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PolySystems Client Information System: Your New Year's Resolution?

—Jackie Smith - Actuarial Assistant

PolySystems Client Information System has been online for over a year, and if you are not logging in regularly, now is a good time to start.

The primary function of our Client Information System is to provide software updates. We used to email change and feature reports to you four times per year. Now we update our Client Information System monthly, and you can search through a database of all the changes and features at your convenience. These software reports are a key element in your change control process and part of our software maintenance program.

PolySystems Client Information System is a restricted area of our website containing files and information specific to your PolySystems products. Logging in gives you access to our change and feature reports, product documentation, our Knowledge Base and a feedback form.

We have reviewed our website statistics, and many of our users are not using the Client Information System very often. Some users logged in right after we rolled it out and never logged in again. Others have never logged in at all!

I hope to illustrate how easy it is to create an account and how valuable it is to have an account.

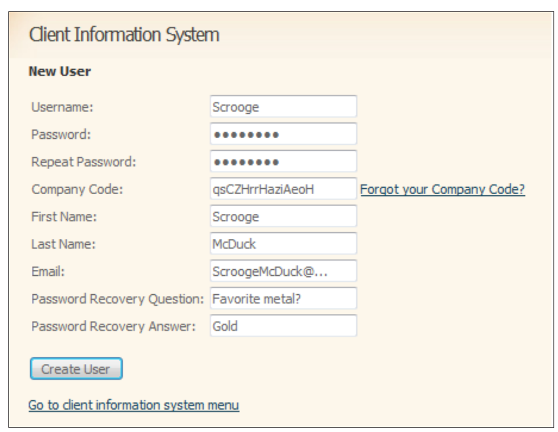
Getting Started

You can link to PolySystems Client Information system from the PolySystems website *(www.PolySystems.com)*. You must create an account in order to access the system. If you have already created an account but have forgotten your username or password, there are links on the login page that will email your username to you and reset your password. If you have not already created an account, click the *Create New User* link.

Creating an Account

To create a new account, you need to create a username and password. You also need your company's Company Code. Each client was issued a unique Company Code as an added level of security as the site stores information specific to your company. If you do not know your Company Code, you can use the *Forgot Your Company Code* link on the *New User* page to request it. [A sample *New User* page is shown below.] I recently read that Scrooge McDuck is #1 on *The Forbes Fictional 15* (D. Ewalt, www.forbes.com) list of wealthiest fictional characters. How such rankings are determined is beyond me, but I thought he would make a perfect example of a fictional new user. (The downside is the username "Scrooge" is no longer available as a username for you.)

Clicking the *Create User* button returns you to the login page. You are now ready to login into our Client Information System.



Logging In

Logging in brings up the Main Menu.

The *Edit Your Details* link allows you to change your password, name and email address.

The *View Changes and Features* link points to a searchable database of our change and feature reports since 2009. I will come back to this link.

PolySystems Knowledge Base is a one-stop-shop for troubleshooting, FAQs, tutorials, tips and tricks and research. We are regularly adding new content to it.

The latest versions of all documentation for your licensed PolySystems products are available under the *Product Documentation* link.

The *Feedback* link is a portal for sending questions and comments back to PolySystems on everything from the change and feature reports to billing, upcoming events, our software services, and even our Client Information System itself!

Change and Feature Reports

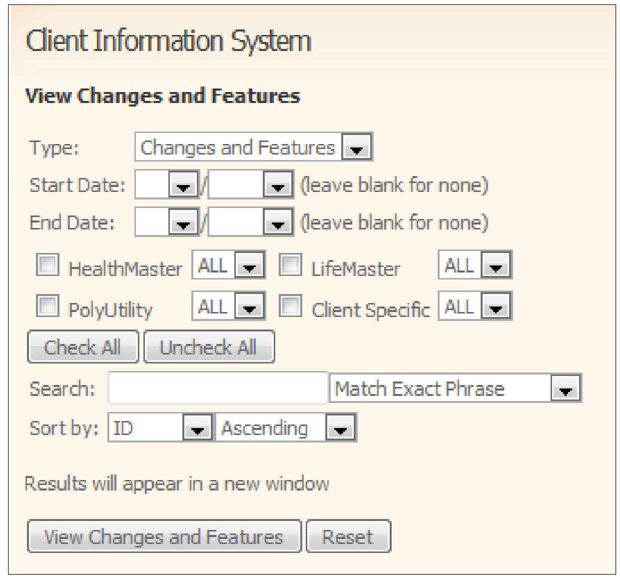
The *View Changes and Features* link gives you access to all change and feature reports associated with your PolySystems products.

Our interface (see image right) allows you to view changes only, features only, or both; search within a date range; focus on all lines of business or only specific PolySystems products; and search for keywords or phrases. You can review these reports "on demand" and create a report of only the changes and features that are of interest to you. We email our clients when the new reports have been added each month.

Reviewing the changes and features added to your PolySystems software is very important and should be done regularly. It is also important to update your PolySystems software regularly, and reviewing the change and feature reports will identify the differences between software releases. PolySystems offers Advanced Maintenance services to assist with the process of reviewing the change and feature reports, testing new software releases and analyzing the differences between software releases.

Log On Today

If you have not logged on to our Client Information System, the time has come! It is a convenient source of information for all



PolySystems users at your company. There is no limit to the number of accounts that can be created, so we encourage you to share this information with all PolySystems users.

Contact Jackie Smith at JSmith@PolySystems.com with any questions about how to start using PolySystems Client Information System.

If you are interested in learning more about our Advanced Maintenance services, where we automatically apply and test all software updates to your PolySystems model, contact Bob Keating at 312.332.8740 or via email BKeating@PolySystems.com.

PolySystems New Zip Feature

—Tiffany Connell - Software Programmer/Tester

In an effort to make zipping up your data quicker and easier, PolySystems has created a zip program, pswzip.exe. You now have the option to automatically zip your projection, valuation, or standard scenario data after the run is complete.

Zip Filename is a new field in Universal Life and Annuity 9.8 Run Projection, Run Valuation, and Run Standard Scenario screens. When this field is coded, the single processor projection, valuation, or standard scenario will run normally, but after the program is complete and the program's wrapper window closed, the PolySystems zip program is automatically called. The program will zip up all of the files that are necessary to reproduce the projection, valuation, or standard scenario run that just completed and only those files. The zip feature produces a clean zip file that is not cluttered with large, unnecessary files.

This is a great tool for making a sample or subset of your data for testing purposes as well as creating backups of your runs. As it only zips the files it needs to reproduce the run, the run time of our zip utility is significantly shorter than the time needed to zip an entire directory.

Zip Filename will soon be added to our Health and Life systems as well as be available for Scenario and Projection Report utilities.

****** NEW STARTING WITH DECEMBER 2011 CHANGE AND FEATURE REPORTS ******

The PROGRAM NAME and MAKE/REVISION NUMBER have been added to the software change and feature reports beginning with the December 2011 reports. This will make it easier for you to determine whether you have a version of the software with a particular change or feature.