

Vanguard Vendor Programme

March 2024

The Vanguard Vendor Programme

This pack informs on the Vanguard Vendor testing approach, detailing plans, information available and actions required to participate.

The approach is broken into stages:

Stage 1: Interface Testing (recommended for all)

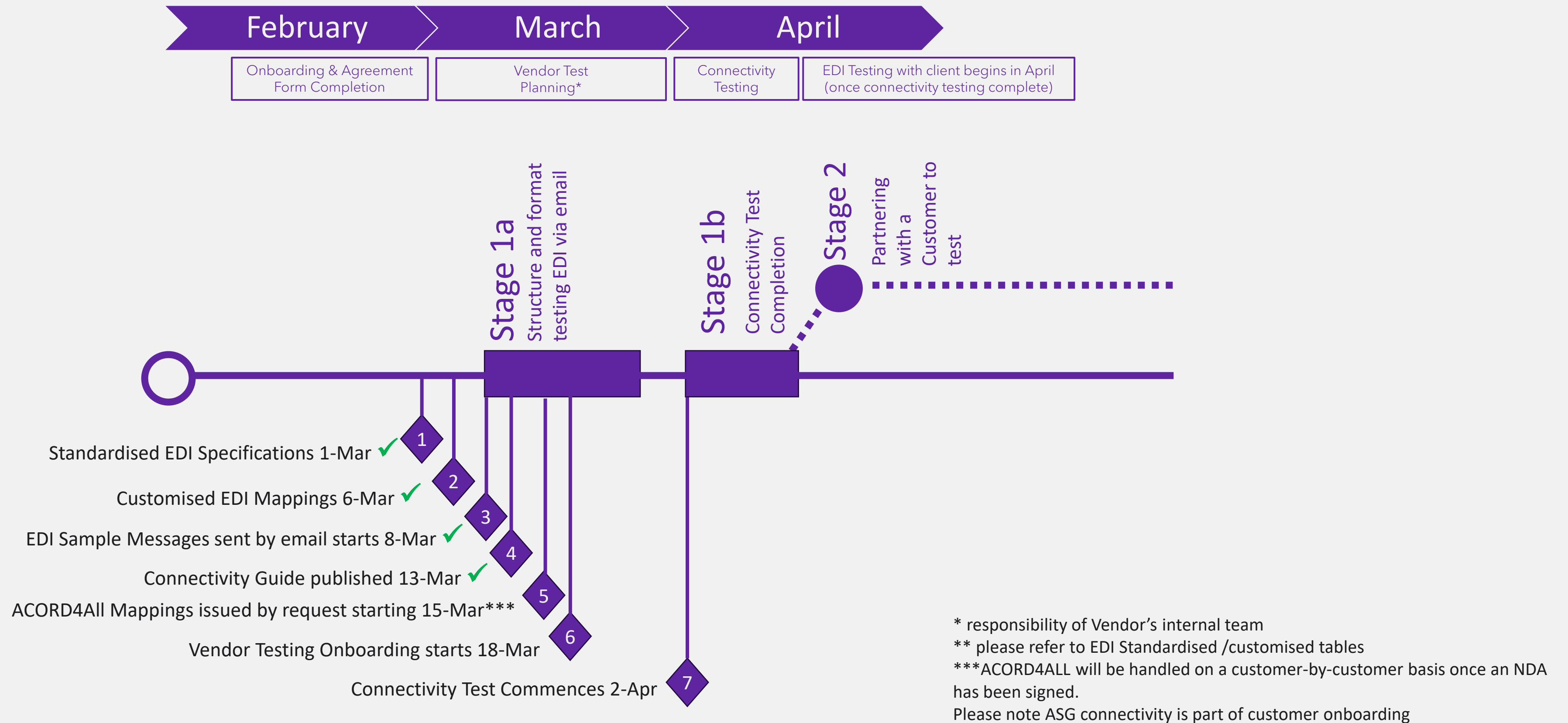
- Structure and Format testing for EDI Standardised messages. Test ability to submit, consume and process messages.
- Connectivity testing aims to ensure that your system can communicate effectively with the ASG Adept system.

