

## **LEG Guidelines on Information Indexing**

AIM – to encourage and promote a system of concise presentation of information indexed in an easily accessible format.

There is a need for engineering insurers to avoid searching through incorrectly indexed and poorly presented information. It is essential that this document is passed to all parties involved with construction business. Compliance with this set of guidelines will assist in the timely production of quotations.

### **Guidance on requirements for presentation of information:**

#### **Information presented as a printed folder:**

- Folder to contain an index of contents.
- Easy access to information and correct indexing.
- Information relevant to the insurance contract and underwriting process.
- Printed maps and site plans to be legible and of a size sufficient to display detail (i.e. no A0 plans reduced to A4).

#### **Information presented on CD Rom and e-mail:**

- Easy access to information and correct indexing (all folders, subfolders and individual files to be clearly marked with their content and accessible via shortcuts). Inlay card to contain an index of contents including a tree diagram displaying folders and subfolders.
- Information relevant to the insurance contract and underwriting process.
- Computer files to be of a recognisable type, i.e. TIF, GIF, JPEG, Word, Excel, etc. and not specialised programs which Underwriters do not have access to, for example Autocad.
- Scanned maps and site plans to be legible and of a size sufficient to display detail (i.e. no A0 plans reduced to A4).
- Any information on the CD Rom needs to be capable of being printed, for example spreadsheets are often difficult to set up for printing.
- Any e-mail information to be supplied has attachments with accurate and descriptive filenames.

#### **Information stored on websites**

##### **This is only acceptable if:**

- Administration of the site is by the Broker, not a third party
- At the end of the project, a CD Rom to be supplied to Underwriters as a permanent record of the information supplied.
- Computer files to be of a recognisable type, i.e. TIF, GIF, JPEG, Word, Excel, etc. and not specialised programs which Underwriters do not have access to, for example Autocad.
- Easy access to information and correct indexing.
- All information not relevant to the EAR insurance contract is separately filed.
- Underwriters need to be guaranteed that passwords do not expire on a regular basis.
- Clear as to what information has been added and deleted.
- E-mail notifications to be sent to Underwriters when new information has been added.

**Indexing guidelines**

Information presented (in all formats) should be subdivided and clearly marked under the following headings:

**Project Overview**

**Title of the project**

**Location of the project**

**Insured parties**

**Project description**

**Project Specifics**

- 1. Project parties**
- 2. Description of the process and/or technology**
- 3. Contract value breakdown**
- 4. Major equipment details**
- 5. Territorial, geographic and site specific**
- 6. Civil works**
- 7. Third Party Liability**
- 8. Plans and diagrams**
- 9. Bar charts**
- 10. Contractual documentation**
- 11. International Standards**
- 12. Testing**

**For projects where DSU is required**

- 1. Sums Insured**
- 2. Contractual Documentation**
- 3. Mitigation of delay**
- 4. DSU Extensions**