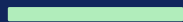




RELEASES OCTOBER 30, 2026

Analytics Redesign Reference Guide



What's changing, where to find it, and how to explain it to clients



A new Analytics experience, same data

The redesigned LineSlip Analytics goes live on **October 30, 2026**. Every Analytics page gets a modern, cleaner look, a single left-hand sidebar for navigation and controls, and new ways to set dates, filter and change how visuals behave.

The data, data model, calculations and the visuals themselves are unchanged. What changes is where controls live and how users interact with them.

44

pages updated
with the new
design

6

new pages

3

unused pages
retired

0

changes to data
or calculations

WHY THE CONTROLS MOVED



Clean screenshots

With every filter in the sidebar, users can capture a page's main content without cropping out controls.



Ready for Presentations

Sets up the upcoming Presentations enhancement: exportable decks built from AI Chatbot data and Analytics pages.

What's changing

01

New design

Refreshed layout and cards on every page

02

Page navigation

Pages menu with names and descriptions

03

New sidebar

One home for every control

04

Date Controls

Calendar, relative and page-specific date options

05

In Force vs Custom Date Controls

Policy Period toggle in Calendar Options

06

Filter grouping

Five labelled filter groups

07

More filter options

New fields to filter on

08

In Force Snapshot

In-force premium, limits and 90-day renewals

09

Interactive options

Page-specific visual settings

10

No top-of-page filters

More room for visuals

11

Single Year / Historical

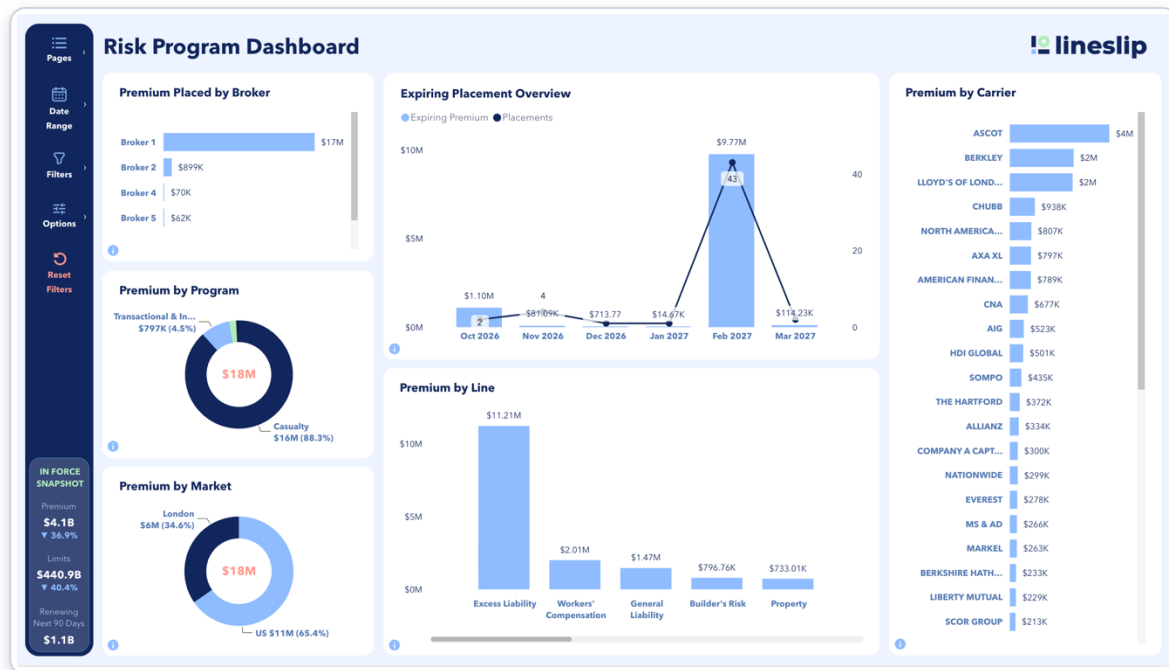
Program View and TCOR Comparison toggles

Visuals get the whole page

- Every Analytics page uses the same card-based layout.
- Page title on the top left, sidebar on the left edge.
- Filters no longer sit across the top, so visuals get the full width.

Say it to clients

"Everything you used to click around for is now in one place on the left."



Find any page from one list

Pages in the sidebar opens every page the client can access.

