

Whitespace Platform

Release Notes v3.1.0

Author: Tim Dedopulos
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Headlines

Defined Data View is a new way for users to immediately see and, where appropriate, edit just the tagged data of a contract.

The Contract Library and Contract Builder have been significantly enhanced, with bulk imports, fuller integration into the Whitespace Platform, and more.

Helpful videos, instructional user guides, detailed functionality manuals and more are now available in-platform via the new Whitespace Knowledge Base.

Facilities can now be shared, allowing multiple broker teams to declare contracts to those panels.

The new PDF Preview allows users to see exactly how a contract will look once exported to a .PDF file in a quicker way and with fewer clicks than the regular export process.

Release Details

[Using Defined Data View to Immediately Access the Tagged Data in a Contract](#)

Accessing tagged data in a contract has required different processes at different stages in the contract life cycle. Defined Data View provides a quick, consistent way of viewing all of a contract's tagged data fields and values. Additionally, it provides users working on editable templates and contracts with a convenient data entry style form to ensure the contract data is fully populated.

- The new Defined Data View is an alternative way of examining a contract that shows the contract's tagged data, including questionnaire questions and answers.
- The listed data is sorted by the section heading and contract heading that each tagged value falls under.
- Groups ('pages') of data tags, and tags with multiple values, show their information in the same order as in the contract.
- Opening the Defined Data View for an editable contract allows the user to easily edit the values of tagged data fields, subject to the normal data validations. Locked tags maintain their usual behaviour.
- Data associated with vertical terms is clearly labelled.
- At the current time, Defined Data View excludes tagged tables, and only displays the parent tag of any cross-reference tags.

[Integrating the Contract Builder and Contract Library More Closely into the Platform](#)

To improve the convenience of the Contract Library and Contract Builder, those systems now offer further integration into the regular functioning of the Whitespace Platform. The Contract Builder can be fully accessed from within the Platform by users with the correct permissions, individual Library Line Items can be inserted into editable templates, contracts, and endorsements, and both the Library and the Builder can draw on Platform contracts and templates to identify matching Library Line Items.

- Broker users with the correct permissions can now access the Contract Builder from within the Whitespace Platform when choosing to create a new contract or template.
- Full Contract Builder integration allows users to search the Library's Line Items and Layout Guides, build a new contract or template (subject to permissions), and save it to the platform.
- Both the Contract Builder and the Library can use filters to show Library Line Items based on the latest versions of contract headings held in a specific contract or template in the Whitespace platform.
- Using the 'Insert Content from Library' feature, the Library's list of Line Items can be fully filtered and searched from within the Platform, and suitable Line Items can be dragged and dropped into any contract, endorsement, or template at any editable stage throughout the placing lifecycle as new/replacement contract headings.
- Inserted Library items retain all their tagging and metadata, including their link to the Library, and can be sectioned/verticalised as required.
- Contract headings linked to a Line Item in the Contract Library display a coloured book icon above their title. Green books indicate that the contract heading and Line Item are identical. Other colours indicate a discrepancy.
- Clicking on the book opens a comparison panel for the contract heading showing exactly how it differs from the original Line Item that it was generated from / linked to.

Expanding the Functionality of the Contract Library

The Contract Library has been significantly enhanced and improved. Whole templates and contracts can have their contract headings imported as Library Line Items in a single operation, the dashboard has been redesigned for increased clarity and functionality, Library contents can be restricted to specific user teams, and contract headings can link to Library Line Items, making it easy to see when they need to be updated.

