



# B Template Validator User Guide

Version 1.1

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## INTRODUCTION

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This document is intended for Program and Claims Administrators who are providing policy and claim data to Hudson Insurance Group using the B Template format. If you have any questions regarding the topics covered in this document, please contact the Hudson Insurance Group's Information Technology Department by sending an E-mail to [support@hudsoninsgroup.com](mailto:support@hudsoninsgroup.com).

## ACCESSING THE WEBSITE

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To access the website, open a browser session and enter the following address: [www.hudsonportal.com/validator/](http://www.hudsonportal.com/validator/). Don't forget the trailing slash ("/"). When you see the Login window, enter your User Name and Password.



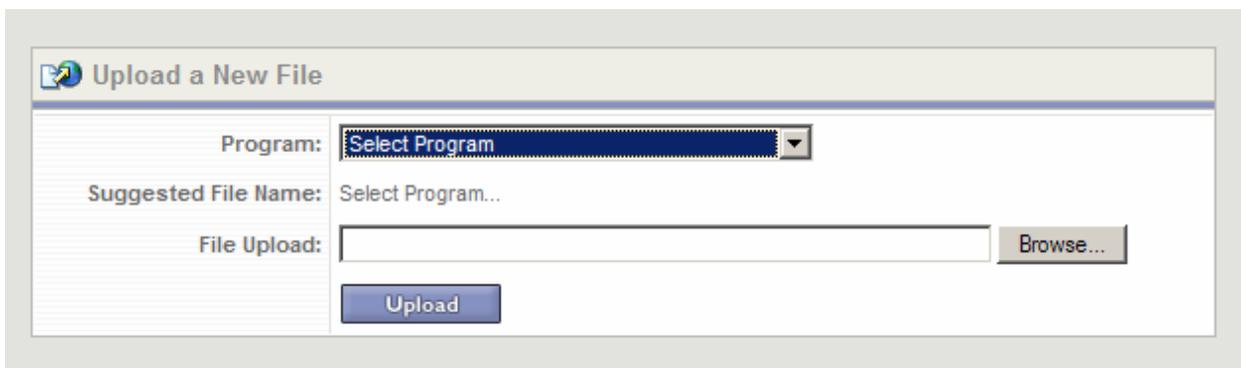
The screenshot shows a web browser window titled "Login". It features a "User Name:" label next to a text input field containing "johnsmith". Below it is a "Password:" label next to a masked password field. A checkbox labeled "Remember my login information" is present. At the bottom, there is a blue "Login" button and a blue link that says "Forgot your password?".

When logging in for the first time, you will be prompted to provide a new password. Additionally, every 30-days you will be prompted to change your password. Your password must be between 8 and 21 characters long, must contain at least one letter and one number, and may NOT be the same as the your Full Name, E-mail Address, or User Name. The Use Name and Password are not case sensitive.

## UPLOADING AND VALIDATING A FILE

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After successfully logging in, the Upload New File window will be displayed.



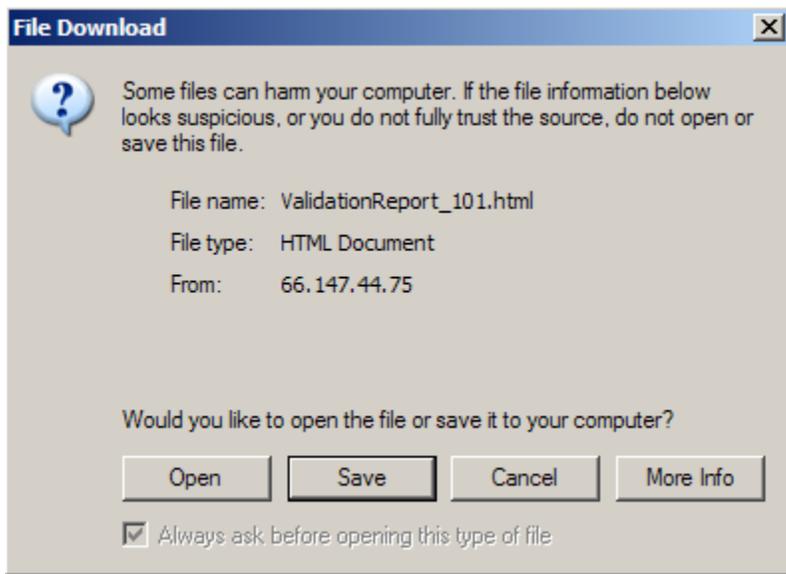
The screenshot shows a web browser window titled "Upload a New File". It features a "Program:" label next to a dropdown menu showing "Select Program". Below it is a "Suggested File Name:" label next to a text input field containing "Select Program...". Further down is a "File Upload:" label next to a text input field and a "Browse..." button. At the bottom, there is a blue "Upload" button.

