

Making Sense of the Broker User List

The full list of users that have been created within a Whitespace 'corporate' instance can be downloaded from the Admin Portal. Select the 'Users' button in the black left-hand bar and then click 'Download List Of Users' near the top left of the 'Users' screen.

Name	Email	Notification	Teams	Reporting	Admin	Status	Invite
Pending Invite Test	broker.magda@wspt.co.uk	No	1	NO	YES	Draft	Pending Response
Cayce Hubbard	broker.tim@wspt.co.uk	Yes	7	YES	YES	Live	Active
Melanie Dedopulos	broker.dedopulos@wspt.co.uk	Yes	3	NO	NO	Live	Active
False Email Test	tumbleweeds@gmail.com	No	0	NO	NO	Suspended	Incorrect Domain
Magda Downing	broker.downing@wspt.co.uk	No	3	NO	NO	Live	Not Invited
Elizabeth Burberry	broker.elizabeth@wspt.co.uk	No	3	NO	NO	Draft	Pending Response
Simone Power	broker.simone@wspt.co.uk	No	3	NO	NO	Live	Pending Response
Denise Duchesne	broker.denise@wspt.co.uk	No	2	NO	NO	ReadOnly	Pending Response
Sally Howells	broker.sally@wspt.co.uk	No	1	NO	NO	Suspended	Not Invited
Draft User	draft.user@wspt.co.uk	No	3	YES	YES	Draft	Not Invited

You are prompted to save the user list, which is presented as a .CSV file. Use a spreadsheet programme to open the list. Each row contains one user's details and permissions for one Whitespace user team that they are a member of. This means users that are members of multiple teams have multiple rows of data in the list, one after another.

User Name	User Unique Id	Email	Current State	Team Name	Team Unique ID	Admin User	Reporting User	Template Manager	Edit Contract	Corrections	Revert to Firm Order	Share Facility
1 Pending Invite Test	MU53993157-920F-4C47-8AAF-5F3728BA497A	broker.magda@wspt.co.uk	Draft	Marine2 VIDEO	YES	NO	NO	NO	NO	YES	NO	YES
3 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	All Risks ALLRISKS	YES	YES	YES	YES	YES	YES	YES	YES
4 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Property PROPERTY	YES	YES	YES	YES	YES	YES	YES	YES
5 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Marine2 VIDEO	YES	YES	YES	YES	YES	YES	YES	NO
6 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Marine MARINE	YES	YES	YES	YES	YES	YES	YES	NO
7 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Aviation AVIATION	YES	YES	YES	YES	YES	YES	YES	NO
8 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Cyber CYBER	YES	YES	YES	YES	YES	YES	YES	YES
9 Cayce Hubbard	MU5C5CCB69-0E0E-4218-A7E1-97BC8AB5E6F8	broker.tim@wspt.co.uk	Live	Aviation2 THROCKMORTONS	YES	YES	YES	YES	NO	YES	NO	NO
10 Melanie Dedopulos	MU426058B6-0F02-4930-8150-D4FC4221DAD0	broker.dedopulos@wspt.co.uk	Live	All Risks ALLRISKS	NO	NO	YES	YES	YES	YES	YES	YES
11 Melanie Dedopulos	MU426058B6-0F02-4930-8150-D4FC4221DAD0	broker.dedopulos@wspt.co.uk	Live	Cyber CYBER	NO	NO	NO	YES	YES	YES	NO	YES
12 Melanie Dedopulos	MU426058B6-0F02-4930-8150-D4FC4221DAD0	broker.dedopulos@wspt.co.uk	Live	Property PROPERTY	NO	NO	NO	YES	YES	YES	NO	YES
13 False Email Test	MU56039AE8-0AAA-4E2F-8B15-E9CAD84C7AEB	tumbleweeds@gmail.com	Suspended		NO	NO	NO	NO	NO	NO	YES	NO
14 Magda Downing	MU548EBB97-3E05-473E-9CB8-155DB248EBC9	broker.downing@wspt.co.uk	Live	All Risks ALLRISKS	NO	NO	NO	NO	NO	YES	NO	YES
15 Magda Downing	MU548EBB97-3E05-473E-9CB8-155DB248EBC9	broker.downing@wspt.co.uk	Live	Property PROPERTY	NO	NO	NO	NO	NO	YES	NO	YES
16 Magda Downing	MU548EBB97-3E05-473E-9CB8-155DB248EBC9	broker.downing@wspt.co.uk	Live	Cyber CYBER	NO	NO	NO	NO	NO	YES	NO	YES
17 Elizabeth Burberry	MU96C29E4E-958A-4573-A947-EFEC542418RD	broker.elizabeth@wspt.co.uk	Draft	All Risks ALLRISKS	NO	NO	NO	NO	NO	YES	NO	YES

Each column contains one specific item of data about the user and their permissions, as follows.

Column A, "User Name" – The display name of the user when they're logged in to the Platform. This is the same for all the user's entries.