- The Contract Library's dashboard has been substantially redesigned to improve both appearance and functionality, including a new 'Actions' drop-down menu for Line Items.
- The Library now allows the bulk import of an entire contract or template's Line Items in a single operation.
- When Line Items are imported to the Library from a platform template, the contract headings in the template are automatically linked with the newly-created Line Items, making it easy to keep the template fully up to date.
- Line Items can be locked with exactly the same range of locking options as contract headings in Platform templates and contracts. Library users do not need Template Manager permission to apply template-level locks.
- Library Line Items can be restricted to a single user team, and are invisible to all other teams.
- Contract Library users with Whitespace Platform accounts for more than one sub/organisational entity can make Line Items available to all of the entities that they have active user accounts for.
- Any Line Item or Layout Guide can be exported from the Contract Library as a special JSON file, retaining all metadata. These files can then be imported again as draft Line Items, identical to the exported version. This is useful when transferring Items from one Whitespace environment or Library to another, or if multiple teams need unique restricted access to a particular Line Item.
- Contracts constructed in the Builder can be displayed/copied as a specific API call and full payload, including unique reference IDs for all items involved in the new contract, for use in integrations.

Getting In-Platform Help with the Knowledge Base

Building on the help and information systems in the Platform, the new Knowledge Base collects step-by-step instructions, user guides, detailed manuals, process descriptions, training videos, release notes, and other useful information in a convenient, easy to use system. Material is categorised, filterable, and searchable to make it easy to find the information you are looking for. Documentation of all types is being added to the repository all the time.

- The new Whitespace Knowledge Base allows users to access a wealth of instructional information including video guides, help documents, process descriptions, current and past release notes, and other useful material.
- Information is broken into categories by platform functionality and contract lifecycle stage.
- Detailed filters allow users to rapidly find the help and information that they need.
- An innovative experimental search function helps retrieve useful material.

Sharing Facilities Across Multiple Broker Teams

Facility Agreements provide brokers with a pre-defined market for compliant contracts, subject to the leader's agreement. These facilities have been visible only to members of one specific team, meaning different teams at the same organisation have had to agree their own versions with all the parties or create Off-Platform Facility versions. This new system permits a broker in one team to share a facility agreement with other teams, giving them access to the same markets.

- Users with the suitable permissions can now share facilities and off-platform facilities with other user teams within the same organisational sub/entity. This includes endorsements and attachments present at the time of sharing.
- Members of one broker team do not have visibility of declarations shown to the facility by other teams that they are not members of.
- Adding an attachment to an original master facility that has been shared does not automatically apply that attachment to its shared versions, although such attachments can be shared when any subsequent endorsement/MTPC is completed.
- A Mid-Term Participant Change that modifies the panel of the master facility also modifies the panel of all shared versions once completed.
- It is possible to select an older version of the panel when showing to a shared version of a facility if required.
- Endorsements that change the terms but not the panel are visible to shared versions of the original master as read-only documents once completed.
- Original master facilities can be modified via contract correction, and the correction will be passed to the shared facility versions once completed.
- An original facility cannot be reverted to a firm order once it has been shared.
- In the MI Report, all the declarations shown to a shared facility are fully listed together under the original facility.

Previewing the PDF Version of a Contract In-Platform

Rather than forcing users to go through the process of selecting an export action, choosing export options, exporting a PDF as a file, locating the file, and opening it outside of the Platform to check layouts and other details, the Preview button provides a one-click solution that opens a PDF which shows how the current contract or template will export. To avoid confusion, this document is clearly watermarked.

- The conveniently-placed 'Preview' button when viewing a contract document opens an on-screen .PDF that replicates the appearance of the contract when exported as a .PDF file.
- Settings are duplicated from the Export panel, ensuring proper recreation of the potential exported document.
- The preview .PDF correctly depicts the current state of the contract – including font size, margins, headers, text formatting and alignment, the organisation's logo, page breaks after stamps and contract headings, inline images, references to in-line attachments, and internal review details.
- Supplementary documents such as the actual body of in-line attachments, separated vertical terms, questionnaires, and data supplements are not rendered in the preview.
- Preview .PDFs include a distinctive watermark to ensure that they are not accidentally used as live contracts.
- There may be small layout inconsistencies between the preview and exported .PDF file. Therefore, the final .PDF file being sent to the client should always be checked.

Setting Default Text at the Corporate Level

Organisations that have specific font-size requirements associated with their corporate identity can now apply a default text size for all new text moving forwards. This default size can also be set on a contract-by-contract basis as required, or overridden in the usual text editor.