In order to upload and validate a file, take the following steps:

1. Select a Program using the drop down list box. In many cases, a user will only have one program and it will be pre-filled.

2. Click the Browse button and locate the file on your PC or file server. Note that the file must be named as per the following convention: short program name \_ time period \_ type of data . xls or csv. For example: `Abc_200509_Policy.xls`. See the Suggested File Name on the Upload a New File window for help.
3. Click the Upload button.

The system will then upload your file, convert it to CSV format (if necessary), and validate it. During the validation process, a progress meter will be displayed. Please wait for the process to complete (which may take a few minutes depending on the size of the file). After the file is validated, the following window will be displayed. Click Open to see the validation report. Optionally, you can click Save, save the file on your PC, and then view it from there.



## REVIEWING THE VALIDATION REPORT

A sample validation report (with errors) is as follows.

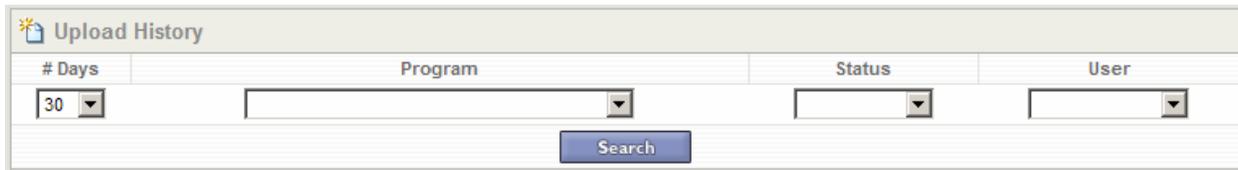
Submission #225 8/16/2008 4:54:53 PM			
File:	ExpressAuto_2008-09_Policy.csv		
Status:	Invalid		
# Errors:	1		
# Warnings:	0		
# Rows:	1		
# Valid Rows:	0		
ERRORS			
Row	Column	Message	Data
1	A	Header Field #1 - ProgramNumber Field Name is incorrect.	
1	B	Header Field #2 - PolicyNumber not found.	[empty column header]
1	C	Header Field #3 - PriorPolicyNumber not found.	[empty column header]
1	D	Header Field #4 - LegalEntityCode not found.	[empty column header]
1	E	Header Field #5 - ProducerCode not found.	[empty column header]
1	F	Header Field #6 - NamedInsuredLast not found.	[empty column header]
1	G	Header Field #7 - NamedInsuredFirst not found.	[empty column header]
1	H	Header Field #8 - StreetAddress not found.	[empty column header]
1	I	Header Field #9 - StreetAddress2 not found.	[empty column header]
1	J	Header Field #10 - City not found.	[empty column header]

When there are no validation errors the Status will be “Successful” and no further action is required on your part. Hudson Insurance Group will be automatically notified that you have successfully uploaded the file and hence it is ready for processing into our data warehouse.

