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	Select My A	ctions	for risks	requiri	ng your	1	User Hannal	Jarvis	
	attention					<u>99</u>	Role Broker		
$\smile$	Blackhole Brokers Ltd					Â	Comp Blackh	ny le Brokers Ltd	
All My Actio	ns Recently Viewed	Templates	Pinned Risks	Labels	Reset Filters	$\sim$	Email broker.	lackhole@wspt.co.uk	
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The new **Contract Library** allows an organisation's users to build a flexible, version-tracked database of clauses, wordings, and standard contract headings for easy repeat use.

This includes building new contracts and templates, ensuring existing ones are up to date, and, soon, inserting into editable contracts.

Users with the new Library Admin permission can open the Contract Library by clicking on their profile icon at the top of the Whitespace Platform and then selecting 'Library' from the drop-down menu.

ACTICIAL TIPE	AGINE		History CO
NFORMATION	• 2	CONTRACT HEADING	CONTRACT TYPE
Core Info	Usage	TYPE	1
			0
litle		Contract Classification: Insurance	All Tags
Reference		Description: All Dirici of Division loss or domone including Boller and Machinery Breakford	Class Of Business 😡
SEN_CONTRACT_M	IRCV-CT	Entering and injuries only an another second groups and an entering of a second second	Insurance Type 🛛 🗸
3			Lloyds Generic Class Of Business @
Section Heading RiskDetails			Perils Included 🛛 🗸
Contract Heading			All Risks Machinery Breakdown
Tag Category			Perils Excluded @
Гуре			Proportional Or Non-Proportional 🔞
Class of Business			Reinsurance Type 😡
lurisdiction			Retrocession @
anguage			Treaty Or Facultative 😡

The Line Item display shows the item's metadata in the leftmost '**Information**' panel, its Item type and how it appears when used in a Whitespace template/ contract in the central panel, and its detailed Defined Data tag fields and values in the rightmost panel, titled with the tag category it is mapped to.

Active Items are available for use in the Contract Builder. Some information can be updated. Click the 'Pencil' icon to open editable fields. To otherwise edit it, pick 'Edit as New Version' in its 'Actions' menu. When saved as Active, its version number increases and the old version is deprecated.



The main screen of the Library lists any "Line Items" – standard contract headings, clauses, and wordings – that have already been added to your organisation's library collection. This list can be searched and filtered at the top of the page.

The Line Items are shown in modification date order. Each entry shows the title, reference code, other key identifying details, and the status. To view an active Line Item, click the 'Actions' button and select 'View/Update Information'. To access a draft Line Item, select 'Edit Line Item'.



Since underwriters do not typically originate contracts, underwriter users do not see the 'Build' category, nor do they see the option to create a new Layout Guide, and on the main Library page (see figure (1.2) above), the 'Layout Guides' tab is hidden.

To add a new entry to the Library, first click on the blue 'Create New +' button in the Contract Library top bar to open the page shown above. To add a Line Item manually, click 'Line Item' (see 2.1 overleaf), or to import one, click 'Line Item from Contract/Template' (2.3 overleaf).



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2.

Select Option		<ul> <li>Add Information</li> </ul>		<ul> <li>Creat</li> </ul>	10	
		CREATE	NEW LINE ITEM O			
CORE INFORMATION						
Title* 🛛		Reference*	Line Item Type*		Valid From Date*	
NA Property Premium, TRIA	excluded	NA-PROx-Premium-GSV	Standard Heading	~	06 Dec 2024	
Section Heading*		Contract Heading*	Tag Category*			
Risk Details	~	PREMIUM	Premium	~		
Clause Type	~	Language Erglish × ×				
USED IN (OPTIONAL)						
		Group Names O				
Teams	~	US Prop Fac Cert X PM_VARUTION X clause #				
PROPERTY ×		2024 × G8V Contract ×				
PROPERTY ×						
Teams PROPERTY ×						

Title and Reference in Core Information' are only used within the Library, and are vital for filtering, so really do need a standardised approach. Other data n that area describes the Item's uses.

n the optional data, the 'Group Names' field allows free-text labels to associate related tems clearly.

Manually-created new Line Items require several pieces of key metadata ('CORE INFORMATION') to enable retrieval and manage placement in new documents. Optional information can also be critical for filtering as libraries grow. Provide as much data as possible, then click 'Proceed'.

<ul> <li>Select Option</li> </ul>		<ul> <li>Select Contract/Te</li> </ul>	mplate	<ul> <li>Ar</li> </ul>	dd Information		Create
		SE	ARCH FOR CO	ONTRACT/TEMPL	ATE 9		
	Placement Type		Risk Name		Unique ID		
	Full Contract ×	~					
	Contract Type		UMR		Status		
	Open Market ×	~			Firm Orders X	~	
	Teams						
		~				Clear Search	
Risk Name		Status	Contract Type	UMR	Team	Owner	Inception Date
Artemasia Retail Co.		Firm Order	Open Market	B0999GM0601231025	All	Gall McNeillie	01 Mar 2022
Ableforth Property Inc.		Firm Order	Open Market	B0999GM123456	All	Gail McNeillie	01 Aug 2019
ABC Company Ltd 2023		Firm Order	Open Market	B0509FINFP2550006	All	Gail McNeillie	25 Jan 2025

The list of Platform contracts can be filtered from the '**Search**' panel – by name, UMR, ID (38character string before any :: limiters in the URL), by placing status, by contract or template, by contract type, and/or by teams that can access it.