Each entry shows the page name and a one-line description, so users find the right page without opening each one.

1

Click Pages

Top of the sidebar

2

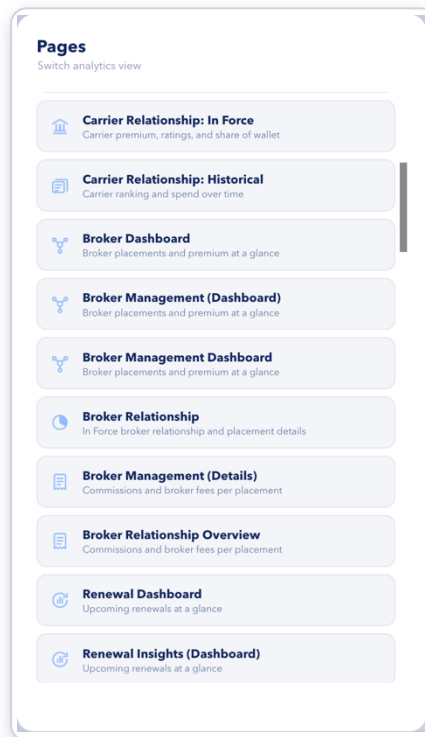
Scan names and descriptions

Scroll for more pages

3

Click a page

The page opens instantly



One sidebar on every page



Pages

Switch to another page



Date Controls

Always the second button: Calendar Options on most pages, In Force Policies or Variance Options on a few



Filters

Grouped filters; the number on the button shows how many are applied



Options

Page-specific display settings



Reset Page

Shows only after a change in Calendar Options, Filters or Options; resets the page to its default

Closing a menu: click the same sidebar button again, or click anywhere on the page outside the open menu.



IN FORCE SNAPSHOT

Premium, limits, and premium renewing in the next 90 days for the client's in-force book.

Key point: in force only

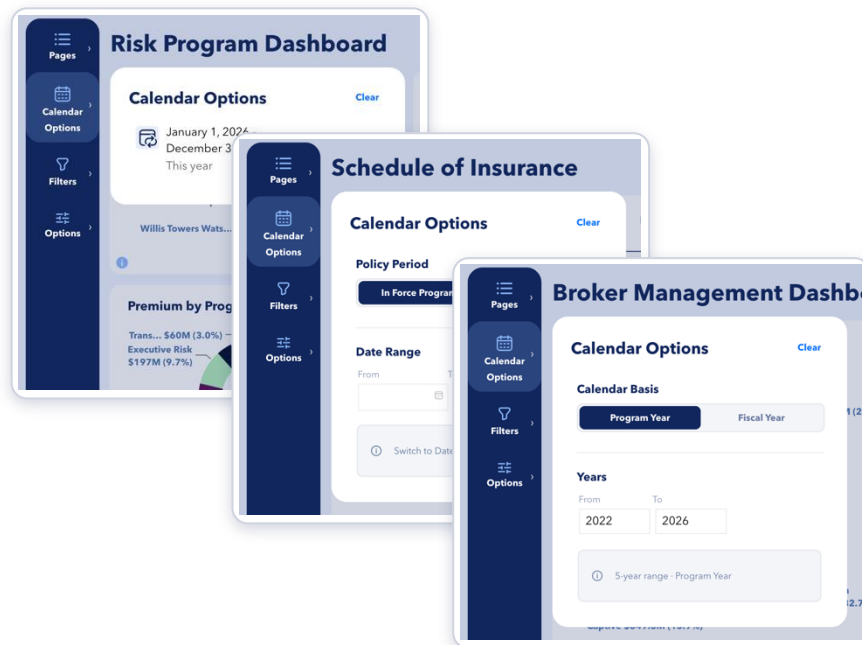
Filters and Options settings change its values. Date controls don't, because it always shows in-force policies.

One button, a panel that fits the page

On almost every page the second sidebar button is **Calendar Options**. It always sits in the same spot; what opens inside depends on the page.

- 1 Date picker** Manual calendar or Relative period
- 2 Policy Period** In Force Program or Custom Date Range
- 3 Program View** Switch between paired in-force and historical pages
- 4 Calendar Basis** Program Year or Fiscal Year, plus TCOR Comparison on TCOR Summary
- 5 Year controls** A year range or Year dropdown on its own

A few pages differ: an **In Force Policies** label (4 pages), date selectors inside **Variance Options** (Policy Analyzer), and no date control on Renewal Benchmarking.



