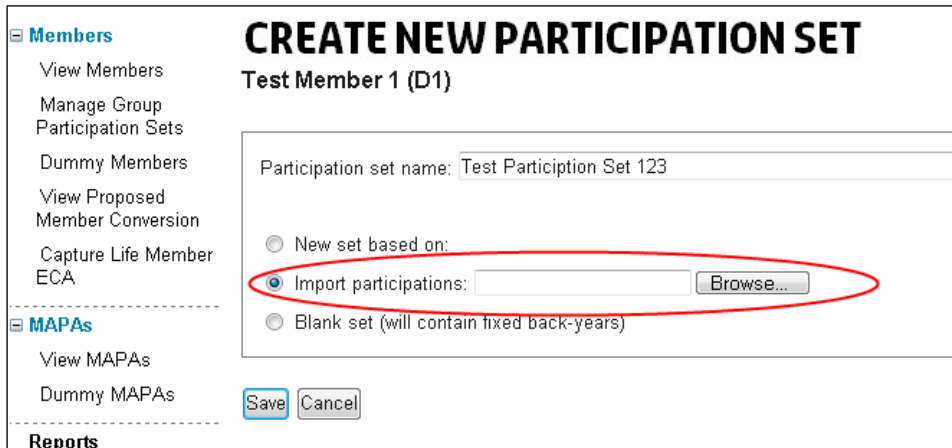
4.5.2.2 Creating a New Participation Set – Importing

Step 1: Click on the 'Create Participation Set' button on the Member Details page

Step 2: Enter a name for the participation set in the 'Participation Set Name' field

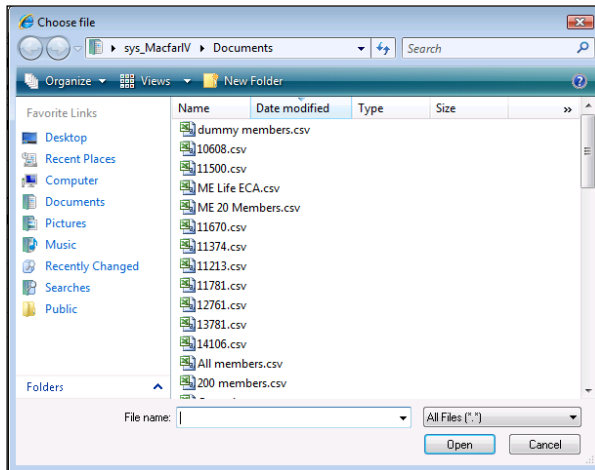


Step 3: Select the 'Import Participations' radio button

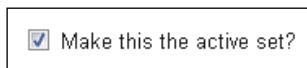


Step 4: Click the 'Browse' button

Step 5: Select the file to import and click on the 'Open' button



Step 6: To make the new set the member's active participation set click on the checkbox 'Make this the active set?'



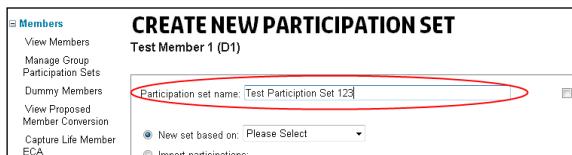
Step 7: Click on the 'Save' button

This will create the new set. The user will be navigated to the Member Participation Set Details page for the new set.

4.5.2.3 Creating a New Participation Set – Blank

Step 1: Click on the 'Create Participation Set' button on the Member Details page

Step 2: Enter a name for the participation set in the 'Participation Set Name' field



Step 3: Select the 'Blank Set' radio button

Step 4: To make the new set the member’s active participation set click on the checkbox ‘Make this the active set?’

Step 5: Click on the ‘Save’ button

This will create the new set. The user will be navigated to the Member Participation Set Details page for the new set.

4.5.3 Deleting a Participation Set

Step 1: Select the member’s participation set(s) to be deleted by clicking on the checkbox to the left of them

Step 2: Click on the ‘Delete’ button

Step3: Click on the ‘Ok’ button

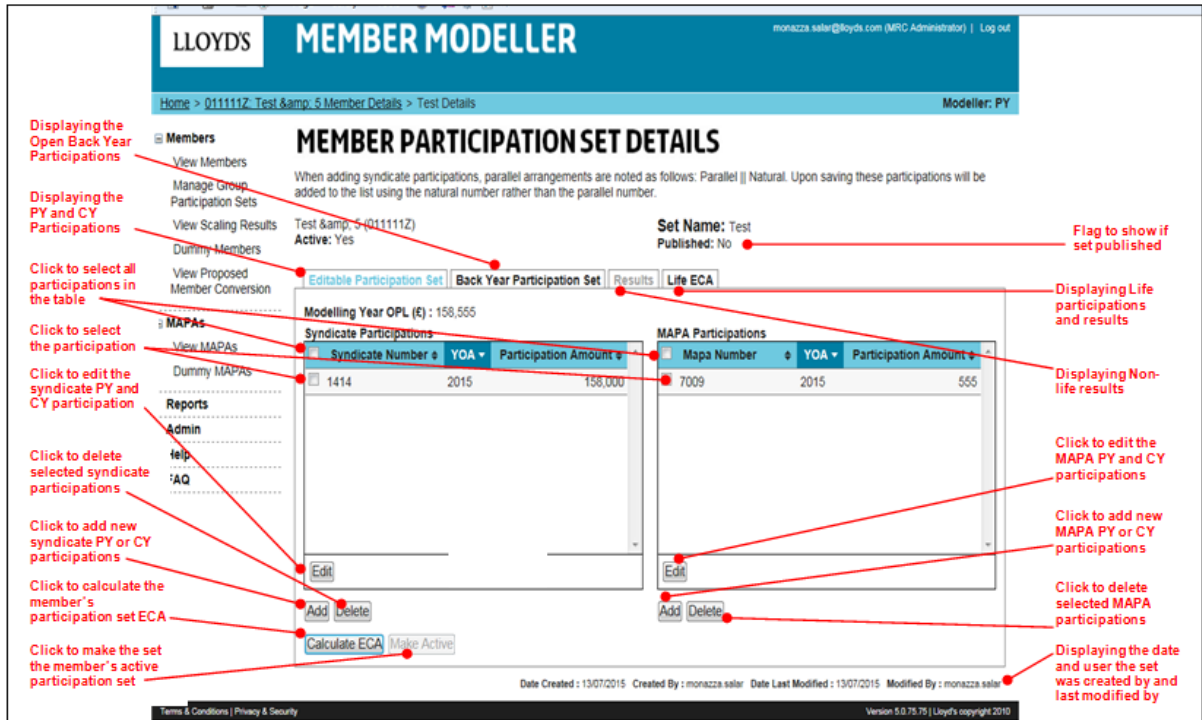
The selected participation set(s) is deleted from the Member Details page.

4.6 Member Participation Set Details Page

To navigate to the Member Participation Set Details page click on the Participation Set Name on the Members page or the Member Details page.

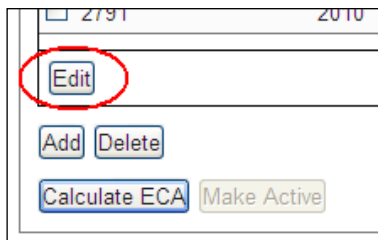
The Member Participation Set Details page displays the syndicate and MAPA participations which constitute the member's set. The Page consists of three tabs;

- **Editable Participation Set** – If the modeller type is the proposed year (PY) then the member's PY and CY participations will be displayed. If the modeller type is the current year (CY) then only the CY participations will be shown. On this tab the PY and CY participations can be created, edited and deleted. However, there are restrictions in place; existing CY participations can only be increased, they cannot be decreased or deleted, user created CY participations have no such restrictions. If participations are edited then the Results tab will be disabled forcing the user to recalculate the ECA to access the tab
- **Back Year Participation Set** – The member's open back year participations are displayed read only
- **Results** – The member's ECA results based on the participations in the set are displayed on this tab. The Member Summary report can be generated from the tab which displays the extended results for the member.



4.6.1 Editing Syndicate or MAPA Participations

Step 1: Click the 'Edit' button



Step 2: Overwrite the Participation Amounts £ for one or multiple participation entries

<input type="checkbox"/> Syndicate Number	YOY	Participation Amount
<input type="checkbox"/> 609	2011	3,000
<input type="checkbox"/> 2010	2011	2,000
<input type="checkbox"/> 2791	2011	1,000
<input type="checkbox"/> 609	2010	1,000
<input type="checkbox"/> 2010	2010	2,500
<input type="checkbox"/> 2791	2010	20,329

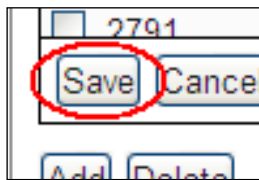
Save Cancel

Add Delete

Calculate ECA Make Active

Note: There are no restrictions editing PY participations or user created CY participations but existing CY participations can only be increased, they cannot be decreased or deleted.

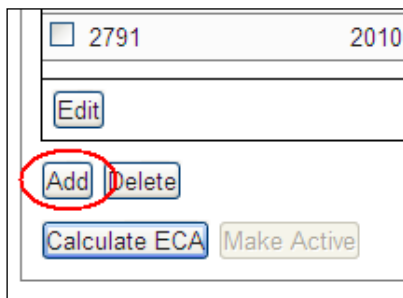
Step 3: Click the 'Save' button



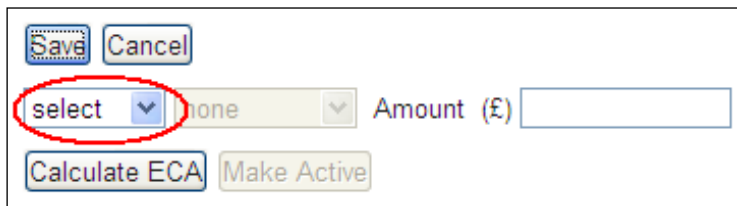
The participation table is closed to edits and the changes are saved.

4.6.2 Adding New Participations

Step 1: Click the 'Add' button under either the Syndicate Participations table or the MAPA Participations table



Step 2: Select the syndicate number or MAPA number from the dropdown



The year dropdown will be enabled with the available PY and or CY years for the selected syndicate or MAPA.

Step 3: Select the PY or CY in the dropdown

YOA as illustration

Note: in the PY modeller type the PY and CY will be available in the dropdown depending on whether the syndicate or MAPA are available in that year. In the CY modeller type only the CY will be available in the dropdown.

Step 4: Enter the premium limit £

Step 5: Click the 'Save' button

The participation will be added to the syndicate or MAPA participations table. The Results tab will be disabled. The user will need to recalculate the member's ECA based on the changed participations.

4.6.3 Deleting Participations

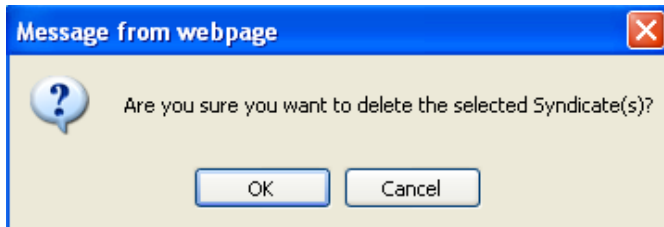
Step 1: Click on the checkbox(s) next to the syndicate or MAPA participations to be deleted

<input type="checkbox"/>	Number	YC
<input type="checkbox"/>	609	201
<input type="checkbox"/>	2010	201
<input checked="" type="checkbox"/>	2791	201
<input checked="" type="checkbox"/>	609	201
<input type="checkbox"/>	2010	201
<input checked="" type="checkbox"/>	2791	201

Step 2: Click on the 'Delete' Button



Step 3: Click on the 'OK' button



The page will automatically refresh and the participations will be deleted from the relevant table.

