# NAVIGATE

# Policyholder Standard File Transfer User Guide

**For policyholders to use when loading vehicle records via Non-Macro Attended File Transfer.**

# Contents

# 1 Standard File Transfer (SFT)

The standard file transfer functionality allows you to add and amend vehicles against your policies using an excel sheet formatted as a CSV file. The fields that you will populate replicate the fields you would use when adding via the Navigate Portal interface. There are some additional fields which will be within the sheet which are explained within this document.  Use the following steps to assist you.

## 1.1  **Log in** to the Navigate Portal

## 1.2  **Click** on the Motor Insurance Policy Data tile
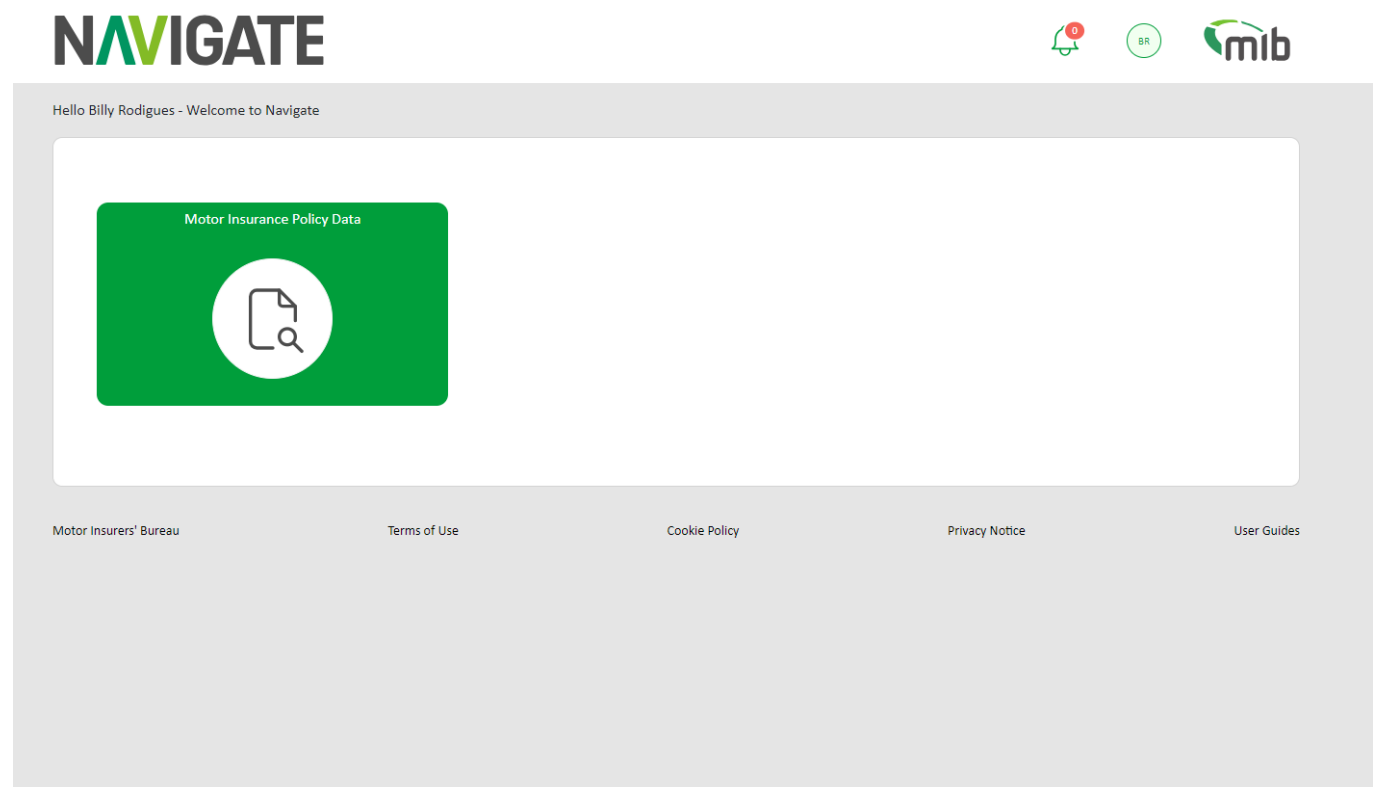
## 1.3  Motor Insurance Policy Data will be available