Column B, "User Unique Id" – Each user has a 36-character code that's unique across the entire Platform, known as the "MUID". It's primarily used by the system and API integrators. This is the same for all the user's entries.

Column C, "Email" – The email address that the Platform has for the user. This address must use an email domain associated with the corporate instance, either during initial set-up or afterwards. This is the same for all the user's entries.

Column D, "Current State" – The status of the user's account. "Live" users have full access to the platform. "ReadOnly" users cannot make any changes to their team's materials. "Draft" users are newly set up but cannot yet access the platform. "Suspended" users have no access the platform. This is the same for all the user's entries.

Column E, "Team Name" – The display name of the team that this row is detailing the user's permissions for.

Column F, "Team Unique ID" – The internal system name of that team.

Column G, "Admin User" – A permission flag. If "YES", the user can access the Admin Portal. If "NO", they cannot. This permission is set at the user profile level, so is the same across all teams.

Column H, "Reporting User" – A permission flag. If "YES", the user can run Management Information reports for any of their teams. If "NO", they cannot. This permission is set at the user profile level, so is the same across all teams.

Column I, "Template Manager" – A permission flag. If "YES", the user can create and edit templates. If "NO", they cannot. This permission is specific to an individual team.

Column J, "Edit Contract Corrections" – A permission flag. If "YES", the user can edit, show and progress contract corrections. If "NO", they cannot. This permission is specific to an individual team.

Column K, "Revert to Firm Order" – A permission flag. If "YES", the user can roll back a signed contract to the firm order stage. If "NO", they cannot. This permission is specific to an individual team.

Column L, "Share Facility" – A permission flag. If "YES", the user can share their team's facility contract records with other teams, allowing those teams to show declaration contracts to that facility panel. If "NO", they cannot. This permission is specific to an individual team.

Column M, "Contract Builder" – A permission flag. If "YES", the user can use the Contract Builder to create a new contract from Library records. They also need the appropriate 'Contract Creator' permission to complete the operation. If "NO", they cannot. This permission is specific to an individual team.

Column N, "Contract Creator – UI" – A permission flag. If "YES", the user can create new open market, declaration, off-platform, and market-only contracts using the Whitespace web interface. If "NO", they cannot. This permission is specific to an individual team.

Column O, "Contract Creator – API" – A permission flag. If "YES", the user can create new open market, declaration, off-platform, and market-only contracts using calls to Whitespace's API system. If "NO", they cannot. This permission is specific to an individual team.

Column P, "Facility Creator – UI" – A permission flag. If "YES", the user can create new facility contracts using the Whitespace web interface. If "NO", they cannot. This permission is specific to an individual team.

Column Q, "Facility Creator – API" – A permission flag. If "YES", the user can create new facility contracts using calls to Whitespace's API system. If "NO", they cannot. This permission is specific to an individual team.

Column R, "Endorsement Creator – UI" – A permission flag. If "YES", the user can create an endorsement to an existing contract using the Whitespace web interface. If "NO", they cannot. This permission is specific to an individual team.

Column S, "Endorsement Creator – API" – A permission flag. If "YES", the user can create an endorsement to an existing contract using calls to Whitespace's API system. If "NO", they cannot. This permission is specific to an individual team.

Column T, "Contract Correction Creator – UI" – A permission flag. If "YES", the user can create a new contract correction using the Whitespace web interface. They still need the "Edit Contract Corrections" permission to do anything else with the correction. If "NO", they cannot. This permission is specific to an individual team.

Column U, "Contract Correction Creator – API" – A permission flag. If "YES", the user can create a new contract correction using calls to Whitespace's API system. They still need the "Edit Contract Corrections" permission to do anything else with the correction. If "NO", they cannot. This permission is specific to an individual team.

Column V, "Reviewer" – A permission flag. If "YES", the user can conduct internal reviews for colleagues. If "NO", they cannot. This permission is specific to an individual team.

Column W, "Self-Approver" – A permission flag. If "YES", the user can complete an internal review on their own work. If "NO", they cannot. This permission is specific to an individual team.

Column X, "Library Access" – A permission flag. If "YES", the user can access the Contract Library and make changes to its contents. If "NO", they cannot. This permission is set at the user profile level, so is the same across all teams.

Column Y, "Clause Management" – A permission flag. This requires the 'Library Access' flag set to "YES". If it is "YES", the user can create and edit Contract Library items flagged as clauses. If "NO", they cannot. This permission is set at the user profile level, so is the same across all teams.

Column Z, "Added on" – The date and time that the user's record was created. This is the same for all the user's entries.

Column AA, "Last Modified" – The date and time that the user's record was last modified. If the user's data has never been modified, this will be blank. This is the same for all the user's entries.

Column AB, "Last Active" – The date and time that the user last logged in to the Platform or requested an API token. If the user has never accessed the Platform, this will be blank. This is the same for all the user's entries.