4.6.4 Generating the Member Summary from the Results Tab

Step 1: On the Results tab click on the 'Member Summary – PDF' button or the 'Member Summary – XLS' button

MEMBER PARTICIPATION SET DETAILS

Test Member 1 (D1) Set Name: Lloy
 Active: Yes Published: No

Editable Participation Set	Back Year Participation Set	Results
OPL for Modelling YOA (£)		5,000
Undiversified ECA (£)		45,007
Diversification Credit (£)		12,842
Diversification Credit (%)		28.5
ECA (£)		32,165
ECA (%)		643.3
Final ECA (£)		32,165
Final ECA (%)		643.3

Member Summary - PDF
Member Summary - XLS

Note: Ensure the Member Modeller site has been added to trusted sites otherwise a security risk will pop up which must be accepted and the member summary report button clicked again.

Step 2: Select the option to open or save the report

4.7 Set Target ECA

Available to: Member, ME Admin, ME, MA Admin, MA **Note: unavailable to Multi-Members**

The Set Target ECA functionality can be invoked from the Member Details page, it is used to enter a target ECA, the system will then scale the modelling year participations accordingly to achieve the closest match to the target ECA figure. **Note:** this function is unavailable to Life ECAs.

Step 1: Click the participation set to model

Step 2: In the dropdown select the 'Set Target ECA' action

The screenshot shows the 'MEMBER DETAILS' page for 'Test & 5 (011111Z)'. On the left is a navigation menu with categories like Members, MAPAs, Reports, Admin, Help, and FAQ. The main content area has a search bar for 'Participation Set Name' and a table with columns: Participation Set Name, Valid, OPL (£), Final ECA (£), Final ECA (%), Life ECA (£), and Active. The table lists 'Test' and 'test 2'. Below the table are buttons for 'Create Participation Set', 'Delete', and 'Calculate ECA'. A dropdown menu is open over the 'Go' button, listing actions: 'Set Target ECA', 'Select an action...', 'Export Participations', 'Model Proposed Conversion', 'Set Target ECA' (highlighted in red), and 'Scale Participations'.

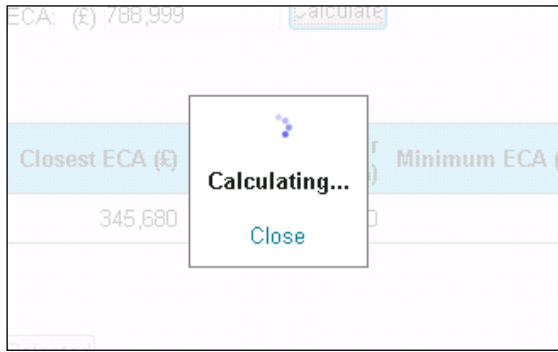
Step 3: Click on the 'Go' button

Step 4: In the 'Target ECA £' field enter the £ amount

The screenshot shows the 'SET TARGET ECA' page. It includes a navigation menu on the left. The main content area has a breadcrumb trail: 'Home > D1: Test Member 1 > Test Participation Set 2 > Set Target ECA'. Below this is a form with a 'Target ECA (£)' input field and a 'Calculate' button. A table below the form has columns for 'Closest ECA (£)', 'Scaling Factor (%)', and 'Minimum ECA (£)', with the message 'No records were returned.' and an 'Apply Selected' button. Red annotations with arrows point to: 'Name & Code of Member' (Test Member 1 (D1)), 'Name of Member's Participation Set being Modelled' (Participation Set Name: Test Participation Set 2), 'Enter the Target ECA £' (the input field), 'Click to Calculate the Target ECA' (the Calculate button), 'Target ECA Results Table' (the table), and 'Click to Apply a Selected Target ECA to the Member's Participation Set' (the Apply Selected button).

Step 5: Click the 'Calculate' button

The status calculating will be displayed whilst the target ECA calculation is in progress.



Once the calculation is complete the closet results will be returned.

Members | Target ECA is reached within tolerance

SET TARGET ECA

Enter a target ECA value then select 'calculate' to return achievable ECA value(s) and corresponding scaling factor percentage(s). To apply a scaling factor result to the participations in this participation set, select preferred result and press the 'apply selected' button.

Test Member 1 (D1)
Participation Set Name: Test Participation Set 2

Target ECA: (£) 345,666

	Closest ECA (£)	Scaling Factor (%)	Minimum ECA (£)
<input checked="" type="radio"/>	345,680	122,900.00	-

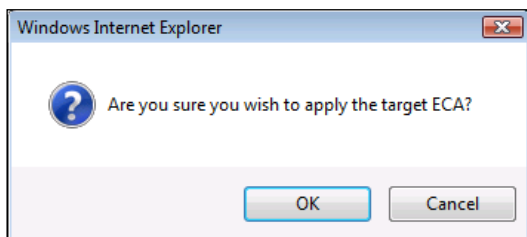
Step 6: To scale the member's participation set to achieve the target ECA select the radio button next to the result

Target ECA: (£) 7,888,777

	Closest ECA (£)	Scaling Factor (%)	Minimum ECA (£)
<input checked="" type="radio"/>	7,393,379	3,045,840.00	7,888,725

Step 7: Select the 'Apply Selected' button

Step 8: Select the 'Ok' button



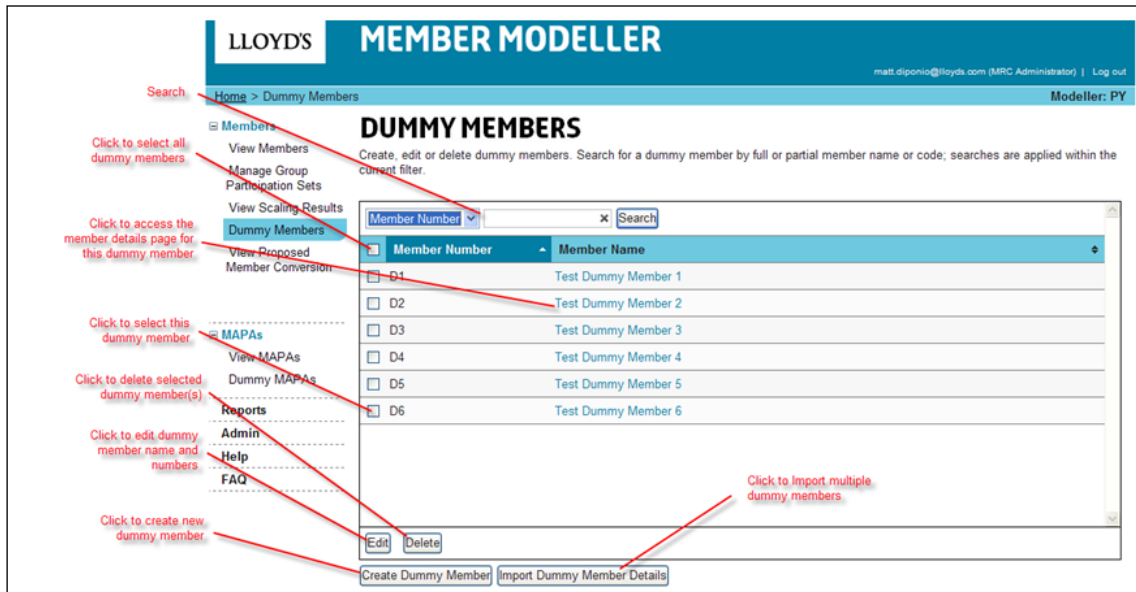
A notification message will be displayed on the page confirming that the member's participation set was successfully scaled in order to achieve the target ECA.

4.8 Dummy Members

Available to: ME Admin, ME, MA Admin, MA

To access the Dummy Members page, click on the link in the left hand navigation menu.

Dummy members can be created in the system. The functionality to import open back year participations for a dummy must be unlocked by Lloyd's MRC.



4.8.1 Creating a Dummy Member

Step 1: Click on the 'Create Dummy Member' button on the Dummy Members page

The Create Dummy Member page is loaded.

The screenshot shows the 'CREATE DUMMY MEMBER' page in the LLOYD'S MEMBER MODELLER. The page has a blue header with the LLOYD'S logo and the title 'MEMBER MODELLER'. Below the header, there is a breadcrumb trail: 'Home > Dummy Members > Create Dummy Member'. The main content area is titled 'CREATE DUMMY MEMBER' and contains a form with two input fields: 'Dummy Member Number' and 'Dummy Member Name'. There are also 'Save' and 'Cancel' buttons. Red annotations with arrows point to the 'Dummy Member Number' field, the 'Dummy Member Name' field, the 'Save' button, and the 'Cancel' button. The left sidebar contains a menu with options like 'View Members', 'Manage Group Participation Sets', 'Dummy Members', 'View Proposed Member Conversion', 'Capture Life Member ECA', 'MAPAs', 'Reports', 'Admin', 'Help', and 'FAQ'.

Step 2: Enter a dummy member code in the 'Dummy Member Number' field

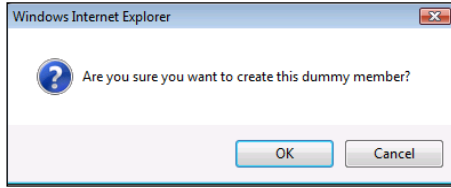
This screenshot shows the 'CREATE DUMMY MEMBER' page with the 'Dummy Member Number' field filled with 'D1234'. The field is circled in red. The 'Dummy Member Name' field is empty. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

Step 3: Enter a dummy member name in the 'Dummy Member Name' field

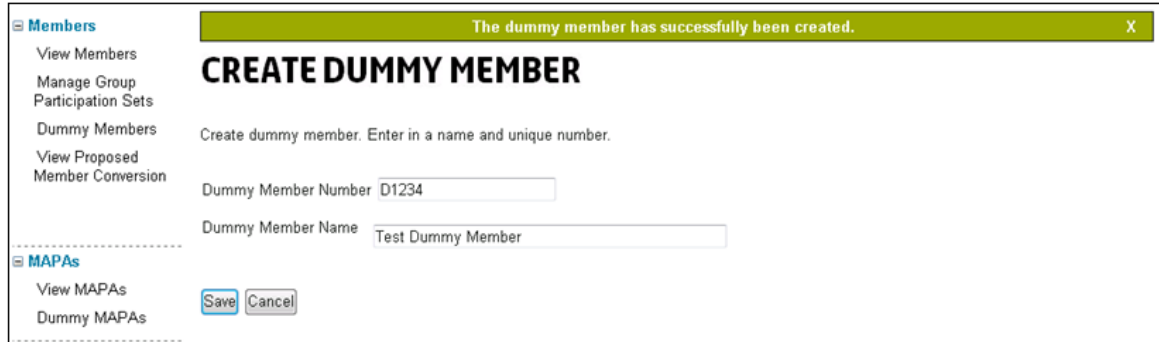
This screenshot shows the 'CREATE DUMMY MEMBER' page with the 'Dummy Member Name' field filled with 'Test Dummy Member'. The field is circled in red. The 'Dummy Member Number' field contains 'D1234'. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

Step 4: Click on the 'Save' button

Step 5: Click on the 'OK' button



A notification message is displayed on the page confirming that the dummy member has been successfully created.



The user is automatically redirected to the Dummy Members page and the newly created dummy is displayed on it.