## 1.4  **Click** on the File Transfer tile

**1.5  Open** the separate CSV file attached to the email

**1.6  Prior to populating the required fields, ensure column C and H have been changed to text**



Highlight the columns, select the drop down within 'Number' section on Excel and scroll to the bottom to select 'Text' as show above. This is to ensure that any fields with leading 0's do not get ignored when populating the sheet.

**1.7  Populate** the required fields with your policy records

Replace the placeholder example values (colums A, B, C, H, I, J, K, T, and U) with your vehicle data.

**Column A**

- Record Type (this will always be **V** for vehicle records)

**Column B**

- Update Type

    - **N (New)**– used when adding new vehicles to the policy  (how it appears in the portal)
    - **A (Amend)** – used when you are updating any of the vehicle details listed against the policy  (how it appears in the portal)

    - **D or O (Delete)**
        - D should be used when you want to remove an incorrect vehicle record, or records from the Policy. At least <u>one</u> record on the policy for that VRM must be found in the CSV, where the On and Off dates match exactly. The system will then delete all instances of that VRM from the policy (including any future dated records that have not come in force)
- should be used where you want to delete a single vehicle record only. In this instance at least one record must be found where the On and Off dates listed within the CSV match exactly with the record otherwise the update will be rejected.

**Column C**

- You will need your Insurer ID example below



    -

**Column H**

- Policy number - **must** be included for every single record

**Column I**

- The Foreign Registration Indicator must always be **U**

**Column J**

- VRM (Vehicle Registration Mark/Number)

**Column K**

- Trade Plate Indicator (this must always be populated – either with:
  - T for a Trade Plate, or
  - U for a standard UK registration

**Column T**

- Vehicle On-date as YYYYMMDD

**Column U**

- Vehicle Off-date as YYYYMMDD

- As per example below:

| T | U |
|---|---|
| Vehicle On Date | Vehicle Off Date |
| 20240509 | 20250108 |

**It is recommended that the other fields are also completed: (Columns L – R)**

- Vehicle Type (e.g. car, van)
- Vehicle Make (e.g. Ford, Hyundai)
- Vehicle Model (e.g. Astra, i30)
- Vehicle Derivative (e.g. GLS)
- Vehicle Engine Size (e.g. 1400)
- Number of Seats (for buses and minibuses)
- Gross Vehicle Weight (for HGVs)

## 1.8 Once the file has been populated you will need to **delete** the headings in row 1 leaving only the data records

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Record Ty | Update Ty | Insurer ID | Insurer Br | Quoteback | Delegated | DA Branch | Policy Num | Foreign Re | VRM | Trade Plat | Vehicle Ty | Vehicle M | Vehicle M | Vehicle De | Vehicle En | Number o | Gross Veh | Vehicle In | Vehicle Or | Vehicle Off Date | |
| 2 | V | e.g. N or A | e.g. 123 | | | | | POLICY1 | U | | U | | | | | | | | | 20240509 | 20250108 | |
| 3 | | | | | | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | | | | | | |

As per example below:

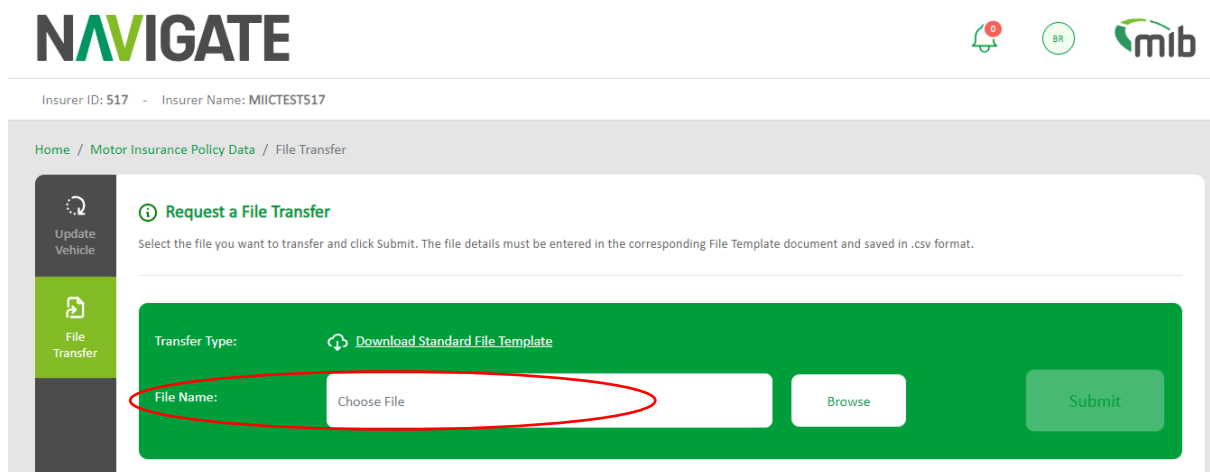| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | V | N | 517 | | | | | XL/898934 | U | LG69OYT | U | BMW | 3 series | 330 | | | | | | 20240509 | 20250108 |
| 2 | V | N | 517 | | | | | XL/898934 | U | LG71VYT | U | BMW | 4 series | 430 | | | | | | 20240509 | 20250108 |

## 1.9 **Save** the file

When the fields have been completed, select File **Save As**. Name the file (a sequence you're familiar with) and make sure the file is saved as a **CSV (.csv)** ready for uploading to the database.
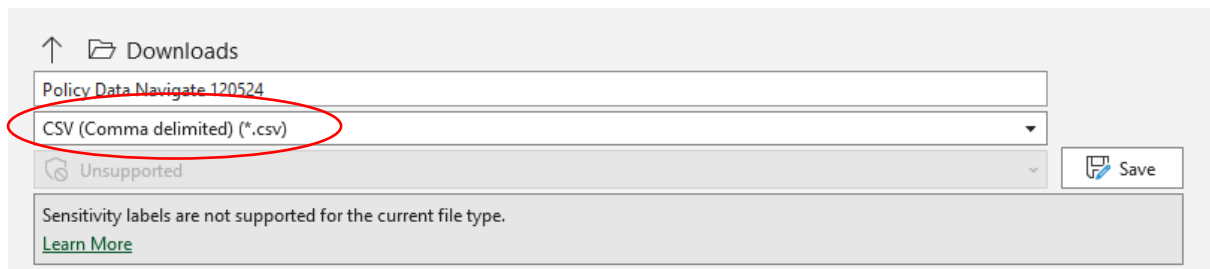


Note when you close the workbook, you **might** be asked if you want to save the changes made to "Standard File Template.xls?", you do not need to save the file again when closing, but if you want to keep a copy of the data or re-use the data at a later date, it is recommended that the file is saved as an Excel Workbook (.xls) so that is can be easily opened and viewed. To do this, change the file name (so that the downloaded "empty" standard template is not saved with data in it) and select "Save" to save the workbook.
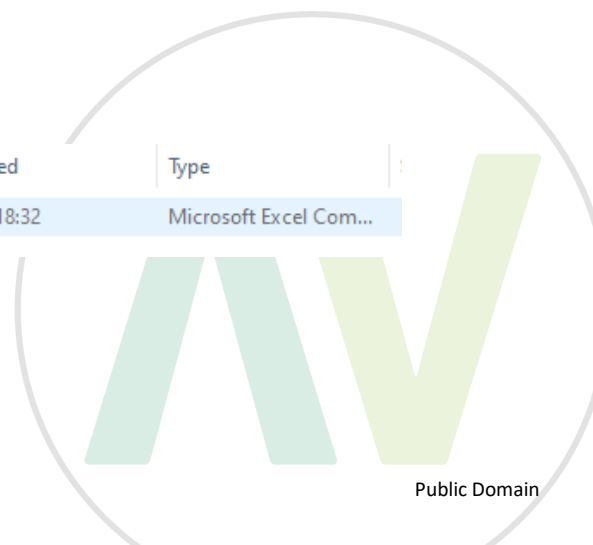
## 1.10 **Click** on Choose File in Navigate