- Individual organisations can now apply a standard font size for use in all contracts by setting it in the Admin Portal. This standard size can be changed on a contract-by-contract basis as necessary.
- All new text automatically defaults to the specified standard size for that particular contract.
- Existing contracts, templates, and contract headings are not resized to ensure existing layouts are not damaged.
- Cloned contracts and endorsements take their standard font size from their parent by default, but this can then be updated.
- New contracts created by API will use the organisational standard font size unless another value is specified.

Using CDR Tag Field Names in a Contract

Organisations that want to see Lloyd's CDR tag names instead of the default Whitespace tag names when working on a contract can toggle tag fields to use those names as required, making it easier to ensure accurate compliance with CDR requirements.

- The tag field names displayed in a contract can now be set to those specified in the CDR.
- An exact one-to-one mapping between Whitespace's default tags and the CDR tag set has been devised. This includes the tags generated by the Get Data API that are not visible in the platform.
- Whitespace does not support a 'Written Lines Currency' value as Whitespace lines are percentages, so the 'CDR-2580: (Re)Insurer Written Share Currency' tag is unsupported.
- Where there is no CDR equivalent to a Whitespace tag, the original Whitespace tag name is preserved. Similarly, where one Whitespace Tag maps to multiple CDR tags, all the CDR names are displayed for the tag, and where multiple Whitespace Tags map to a single CDR tag, the CDR tag is duplicated with a clarification note.

Inserting Contract/Template Content Into an Endorsement and Vice-Versa

Previously, it was possible to insert contract headings from a contract or template into a contract or template, but endorsements were excluded from this functionality. This shortcoming has been removed.

- Endorsements are now considered a valid target for content insertion.
- This means it is possible to take content from a contract, template, endorsement, or, via a separate action, from the Contract Library, and insert it into a different contract, template, or endorsement.

Exporting Verticalised Contracts as a Single PDF

When exporting a verticalised contract, it is now possible to generate a single PDF with each participant's specific terms included on their own page of the PDF. The prior options of exporting terms as separate PDF documents or excluding them from the export remain available.

- An option has been added to the export screen allowing users to export a contract's vertical terms at the end of the contract as part of a single .PDF file.
- Underwriters who have been shown vertical terms both as part of a declaration and on the open market have two separate entries for those terms.
- It is still possible to export the vertical terms as separate .PDF files included in a .zip archive, or to exclude them from the export completely.

New User Permissions in the Admin Portal Contract

To help customers facilitate a move towards headless systems, the range of user permissions required for various functions has been expanded. Existing users will automatically default to having the permissions

required to continue using the Platform as they have been. New users only automatically get permissions shared by every other member of a team they are on.

- Several new permissions have been added to the Admin Portal, accessible via the 'Edit User' and 'Create New User' options.
- 'Library Access' is an organisational-level permission that lets the user access, maintain, and add to the Contract Library and the content within it, and to access the Contract Builder in both the Library and the Platform.
- 'Clause Management' is an organisational-level permission that lets users with Library Access create and edit Library Line Items of the 'Clause' Line Item type. All users with Library Access can view clauses, and all users with Contract Builder permission can use clauses in contracts and templates.
- Team-by-team permissions are assigned to users for each team that they apply for.
- 'Contract Builder' is a team-by-team permission that lets the user build contracts via the Contract Builder in the Whitespace Platform.
- Users with the 'Template Manager' team-by-team permission as well as the 'Contract Builder' permission can also build Templates in the Contract Builder.
- 'Share Facility' is a team by team permission that lets the user share a facility agreement with other teams.

Marking a Facility as Expired or Inactive

Like contracts, facility agreements cannot be deleted for legal reasons. It is now possible to clearly mark a facility agreement as expired or, in the case of off-platform facilities, inactive. This removes them from the primary selection list from when showing a declaration to a facility.