Stage 2: Testing scenarios in partnership with a Customer (Optional, not part of Vanguard Vendor Programme)

- Part of the Vanguard/LIMOSS Co-ordinated Customer or Enhanced Customer Testing. Vendor participation is optional.

This pack details the information and support available from Velonetic along with actions for participating vendors at each stage.

Timeline for Vendor Testing



Vendor integration testing is embedded in Customer Testing via connectivity testing

Vanguard's initial phase is connectivity testing, encompassing key vendor testing aspects

Outcomes validated via connectivity testing:

- ✓ Customer systems can integrate to and call the platform endpoints
- ✓ Information can be sent and consumed between the two systems

Illustrated test examples

Inputs	Platform behaviour	Outputs
Authenticate call	Pass/fail	Security token
Pick up file from SFTP site	Provide folder structure with test EDI file	Test EDI file

Coverage of vendors serving majority of market via Vanguard's participants

We believe majority of key technology vendors are represented through their customers in Vanguard, including but not limited to

- DXC
- Webcon
- AdvantageGo
- Verisk
- Eurobase
- Ebix
- GPM
- Novidea
- Docosoft
- Guidewire

... and additional self-build solutions



- Technical integration across major vendor platform verified via connectivity testing
- Further vendor connectivity testing enabled via ASG gateway (already accessible)
- New workstream for vendors to be established within Vanguard to
 - Enhance vendor visibility into testing
 - Improve vendor coverage for technical integration

Overview and Approach of Vanguard Vendor Testing

STAGE 1 - Recommended for all vendors

Pre-go-live activities recommended to all vendors to ensure readiness. Includes test connectivity and data structure of standardised EDIs.

Within scope of Vanguard Vendor Testing

Will be carried out in two parts: 1a and 1b

1a EDI messages Testing:

- Send a sample EDI - Check Structure is accurate and correct format and can be consumed in the test environment.
- Suitable for vendors using EDI Standardised message.

1b Connectivity Test Data Structure Validation Test

- Suitable for all vendors wanting to test connectivity.
- Can begin once onboarded into ASG.

Actions required from both Velonetic and Vendors to progress through Stage 1 and ready for Stage 2 are detailed in the next four slides

Stage 2 - Options to expand testing scenarios:

Optional for vendors who wish to test extra functionalities **alongside their customers.**

This is outside Vanguard Vendor Testing scope

3 routes depending on vendor requirements: testing scenarios depend chosen route

A Partner with a Vanguard Participant

- Partner with a Vanguard participant customer to perform required E2E tests.
- You will coordinate your test directly with your chosen customer.
- Using Vanguard participant data to check and validate scenarios.

B Partner with LIMOSS Coordinated Customer testing

- Suitable for vendors without access to a Vanguard participant and open to any vendor wanting to test with their customers.
- Enables vendors to partner with other market participants to test Velonetic and LIMOSS defined E2E processes through scenarios.
- Potential requirement for vendors and their customers to produce test data if unavailable in the testing environment.
- LIMOSS will support with customer coordination for testing.

C Partner with an Enhanced Customer Testing Member

- Chargeable testing of scenarios tailored to vendor requirements in conjunction with your customer.
- You will create all the data needed to perform your tests.
- Velonetic will provide training material where/if possible/available.

Preparation for Stage 1

February

Onboarding & Agreement
Form Completion

Stage 1a

Structure and format
testing EDI via email

Velonetic Actions

1. Send Beta Agreement and Onboarding forms to all vendors. (Complete)
2. Once Beta Agreements and onboarding requirements have been received, we will arrange a drop-in sessions with vendors to discuss Stage 1 testing. Virtual session will be available if required.
3. Onboard vendor into the system (30 days).
4. Liaise with vendor and troubleshoot.