This will allow you to search for your saved CSV file



## 1.11 **Click** on the file pop up to select your file



Select file.

## 1.12  **Click** on Submit



When a file is successfully submitted, a "Results File" email is sent, showing the File Request ID assigned. Where the file format is not correct and cannot be processed, a "Results File" email is sent to advise this is the case.

A Results File for successful load will show "THIS FILE HAS BEEN SUCCESSFULLY LOADED"



A Results File with errors and warnings will provide the error and warning codes.



It is important that the errors and warnings are acted upon to ensure the vehicle is on *Navigate* and the data is correct.

The results file is also visible within the Navigate Portal, as per the below.

## ⓘ Request a File Transfer

Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.

**Transfer Type:** ☁ Download Standard File Template

**File Name:** Policy Data Navigate 120524.csv   Browse   Submit

*2 Requests have been submitted between* 12/05/2024 📅 12/05/2024 📅 Refresh

**File Request ID:** [ ] Find          Show Status: Show All ▾

| Date/Time File Uploaded | File Request ID | Record Count | Date Results File Created | File Upload Method | File Upload Status |
|---|---|---|---|---|---|
| 12/05/2024 16:04:12 | 2024133000002 | 1 | 12/05/2024 16:07:33 | Attended/SFTP | COMPLETE |
| 12/05/2024 16:16:32 | 2024133000003 | 1 | 12/05/2024 16:19:48 | Attended/SFTP | COMPLETE |

Displaying Results 1 to 2 of 2          ‹ 1 ›          Show: 10 Rows ▾

Clicking on the File Request ID for visibility of the success of the file transfer, if the file has been rejected it will display as per the below with an error code.

Insurer ID: **517** - Insurer Name: **MIICTEST517**

## ⓘ File Request ID 2024133000002          Export Result File   Back to File Transfer

### FILE SUMMARY

No. of records in file : 1



- Accepted (0) (0%)
- Rejected with Errors (1) (100%)
- Accepted with Warnings (0) (0%)

### FILE DETAILS

| | | | |
|---|---|---|---|
| File Status: | Accepted with Errors | Last Status Changed: | C99 To H10 |
| File Received on Server: | 12/05/2024 16:04:12 | Change Made On: | 12/05/2024 16:07:47 |
| File Transfer Began: | 12/05/2024 16:07:15 | Updated By: | 52 |
| File Transfer Completed: | 12/05/2024 16:07:15 | Sent to Database: | 12/05/2024 16:07:15 |

### TOP 5 ERRORS

| Code | Status | No. |
|---|---|---|
| ⓘ E089 | Vehicle On/Off dates not within Policy Effective/Expiry dates | 1 |

