Whitespace Platform v2.14.0

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Headlines

The defined data tagging system has gained significant new functionality to improve user experience.
(Re)Insurers may activate a whitelist of brokers that their users are permitted to do business with.
User-defined custom activities provide increased flexibility for integrated systems.
In-line attachments can now optionally be exported at the start of a PDF rather than at the end.

Release Details

New Features

- ### Cross-Referencing Tags

  Some items of data can appear repeatedly across the text of a contract, such as the inception date or insured location. Tagged data can now be inserted as cross-references at other places in the contract, updating with the original.
    - Any correctly-tagged piece of data can be duplicated at other points in the contract as a cross-reference.
    - It is possible to add a cross-reference at any location in the text.
    - Click in the text where the cross-reference is to be added, select 'Add Cross-Reference', and pick the data item to add.
    - When the original value is edited, all cross-references automatically update, and if it is deleted, the cross-references are removed.
    - Cross-reference values are not editable, and appear as normal text when exported.

- ### Assigning Multiple Values to a Single Tag

  Certain tags – for example, 'Perils Excluded' – commonly need to list multiple values. This feature permits specific tags to include multiple values natively, and replaces the older functionality of having to create multiple versions of the same tag across multiple tag groups ('pages') under the same contract heading.
    - Expands a subset of relevant tags to encompass multiple values.
    - Multiple-value tags work identically to single-value tags.
    - Tags include data for perils, locations, coverage, and the basis of several contract values.

- ### Searching Data Tags

  Users may now search a contract for tags by name as well as for specific items of data held in tags.
    - Freely toggle the search box between contract text or the names of applied tags.
    - Search results are displayed document-wide.
    - Applied tag names are displayed by contract heading.
    - Cross-reference tags are shown with dotted borders.

- ### Selecting the 'Approved Brokers' that Underwriters are Authorised to Conduct Business With

  (Re)Insurers may choose to restrict the brokers that their users are pre-authorised to do business with. In conjunction with the existing broker-facing Approved (Re)Insurers system, this provides the "Platform functionality" referred to in Clause 4.13 of the Whitespace Platform Interchange Agreement.
    - Underwriter admins may activate the 'Approved Brokers' functionality in the admin portal.
    - Broking organisations can be added freely to the whitelist, and toggled between 'approved' and 'unapproved' as needed.
    - Organisations not on the whitelist are automatically considered unapproved.

- With the functionality active and set to 'Warning', underwriters will be informed before responding to unapproved brokers.
- With the functionality active and set to 'Blocked', underwriters can only decline open market offers from unapproved brokers
- Certain placement stages where there has been previous agreement will always revert to 'Warning' when the functionality is active and set to 'Blocked'.

- ### Creating Custom User-Triggered Activities for Integrated Systems
  Fully-customised platform activity codes can be generated via user options placed in the 'Actions' menu at key stages in the placing process. These can then be read by an integrated service bus queue consumer system and used to drive a range of processes both inside and outside the Whitespace platform.

  For example, a user could select an action that triggers a process which calls a third party rating solution using tagged data from the contract, then retrieves the resulting output and pushes it to a tagged data placeholder in that same contract.
  - The customer informs Whitespace Support of the custom activity required, including (a) details of the user-facing action, (b) the user teams it should be available for, and (c) the name of and information in the activity document passed to the queue. Support then implements the activity for the organisation's specified teams.
  - An organisation's custom activities are not visible to other Whitespace customers.
  - If the activity requires information not retrievable from the contract by API, this can be configured for manual entry by the user when the action is triggered.
  - Any such information will be passed to the customer's specified service bus queue within a new 'RWCustomActivity' JSON payload, along with the designated activity code.
  - Integration processes can then call the Whitespace API as usual to retrieve other data from the contract, manipulate it or pass it to third party systems as appropriate, and then make use of the results as required, such as calling the Whitespace API again to update the contract.