4.8.2 Importing multiple Dummy Members

Step 1: Creating a Dummy Member import file

Import files must be .CSV in the following format:

Dummy Member Number	Dummy Member Name
---------------------	-------------------

Please note that the file should not have headers. For Example:

TEST001	Test Dummy Member 1
TEST002	Test Dummy Member 2
TEST003	Test Dummy Member 3

Step 2: On the Dummy Members page click on 'Import Dummy Member Details'

A Text box, 'Browse...', 'Import' and 'Cancel' buttons appear.

LLOYD'S MEMBER MODELLER

matt.diponio@lloyds.com (MRC Administrator) | Log out

Home > Dummy Members Modeller: PY

DUMMY MEMBERS

Create, edit or delete dummy members. Search for a dummy member by full or partial member name or code; searches are applied within the current filter.

Member Number Search

Member Number	Member Name
<input type="checkbox"/> D1	Test Dummy Member 1
<input type="checkbox"/> D2	Test Dummy Member 2
<input type="checkbox"/> D3	Test Dummy Member 3
<input type="checkbox"/> D4	Test Dummy Member 4
<input type="checkbox"/> D5	Test Dummy Member 5
<input type="checkbox"/> D6	Test Dummy Member 6

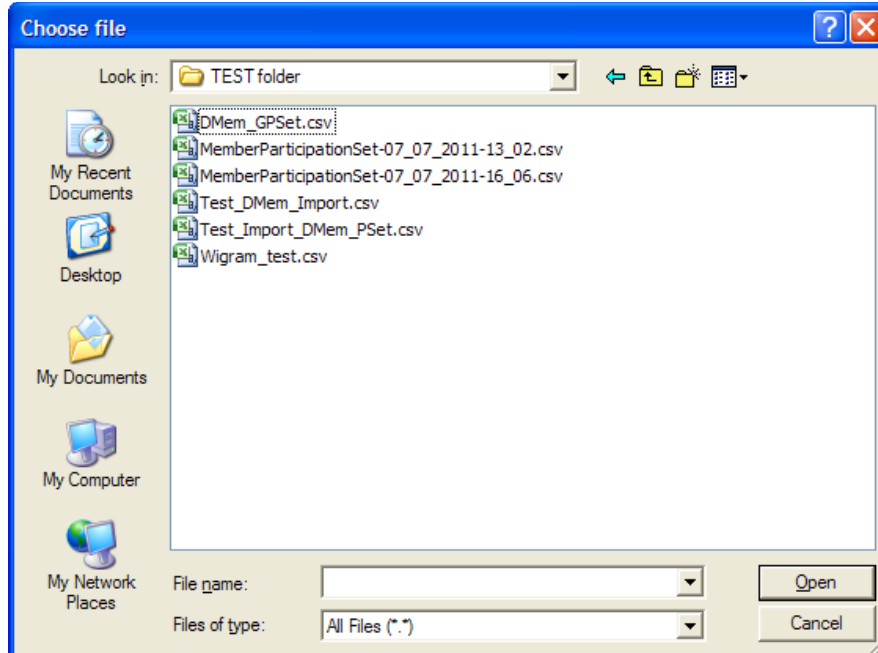
Edit Delete

Create Dummy Member

Browse... Import Cancel

Step 3: Click 'Browse...' button

A 'Choose file' window appears.



Step 4: Select the .CSV file to import and click 'Open' button

File name populates text box.

Step 5: Click 'Import' button

This will create all Dummy Members contained within the .CSV file.

4.8.3 Editing Dummy Member Back Year Participation Set information

Note that this can only be implemented by organisations with permission granted by an MRC user.

Step 1: Navigate to the 'Dummy Members' page and click on the dummy member whose back years you wish to edit

The desired dummy member's details page is loaded.

Step 2: Click on the participation set that you wish to edit

Step 3: Click on Back Year Participation Set tab

Step 4: Click on 'Edit' button

The back year participation amounts should now be editable.

MEMBER PARTICIPATION SET DETAILS
Test Dummy Member 1 (D1) Set Name: Test PSet
Active: Yes Published: No

Editable Participation Set | **Back Year Participation Set** | Results | Life ECA

Modelling Year OPL (£) : 690,420

Syndicate Participations

<input type="checkbox"/> Syndicate Number	YOA	Participation Amount
<input type="checkbox"/> 33	2010	103,507
<input type="checkbox"/> 218	2010	35,500
<input type="checkbox"/> 318	2010	22,119
<input type="checkbox"/> 386	2010	54,906
<input type="checkbox"/> 510	2010	99,999
<input type="checkbox"/> 557	2010	60,037

MAPA Participations

<input type="checkbox"/> Mapa Number	YO
No records w	

Edit Add Delete Add Delete

Calculate ECA Make Active

Step 5: Overwrite the Participation Amounts £ for one or multiple participation entries

Editable Participation Set | **Back Year Participation Set** | Results | Life ECA

Modelling Year OPL (£) : 690,420

Syndicate Participations

<input type="checkbox"/> Syndicate Number	YOA	Participation Amount
<input type="checkbox"/> 33	2010	103,507
<input type="checkbox"/> 218	2010	35,500
<input type="checkbox"/> 318	2010	22,119
<input type="checkbox"/> 386	2010	54,906
<input type="checkbox"/> 510	2010	99,999

MAPA Participations

<input type="checkbox"/> Mapa Number	YO
No record	

Save **Cancel** Add Delete Add Delete

Calculate ECA Make Active

Step 6: Click the 'Save' button

The participation table is closed to edits and the changes are saved.

<input type="checkbox"/>	318	2010	22,119
<input type="checkbox"/>	386	2010	54,906
<input type="checkbox"/>	510	2010	99,999

4.8.4 Storing back-year participations for Dummy members

Members' Agents can store back-year participations for dummy members and manage default settings.

Once back year (CY and prior) participations have been set up (via group or individual function) they can now be automatically included when a new set is created.

CREATE NEW PARTICIPATION SET

When importing set or creating blank set, current year and prior will use default back year participations unless different option selected. If the "None" option is selected, the back year participations will be taken from the imported file. Default back years can be changed from individual participation set screens.

Test 2 (001112E)

Participation set name: Make this the active set?

New set based on:

Import participations with back years based on:

Blank set with back years based on:

Default Participation Sets will appear at the top of the drop down list (along with the word Default) when creating a new set based on existing ones.

4.8.5 Change an existing Participation Set to default

Go to the Dummy Members screen. In the list existing Dummy members can be seen along with their default Participation Set (if one has been set).

DUMMY MEMBERS

Create, edit or delete dummy members. Search for a dummy member by full or partial member name or code; searches are applied within the current filter.

Member Number	Member Name	Default Participation Set Name
<input type="checkbox"/> 001084R	RITC - Chaucer	No Default Set Selected
<input type="checkbox"/> 001110R	RITC - Argenta	Actual - 2104 ECA
<input type="checkbox"/> 001111E	Alan Test	No Default Set Selected
<input type="checkbox"/> 001112E	Alan Test 2	Set 2
<input type="checkbox"/> 001301R	RITC - Torus	No Default Set Selected
<input type="checkbox"/> 002008R	RITC - Shelbourne	No Default Set Selected
<input type="checkbox"/> 005820D	Jubilee Combined	No Default Set Selected
<input type="checkbox"/> 053597D	Markel	No Default Set Selected
<input type="checkbox"/> 056032D	R&Q Capital 1	No Default Set Selected
<input type="checkbox"/> 222222D	with 4001	No Default Set Selected
<input type="checkbox"/> AmtSag1	Comb Amtrust Sagcor member	No Default Set Selected
<input type="checkbox"/> R02360C	Consolidated Ace Member	No Default Set Selected

Page 1 of 3

From the Member Details page click on the Participation Set name. The Member Participation Set Details page will open. To make this set the default set click on the 'Set As Default' button at the bottom of the screen.

MEMBER PARTICIPATION SET DETAILS

When adding syndicate participations, parallel arrangements are noted as follows: Parallel || Natural. Upon saving these participations will be added to the list using the natural number rather than the parallel number.

(001112E) Set Name: Set 4
 Active: No Published: No

Editable Participation Set | Back Year Participation Set | Results | Life ECA

Modelling Year OPL (£): 200,000,000

Syndicate Number	YOA	Participation Amount
3000	2014	200,000,000
3000	2013	100,000,000

MAPA Participations

No records were returned.

Buttons: Edit, Add, Delete, Calculate ECA, Make Active, **Set As Default**

Date Created: 28/02/2014 Created By: Date Last Modified: 22/04/2014 Modified By:

4.9 Manage Group Participations Sets

Available to: ME Admin, ME, MA Admin, MA

The Manage Group Participation sets page can be accessed via the left hand navigation menu. This page allows users to import multiple member participation sets and manage them as groups.

LLOYDS MEMBER MODELLER (MRC Administrator) | Log out

Home > Manage Group Participation Sets Modeller: PY

MANAGE GROUP PARTICIPATION SETS

To import a new file containing multiple member participation sets press the 'Create New Import' button. Use the search function to select an existing group participation set. Select the import name to manage the results of the previously imported file.

Import Name	Date Created	Created By	No. of Members
Group 2	21/11/2013	lloyds-admin@lloyds.com	979
Group 4	20/11/2013	lloyds-admin@lloyds.com	979
61	20/11/2013	lloyds-admin@lloyds.com	981
Draft	16/12/2013	lloyds-admin@lloyds.com	549
Draft No1	16/12/2013	lloyds-admin@lloyds.com	1005
Draft No1	16/12/2013	lloyds-admin@lloyds.com	579
Draft No1	16/12/2013	lloyds-admin@lloyds.com	2133

Buttons: Create New Import, Delete, Make Back Year Default

Annotations:

- Click to select all group participation sets (points to 'Manage Group Participation Sets')
- Click to select a group participation set (points to 'Group 2')
- Click to navigate to the import participation sets page (points to 'Import Name' dropdown)
- Click to create new group participation set (points to 'Create New Import')
- Click to delete selected group participation sets (points to 'Delete')
- Shows number of members in the group participation set (points to 'No. of Members' column)
- Click to change default set to be used in future set creation (points to 'Make Back Year Default')

4.9.1 Importing a group participation set

Note: You are now able to use natural or parallel syndicate numbers as the “main” syndicate. This will allow the modeller information to be better co-ordinated with your own system. Please contact MRC helpdesk (Lloyds-MRC-Help@lloyds.com) for further assistance.

It is now possible to import life participations. The Import Participations page now includes a column called ‘Life ECA (£)’ next to the Non-Life column ‘Final ECA (%)’. The Group Summary report will show the ‘Life ECA (£)’ column populated if there are Life participations present in the report.

Follow the steps below in the same way you would for non-life participations below. To model individual life members, see section 4.10.

