Working With References, Titles, and Group Names in the Contract Library

The references, titles, and group names associated with a Line Item are only ever visible within the Contract Library and Contract Builder. They do not appear in – or even get transferred to – any template or contract in the Whitespace Platform. They exist entirely as a means to help users find the Line Items they are looking for. As such, your goal when creating them should be to provide easy identification tools for yourself and other Library users.

Titles can be up to fifty characters long, and are intended to be readily visible when looking through a list. **References** can be up to twenty characters long, and are intended for precise filtering. Both titles and references should be unique. **Group Names** allow for multiple tags of arbitrary length, and are intended for linking groups of Line Items together. They should typically be common to a number of Line Items that are likely to be used together. All three fields support letters, numbers, and punctuation.

At the current time, Line Items can only be imported into the Library individually. The facility to import an entire template or contract's Line Items into the Library in one operation will be made available soon.

It is anticipated that some organisations will have Libraries that grow to thousands or even tens of thousands of Line Items spread across a significant number of classes of business. If these fields are assigned haphazardly, even a fairly small library could become unnecessarily slow to manage. Therefore, planning a flexible and reliable naming schema for references, titles, and group names is worth considering.

The following points may prove useful:

- When entering references, titles, and group names avoid including your own initials or a Team name. Teams have their own filterable item of metadata, and it will be possible to restrict the visibility of Line Items on a team basis in a future release.
- If a line item is generic, stick with a reference structure that tells you that it is generic and what it contains.
- An established code or acronym structure to readily identify classes of business and generic items will help. Make sure that no one code/acronym is a substring of another – avoid using both 'G' and 'GSV', for example, as it will make the shorter 'G' much harder to find.
- Similarly, established codes/acronyms for identifying a Line Item's purpose will be useful, although there are other metadata fields that will work in tandem with this.
- Line Items have a 'Valid From' date in their metadata, and should be withdrawn once they are no long valid, so in general, it is inefficient to include data elements in a title, reference, or group name.
- Hyphens, underscores, and full stops can be more readily visible than spaces when separating key informational elements.
- Decide whether to use lower case, upper case, or mixed letter patterns, and then stick to that decision.

As an additional consideration, tagged data values within Line Items that will always be contract specific – such as Inception and Expiry Data, UMR, Insured Name and Adress, and any tag field with the placeholder '???' value – should be specifically excluded from the Library's Line Item version-matching checks as shown in the image below.

This will prevent contract headings in Platform documents being flagged as different to the Library when all that has happened is that a placeholder tag has been populated with the correct data.

A good reference tells you the specific details of the line item at a glance, but is also easy to remember and to key in when searching for that item by reference in future. Titles should expand these sorts of references into human-readable text.

For example:

GEN_UMR – Generic UMR line item
GEN_PERIOD – Generic Period line item
NAPROP_PM+TRIA – NA Property Premium with TRIA included
NAPROP_PM-TRIA – NA Property Premium with TRIA excluded
OFFEN_COW_CLMBASIS – Offshore Energy Control of Well Claims Basis

Alternatively, you could follow a reference structure more akin to London Market Wordings where the initials of the officiating body are followed by a 4 digit number.

For example:

    UMR_0001
    PERIOD_0003
    NAPROP_1032
    NAPROP_1033
    OFFEN_4324

This is less immediately clear, but has the benefit of being independently established.