- ### Positioning In-Line Attachments in PDF Exports
  This facilitates instances where users need in-line attachments to be exported at the front of a PDF rather than at the end.
  - When exported, in-line attachments are by default linked in the text as appendices and placed at the end of the contract with an 'Appendix #' cover page.
  - Optionally, in-line attachments may be placed before the contract in the export.
  - Attachments at the front of the contract are not linked in the text, and do not have an appendix cover page.

- ### Renaming Section Headings to Improve Contract Clarity
  Brokers can change section heading titles within a contract to more improve accuracy and readability.
  - Contract section headings can be freely edited via their three-dot menu
  - This functionality is not available when the user is in edit-all mode.
  - Section headings may not be given the standard name of a different section heading, so for example, you may not change 'Risk Details' to 'Broker Remuneration and Deductions'.
  - Edited section headings are preserved when cloning, exporting, and advancing through the placing process.

Enhancements
- The editing system has had a round of improvements.
  - You will not be asked to save changes if nothing has been changed.
  - Indents are retained correctly when text is pasted into the platform from Microsoft Word, and when copying text from contract heading to another.
  - Saving edits to a contract heading's text no longer sends you back to the top of the contract.
  - The 'Edit All' bar no longer accidentally features internal system terms.
- When exporting a contract, section headings do not have to begin on a new page.
  - When exporting a contract, by default a page break is inserted before each section heading.
  - These page breaks may be individually or collectively toggled off using the export screen.
- While assigning users to a stamp in the admin portal, the stamp being assigned is clearly identified.

- Contracts can be cloned to create an off-platform contract.
  - 'Off-Platform Contract' has been added as a new placement type when cloning contracts.
  - The resulting contracts have all the same functionality as current off-platform contracts.
- Mid-Term Participant Change facility endorsements can only be progressed if there is a leader.
  - MTPC endorsements must have a designated facility leader in place before showing is possible.

Resolved Issues

- Underwriters can't edit the Broker's Message while in 'Edit All' mode.
- Management Information Reports include proper underwriting identification as well as stamp information for non/notify parties.
- Underwriters now correctly see the status of a contract when a Broker creates a Mid-Term Participant Change for that contract.
- PDF exports now reliably include all table data, and do not add a blank page after a table
- User emails always display standard formatting in the admin portal.
- Brokers can properly create contracts when just added to a new team, and can select a team to create a contract under if they are in multiple teams.
- Contract overview thumbnail properly displays UMR.
- It is no longer possible to attempt to show attachments to off-platform underwriters.
- Brokers can properly show firm orders in all cases.
- All information is properly returned to the producing broker in facility advice documents.
- Brokers can no longer mark a declaration of a firm order to a facility as 'Not Taken Up'.
- When a team is set as inactive, brokers can now properly create a bindable quote under that team if the draft contract was created prior to the team's deactivation.
- Brokers can properly mark subjectivity requirements as satisfied/unsatisfied at the firm order stage.
- Firefox no longer occasionally drops icons into a new row.
- Logos display properly on the Broking Partners overview tab.
- Brokers are now warned when cloning new full contracts from an inactive team.
- The blue drop-down 'Actions' menu is properly consistent between the iOS app and the browser.
- The default role for participants on firm orders declared to a facility is not that of non-notify party.
- Bindable quotes can't be progressed to firm orders without properly binding the notify parties.
- Text set to 'Heading 1' font size retains its size.
- Template Manager status is properly required to change alignment on locked iOS contracts, but not to apply standard broker-level locks on verticalised draft bindable quotes.
- Underwriters adding a stamp to a mid-term participant change endorsement get the correct stamp options on iOS
- If an underwriter is removed and re-added in an endorsement, their chat permissions are retained.
- You can't choose an underwriter twice on iOS when showing a bindable quote.
- The iOS app is correctly identifying text when tagging
- Bindable lines on iOS can be added correctly after a firm order line has been written, and the firm order's underwriter can be set as the leader of the bindable quote.
- The iOS app no longer crashes on brokers without template manager permission who are trying to verticalise a draft bindable quote.
- New user permissions are no longer dropped occasionally.

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.