In Force Program or a Custom Date Range

On five pages, Calendar Options opens a **Policy Period** toggle.

In Force Program (default)

Policies currently in force. Date fields are greyed out.

Custom Date Range

Unlocks From and To. No dates are preset.

Used on Schedule of Insurance, Counterparty Risk, Spend Details, Broker Relationship and Portfolio Company Overview.

IN FORCE PROGRAM

The screenshot shows the 'Schedule of Insurance' page. On the left is a dark blue sidebar with icons and labels for 'Pages', 'Calendar Options', 'Filters', and 'Options'. The main content area has a title 'Schedule of Insurance' and a 'Calendar Options' section with a 'Clear' link. Under 'Calendar Options', the 'Policy Period' section has two buttons: 'In Force Program' (which is selected and highlighted in dark blue) and 'Custom Date Range' (which is greyed out). Below this, the 'Date Range' section has 'From' and 'To' input fields, both of which are greyed out. At the bottom of the 'Date Range' section is a light blue button with an information icon and the text 'Switch to Custom Date Range to set dates'.

CUSTOM DATE RANGE

The screenshot shows the 'Schedule of Insurance' page with the 'Custom Date Range' toggle selected. The 'Policy Period' section now has 'In Force Program' greyed out and 'Custom Date Range' selected and highlighted in dark blue. In the 'Date Range' section, the 'From' and 'To' input fields are no longer greyed out; they contain the dates '1/1/2026' and '12/31/2026' respectively, each with a calendar icon to its right. The bottom button now says 'This year'.

Switch between paired pages

On paired pages, Calendar Options opens a **Program View** toggle. Choosing the other view opens its partner page; historical pages add a date or year range under the toggle.

PAIRED PAGES

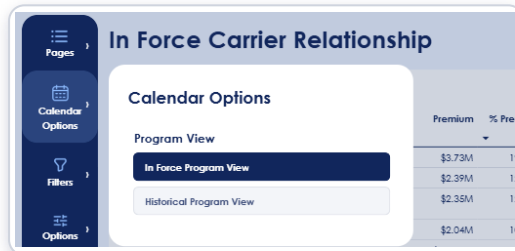
In Force Broker Relationship ↔ Historical Broker Relationship

In Force Carrier Relationship ↔ Historical Carrier Relationship

Program Analytics ↔ Historical Program Analytics

On the Real Estate pair, the toggle reads: Single Year View / Historical Program View.

IN FORCE PROGRAM VIEW



In Force Carrier Relationship

Calendar Options

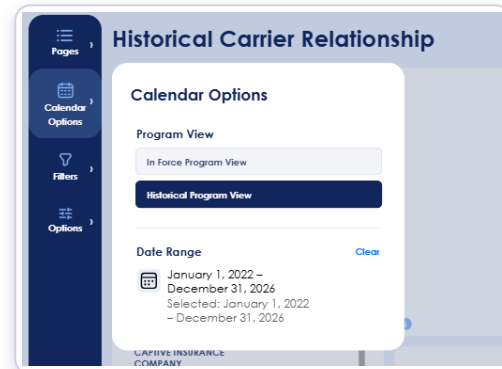
Program View

In Force Program View

Historical Program View

Premium	% Pre
\$3.73M	1
\$2.99M	1
\$2.35M	1
\$2.04M	1

HISTORICAL PROGRAM VIEW



Historical Carrier Relationship

Calendar Options

Program View

In Force Program View

Historical Program View

Date Range [Clear](#)

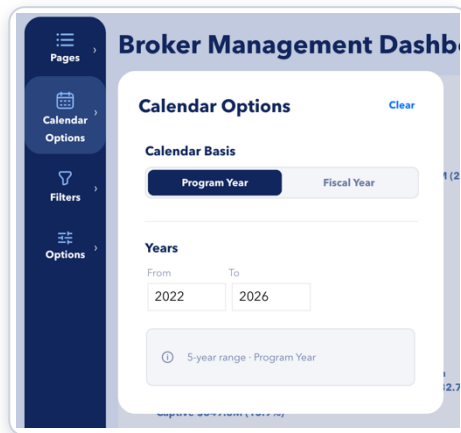
January 1, 2022 – December 31, 2026
Selected: January 1, 2022 – December 31, 2026

CARRIER INSURANCE COMPANY

Program Year or Fiscal Year, then the years

Choose a **Calendar Basis**, then a year range or a single year. TCOR Summary also has a **TCOR Comparison** toggle.