Step 1: Creating a group participation set import file

Import files must be .CSV in the following format:

Member Code	Member Name	Year	Syndicate Number or MAPA Number	Premium Limit £
-------------	-------------	------	---------------------------------	-----------------

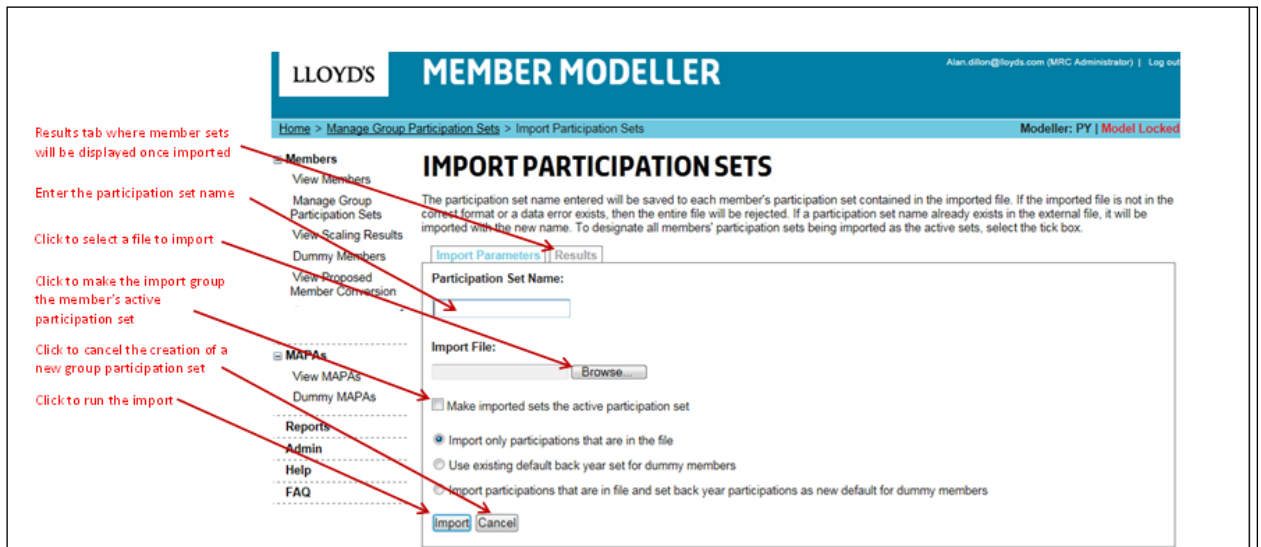
Note the file should not have headers. For example:

D1	Test Member 1	2011	33	4444
D1	Test Member 1	2011	518	333
D1	Test Member 1	2010	33	7777
D2	Test Member 2	2011	7217	1111
D2	Test Member 2	2010	33	6666

Step 2: On the Manage Group Participation Sets page click on the 'Create New Import' button



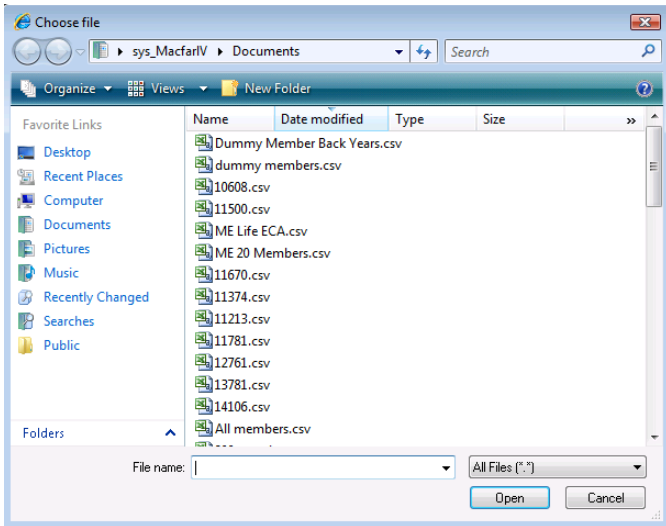
The Import Participation Sets page will load.



Step 3: Enter a name for the group in the 'Participation Set Name' field

Step 4: Click on the 'Browse' button next to the Import File field

Step 5: Select the import file and click on the 'Open' button



The import file location and name will be populated in the 'Import File' field.

Step 6: Click on the 'Make imported sets the active participation set' checkbox

This will make the imported participation sets the active set for each of the members in the import file. If this is not selected the sets will not be the members active set.

Step 7: Click on one of the following checkboxes:

- 'Import only participations that are in the file'
- 'Use existing default back year set for dummy members'
- 'Import participations that are in file and set back year participations as new default for dummy members'

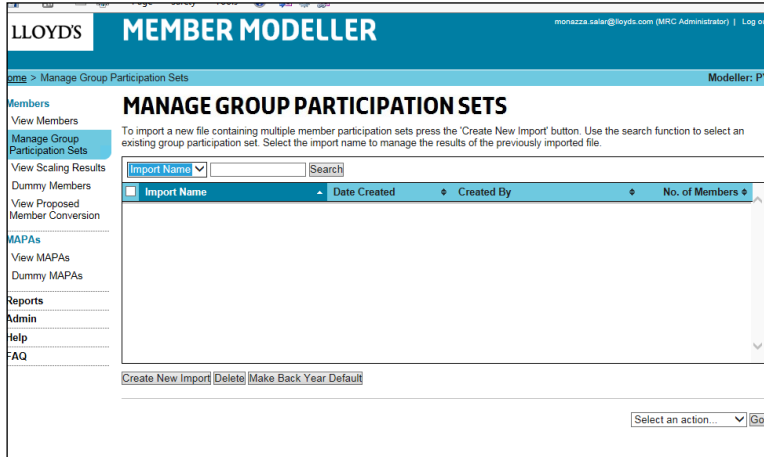
Note: Members' Agents can store back-year participations for dummy members and manage default settings. Once back year (CY and prior) participations have been set up (via normal import) they can now be automatically included when a new set is created.

Step 8: Click on the 'Import' button

4.9.2 Exporting a Group Participation Set

This functionality has now been added to the 'action' dropdown. Select the Participation Set by clicking on the checkbox next to the set and select 'Export Participations' from the drop down and select 'Go' to download.

Note: It is now possible to run member ECA reports for all members in Group participation sets (from either the Group Participation set function using the buttons on the Import Participations Sets screen [see above], or the Reports section).



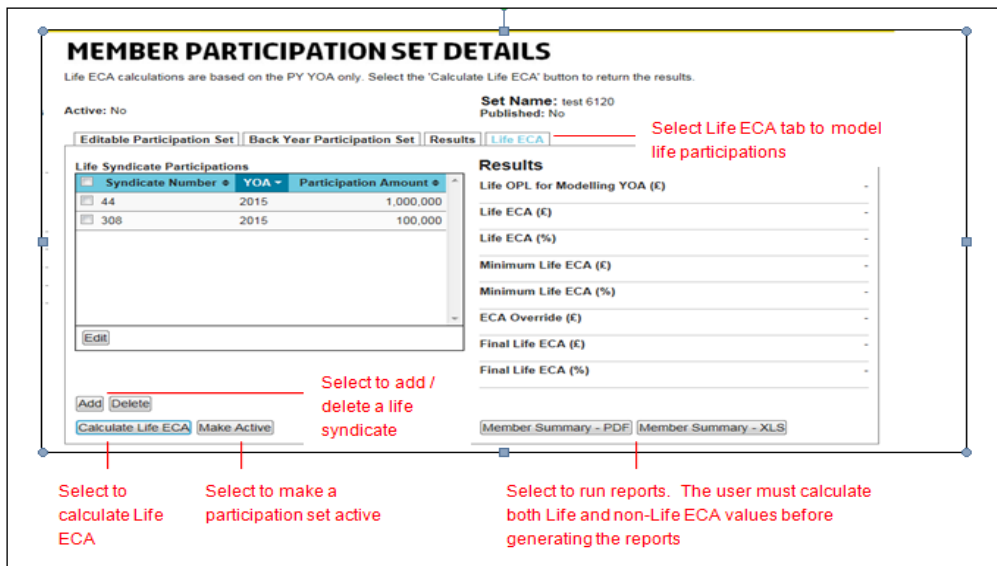
4.10 Life ECA

Available to: ME Admin, ME, MA Admin, MA

The Life ECA page can be accessed via the View Members page.

Member life ECAs can be captured for members that already exist in the system having non-life ECAs or for members that participate on only life syndicates.

To include a life only member in reports the member must be set up as a dummy member in the system.

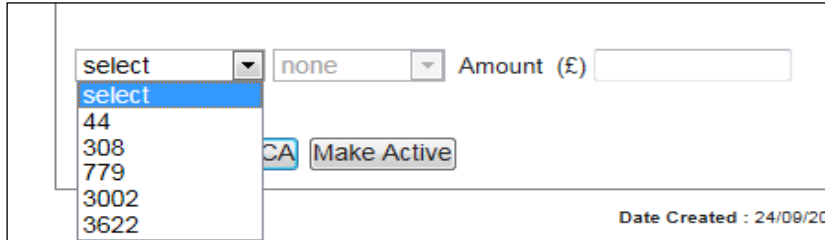


4.10.1 Creating a Life ECA – Individual Members

Step 1: Select View Members from the menu on the left hand side of the screen and select the member you want to model.

Step 2: Select the 'Life ECA' tab and then the 'Add' button.

Step 3: From the drop down, select the life syndicate you want to model and then select the 'Save ECA' button.



Step 4: Select the 'Calculate Life ECA' button to run the results.

Step 5: To view the results in PDF or Excel, select the 'Member Summary – PDF' or 'Member Summary - XLS' button. Note: The reports cannot be run until both non-life and life ECAs have been calculated. Once calculated, the Life ECA (£) result will also be available on the main View Members screen.

To model group life members, see section 4.9.1.

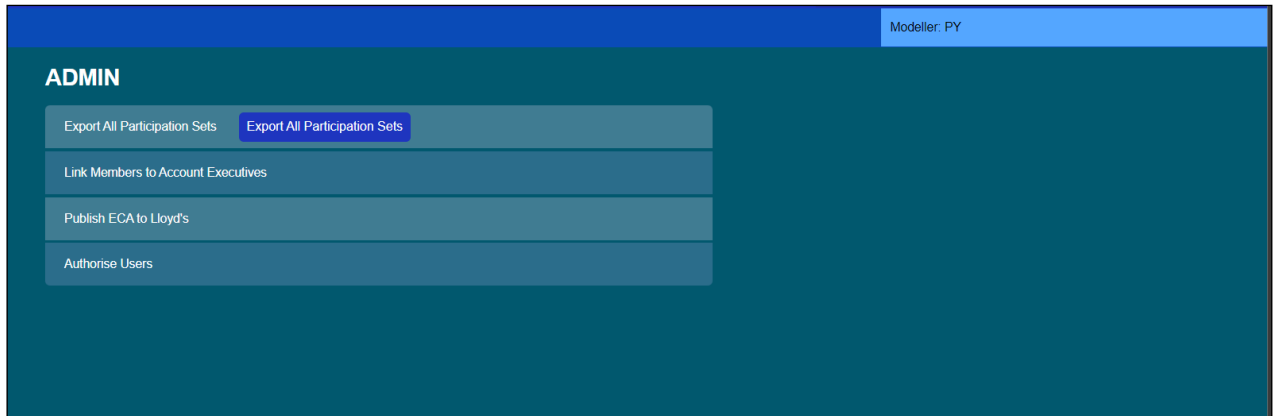
5 ADMIN

Available to: ME Admin, MA Admin

The Admin page can be accessed via the left hand navigation menu > Click on the 'Admin' link.