Vendor Actions

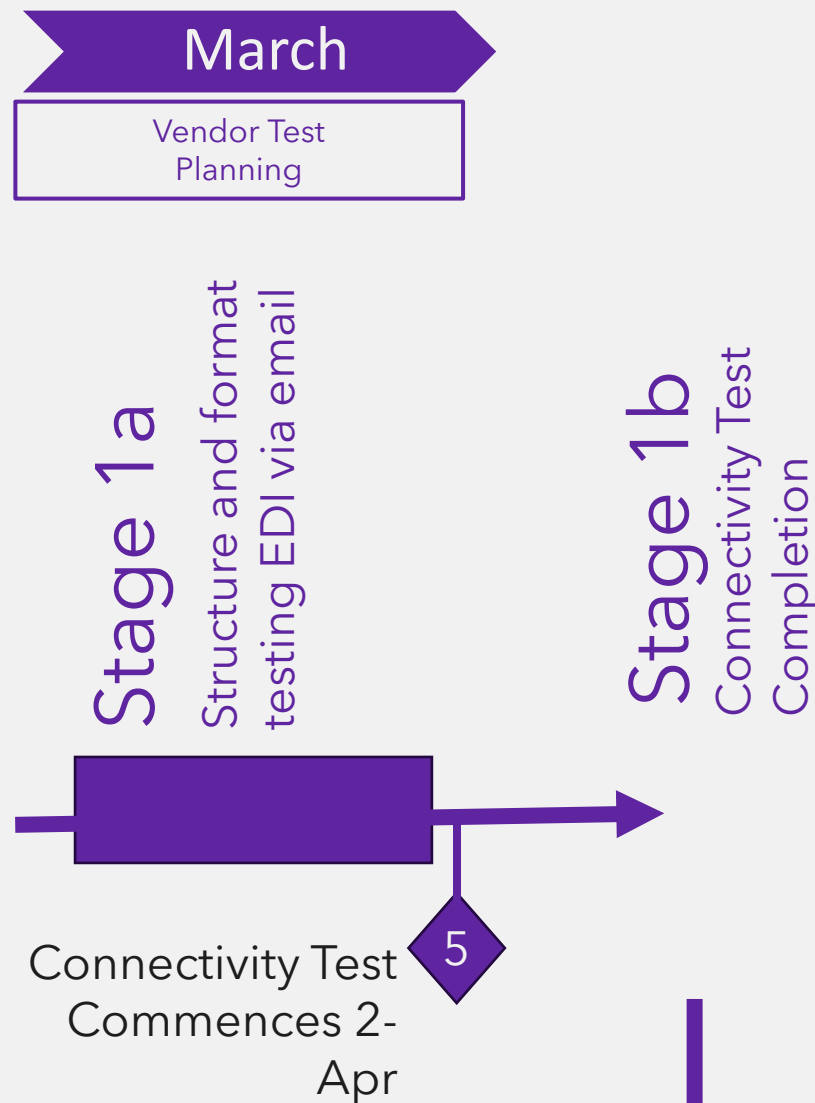
1. Carefully review and understand all documentation provided such as scope, agreements, onboarding forms, specs, etc.
2. Sign the Beta Test Agreement by 01/03/24.
3. Fill the Onboarding forms and send them back by 01/03/24
4. Provide an email address where you want to receive the EDI message (if applicable).

To move to Stage 1a:

- Scope, specs and onboarding requirements read and understood
- Beta Test Agreement Signed & returned
- Onboarding forms completed, returned and checked
- Drop-in session/Virtual session - Stage 1 testing
- Email Address for EDI receipt provided (if applicable)
- Vendor Onboarded into the system

Stage 1a:

EDI Standardize Structure and format testing via email message



Velonetic Actions

- Send required EDIs as per release schedule.
- We will send the messages in 3 batches as per schedule.
- We will liaise with your test team and hold a pre-start meeting to discuss Stage 1b.
- Liaise with vendor on defect management and troubleshooting.

Vendor Actions

- Confirm you have received the EDI message, provide feedback on the file(s) received and sign off Stage 1a
- Set up your test team.
- Carefully review and understand the *Velonetic-IPOS-ICOS Connection Guide* published on the Velonetic website.
- Set up your environment and prepare for connection.