PROGRAM YEAR



Broker Management Dashboard

Calendar Options Clear

Calendar Basis

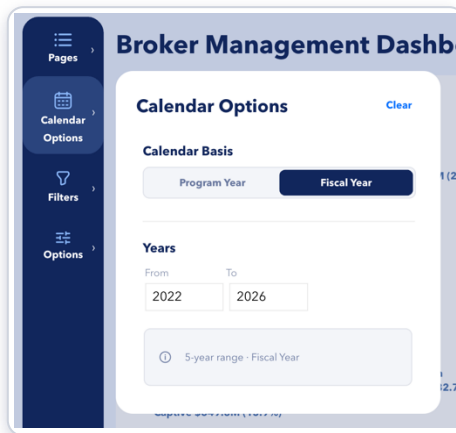
Program Year Fiscal Year

Years

From To

5-year range · Program Year

FISCAL YEAR



Broker Management Dashboard

Calendar Options Clear

Calendar Basis

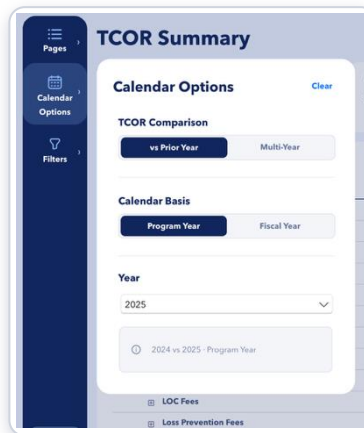
Program Year **Fiscal Year**

Years

From To

5-year range · Fiscal Year

TCOR: VS PRIOR YEAR



TCOR Summary

Calendar Options Clear

TCOR Comparison

vs Prior Year Multi-Year

Calendar Basis

Program Year Fiscal Year

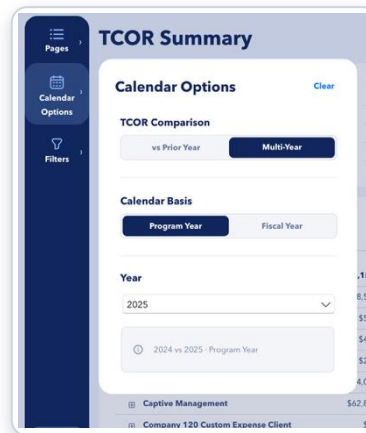
Year

2024 vs 2025 · Program Year

LOC Fees

Loss Prevention Fees

TCOR: MULTI-YEAR



TCOR Summary

Calendar Options Clear

TCOR Comparison

vs Prior Year **Multi-Year**

Calendar Basis

Program Year Fiscal Year

Year

2024 vs 2025 · Program Year

Captive Management

Company 120 Custom Expense Client

Year range on Broker Management Dashboard, Exposure & Rate Report and the six Old TCOR pages; a Year dropdown on TCOR Year-over-Year Bridge and TCOR vs Exposure.

Multi-Year opens TCOR Summary – Historical, which shows each year side by side.

Year-only, fixed and Policy Analyzer controls

EXPOSURE & LOSS Year range only

A from-to year range on Effective Year, with no other options.

4 PAGES In Force Policies

Renewal Planning, Renewal Tracking, Captive Insights Dashboard and In Force Captive Details. A label, not a button: these pages always show in-force policies.