Please note that it is not possible to search by text appearing in the contract.

When adding a Line Item from an existing template or contract in the Whitespace platform, a list of all templates and contracts visible to the user is shown to select from. This list can be filtered in multiple ways. Click on an entry to proceed.



The Line Item's contract heading and tag category are taken from the 'Core Information'.

Draft line items can be edited later but not used; active line items can be used, but not edited. Select your save option accordingly.

When manually creating a new Line Item, the editor is empty, and is identical to editing on the Platform. Type or paste the text of the new Line Item, or upload a PDF or Word Document with 'Digitise', then tag and format. When ready, click 'Save as Draft', 'Save as Active', or 'Discard'.

NFORMATION	Risk Details	Underwriters	Created / Shared Date
Risk Name Artemasia Retail Co.	Firm Order		29 November 2024 12:22
Status Firm Order	O Draft		29 November 2024 12:22
Type Open Market			
UMR B0999GM0601231025			
Team All			
Owner Gail McNeillie			
Inception Date 01 Mar 2022			

Various items of data about the selected template or contract are shown in the lefthand '**Information**' panel, including its name, owner, team, and UMR. This information can help you ensure that you are importing the correct document.

Along with the contract or template's metadata, this page shows all the different contract stage documents held within the contract record. Click on the chosen document and then press 'Proceed' to continue.



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Soon, we are making it possible to import an entire template or contract in one go. Note that all of an imported template's Line Items will then be fully tracked against the Library.

This ensures that down the line, it is trivial to keep even repeatedly-cloned contracts up to date.

The template or contract you are importing from is displayed on the screen, broken into individual Line Items. Navigate to the one you wish to import, tick it, and then click the 'Add Headings to Library' button.

Select Option	Select Contract/Template	Select Line Item	Add Information	⊙ Create	
REATE NEW LINE ITEM: 0					
	CONTRACT HEADING		ΞΞ	NOTICES	
Core Info Usage NOTICES:			1 +		
Title	BIUA EEEE EEE	■ 10x : 00 ▼	Diatise 위	0	
Reference BM0303-CON-NAX-2024 Version 1 Section Heading Risk/Details Contract Heading NOTICES: Tag Category Notices	ICXE For straphic lates or Saff Processed who are off.         LMX0116 Program Voltage Professor of Transition Intel LMX0116 Program Voltage Professor of Transition Intel PDXC For Subject Lines)	ring TRA) unnor Overage, as attached. Jests here alled in the title of the classes joks ", as attached." In t distants nection using LWR to cotain classe text (ar g TRA)	Na section. Hend to fort Actal <u>11 unless specifically.</u>		
Class of Business Casualty Treaty	To insert a table, copy and paste the source table into export neatly.	the desired position within the text box above. Please	note that unusually wide tables may not		
Sub Class					
Tag Category Notices Class of Business Casualty Treaty Sub Class	None To insert a table, copy and pasts the source table into export relativ.	the desired position within the text box above. Please	note that unusually wide tables may not		

If you are not finding necessary data tags in the right-hand pane, update the tag category ('**Conditions**', here) by choosing another in the Information panel. Note this may reset some other data. Tagged data items can be set to have their values ignored when checking if contract items match their Library item.

In the editing screen, format and revise text and data tags as necessary. Remember that all defined data tag fields accept three question-marks ('???') as a placeholder value. Click 'Save as Draft' or 'Save as Active' to proceed, or 'Discard' to abandon the import.



Please note that some core metadata cannot be edited once a Line Item is set as '**Active**' – Reference, Line Item Type, Section Heading, Contract Heading, Tag Category, and Clause Type.

To update these, a new version of the Line Item has to be created, deprecating the old version.

Some items of metadata are pre-populated from the template or contract that you are importing from – Line Item Type, Section Heading, Contract Heading, Tag Category, Teams, and Group Names are all retrieved, but can be changed. Fill in other data and click 'Proceed' to continue.

Select Option	Select Contract/Template	Select Line Item	Add Information	Create
1 Line Items have been identified Please compare each one to its o matched Line Item to support fut	as potential duplicates. corresponding potential match(es) and choose whether to ad are search capabilities.	i new headings to the Library as new duplicate Line	Item(s) or to add supporting information (such as	Team and Template Name) to the selected
EW MATCHING HEADING	S: 0	EXISTING MATCH	ING HEADINGS:	
Notices - BM0030_NA_CAS-N	Add info Dupli	cate Ignore A55/7W - Markham		•

Contract Libraries can quickly become extremely large, so as a rule of thumb, it is better to add extra metadata to an existing Line Item rather than to add a new identical copy.

If this screen does not show, there is no duplicate item, and the new Line Item is created.

If the new Line Item's text and tags are identical to an existing one, the screen above is displayed. 'Add Info' adds the item's metadata to the existing item. 'Duplicate' creates the new item anyway. 'Ignore' does not add the item. Select the appropriate option and click 'Proceed' to create the item.



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