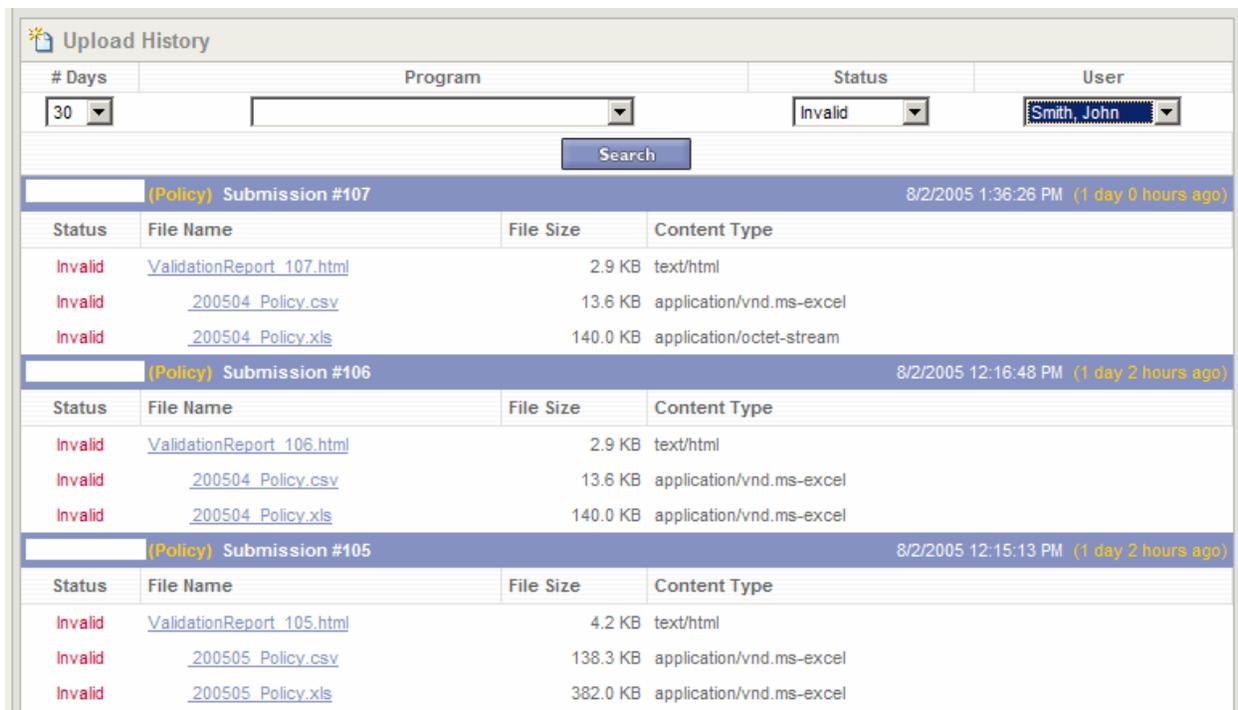
When there are validation errors (as in the sample above), you will need to correct ALL of the problems noted on the report in the source file and resubmit it again. For each error, a row number, column, error message, and the data are displayed on the report. Optionally, you can print the report by clicking on the browser's print icon or clicking File then Print.

## ACCESSING HISTORY

Each time a file is uploaded, the source file, CSV file, and validation report are saved. To access your historical information, click on Upload History at the top of any window. Upon doing so, the following search window will be displayed.



Select the desired search criteria (some fields may be pre-filled for you) and then click Search. A list of all activity that met your criteria will be displayed.



# Days	Program	Status	User
30		Invalid	Smith, John

(Policy) Submission #107		8/2/2005 1:36:26 PM (1 day 0 hours ago)	
Status	File Name	File Size	Content Type
Invalid	<a href="#">ValidationReport_107.html</a>	2.9 KB	text/html
Invalid	<a href="#">_200504_Policy.csv</a>	13.6 KB	application/vnd.ms-excel
Invalid	<a href="#">_200504_Policy.xls</a>	140.0 KB	application/octet-stream

(Policy) Submission #106		8/2/2005 12:16:48 PM (1 day 2 hours ago)	
Status	File Name	File Size	Content Type
Invalid	<a href="#">ValidationReport_106.html</a>	2.9 KB	text/html
Invalid	<a href="#">_200504_Policy.csv</a>	13.6 KB	application/vnd.ms-excel
Invalid	<a href="#">_200504_Policy.xls</a>	140.0 KB	application/vnd.ms-excel