Three functions are available from the Admin page:

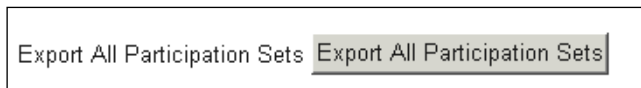
- Export All Participations Sets
- Link Members
- Publish ECAs to Lloyd's
- **New** Authorise Users (MA admin)



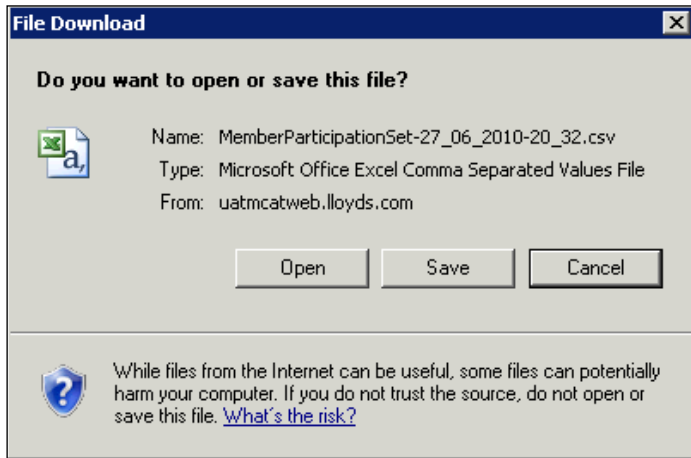
5.1.1 Export Participations

Available to: ME Admin, MA Admin

Step 1: Click on the 'Export All Participation Sets' button



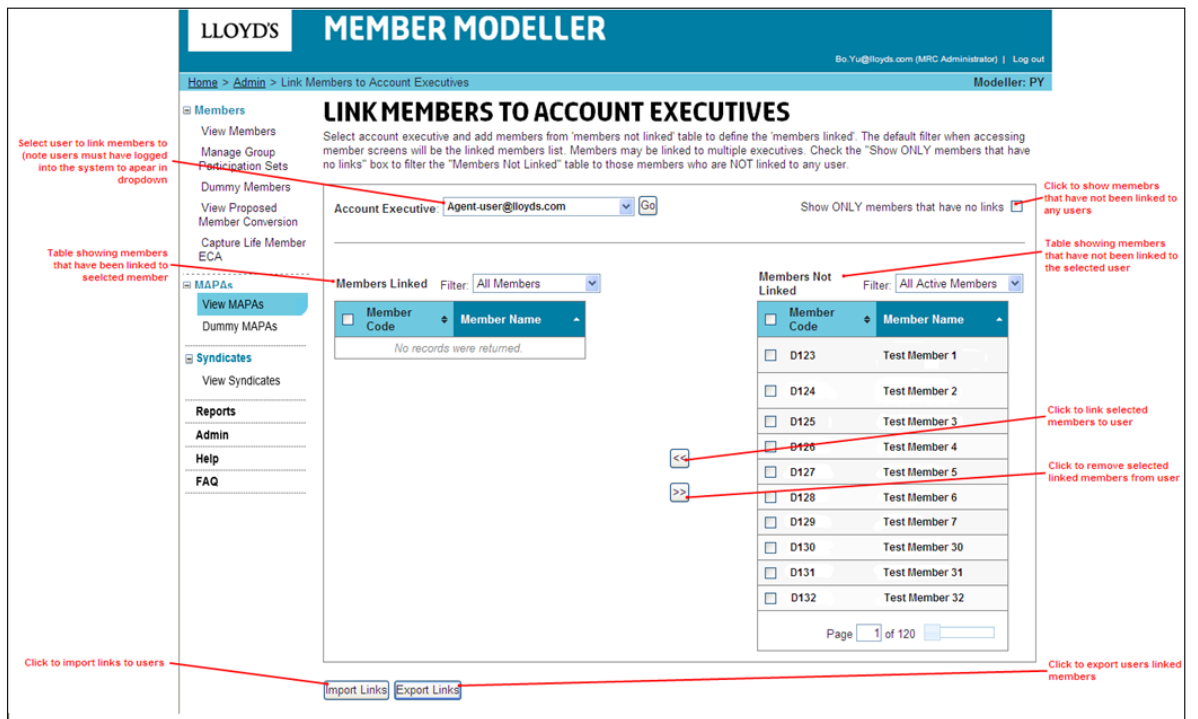
Step 2: Click on the 'Open' button to open the file in Excel or the 'Save' button to save the file to a selected location



5.1.2 Link Members

Available to: ME Admin, MA Admin

The Link Members functionality enables users to link members to selected users within their organisation so when these users log into the system, the Members page defaults to display their linked members. This can be particularly useful when different users manage different sub-sets of members.



Step 1: On the Linked Members page select the user to link members to from the 'Account Executive' dropdown

Note: Only users that have logged into the system will be displayed in the dropdown.

The page will refresh to display the selected users linked members.

Step 2: Select one or multiple members on a page by clicking on the checkbox next to their member code

Step 3: Click on the '<<' button to linked the selected members to the user



Step 4: To remove linked members from the selected user click on the checkboxes next to the members in the 'Members Linked' table

Step 5: Click on the '>>' button



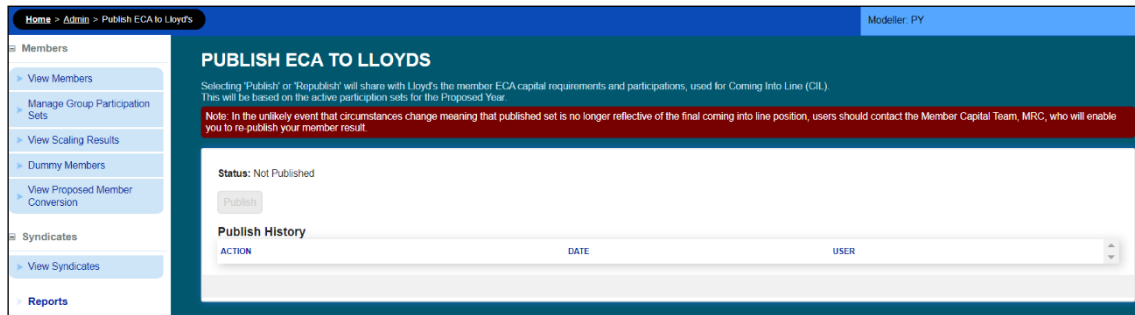
Step 1: On the Linked Members page

5.1.3 Publish ECA

Available to: ME Admin, MA Admin

Agents are able to share with Lloyd's the member ECA capital requirements and participations used for Coming into Line (CIL). This will be based on the **active** participation sets for the Proposed Year. In the unlikely event that a Members' agent needs to make a change to the published results, it needs to contact Lloyd's MRC to arrange this.

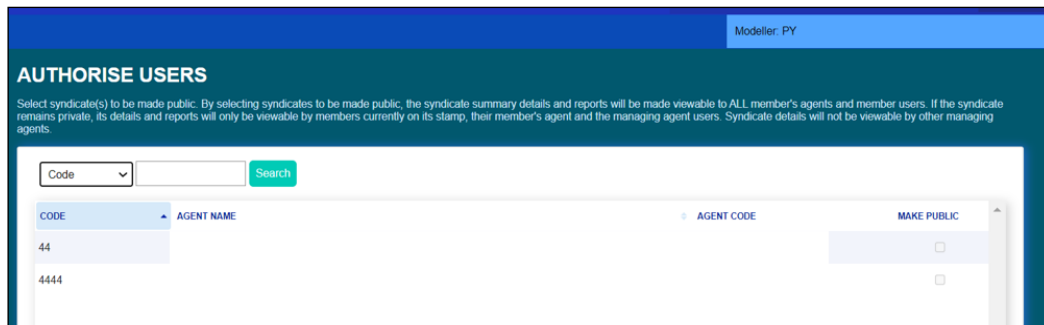
An admin user will need to select 'Admin' from the menu and then select 'Publish ECA to Lloyd's'.



5.1.4 New Authorise Users

Available to: MA Admin

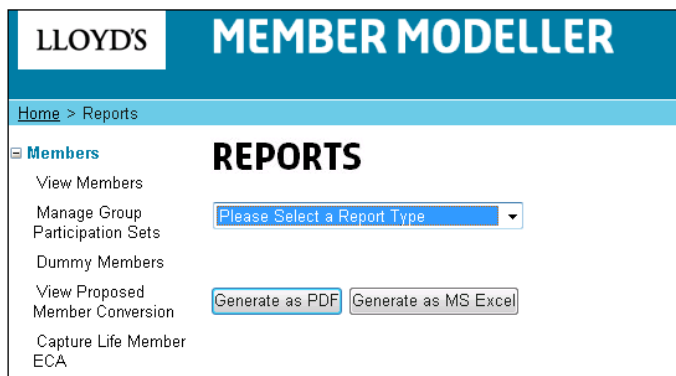
The syndicate summary details and reports will be made viewable to ALL member's agents and member users. If the syndicate remains private, its details and reports will only be viewable by members currently on its stamp, their member's agent and the managing agent users. Syndicate details will not be viewable by other managing agents.



6 REPORTING

The Reporting page can be accessed via the left-hand navigation menu.

There are a number of different reports that can be generated from the Reports page. Selection of the Report Type will enable relevant parameter fields.



The reports available are:

- **Abridged Active Set ECA & Extended Active Set ECA**– This report displays all of an organisations member's ECAs for their active participation set and shows which sets have been published to Lloyd's. It is now possible to exclude Dummy Members from this screen via the All Active Members drop down. Select the checkbox to Exclude Dummy Members from the report. A new column to report life has been included called 'Life ECA (£)'.
- **Abridged Agent Summary and Extended Agent Summary**– This report displays all of an organisation's members ECAs for their active participation set along with any member life ECAs.
- **Audit History** – This report shows the history of certain auditable events.
- **Group Participation Set**
- **MAPA Member Participation** – This report will show a selected MAPA and all members that participate on that MAPA along with their premium limit £.
- **MAPA Syndicate Participation** – This report will show a selected MAPA and the syndicates on which it participates along with their premium limit £.
- **Member Participation Set Comparison**
- **Member Summary**
- **Proposed Member Conversion** **Note: unavailable to Multi-Members**
- **Existing Conversions (individual)** **Note: unavailable to Multi-Members**
- **Existing Conversions (All)** **Note: unavailable to Multi-Members**
- **Existing Conversions (All) Active Sets Only** **Note: unavailable to Multi-Members**
- **Life ECA** – This report will include the **Life OPL (£), Final Life ECA (£) and Final Life ECA (%)**.
- **New Syndicate Summary**
- **New Syndicate List**

Note: page 7 specifies which reports are available to a type of user.

7 MAPAS

Available to: ME Admin

7.1 MAPAs Page

The MAPAs page can be accessed via the left hand navigation menu > Click on the 'View MAPAs' link.

LLOYDS MEMBER MODELLER

Home > MAPAs Modeller: PY

MAPAS
Manage MAPA constitutions. Any amendments will persist to Member ECA calculations. Back year participations are for reference only.

Search

Select ALL MAPAs

MAPA Number	YOAs	Type	OPL (£)	ECA (£)	ECA %
<input type="checkbox"/> 7008	2010	Amended	14,267,260	3,776,119	26.5
<input type="checkbox"/> 7009	2010	Baseline	134,220,250	32,875,382	24.5
<input type="checkbox"/> 7065	2010	Baseline	44,011,312	14,134,932	32.1
<input type="checkbox"/> 7200	2010	Amended	18,613,018	10,007,441	53.8
<input type="checkbox"/> 7201	2010	Baseline	116,545,892	56,597,581	48.6
<input type="checkbox"/> 7202	2010	Baseline	38,383,408	17,872,139	46.6
<input type="checkbox"/> 7203	2010	Amended	14,244,941	6,524,381	45.8
<input type="checkbox"/> 7208	2010	Amended	31,664,837	18,174,043	57.4
<input type="checkbox"/> 7209	2010	Baseline	22,927,531	7,503,612	32.7
<input type="checkbox"/> 7210	2010	Baseline	48,618,502	11,452,199	23.6

Calculate ECA Create New Dummy MAPA Export MAPA Import MAPA

The MAPAs page displays all MAPAs that the organisation of the user logged in manages.

7.1.1 Search

The MAPAs table can be searched by MAPA Number, MAPA YOA or MAPA Type.