POLICY ANALYZER Variance Options

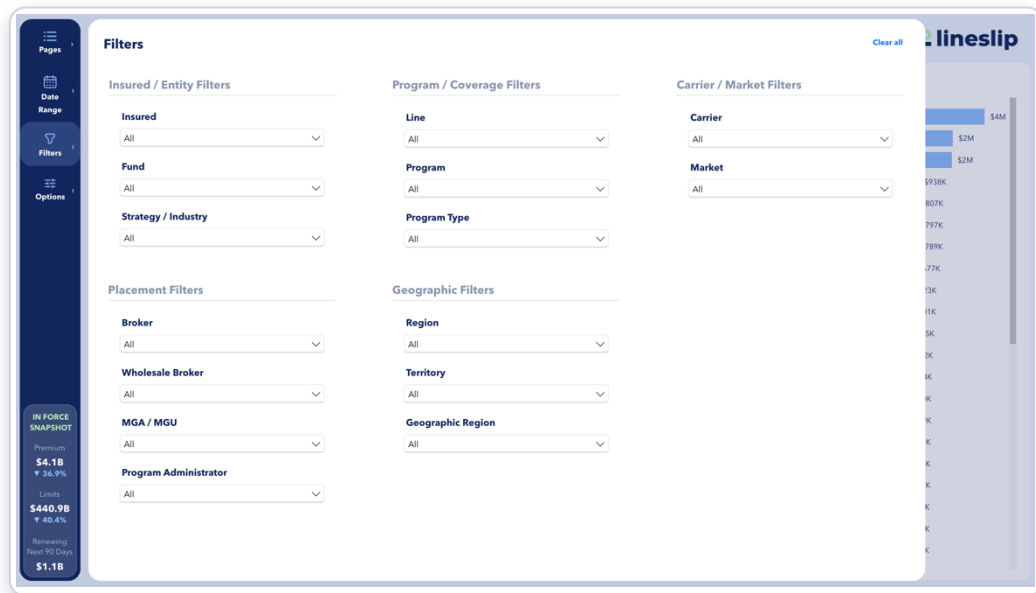
No separate date button. Comparison Year (plus Effective Date on the Summary Report) sits in Variance Options.

RENEWAL BENCHMARKING No date control



Both Renewal Benchmarking views compare peers without a date selection.

All filters, grouped in one panel



Filters have moved off every page and into the sidebar. **Policy Number** is added on renewal and SOI pages; **Captive** sits under Insured / Entity on CAP pages.

1

Insured / Entity

Insured, Fund, Strategy / Industry

2

Program / Coverage

Line, Program, Program Type

3

Carrier / Market

Carrier, Market

4

Placement

Broker, Wholesale Broker, MGA / MGU, Program Administrator

5

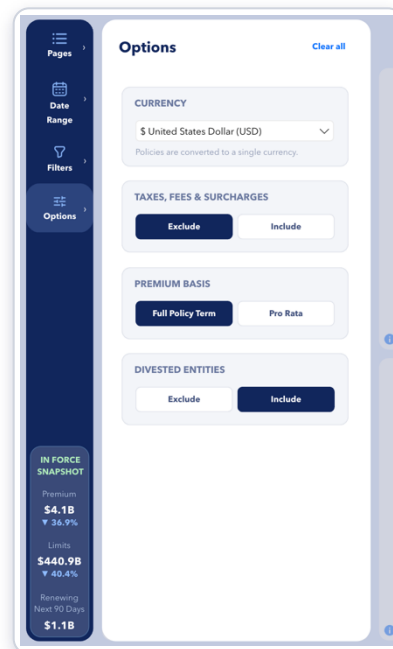
Geographic

Region, Territory, Geographic Region

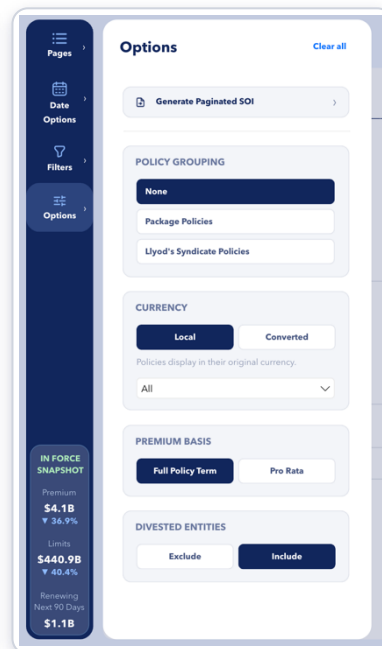
Settings that shape each page's visuals

Setting	Risk Program Dashboard	Schedule of Insurance
Currency	Convert all to one currency	Local or Converted
Taxes, fees & surcharges	Exclude / Include	—
Premium basis	Full Policy Term / Pro Rata	Full Policy Term / Pro Rata
Divested entities	Exclude / Include	Exclude / Include
Policy grouping	—	None, Package, Lloyd's Syndicate
Paginated SOI	—	Generate Paginated SOI

Options vary by page because each page's visuals support different interactions. **Clear all** clears any options applied, including Pro Rata.