- Signed facility contracts can be marked as expired, giving them a clear 'EXPIRED' label on the facility overview page as well as the facility selection screen when showing declarations. This expiry can be revoked if necessary.
- Expired facilities cannot be shared with other teams, and if a master facility that has been shared is marked as expired, all its shared instances will also be expired.
- It is still possible to show declarations to an expired facility subject to accepting a cautionary notification, but expired facilities are hidden by default, cannot be endorsed, corrected, or reverted to firm order, do not permit responses to subjectivities or updates to stamp information, and do not generate any notifications.
- Off-platform facilities can also be marked as inactive. Inactive off-platform facilities are clearly labelled, hidden by default, and it is not possible to show new declarations to them. They cannot be shared, corrected, or endorsed, and do not generate warnings.

Changing the Visibility and Placement of a Contract Heading

To assist users in obtaining the layout and appearance they desire for their contracts, it is now possible to hide a contract heading's title field.

- It is now possible to set a contract heading's title as invisible, and to modify the alignment of the text under it so that it appears to be a direct continuation of the text under the contract heading above.
- This allows users to give the appearance of a single detailed contract heading item in an exported contract.
- Hidden contract heading titles also allow users to then restate the title as part of the text, and apply the full range of rich text formatting options to the faux title.

Editing Enhancements

Further improvements have been made to the editing and formatting systems for platform contracts and templates.

- The size of exported contract heading titles can be set in the Export screen, and is visible in .PDF Preview.
- The bold font used for sans-serif text in exported .PDFs has been increased in weight.
- Web addresses and other hyperlinks are now clickable in the Platform, and open in a new browser window.

Approving Contracts and Corrections Individually Under Multiple Teams with Mandatory Internal Reviewing

To improve the workflow of the internal review process, underwriters can request individual internal reviews on a team-by-team basis for contracts and contract corrections received by multiple teams.

- Underwriters receiving a contract that has been shown to multiple teams that they are part of are now able to request internal review for each of those teams individually.
- They are also able to approve, self-approve, and/or decline such contracts on a team-by-team basis.
- Similarly, Contract Corrections can also be reviewed – and agreed, if approved – team by team, allowing one team to complete a correction while another is still considering it.

Enhancements

- Underwriters receiving a contract correction from a broker with unapproved status when the Approved Brokers functionality is enabled have to acknowledge a warning message to proceed.
- Sending a contract correction allows the broker to also share attachments.
- Endorsements now have tags for indicating the change to the premium.
- Detailed error messages are now shown when a new off-platform stamp fails validation.
- When an endorsed contract is reverted to FO, endorsement/s agreed after the reversion and before a new signed version is created take their stamps from the reverted firm order.
- Stamp updates must contain at least one change before they can be sent.
- Users who are not in any user teams will be listed when exporting a user list.
- All user permissions are clearly shown when exporting a user list.
- Off-platform teams and underwriters no longer appear on exported platform user lists, since they are not real.

Defined Data Updates

- The following new MRC headings and tags are added under the Risk Details section:

MRC Heading	Tag
Claims Payment Date	Waiting Period Duration
Claims Payment Date	Waiting Period Qualifier
Definitions	Indemnity_%
Definitions	Insureds Participation
Definitions	Obligor Name
Definitions	Obligor Identifier
Definitions	Obligor Identification Agency
Definitions	Obligor Number And Street
Definitions	Obligor Additional Address Line
Definitions	Obligor City Name
Definitions	Obligor Country Subentity
Definitions	Obligor Postal Code
Definitions	Obligor Country
Financing	Financing Type
Tenor	Tenor Duration

MRC Heading	Tag
Tenor	Tenor Duration Qualifier

- *The following new tags have been added to the existing Period MRC heading under the Risk Details section:*
 - Policy Period Duration
 - Policy Period Qualifier
- All CDR v3.2 field names are now available as alternative tags for the existing Whitespace tags, with the exception of 'CDR-2580: (Re)Insurer Written Share Currency'. The CDRv3.2 alternative tags for a contract can be accessed via the /api/v22.04/data/\$IC/tagset/CDRv3.2 endpoint.

