Certigo Platform

certigo

Product documentation

This is the Certigo Platform product documentation.

The [full documentation is online available](#) in the Dutch language. The online documentation can be translated to any language by means of providing the link of the documentation website to online tooling like Google translate.

Pleas do note that the functional coverage of Certigo Platform is currently for The Netherlands.

Below you find a summary of the product documentation.

Documentation structure

The product documentation contains the description of Certigo Platform standard features and the features of the practices. Practices are template settings for common insurance administration types supported by Certigo Platform; property & casualty for consumers, P&C for commercial lines, income and collective income insurance products.
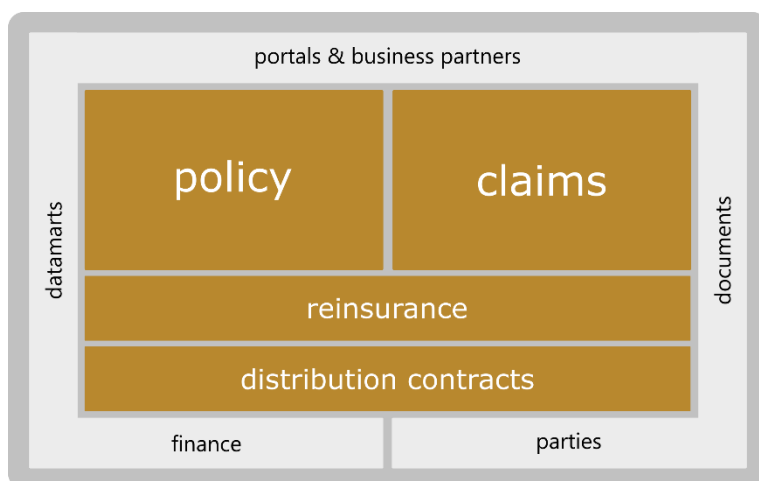
The Certigo Platform consists of the following software components:

1   Main functions

1. Policy administration
2. Claims management
3. Reinsurance
4. Distribution contracts

Integration facilities

1. Finance
2. Parties
3. Documents
4. Portals and business partners
5. Datamarts

Certigo Platform software components

2   Practices
The specific options and software functions available are described for each practice, a specialized insurance administration.

3   Settings
The settings and parameters are grouped by:

1. Setup settings; one-off
2. Conversion and import tooling
3. Integration settings
4. Personalization settings; managed by the customer

4   Application management
1. Systems requirements
2. Authorizations
3. Jobs
4. Reporting
5. Premium calculations

Certigo user experience

To make it easy for end-users to find their way around Certigo, a description is given here of the Certigo screen designs.

Dashboards

Dashboards are overview screens and the starting point for 'work' for a specific part of the insurance administration. You access the Certigo Dashboards from the central Certigo screen. For example: Quotations, Underwriting requests, Policy management or Claims handling.

The Dashboard will offer elements for:

- Search
- Start links
- Tasks
- Work items

Search
With the Search and Advanced Search function, data is searched and presented in a list. By clicking on a data item (policy, quotation, relation, etc.) the relevant screen will be opened.

Adding an * to the search makes the search less specific, for example * 99 returns all results that end 99 and A * returns all results that start with an A.

Start Links
Start Links are URLs where a certain activity can be performed. Because Certigo is a browser-based application, you can also place these links in your own Favorites in your browser.

Tasks
Tasks are created by a previous activity and are offered to work groups or individual employees. By clicking on a task, the screen where the activity must be performed is opened, with the relevant record loaded. For example, a policy application or underwriting request that has yet to be finalized.

There are two types of tasks:

- Tasks Generated by Business Processes

- Manually created tasks

Tasks Generated by Business Processes
When a business process requires action by a user, a task or schedules task will be created by the relevant business process. An user who is sufficiently authorized can assign schedules and tasks to other users within his user group.

The user can then track and monitor progress within a task assigned to him. When the task is reported as completed, a signal will be passed to the process that initiated the task. The process will then continue automatically.

Work items
Work item screen elements show the not yet fully processed business objects (policy request, underwriting request, etc.) in a list. Workers select a task from a Workgroup list or an Individual list by clicking on a line. This will open the 'work' in the appropriate screen.

5 Information
There may be information screen elements that show data relevant to the dashboard. The information can be from Certigo or other systems, like a finance system.

Panes

Panes are the screens in which work is done on the business objects; policies, claims, quotations, intermediary contracts, etc.

The panes offer screen parts for:

- Search
- Tasks
- Action buttons
- Information
- Process help
- Navigation tree

The Search and Tasks functions are identical to the Dashboard functions.

Action buttons

The Certigo method for creating and editing business objects (policies, claims, intermediary contracts, etc.) is that the 'request' for processing is constructed in a panel.

This gives the opportunity to fully prepare this request at your leisure and not lose it in the meantime.

The following action buttons (blue color if they are active, gray if they are not active) are available in Certigo panes:

- **Cancel request:** Stop the request, do not save the request and return to the main screen of the business object.
- **Save temporarily:** Save the request temporarily. The validations will not be performed yet and an request number will be assigned, on the basis of which the request can be completed at a later date.
- **Update:** Do not save the request yet, but do run the screen validations and business rules. This option is useful for checking entered information.
- **Request ready:** Save the application and start any follow-up process. Screen validations and business rules will be executed when saving. Any error messages (red) will be fed back at the top of the screen and must be corrected before the application can be saved.
- **Delete:** Delete the selected business object from the request.

Information

The aim is to have all relevant information available and accessible in one screen to do your 'work'.

There may therefore be screen elements that offer relevant information for the business object: for example, documents pertaining to a policy or damage; other available versions of a policy; historical damage overview of a policyholder, whether additional operations are in progress in which this policy is involved, etc.

Process help

Process help screen elements are Notes, Report dossiers and Agendas. These process tools are available on relevant screens.

Navigation tree

A navigation tree is available at Policies, Quotations and Claims.

Policies and Quotations

The tree structure with the policy elements is visible on the left of the pane; package, component, object, covers. The tree structure not only provides an overview of the structure of the policy, but also serves as a navigation aid. Clicking on one of the policy sections (package, component, object, cover) will navigate to this detail section.

If a part contains error messages (input validations for example), the part will be displayed in red. This makes it clear at a glance where additional attention is expected from the user.

If several policy versions exist, Certigo always opens the current version first. Selecting an older policy version via the Version overview screen section will open it. In the navigation tree it is then indicated by means of asterisks (***) at which level of the package policy a change in the newer version occurs.

Claims

The tree structure of the Claim is shown on the left: incident, file, damage. Clicking on one of the claim sections (incident, file, damage) will navigate to this detail section.