Risk Program Dashboard



Schedule of Insurance

Options and buttons unique to certain pages

Display Value As

Millions or Thousands
6 pages incl. TCOR Dashboard

Exposure

Pick the exposure measure or base
Exposure & Loss, TCOR vs Exposure

Display Rate

Per 1000 Sq Ft or Per Door
Program Analytics, Historical Program
Analytics

X-Axis Value

Change what the bar chart measures
Broker Relationship Details

Commission

Document commission or an
estimated %
Portfolio Company Overview

Matrix Grouping

Group the matrix by Carrier or Line
Premium Spend

View

Standard or Detailed timeline
Renewal Planning

Carrier Rating Changes

Opens last-year rating changes
Counterparty Risk

Detailed Limits & Sublimits

Include or exclude sublimits
Coverage Summary

Include

Show Limit or Retention
Coverage Summary

Bridge Category

Isolate one TCOR component
TCOR Year-over-Year Bridge

Generate Paginated SOI

Opens the paginated SOI view
Schedule of Insurance

SIDEBAR BUTTON

Variance Options

Policy Analyzer pages: Insured, Comparison Year, Line
and Document selectors moved here from the top of
the page.

SIDEBAR BUTTON

Exposure Options

Exposure & Rate Report: Insured, Line, Exposure and
Divisor selectors.

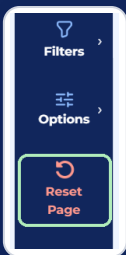
SIDEBAR BUTTON

Back

Drill-through and reference pages return to the page
they opened from and inherit its selections.

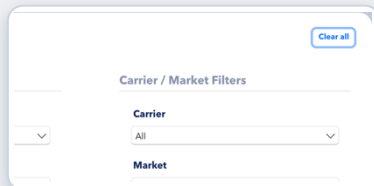
Start over, or clear just one menu

SIDEBAR Reset Page



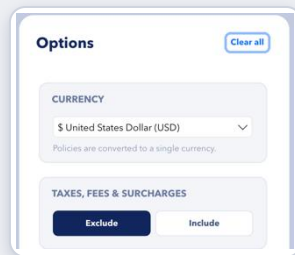
Hidden until a selection is made in Calendar Options, Filters or Options. **Resets everything on the page** back to its default.

FILTERS MENU Clear all



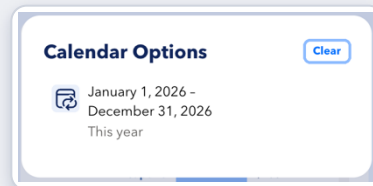
Clears any filters applied. **Date controls and options stay as they are.**

OPTIONS MENU Clear all



Clears any options applied, including Premium Basis (Pro Rata). **Filters and date controls stay as they are.**

CALENDAR OPTIONS Clear



Resets the date control back to its default. Filters and options stay as they are.

Rule of thumb: **Reset Page** starts the whole page over. **Clear all** and **Clear** clear just the menu they sit in.

How fonts display and export

Power BI themes can't load web fonts, so each viewer sees the first font in this list that's installed on their device. Windows users without Montserrat see Century Gothic; Mac users see Avenir Next. The same order applies to all heading and body text. The data and layout don't change; only the letterforms do.

1 PRIMARY Montserrat

The LineSlip brand font. Shown when it's installed on the viewer's device.

2 WINDOWS FALLBACK Century Gothic

Common on Windows. Most Windows users without Montserrat see this.

3 MAC FALLBACK Avenir Next

Built into macOS. Mac users without Montserrat always see this, not Century Gothic.

4 FINAL FALLBACK Arial

Available on almost every device.

EXPORTING

Exported files follow the same order: if Montserrat isn't available where the export is rendered, the PDF or PowerPoint shows the next font in the list instead.

The same page in each font

Risk Intelligence Dashboard, as it appears with each font in the list. If a client's screen looks like versions 2–4, Montserrat isn't installed on their device. (Versions 2–4 are simulated from the Montserrat screenshot.)

1 • MONTSEerrat

Primary



2 • CENTURY GOTHIC

Windows fallback



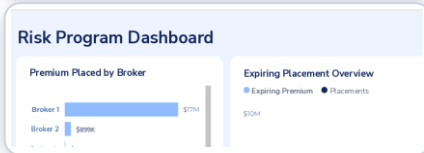
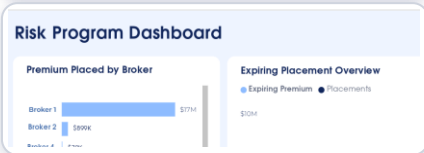
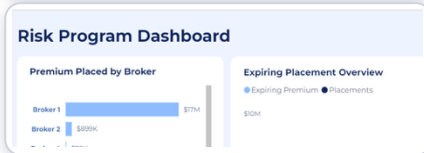
3 • AVENIR NEXT

Mac fallback



4 • ARIal

Final fallback



Sidebar and navigation

How do I get to other pages?