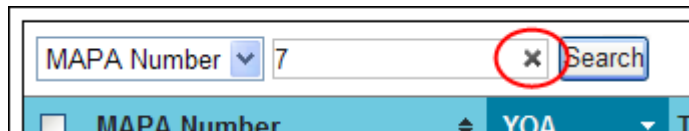
Step 1: In the Search dropdown select 'MAPA Number'

Step 2: In the search field enter a MAPA number or partial MAPA number

Step 3: Click the 'Search' button

All MAPA results matching the search criteria will be returned and displayed in the MAPAs table.

Step 4: To clear the search results click on the 'X' in the search field



The search results will be cleared and all MAPAs will be displayed.

7.1.2 Calculating the Notional ECA for the MAPA

On the MAPAs page, the notional ECA can be calculated for one or multiple MAPAs that do not already have their notional ECA displayed. These MAPAs can then all be selected to be included in a multiple MAPA calculation.

Step 1: Click the check box for one or multiple MAPAs

Step 2: Click the 'Calculate ECA' button

Step 3: Click the 'OK' button

The status 'Calculating' will be displayed against each of the selected MAPAs, their notional ECA results will be returned and displayed as they are calculated.

MAPAS
Manage MAPA constitutions. Any amendments will persist to Member ECA calculations. Back year participations are for reference only.

MAPA Number

<input type="checkbox"/>	MAPA Number	YOAs	Type	OPL (£)	ECA (£)	ECA %
<input checked="" type="checkbox"/>	7296	2011	Dummy	-	Calculating	-
<input checked="" type="checkbox"/>	7297	2011	Dummy	-	Calculating	-
<input checked="" type="checkbox"/>	7298	2011	Dummy	-	Calculating	-
<input checked="" type="checkbox"/>	7299	2011	Dummy	-	Calculating	-

7.1.3 Creating a New Dummy MAPA

Step 1: Click on the ‘Create New Dummy MAPA’ button

The Create Dummy MAPA page is loaded.

LLOYDS MEMBER MODELLER

Home > Dummy MAPAs > Create Dummy MAPA Modeller: PY

CREATE DUMMY MAPA

Create dummy MAPA. Enter in a name and unique number in the range 7000-7999 inclusive.

Dummy MAPA Number

Dummy MAPA Name

Step 2: Enter a dummy MAPA number (between the number range 7000 – 7999)

Step 3: Enter a dummy MAPA name

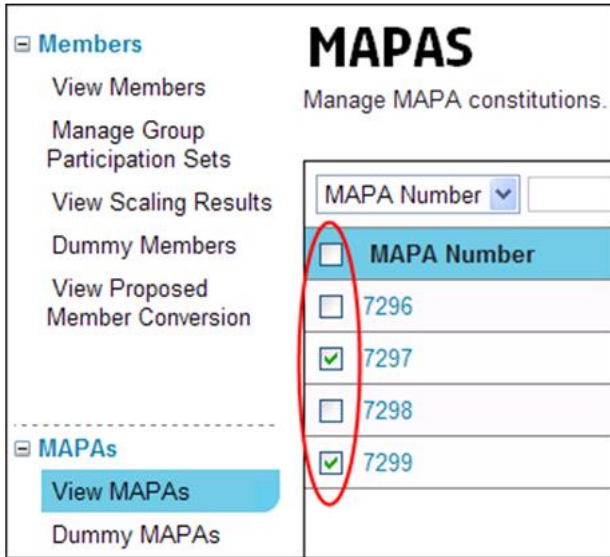
Step 4: Click the ‘Save Changes’ button to save the dummy MAPA

Dummy MAPA Name

7.1.4 Exporting MAPAs

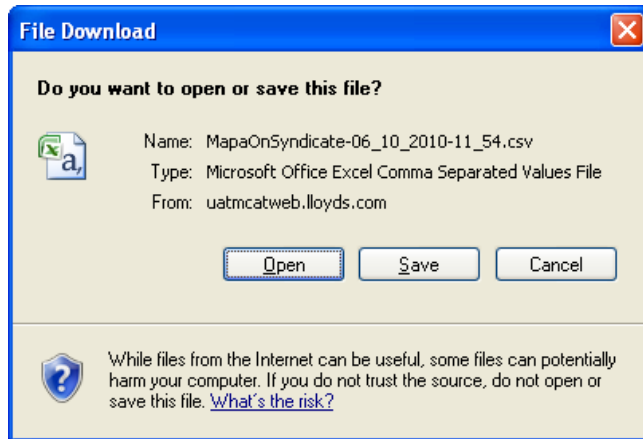
MAPA constitutions can be exported via the MAPAs page for one or multiple MAPAs.

Step 1: Select one or multiple MAPAs by clicking on the check box to the left of the MAPA number



Step 2: Click the 'Export Constitution' button

Step 3: Click the 'Open' button to open the export in MS Excel, click the 'Save' button to save the file or click the 'Cancel' button to cancel the export



The file is in a .CSV format and has four fields (MAPA Number, Syndicate Number, Year and Participation Amount).

7.1.5 Importing MAPAs

MAPA constitutions can be imported via the MAPAs page for one or multiple MAPAs. For a single MAPA, the constitution can also be imported via the MAPA Details page.

Step 1: Create a MAPA constitution import file

Import files must be .CSV in the following format:

MAPA Number	Syndicate Number	Year	Premium Limit £
-------------	------------------	------	-----------------

Note the file should not have headers. For example:

7295	218	2011	4,606,911
7296	4242	2011	5,707,584

Step 2: Click the 'Import Constitution' button

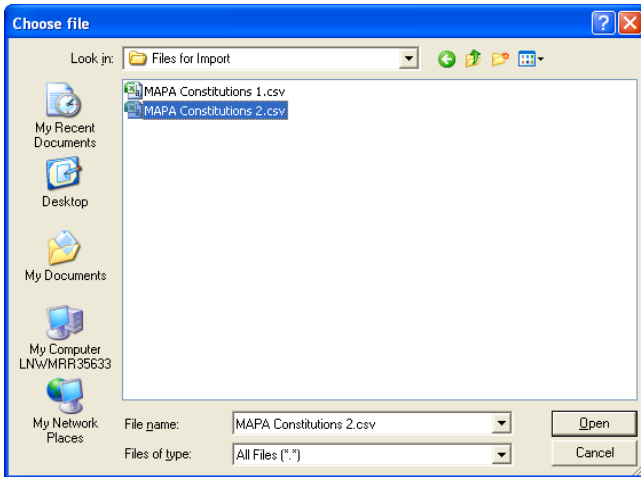


The import buttons are loaded.



Step 3: Click the 'Browse' button

Step 4: Select the file to import and click the 'Open' button



The 'Import File' field is populated with the import file location and name.

Step 5: Click the 'Import' button

While the import is running, the MAPAs page will remain displayed. Once the import is complete, a notification message will be displayed on screen confirming that the file was imported successfully.

7.2 MAPA Details Page

To access the MAPA Details page, click on the MAPA number on the MAPA page or on the Manage Dummy MAPAs page.

MAPA Number	YOA
<input type="checkbox"/> 7296	2011
<input type="checkbox"/> 7297	2011
<input checked="" type="checkbox"/> 7298	2011
<input type="checkbox"/> 7299	2011

The MAPA details page displays the syndicate participations which constitute the MAPA. The page consists of three tabs:

- **Editable Constitution** – If the modeller type is the proposed year (PY) then the MAPA’s PY and CY participations will be displayed. If the modeller type is the current year (CY) then only the CY participations will be shown. On this tab, the PY and CY participations can be created, edited and deleted. However, there are restrictions in place; existing CY participations can only be increased, they cannot be decreased or deleted, user created CY participations have no such restrictions. If participations are edited then the Results tab will be disabled, forcing the user either to recalculate the ECA or revert the constitution to the baseline in order to access the tab
- **Back Year Participation Set** – The MAPS’s open back year participations are displayed for reference only.
- **Results** – The MAPA’s ECA results based on the participations in the constitution are displayed on this tab. The MAPA-Member report and the MAPA-Syndicate report can be generated from the tab. The MAPA-Member report shows the list of all members that participate on the MAPA and the MAPA-Syndicate report shows the syndicate participations which constitute the MAPA.

The screenshot shows the 'MAPA DETAILS' page for 'Test MAPA2 (7297)'. The page has three tabs: 'Editable Constitution', 'Back Years', and 'Results'. The 'Editable Constitution' tab is active, showing a table of syndicate participations. Red annotations point to various features: 'Displaying the Back Years' points to the 'Back Years' tab; 'Displaying the PY and CY Participations' points to the 'Editable Constitution' tab; 'Click to Select All Participations in the Table' points to a checkbox in the table header; 'Click to Select the Participation' points to a checkbox for a specific row; 'Click to Delete Selected Syndicate Participations' points to a 'Delete' button; 'Click to Edit the Syndicate PY & CY Participations' points to an 'Edit' button; 'Click to Add New Syndicate PY or CY Participations' points to an 'Add' button; 'Click to Import Syndicate PY or CY Participations' points to an 'Import' button; 'Displaying the Results for the MAPA' points to the 'Results' tab; 'Click to Search for a Participation' points to a search box; 'Click to Calculate the notional ECA for the MAPA' points to a 'Calculate ECA' button; 'Click to Revert the MAPA to the Baseline' points to a 'Revert To Baseline' button; and 'Displaying the Date and User the MAPA was Created By & Last Modified By' points to the footer information.

7.2.1 Editing the MAPA Constitution

The MAPAs constitution can be edited via the 'Editable Constitution' tab on the MAPA Details page.

Step 1: Click the 'Edit' button

<input type="checkbox"/> 386	
<input checked="" type="checkbox"/> 510	
<input type="checkbox"/>	
<input type="checkbox"/>	

Below the table are buttons: **Edit** (circled in red), **Delete**, **Add**, and **Import**.

The MAPA constitution table is opened to edits.

Step 2: Overwrite the Participation Amounts £ for one or multiple MAPAs

<input type="checkbox"/>	Syndicate Number	YOA	Participation Amount
<input type="checkbox"/>	33	2011	2,000,000
<input type="checkbox"/>	218	2011	3,000,000
<input type="checkbox"/>	318	2011	4,000,000
<input type="checkbox"/>	510	2011	5,000,000

Save Cancel

Add Import Calculate ECA Revert To Baseline

Note: There are no restrictions editing PY participations or user-created CY participations but existing CY participations can only be increased, they cannot be decreased or deleted.

Step 3: Click the 'Save' button

<input type="checkbox"/>	510
Save	Cancel
Add	Import

The MAPA constitution table is closed to edits and the changes are saved. The 'Results' tab will be disabled. The user will need to recalculate the MAPA's notional ECA based on the new participation amounts.

7.2.2 Adding a New Participation

New participations can be added to the MAPAs constitution via the 'Editable Constitution' tab on the MAPA Details page.

Step 1: Click the 'Add' button

<input type="checkbox"/>	510
Edit	Delete
Add	Import

Step 2: Select the syndicate number from the dropdown

select	none	(£)	
Save	Cancel		

The 'Year' dropdown will be enabled and populated with the available PY and/or CY years for the selected syndicate.

Step 3: Select the PY or CY in the dropdown

Note: in the PY modeller type, the PY and CY will be available in the dropdown. In the CY modeller type, only the CY will be available in the dropdown.

Step 4: Enter the premium limit £

Step 5: Click the 'Save' button.

The participation will be added to the MAPA constitution table. The 'Results' tab will be disabled. The user will need to recalculate the MAPA's notional ECA based on the new syndicate participation.