### TOP 5 WARNINGS

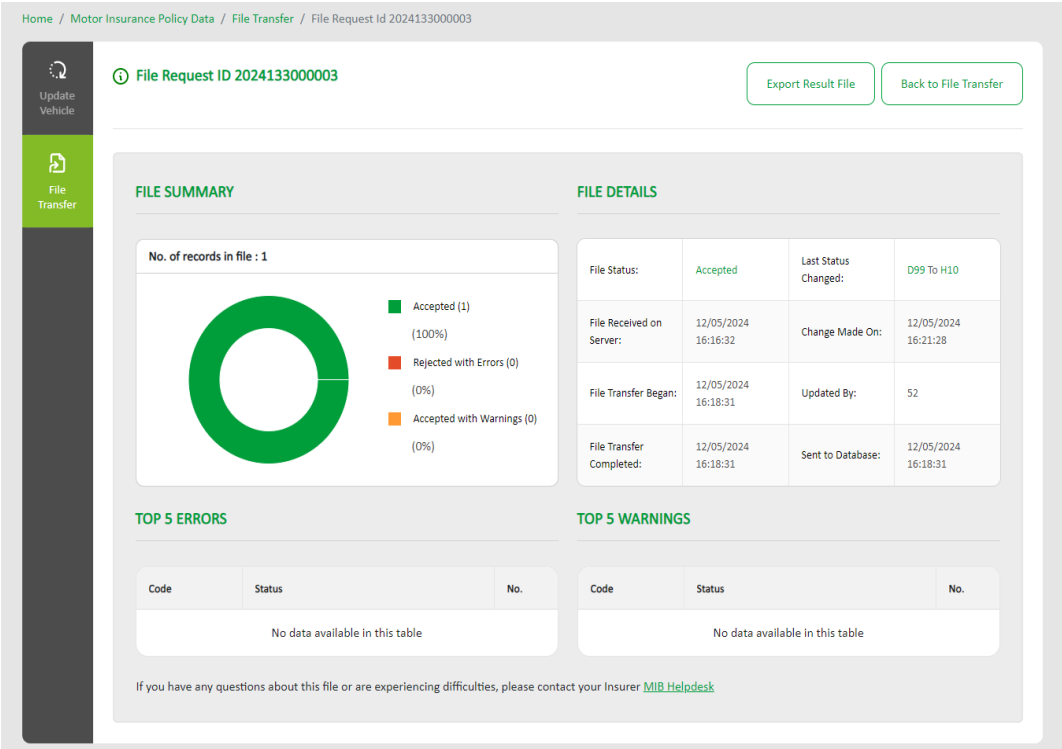| Code | Status | No. |
|---|---|---|
| | No data available in this table | |

If you have any questions about this file or are experiencing difficulties, please contact your Insurer MIB Helpdesk

Public Domain

A successful file upload example below.



**Example of how the fields map between the Add/Update vehicle screen and SFT CSV. file transfer upload.**

## Additional Information regarding updating vehicle schedules using Standard File Transfer

For SFT files, only new vehicles or amended information i.e. vehicle off cover date should be uploaded. It is not necessary to include all details of vehicles in your fleet as this could lead to incorrect information on to Navigate.

A NEW record must be uploaded when a vehicle enters the fleet and is not on Navigate.

A NEW record should also be uploaded when further periods of cover for the same vehicle occur.

An AMEND record type must be uploaded when a vehicle leaves the fleet and the record on Navigate requires the off-cover date to be changed.

A DELETE record should only be used when you need to remove records that have been added in error.

Further details on updating the database using SFT can be found in Appendix B below.

## Guidance for updating the vehicle schedules via Standard File Transfer (SFT)

**Correcting incorrect vehicle cover dates**

If there is a record on Navigate with incorrect cover dates (this can be the on or off date or both) then you will need to delete the record and replace it with a New record with the correct cover dates. Please note this is not the method used when simply taking a vehicle off cover as only an Amend record is required with the new off cover date Extending vehicle cover dates If there is a record with an off-cover date that needs to be extended then you will need to submit a further New record with on cover and off cover dates for the extended period. Please note in this scenario the on date in the record should not be the date the of the original record loaded to Navigate but the start date of the extended period.

**Changing vehicle details**

Where vehicle details change partway through the cover period (i.e. the engine size increases) and this change needs to be reflected on Navigate then you will need to submit an amend record with an off cover date of when the change took place and an off cover date that matches the existing record.