Activity String Updates for Integrators Using MS Service Bus Queues

The following new Activity Strings are being added in this update:

- **“Shared Facility”** – A broker shared a master facility with another team in their organisation
- **“Shared Endorsement”** – An endorsement on a master facility has been completed and shared
- **“Marked Facility Active”** – A facility was marked as 'Active'
- **“Marked Facility Expired”** – A facility was marked as 'Expired'
- **“Marked Facility Inactive”** – An off-platform facility was marked as 'Inactive'
- **“Library IDs Associated with Line Items”** – One or more contract headings within a template were associated with Library Line Items when the template was imported into the Library.

Outstanding Issues

The following issues will be resolved in a future platform release:

Browser

- On the browser, if a broker sends requests to quote for a specific risk to different teams at the same (re)insurer and an individual underwriter user is a member of two or more of those teams, where that underwriter sends a multiple 'quote being prepared' records for Internal Review to a reviewer within the applicable team, the Internal Review status of the responses is not correctly displayed on the contract's Risk Overview screen. Each 'quote being prepared' record will show the 'Pending Internal Review' label until all Internal Review requests have been approved. Individual Internal Review statuses are correctly shown in the iOS app.
- On the browser, using the side-by-side 'Insert Content from Library' function to replace an existing contract heading with a Library Line Item and then reverting/undoing the change before exiting will leave the contract heading with a red Library Book icon, whether or not the original contract heading was linked to a Contract Library Line Item. This does not impede any functionality or prevent progress. Copying the contents of the contract heading, deleting it from the contract, and then re-inserting it either manually or from the Contract Library will clear the red icon.
- On the Browser, if export options are set to use a 'serif' font, then both exported and Preview PDFs may render clickable links in the contract text with occasional incorrect characters, particularly after a full stop.
- When creating vertical terms, the window in which the vertical terms are first created displays the terms in font size 10pt regardless of the default font size on the contract. However, once the terms are created and added to the contract, the default font size is then applied.
- If the visibility of a contract heading is changed within the Edit All view, the change in visibility setting is not reflected until the changes are saved at which point the visibility of the contract heading is then reflected.
- On a sectioned risk at Firm Order, if a broker shows multiple sections to different teams at the same (re)insurer and an individual underwriter user is a member of two or more of those teams, where the underwriter sends the contract for Internal Review to one of the teams, when that

Internal Review request is approved then the Risk Overview will only display the approved section to the underwriter, even though the underwriter previously had visibility of all sections shown to teams that they are a member of. Entering the risk record, viewing the written lines and then returning to the Risk Overview results in all applicable sections being displayed.

- When showing a contract to a Facility, if selecting the 'Choose Recipient' option the list of recipients currently includes suspended users. If a suspended user is selected an error will be generated and will prevent completion of the showing process.

iOS App

- In the iOS app, after showing a contract to an underwriter who has then written their line, if the Broker sends a Line Removal request the Signing button remains visible and is clickable, even after the line has been removed.
- In the iOS app, the Internal Chat system on a shared facility contract appears to indicate that it is possible to communicate with the team in which the original master facility was created. Messages to this team appear to send but are never received. The Internal Chat system cannot be used in this manner.
- If a broker exists out of the authentication step after confirming their request for an underwriter to remove their line, the line removal request is currently being shared with the underwriter despite the authentication step not having been completed.
- When a (re)insurer agrees to be added to a contract via an MTPC endorsement and records their stamp, the signed line % displays the same value as the written line % immediately following the agreement. The signed line % should display N/A until such time as the broker completes the endorsement.
- When exporting a contract containing a table to Word the column widths are not being respected. When exporting to PDF the column widths are handled correctly.