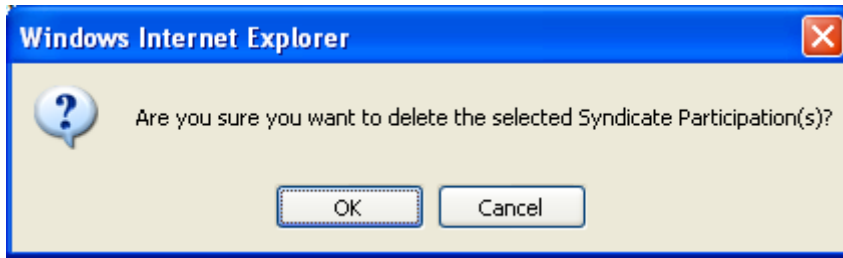
7.2.3 Deleting Existing Participations

Existing participations can be deleted from the MAPAs constitution via the 'Editable Constitution' tab on the MAPA Details page.

Step 1: Click the checkbox(es) next to the syndicate participation to be deleted

<input type="checkbox"/>	Syndicate Number	YO
<input type="checkbox"/>	33	2011
<input checked="" type="checkbox"/>	218	2011
<input type="checkbox"/>	318	2011
<input checked="" type="checkbox"/>	510	2011
<input type="checkbox"/>	557	2011

Step 2: Click the 'Delete' button

Step 3: Click the 'OK' button

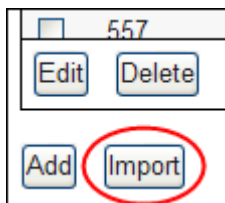
The page will refresh and the participation(s) will be deleted from the MAPA constitution table.

7.2.4 Importing the MAPA

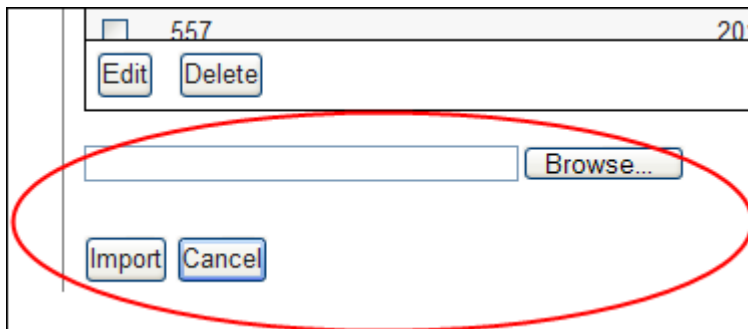
The constitution for the selected MAPA can be imported via the 'Editable Constitution' tab on the MAPA Details page.

Step 1: Create a MAPA constitution file

Import files must be .CSV and must be in the format described in section xxx. Note that import files must only contain participations for the selected MAPA.

Step 2: Click the 'Import' button

The import buttons are loaded.

**Step 3: Click the 'Browse' button****Step 4: Select the file to import and click the 'Open' button**

The 'Import File' field is populated with the import file location and name.

Step 5: Click the 'Import' button

While the import is running, the MAPA Details page will remain displayed. Once the import is complete, a notification message will be displayed on screen confirming that the file was imported successfully.

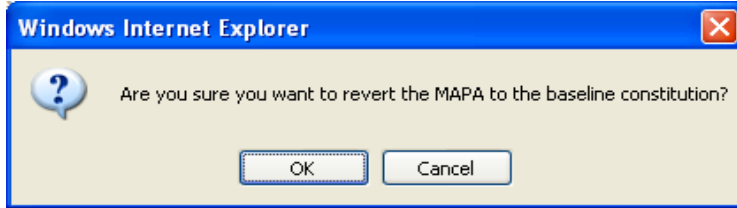
7.2.5 Reverting the MAPA to the Baseline Constitution

The selected MAPA can be reverted to the baseline constitution via the 'Editable Constitution' tab on the MAPA Details page. Note that this feature is not available for dummy MAPAs.

Step 1: Click the 'Revert To Baseline' button

<input type="checkbox"/> 510	2011	20,430,652
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
<input type="button" value="Add"/>	<input type="button" value="Import"/>	<input type="button" value="Calculate ECA"/> <input type="button" value="Revert To Baseline"/>

Step 2: Click the 'OK' button



The selected MAPA reverts to the baseline constitution.

7.2.6 Generating the MAPA Reports from the Results tab

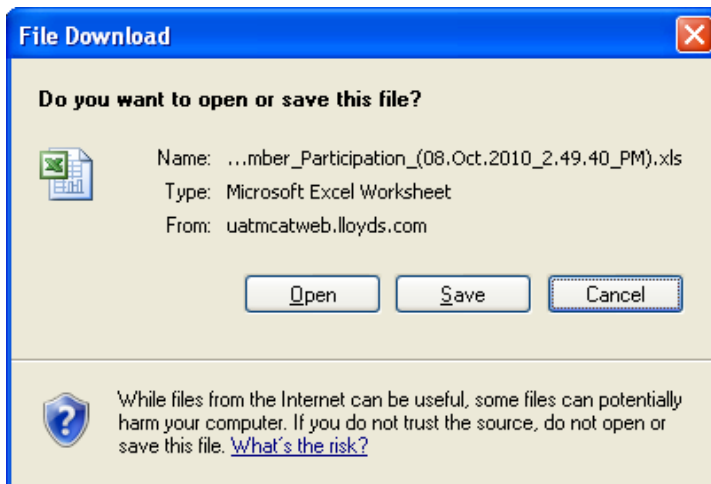
The MAPA-Member report and the MAPA-Syndicate report can be generated via the 'Results' tab on the MAPA Details page.

Step 1: Click the report button for either the MAPA-Member report or the MAPA-Syndicate report

Note that you can choose to generate both of the reports in either PDF or .XLS format.

<input type="button" value="Editable Constitution"/>	<input type="button" value="Back Years"/>	<input type="button" value="Results"/>	
OPL for Modelling Year:	36,893,692		
Notional ECA (£):	13,244,836		
Notional ECA (%):	35.9		
<input type="button" value="MAPA-Member Report"/> <input type="button" value="PDF"/> <input type="button" value="XLS"/>		<input type="button" value="MAPA-Syndicate Report"/> <input type="button" value="PDF"/> <input type="button" value="XLS"/>	

Step 2: Select the option to open or save the report



7.3 Dummy MAPAs

Available to: ME Admin

The manage Dummy MAPAs page can be accessed via the left hand navigation menu > Click on the 'Dummy MAPAs' link.

MANAGE DUMMY MAPAS

Create, edit or delete MAPA details. The MAPA constitution can be imported for the proposed and current years of account only.

Search

Select All Dummy MAPAs

MAPA Number	Dummy MAPA Name
<input type="checkbox"/> 7297	Test MAPA2
<input type="checkbox"/> 7298	Test MAPA3
<input type="checkbox"/> 7299	Test MAPA4
<input type="checkbox"/> 7291	Test MAPA5
<input type="checkbox"/> 7292	Test MAPA6
<input type="checkbox"/> 7293	Test MAPA7

Select Dummy MAPA

Click to go to Dummy MAPA Details Page [7293](#)

7.3.1 Creating a Dummy MAPA

Step 1: Click the 'Create New Dummy MAPA' button

The Create Dummy MAPA page is loaded.

Step 2: Enter a dummy MAPA number (between the number range 7000 – 7999)

CREATE DUMMY MAPA

Create dummy MAPA. Enter in a name and unique number in the range 7000-7999 inclusive.

Dummy MAPA Number

Dummy MAPA Name

Step 3: Enter a dummy MAPA name

CREATE DUMMY MAPA

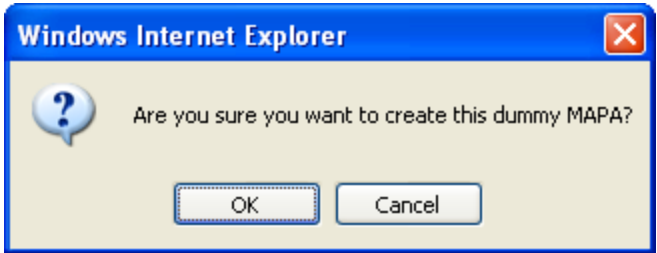
Create dummy MAPA. Enter in a name and unique number in the range 7000-7999 inclusive.

Dummy MAPA Number

Dummy MAPA Name

Step 4: Click the 'Save Changes' button to save the dummy MAPA

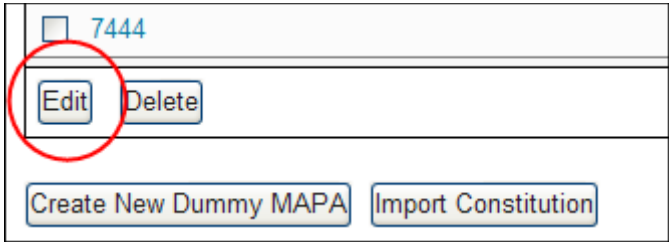
Step 5: Click the 'OK' button



The new dummy MAPA is created and the Manage Dummy MAPAs page is loaded.

7.3.2 Editing a Dummy MAPA

Step 1: Click the 'Edit' button



The dummy MAPAs table is opened to edits.

Step 2: Edit the MAPA number and/or name for one or multiple dummy MAPAs.

<input type="checkbox"/> MAPA Number	Dummy MAPA Name
<input type="checkbox"/> 7296	Test MAPA1
<input checked="" type="checkbox"/> 7297	Test MAPA2
<input type="checkbox"/> 7298	Test MAPA3
<input type="checkbox"/> 7299	Test MAPA4
<input type="checkbox"/> 7291	Test MAPA5
<input type="checkbox"/> 7292	Test MAPA6
<input type="checkbox"/> 7293	Test MAPA7

Step 2: Click the 'Save' button.

<input type="checkbox"/> 7444
<input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/>
<input type="button" value="Create New Dummy MAPA"/> <input type="button" value="Import Constitution"/>

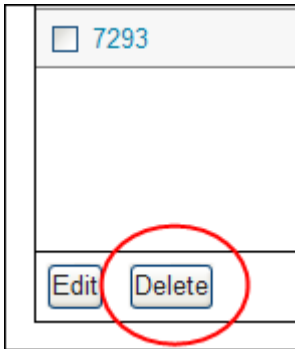
The dummy MAPAs table is closed to edits and the changes are saved.

7.3.3 Deleting a Dummy MAPA

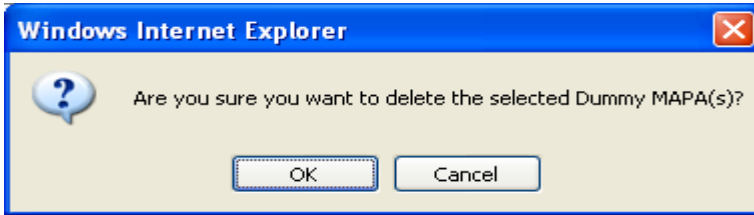
Step 1: Click on the checkbox(es) next to the dummy MAPA(s) to be deleted.

<input type="checkbox"/> MAPA Number
<input type="checkbox"/> 7296
<input checked="" type="checkbox"/> 7297
<input type="checkbox"/> 7298
<input type="checkbox"/> 7299
<input checked="" type="checkbox"/> 7291
<input type="checkbox"/> 7292
<input type="checkbox"/> 7293

Step 2: Click the 'Delete' button



Step 3: Click the 'OK' button



The page will refresh and the selected dummy MAPAs will be deleted from the MAPAs table.