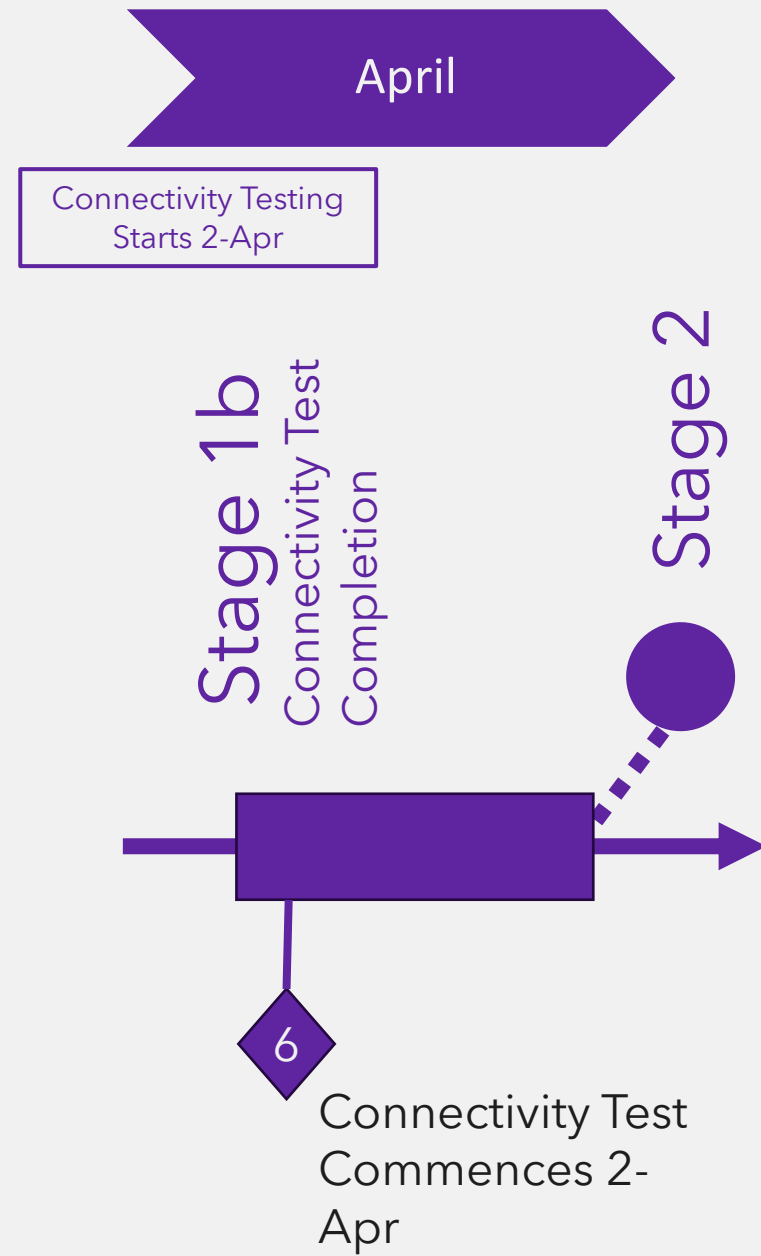
To complete 1a and move on to 1b:

- EDIs sent to vendor as per schedule
- Confirmation that EDIs have been received, feedback provided
- Test team in place
- Environment preparation
- Stage 1b planning meeting held

EDI Sample Messages Sent by Emails

Standard EDI	Sample file available
ILUCSB	08-Mar-24
WSETT	08-Mar-24
DSIGN	08-Mar-24
MCM	08-Mar-24
BSM	08-Mar-24
IPCBSM	08-Mar-24
ILUCSM	08-Mar-24
SCM	08-Mar-24
ILUCST	20-Mar-24
IPCCSM	20-Mar-24
USM	20-Mar-24
IPCDSM	20-Mar-24
LIMCLM (CLMLRC)	28-Mar-24
LIMCLM (CLMILC)	28-Mar-24
LIMRIS (Carrier)	28-Mar-24
LIMRIS (Broker)	28-Mar-24

Stage 1b



Velonetic Actions

- We will onboard you into testing environment.
- We will provide you with credentials to connect to the system.
- Coordinate with vendor’s test team to establish the testing framework, including testing requirements, environment set up and configuration.
- Sign off connectivity test and data structure (if applicable) with the vendor.

Vendor Actions

- Ensure that your network configurations are properly set up to allow communication between your systems and ASG Adept
- Login into ASG and confirm connection. You’ll be able to see and access your required folder(s).
- Identify the data exchange formats you need to test and test them.
- Verify that the data mapping between you and the system is accurate.
- Provide feedback and sign off Stage 1b
- Plan your approach to Stage 2 - if required.

