Whitespace Platform

Release Notes v2.20.0

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Headlines

Template managers can now make templates available to multiple teams.
Brokers can select how visible underwriters' stamps are to other underwriters on the same contract.
It is now possible to add sections to an unsectioned Bindable Quote or shown firm order.

Release Details

Sharing Templates Across Teams

Template Managers may now give multiple teams access to specific templates, allowing brokers on all those teams to access the template as if it were native to their team. This allows Template Managers to update a single template document and be confident that their changes are correctly propagated to all appropriate users.

- Template Managers see a new 'Shared With Teams' button when viewing a template's text. Click this to show and/or edit sharing. Note that team membership is not required to share a template with that team.
- Templates are not duplicated to the new team, the team's access to them is added, so editing the template changes the document for all teams equally.
- Team access to a template can be removed by a Template Manager so long as at least one active team retains access.
- Brokers who are in multiple teams that have access to a given template can chose which of their teams to clone the template into as a new contract.
- Template Managers are able to clone a shared template to a new template native to their team.

Stamp Visibility Options

Brokers can choose how visible underwriters' stamps are to other underwriters on all types of contract. On declarations, followers can always see their facility leader's stamp, and the broker retains full visibility of all stamps at all times. Visibility settings can be set as mandatory, allowing control at the organisational level.

- Stamp visibility settings are shown below the contract's 'document' icon on its overview page.
- The levels of visibility are:
  - All stamps visible to all participants.
  - Contract leader's stamp/s visible to followers, but followers' stamps not visible to each other or to leaders.
  - All participants' stamps are only visible to themselves.
- Once the contract has been shown, stamp visibility options cannot be revised except when moving from a Bindable Quote to a firm order.
- Default stamp visibility settings can be selected on a team-by-team basis in the Admin portal. The initial setting is for all stamps to be visible to all participants, as per existing functionality.
- A team's chosen default visibility can be enforced as mandatory. If this option has been activated, the broker will not be presented with the visibility options page when showing the contract for the first time, and the chosen default will be applied automatically to all contracts.
- <u>Please Note</u>: When changing leader via MTPC endorsement on contracts with the "Share Leader's Stamp with Followers" setting applied, the replacement's stamp is not visible to followers until the MTPC is complete. Therefore, brokers must inform followers of the new leader manually before asking for endorsement agreement. After completion, the new leader's stamp will be visible on the signed contract.

Sectioning Bindable Quotes and Shown Firm Orders

It is now possible to retrosection a non-sectioned shown Bindable Quote or shown contract at the firm order stage. This allows brokers to add sections as necessary after the contract has been seen by one or more underwriters, when it is otherwise uneditable.

- The contract can then be assigned sections as normal using the 'Manage Sections' dialogue box.
- Underwriters who have already been shown the contract or written lines on it are automatically marked as having received the first contract section.
- Please note that contracts at these stages are not freely editable, so if section-related text or data tags need to be added to the contract, the broker will need to incorporate those into a contract correction or remove written lines to return the contract to an editable state.

Defined Data Tags for New Contract Headings

Two new standard contract headings with associated Defined Data tags have been added to the Platform, covering clauses and wordings. These additions allow users the flexibility to tag clauses or wordings under their own dedicated contract heading/s.

- The 'Contract Clause' heading provides access to the 'Clause Reference' and 'Clause Name' data tags previously restricted to a small number of contract headings, primarily 'Conditions'.
- Similarly, the 'Contract Wording' heading offers the new 'Wording Reference' and 'Wording Name' data tags.
- Contract headings with no recognised MRC heading equivalent and the defined data option to "Select Tag Category" can have standard contract headings applied as equivalents. This specifically includes unlimited instances of the 'Contract Clause' and 'Contract Wording' headings, providing access to their tags for the non-MRC contract heading and its text.