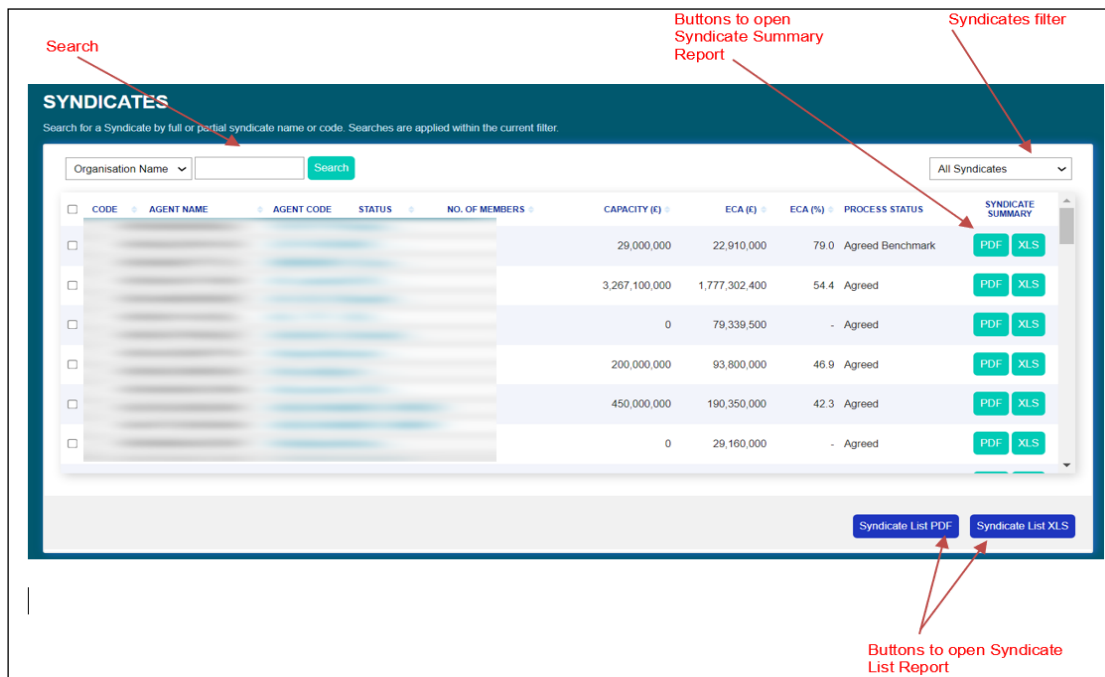
8 SYNDICATE HUB

To access the Syndicates page, click on the 'View Syndicates' link on the left-hand navigation menu.

8.1 The Syndicates Page

Available to: ME Admin, ME, MA Admin, MA, Multimember, Member

The Syndicates page displays all syndicates that the organisation of the user logged in has permission to view. The syndicates displayed on the page will default to 'All Syndicates'. The new column, 'Process Status', has been added to show the status of each syndicate in the review process



8.1.1 Syndicate Filter

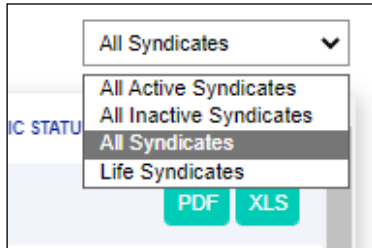
Available to: ME Admin, ME, MA Admin, MA, Multimember, Member

The Syndicate Filter defaults to display syndicates that have been linked to the user logged in. Filter options include; All Active Syndicates, All Inactive Syndicates and All Syndicates and Life Syndicates. The filter option will persist throughout the session until this is changed by the user.

8.1.1.1 Selecting and Applying a Filter

Step 1: Click on the syndicate Filter dropdown

The Syndicate filter dropdown will display all filter options.



Step 2: Click on a filter option

Clicking on a filter option will automatically apply the filter to the syndicate results displayed in the table. Any searches performed will be performed within the syndicate filter applied.

8.1.2 Search

Available to: ME Admin, ME, MA Admin, MA, Multimember, Member

The syndicate table can be searched by Syndicate Code or Syndicate Name.

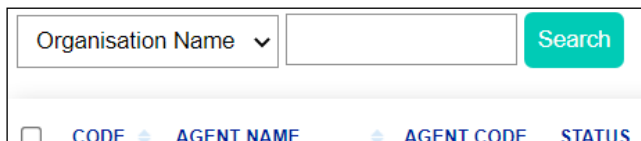
Step 1: In the Search dropdown select 'Syndicate Name'

Step 2: In the search field enter a letter or partial name

Step 3: Click the 'Search' button

All syndicate results matching the search criteria will be returned and displayed in the syndicate table.

Step 4: To clear the search results click on the 'X' in the search field

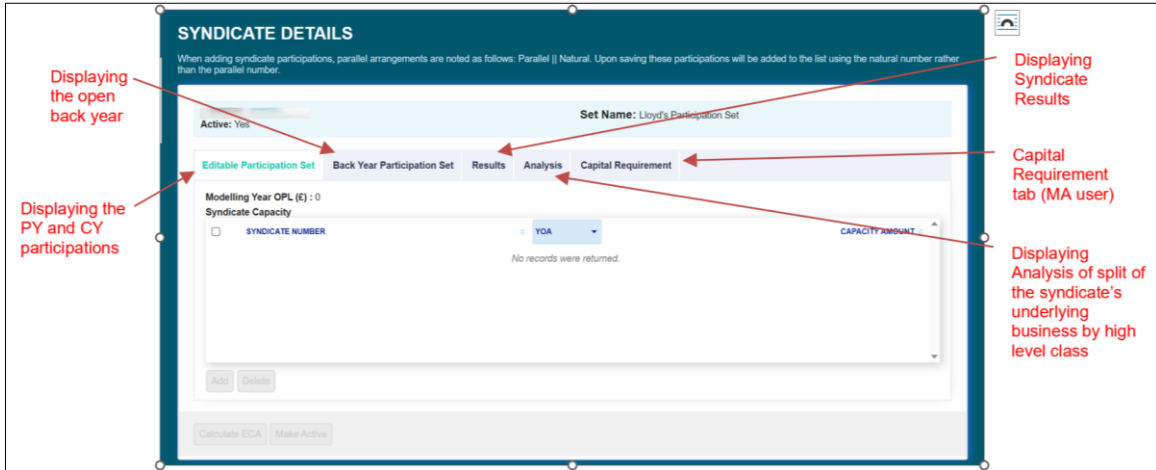


The search results will be cleared and all syndicates that fall under the current syndicate filter will be displayed.

8.2 The Syndicate Details Page

Available to: ME Admin, ME, MA Admin, MA, Multimember, Member

The Syndicate Details page can be accessed by selecting the syndicate code hyperlink on the Syndicates page. Similarly in design to the Member Participations Sets Details page, available is the Back Year Participation Set tab, Results tab, Analysis tab and as well as the new Capital Requirements tab.



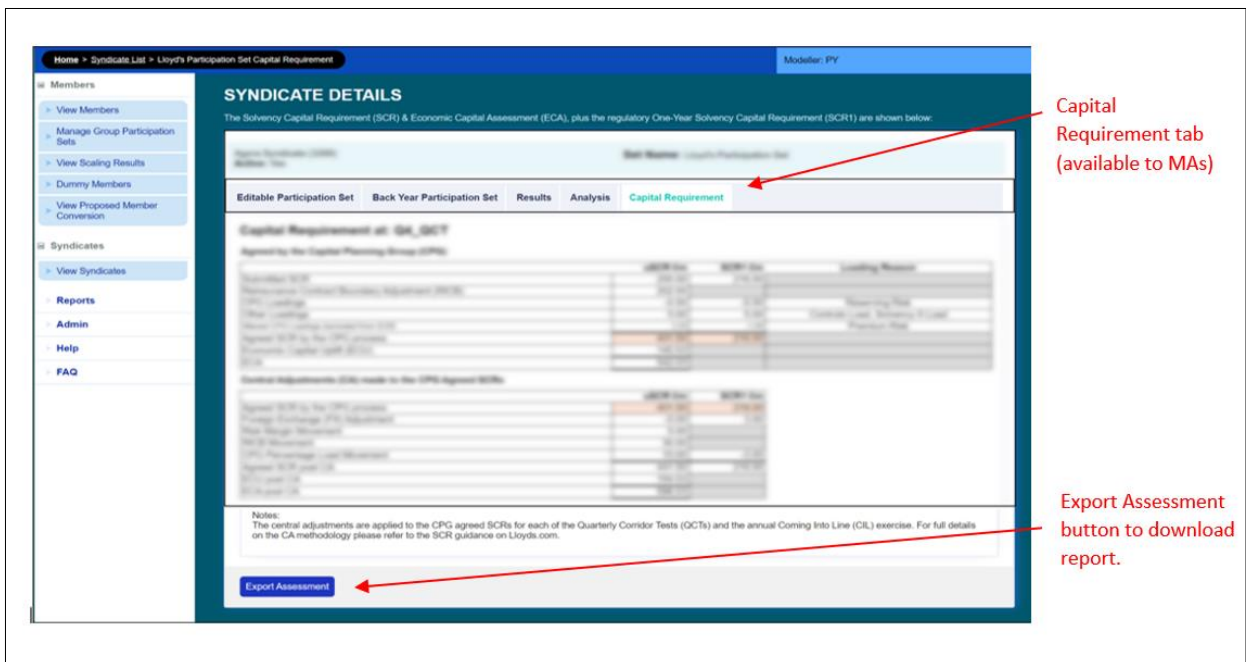
Analysis tab

Users are now able to view the split of syndicate underwriting exposure between US and non-US denominated business in the Lloyd’s model. As well as providing users with useful information about currency exposure, it will also form the basis of the quarterly currency adjustment.

New Capital Requirement tab

Available to: MA Admin, MA

Available to managing agents, this new tab allows users to view their own syndicate’s latest applicable capital requirement, reflecting quarterly adjustments. This report is updated by Lloyds and available to agents to coincide with each quarterly corridor test and coming into line publication. Agents will be able to download the report via the ‘Export’ button at the bottom of the page, making it easier in circumstances when, for example, needing to request a letter of credit from a bank.



8.3 The Members On Syndicate Page

Available to: ME Admin, ME, MA Admin, MA, Multimember

To access the Members On Syndicate page, click on the No. Of Members hyperlink on the Syndicates page.

STATUS	NO. OF MEMBERS	CAPACITY (€)
Inactive	0	0
Active	4	498,200,000
Active	230	530,000,000

The Members On Syndicate page displays the member participations on the selected syndicate year of account. Members' agents will only be able to view members for which they act, with the balancing syndicate capacity shown as "Other Capital Providers". Managing agents will be able to see all members underwriting on its managed syndicates. The Members On Syndicate page is not available to member users.

MEMBERS ON SYNDICATE

Details of member participations on selected syndicate year of account, restricted by normal access rights. Participations include direct and indirect participation via MAPA, based on latest active participation set. Participations do not necessarily reflect final participation for the proposed year of account.

Member Code: Search

Member Name:

MEMBER CODE	MEMBER NAME	TOTAL PARTICIPATION AMOUNT	DIRECT PARTICIPATION AMOUNT	MAPA PARTICIPATION AMOUNT
		110,001	110,001	0
		55,000	55,000	0
		16,500	16,500	0
		220,000	220,000	0
		97,059	97,059	0
		384,977	0	384,977

Sum of Participations: 26,875,104
Total Capacity: 660,000,000
Other Capital Providers: 633,124,896

Annotations:
- Search by Member code or name
- User selects syndicate year of account
- Selecting the Member name hyperlink takes you to the Member Details page