To complete stages 1b:

- Network configurations set up to allow comms with ASG
- Onboarding to the test environment complete
- ASG Connection confirmed
- Testing complete and signed off
- Plan your approach to stage 2 - if required

Preparing for Stage 2:

Velonetic Actions

- Velonetic’s level of support will depend on the chosen path.
- Provide test root scenarios for guidance.
- Depending on the chosen path, support and liaise with vendor on scenario testing, defect management and troubleshooting.

Vendor Actions

- Choose your preferred path, your activities will depend on this path (please refer to slide 5)
- Clearly define your messages requirements with your testing team. Understand the data you need to produce and what stages you want to test.
- Based on your preferred path, plan to partner with a broker/carrier to test if required.

Before commencing Stage 2 (if intending to progress to Stage 2):

- Plan your approach to Stage 2
- Define message requirements and understand test data needed
- Arrange a customer partner to test with (if required)
- Velonetic level of support will depend on the chosen path.

EDI Testing with client begins in April (once connectivity testing complete)

Stage 2

Partnering with a Customer to test



Key Takeaways and FAQs

March 2024

Key Vendor Takeaways

For those who are testing as part of the Vendor Programme, get ready: sign the agreement and complete and return your onboarding form.

- Stage 1 is about interface testing, testing connectivity and ability to submit/consume and process Standardised EDI messages.
- We will send a Standard EDI message via email from the 8th of March to check structure and Format.
- Stage 2 will be part of the Vanguard/LIMOSS Co-ordinated Customer or Enhanced Customer Testing. Vendor participation is optional.
- Scenario testing with EDI messages, Write Back, CWT and DRI are part of Stage 2.
- For High-Level Root Scenarios, please request access to our Vendor SharePoint site [here](#)

FAQs:

What is Vendor Vanguard Programme?

The Vanguard vendor programme is an initiative to test interphase with a selected group of vendors.

What specific elements will be tested?

The testing consists of a series of connectivity, inward/outwards message testing based on the release schedule and before the system is ready.

My client is a Vanguard member, am I part of the Vendor programme?

Not always. We have selected our participants based on specific criteria. Please contact your engagement partner for more information. You should only contact the vendor programme if you are a vendor.

Why haven't I been included in the Vanguard Vendor programme?

The programme is aimed to cover specific requirements that you may not need or use at this stage.

I've been chosen for the Vanguard Vendor programme. Do I have to perform individual tests for each client?

No, the objective is to optimize the workflow by engaging suppliers that serve various carriers and brokers. This approach allows us to efficiently execute a unified test, benefiting multiple clients concurrently, rather than conducting individual tests for each

I have been selected for the Vanguard Vendor program as a vendor; do I need to participate in the programme?

Participation in the program is not mandatory, but we highly encourage it if you've been invited. If you choose not to participate, please confirm your decision with our team.

I've been selected but prefer not to participate in the program. Can I still stay informed about ongoing developments?

We provide regular updates to suppliers and vendors via your engagement partner, please contact [Marek Baldy](#) for more information on the vendors.

My client is a Vanguard participant - What should I do to get ready for the July cutover?

As a vendor you should be have a clear understanding of the messages you consume and check them against the specifications released on our website for specific messages.

I'm not a vendor but a Vanguard participant, can I have my vendor added to the programme?

No, the objective is to optimize the workflow by engaging suppliers that serve various carriers and brokers. This approach allows us to efficiently execute a unified test, benefiting multiple clients concurrently, rather than conducting individual tests for each. However, if you want to discuss in further details, contact your Vanguard representative

As a Vanguard participant utilizing various vendors, if one of my vendors is already part of the program, can I request to include all my vendors in the program?

No, the objective is to optimize the workflow by engaging suppliers that serve various carriers and brokers. This approach allows us to efficiently execute a unified test, benefiting multiple clients concurrently, rather than conducting individual tests for each. However, if you want to discuss in further details, contact your Vanguard representative

I have more questions, I'm a vendor.

If you have any questions related to the Vanguard vendor testing programme, please contact Marek Baldy.

I have more questions, I'm a Carrier/Broker.

If you have any questions related to the Vanguard Vendor testing programme, please contact your [Engagement Partner](#).