Enhancements

- Signed Line Values in Mid-Term Participant Change Endorsements
    - When an MTPC Endorsement adds an underwriter or amends an original underwriter's line, it displays the written line percentage.
    - When the Endorsement is completed, the signed lines on the underwriters' stamps are updated on both the MTPC and the latest version of the contract to match the new written line.
    - This ensures that all information is fully consistent, enabling smooth downstream processing.
- Policyholder Contract Heading Automatically Included in Endorsements
    - The 'Policyholder' contract heading and its associated text have been added to the list of contract headings that are automatically included in endorsements if they are present in the base contract.
    - The contract headings included in endorsements, in the order that they appear in the endorsement, are now Policyholder, Insured, Reinsured, and Original Insured.
    - If a contract includes multiple instances of any of these contract headings, only the first is automatically included, as per current functionality.
- Flexible Font Sizes
    - Font size options have been substantially increased.
    - Old font size options were H1 (20pt), H2 (15pt), and N (10pt).
    - When working with new contracts, users can now select from 10, 11, 12, 14, 15, 16, 18, or 20pt text.
- Soft Line Breaks
    - It is now possible to start a new line within a paragraph of text without automatically starting a new paragraph.
    - Press shift-Enter to create a line break.

Resolved Issues

Platform

- API users can no longer use invalid dates, stamp references, outdated stamps, or duplicate stamps when writing or modifying lines.

Browser

- After a written line has been removed, the contract overview now correctly displays this fact to underwriters.
- An underwriter adding a written line to a contract no longer prevents the history timeline from showing other underwriters that a line has been requested.
- Broker messages sent at firm order are no longer being incorrectly included with endorsements.
- Brokers are no longer prevented from reshowing a section to an underwriter marked as leader if that underwriter had previously removed a written line on the contract.
- Brokers can no longer incorrectly remove a facility leader's line on a declaration that has bound agreement party lines.
- Removing all split stamps from a line and then adding a split stamp no longer prevents the line being submitted.
- Users no longer need to refresh the page to see chat messages generated as a system response to taking a custom action.
- Validations correctly run automatically when a broker advances a Bindable Quote to a firm order.
- When a verticalised declaration is shown to multiple contract leaders in different facilities, those leaders can now correctly see all the appropriate stamp information in the history timeline, not just the most recent participant's information.
- When cloning a contract with a tagged UMR, that UMR is now correctly carried over to the new contract.
- When showing a request for quote, changing user team now correctly removes the contract from the deselected team.
- Withdrawing a declaration from a facility leader in order to complete a pending Mid-Term Participant Change endorsement no longer prevents the broker from showing the declaration to the same facility leader again afterwards.

iOS App

- Brokers are now correctly required to show a verticalised declaration to the facility leader before showing it to following agreement parties.
- Brokers are now warned when a declaration line for a non-notify party exceeds the facility agreement line.
- Brokers can no longer change the formatting of text under a locked contract heading.
- Brokers can no longer incorrectly select multiple recipients at an organisation for different sections of the same declaration.
- Brokers can now correctly centre contract headings on draft endorsements.
- Brokers can now correctly see the tagged data in a quoted contract.
- Brokers managing lines on a facility can now see the 'Remove the line' buttons for parties in all roles.
- Declarations advanced from Bindable Quote to firm order now correctly maintain the participation roles of all parties.
- EEA mirror stamps are now correctly categorised as "Lloyd's Brussels" instead of "Other".
- Mirror stamps now correctly display below the main stamp on endorsements.
- Pending requests to quote now correctly display before declined or withdrawn requests to quote on the contract overview.
- Underwriters are now correctly shown in order of participation role on the contract overview of firm order facilities.

Production Installation and Access Guide

iOS App

iOS users will need to upgrade their Whitespace Platform iOS app to the latest version, which is available on the Apple App store. If you experience any difficulty signing in after the upgrade, it may be necessary to delete and reinstall the iOS app.

Browser

The Whitespace Platform on Browser will update automatically. If you are already logged in at the time of the update, you will see a notice requiring you to refresh the page.