Select **Pages** at the top of the sidebar; it lists every page you have access to.

How do I close a panel?

Select the same sidebar button again, or click anywhere on the page outside the open menu.

Where did the filters go?

Select **Filters** in the sidebar. They are grouped by type: Insured / Entity, Program / Coverage, Placement, Carrier / Market and Geographic, plus Policy Number on the renewal and SOI pages. The number on the Filters button shows how many are applied.

Why does a panel say "Please select ... from the filters menu"?

Some visuals need a single Insured, Broker or Carrier before they show data. Open **Filters** and make the selection named in the message.

How do I start over?

Select **Reset Page** at the bottom of the sidebar. **Clear all** at the top of an open panel clears just that panel.

Why do some pages have no Options button?

TCOR Financial Reporting and TCOR Expenses have no display settings to change.

Why do some pages only have a Back button?

Drill-through and reference pages open from another page and return to it with **Back**. They inherit that page's selections, so they have no Filters or Options of their own. To open a drill-through, right-click a row or data point on the source page and choose **Drill through**.

Does the In Force Snapshot change when I filter?

Yes. Filters and Options settings update it. Date controls don't, because it always shows in-force policies.

Has any of my data changed?

No. The data, data model, calculations and visuals are unchanged.

Dates

How do I change the dates?

Select **Calendar Options** in the sidebar. Pick start and end dates on the calendar (**Manual**) or set a rolling period (**Relative**). Select **Clear** to reset it.

Why do the renewal pages filter differently?

Renewal Dashboard, Renewal Details and Post Renewal Analysis filter on policy **expiration** date and default to the next 12 months.

Do default dates update on their own?

Risk Program Dashboard and Coverage Summary (Multi-Insured) default to **This Year** and roll over each January. The renewal pages roll forward from today. Other pages use fixed defaults.

How do I switch to fiscal year?

Open **Calendar Options** and choose **Fiscal Year** under Calendar Basis, then set the year or year range.

How do I see policies outside the in-force period?

On pages with **Policy Period**, choose **Custom Date Range** and set From and To dates. Choose **In Force Program** to go back.

Where is the date range on historical pages?

In **Calendar Options**, choose **Historical Program View**. The historical page opens with its date or year range under the toggle.

Why can't I change the dates on some pages?

Renewal Planning, Renewal Tracking, Captive Insights Dashboard and In Force Captive Details always show in-force policies. The **In Force Policies** label in the sidebar is a reminder, not a button.

Options and page-specific buttons

OPTIONS

Where are the currency, taxes, pro rata and divested entities settings?

Select **Options**. Currency, Taxes Fees & Surcharges and Premium Basis change how values are calculated, not which policies are included. Divested Entities adds or removes divested entities. Not every page has all four; each page's Options section lists what it has.

Can I show values in thousands?

On TCOR pages, open **Options > Display Value As** and choose Millions or Thousands.

How do I pick the exposure measure?

Open **Options > Exposure** and choose from the dropdown (CM Exposure & Loss, TCOR vs Exposure).

How do I switch between per-square-foot and per-door rates?

On the Program Analytics pages, open **Options > Display Rate** and choose Per 1000 Sq Ft or Per Door.

PAGE-SPECIFIC SIDEBAR BUTTONS

Where did the Insured, Comparison Year, Line and Document selectors go?

On the ANLZ pages, select **Variance Options** in the sidebar. They used to sit across the top of the page.

Where are the Exposure and Divisor selectors?

On the Exposure & Rate Report, select **Exposure Options** in the sidebar; it also holds Insured and Line.

How do I pick a captive?

Open **Filters**; Captive is in the Insured / Entity group. It used to sit in the top bar on the CAP pages.



SUPPORT & ESCALATION

Live October 30, 2026



Questions about the release

Contact your Customer Success Director



Bug reports

Contact your Customer Success Director or support@lineslipsolutions.com

Unlock the power of your insurance data