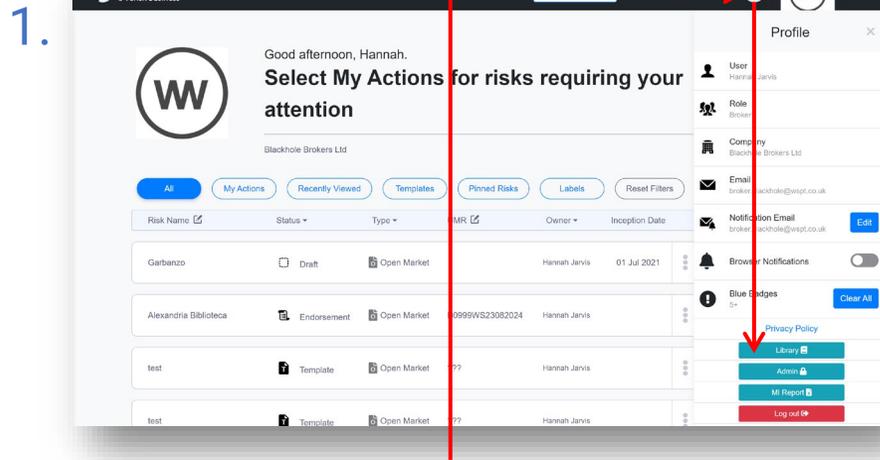


The Contract Library – page 1 of 3



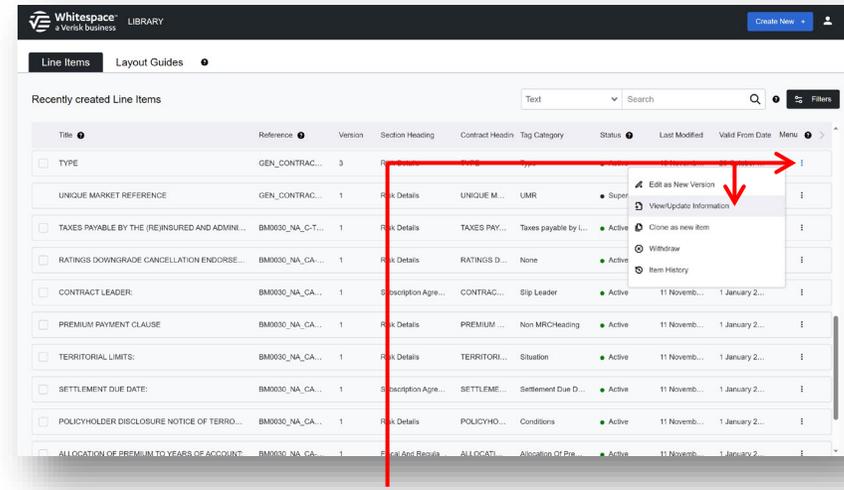
1.

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.

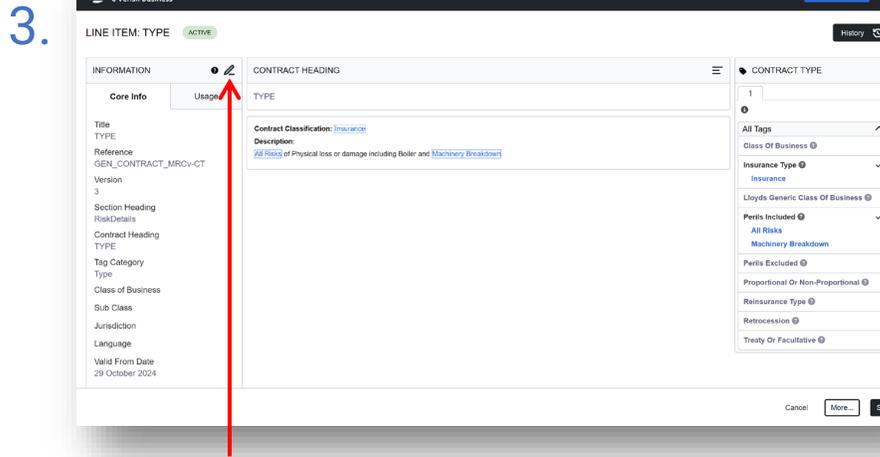
Users with the new Library Admin permission can open the Contract Library by clicking on their profile icon at the top of the Whitepace Platform and then selecting 'Library' from the drop-down menu.

2.



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'.

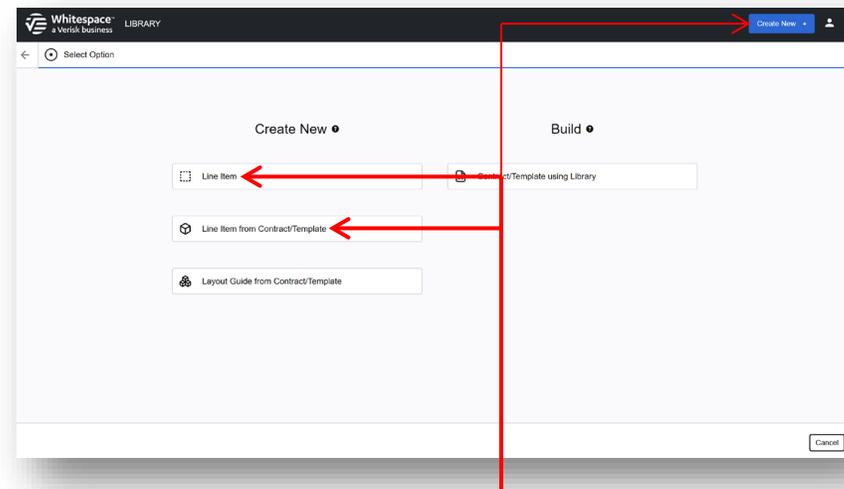


3.

The Line Item display shows the item's metadata in the left-most 'Information' panel, its Item type and how it appears when used in a Whitepace template/contract in the central panel, and its detailed Defined Data tag fields and values in the right-most 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.

4.



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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1.

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 in that area describes the Item's uses. In the optional data, the 'Group Names' field allows free-text labels to associate related Items 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'.

2.

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'.

3.

Risk Name	Status	Contract Type	UMR	Team	Owner	Inception Date
Artemasia Retail Co.	Firm Order	Open Market	B0599GM0501231025	All	Gail McNeillie	01 Mar 2022
Ableforth Property Inc.	Firm Order	Open Market	B0599GM123456	All	Gail McNeillie	01 Aug 2019
ABC Company Ltd. - 2023	Firm Order	Open Market	B0509F-RNP250006	All	Gail McNeillie	25 Jan 2025
ABC Company Ltd. - 2024	Firm Order	Open Market	B0509F-RNP250006	All	Gail McNeillie	25 Jan 2024

The list of Platform contracts can be filtered from the 'Search' panel – by name, UMR, ID (38-character 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.

4.

Risk Name	Status	Type	UMR	Team	Owner	Inception Date
Artemasia Retail Co.	Firm Order	Firm Order	B0599GM0501231025	All	Gail McNeillie	29 November 2024 12:22
Artemasia Retail Co.	Draft	Firm Order	B0599GM0501231025	All	Gail McNeillie	29 November 2024 12:22

Various items of data about the selected template or contract are shown in the left-hand '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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1.

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.

2.

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.

3.

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.

4.

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.