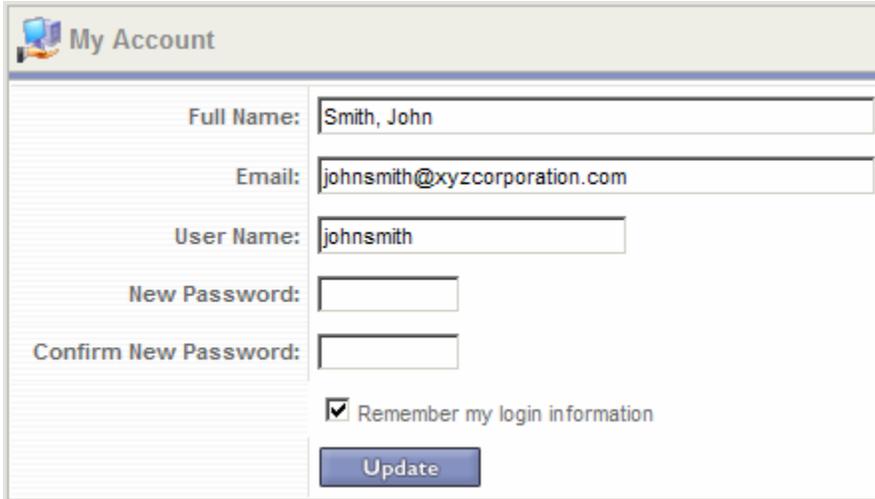
  

(Policy) Submission #105		8/2/2005 12:15:13 PM (1 day 2 hours ago)	
Status	File Name	File Size	Content Type
Invalid	<a href="#">ValidationReport_105.html</a>	4.2 KB	text/html
Invalid	<a href="#">_200505_Policy.csv</a>	138.3 KB	application/vnd.ms-excel
Invalid	<a href="#">_200505_Policy.xls</a>	382.0 KB	application/vnd.ms-excel

To view the validation report, CSV, or XLS file, click on the associated link and then click Open or Save on the subsequent window.

## UPDATING YOUR USER INFORMATION

To update your user information (e.g., Password, E-Mail address), click on the My Account link in the upper right hand corner of any window. The following window will be displayed.



My Account

Full Name: Smith, John

Email: johnsmith@xyzcorporation.com

User Name: johnsmith

New Password:

Confirm New Password:

Remember my login information

Update

Make the necessary changes and click Update.

## GETTING HELP

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If you are experiencing any problems or have a question, send an E-mail to [support@hudsoninsgroup.com](mailto:support@hudsoninsgroup.com). If you are on the website, you can click the Support link in the lower right hand corner of any window and an E-mail message will be addressed for you. When E-mailing us, please provide the following information:

- Your company name,
- Your name and phone number,
- The name of the insurance program,
- A detailed description of the problem or question,
- A screen print of the error message (if any). Please feel free to attach any other information that you think would be helpful in resolving the problem or answering your question.

Don't forget to enter a descriptive subject line.

An up to version of this document can be viewed and printed at any time by clicking on the Help link in the lower right hand corner of any window.

## FORGOT YOUR PASSWORD

If you've forgotten your password, click the Forgot your password? link on the Login window, enter your E-mail address on the subsequent window, and click Send my password. In a few minutes, your ID and password will be E-mailed to you.

## TIPS FOR PREVENTING VALIDATION ERRORS

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Prior to uploading and validating a file, there are a number of things that you can do that will help reduce the number of errors that you would otherwise have to correct later. Please take note of the following tips.

- Spot-check the file's date columns to verify that they all are in MM/DD/YYYY date format. Note that the Policy Effective Date / Expiration Date and Claim Effective Date / End Date columns cannot be null or empty.

- Spot-check the Policy Premium / Limit / Written Exposure and Claim Paid / OS Reserve amount columns and confirm that they do not contain commas. For example, “1,200.00” is not a valid amount.
- Files which are created manually through a “cut & paste” method can pose a few issues that can lead to errors during the validation process. In particular, please ensure that there are not any empty rows at the bottom of the spreadsheet. Additionally, when “cutting & pasting” a large number of records from one source to Excel or moving rows around from one position to another, it is always a good idea to: 1) highlight a number of empty rows (starting with the first one at the end of your data set) and then 2) “Right Click” and 3) “Delete” these empty rows.