Resolved Issues

Browser

- Off-platform contracts are not subject to contract corrections.
- Underwriters who have been removed from a contract via an MTPC endorsement are no longer able to agree to outstanding endorsements that were created while they were still participating.
- When an underwriter SUMO user adds a line on a contract using one corporate and then switches corporates and goes to add a line on the same contract, the "Add written lines" button is now present without the need to refresh the screen.
- The Template Manager permission is now required to amend the sections on a template.
- Changes to the Auth Service routine to reduce the risk of the service stalling at 100% CPU Usage
- When an underwriter adds a Lloyd's stamp, they can no longer see the same stamp as an option to add as a mirror stamp.
- When a producing broker has shared a contract with a placing broker, and the placing broker has signed the contract, the lines are now included in the export of the advice document.
- When a contract correction has been done on a firm order which has the Share All Stamps option selected, once all underwriters have approved the correction and are able to view the archived firm order contract, all underwriters can now see all stamps.
- When a signed, sectioned contract is reverted to firm order, and all lines are withdrawn from a section which is then removed, when viewing the archived Signed contract the removed section is now displayed.
- When an underwriter declines a contract correction, there is now no error.

- When a firm order has a contract correction, is subsequently signed and then has new underwriters added via an MTPC endorsement, the archived contract correction contract version now only includes the lines which were present at the time.
- When an underwriter adds a constium or Lloyd's Brussels Constortium stamp, it is now possible to add a YOA value.
- When a contract has been shown for quote to a facility, on the Carrier Selection page, a counter is now included to indicate the number of underwriters from the facility that the contract has been shown to.
- Fix to ensure mireport endpoint calls are not blocked when using a service token.
- For sectioned off-Platform risks, if there is a section leader then the lineGuidanceSet is now included in the sections array, in-line with Platform risks.
- When an underwriter is on a facility which has mirror stamps and a declaration is shown to the facility, the mirror stamps are now pre-populated in the "Add Mirror Stamps" portion of the "Add a Line" screen, even if the mirror stamps have been marked as inactive.
- When a broker is in multiple teams and chooses to show a contract to a facility, they can now only see facilities that are in the same team as the declaration.
- When an endorsement is created on a firm order contract, and the broker subsequently requests the removal of a line and shows the contract to another underwriter from the same corporate but different team than the removed line, the newly added underwriter can now agree the endorsement.
- There are now no restrictions preventing a stamp from being duplicated. Once a stamp is duplicated, if the "Upload Logo" option is selected and no logo has been uploaded, to save the stamp either a logo needs to be uploaded or the option must be changed to "Default logo" or "No logo".
- Risk attachments can now be shared with notify parties when showing an endorsement.
- When showing a firm order, if "Change Team" is selected under an underwriter's name and then that action is canceled and taken again multiple times, there is now no error.
- The History view on a contract is now displaying the names of users who have been suspended since performing the reported action.

iOS App

- It is no longer possible to set a facility participant's line to nil. Instead, set their participation status to 'Does Not Apply' if they are not participating on a specific declaration contract.
- If a broker has Internal Review set to Mandatory on a contract correction, once the Internal Review has been approved and the underwriter(s) have approved the correction, the broker can now complete or revoke the correction.
- When a broker shows a bindable quote to underwriters and selects a stamp sharing option, if the bindable quote is subsequently shown to more underwriters then the broker is now not shown the stamp sharing options again.
- Brokers can no longer suggest stamps which have not been assigned to that underwriter user.
- When an underwriter is added to a signed contract using an MTPC and they add their line with a mirror stamp, the mirror stamp is now displayed to the broker and other underwriters on the contract.
- It is now possible to delete an inline attachment which has been appended with set text referencing the attachment in the contract.
- When an underwriter is added to a contract using an MTPC, it is now possible to add mirror stamps.
- When a declaration with vertical terms is shown to a facility, notify and non notify parties can now only be bound when they have been assigned to vertical terms.

- If an endorsement is created on a firm order, and then the broker separately requests the removal of an underwriter's line but the underwriter has not accepted, the option to decline the endorsement is still displayed to the underwriter.

Production Installation and Access Guide

iOS App

iOS users 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.

Please note that we are no longer able to include support for iOS v16. From this release onwards, the Whitespace App requires iOS v17 to run.

Browser

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