

Whitespace Platform

Release Notes v3.4.0

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Headlines

Inline PDF attachments can seamlessly display within the contract body as a contract heading. Selected text and tables from PDF and Microsoft Word files can be imported into a contract on the Platform. Brokers can bypass the Approved Stamps functionality when using Approved (Re)Insurers if required. Stamps on written lines show address data in the Platform, and these addresses can also be included in exports. Inclusion of Mandatory Tag Sets in newly-cloned contracts and templates can be enforced on a team-by-team basis.

Release Details

Storing Inline Attachments as Library Line Items and Exporting Them Seamlessly Inline Within the Contract

Inline attachments can now be stored in the Contract Library as Library Line Items. Additionally, all inline attachments, whether linked to a Library Line Item or not, can now be optionally set to export in full at the position that they are inserted into a contract, or, alternatively, at the end of their contract section. This enhances contract versatility.

- Library Line Items containing inline attachments are now available for creation in the Contract Library.
- Any given inline attachment Line Item only contains a single file of a type compatible with regular inline attachments.
- This replicates the way that inline attachments exist within their own separate contract heading in the Platform.
- In addition to appearing as a cover or appendix within an exported contract, all inline attachments can now also be set to appear in full within the exported contract at the position that their contract heading occupies, or alternatively at the end of that contract section.
- Covers and attachments in place within the exported contract are displayed seamlessly.
- Attachments set to show at the end of the contract or contract section include a reference to the attachment.

Importing Selected Text From an External Contract Document Using the Digitiser

Digitising a contract into the platform is more reliable than attempting to copy and paste text from PDF or Word, particularly for preserving formatting. To make it easier for users to incorporate one piece of a document into a contract, it is now possible to select just a piece of an external document in the digitiser and insert it into a specific contract heading.

- The digitiser now allows users to insert selected text from a PDF or MS Word document for insertion into a contract at any editable stage.
- The document can be viewed to locate the required text, and headers and footers may be excluded.
- Tables can be imported as readily as blocks of text.
- The document's content is selected by drawing a box around the desired material.
- Once confirmed, the selection can be inserted into the current contract heading at any line break.
- An undo function makes it easy to revert undesirable changes.
- The selected document stays loaded in the digitiser until the user opens a new contract on the Platform or loads a new document into the digitiser, speeding up repeated use of the same file.

Using the Approved (Re)Insurers Functionality Without Having to Manage Approved Stamps

The Approved Stamps system runs in tandem with the Approved (Re)Insurers functionality. To permit brokers to manage the list of (re)insurers that they deal with but remove the need to manage any stamp approvals, the system now auto-creates a new Stamp Group which automatically includes all available stamps across all approved (re)insurers.

- The 'All Available Stamps' group is now available in the Admin Portal within the 'Stamp Groups' pane.

- This group is automatically generated. It is not user-editable, and includes all active stamps for all (re)insurers listed under the 'Approved (Re)Insurers' functionality.
- As (re)insurers update their stamp lists, the group is updated to remain perfectly current.
- User teams can be assigned to the 'All Available Stamps' group by selecting the group's name in the 'Stamp Groups' panel, selecting 'Edit Team Assignment', and adding teams from the drop-down list.
- Teams assigned to the 'All Available Stamps' group default to giving each underwriter full access to all the stamps they could normally access.
- Brokers can still restrict stamp availability as usual by suggesting stamps to the underwriter.
- All teams currently assigned to the 'All Approved Stamps' group, which lists all approved (re)insurers' stamps deliberately included by an administrator, have been automatically switched to the 'All Available Stamps' group to minimise ongoing administration.
- The 'All Approved Stamps' group remains fully available for use, and teams will not be switched away from it moving forward.

Displaying Stamp Address Information in the Platform and in Exported Contracts

Newer stamps in the Whitespace Platform now include a registered address and/or an invoice address. This information is now displayed with stamps in the Platform, and may be included in exported contracts.

- When a stamp on a contract or Contract Correction includes one or both of the possible addresses, that information is clearly shown below the stamp, with a clearly delineated and labelled box for each associated address.
- For brokers, this includes suggested stamps and all written, signed, and Bindable Quote lines; for underwriters, it includes all of their own stamps, and any other participants' stamps that they have visibility of on a contract or Contract Correction.
- Stamp address information is not shown for general endorsements, indicative stamps on a 'Quote Details' panel, or button stamps, which do not have any associated addresses.
- In a Mid-Term Participant Change endorsement, addresses are shown for stamps appearing under 'Participant Changes', but not for stamps in the 'Endorsement Agreements' section.
- Older stamps without any address data are shown as before, without any blank address-related boxes or fields.
- By default, address information is included when exporting a contract to PDF or MS Word. Address inclusion can be easily toggled off in the 'Export' screen options.

Enforcing a Team's Use of Mandatory Tag Sets When Creating New Contracts and Templates

To help facilitate the user uptake of mandatory tag sets, it is now possible to enforce the presence of a mandatory tag set for all new contracts and templates created within one or more broker teams. Users in these teams with the required permissions will be unable to create a contract or template unless it has been assigned a mandatory tag set. Once assigned, a mandatory tag set can be replaced, but not removed.

- A new 'Configurations' option in the Admin Portal gives administrators access to a 'Mandatory Tagging' screen.
- This screen shows a list of all user teams.
- 'Mandatory Tags' switches allow the admin to enforce tag sets in new contracts on a team-by-team basis, or to toggle the requirement on and off for all teams.
- When 'Mandatory Tags' is toggled on, users cannot complete the creation or cloning of a new contract which does not have a mandatory tag set assigned to it.
- Outline Contracts, being essentially placeholder documents, are exempt from this requirement.
- By default, this switch is set to off for all teams to preserve existing functionality.

Notifying Underwriters of the Reasons for Stamp Unavailability

Underwriters can only access stamps that their organisation has made available to them. Additionally, the Suggested Stamps functionality restricts an underwriter's choice of stamps to those suggested by the broker. This functionality is also activated by the Approved Stamps system, which automatically suggests stamps approved by the broker. In all of these instances, underwriters will now be notified that certain stamps are unavailable and why.

- When writing a line, underwriters now see an information box towards the bottom of the screen listing the number of stamps they can choose from for the line out of the total number of active stamps maintained by their organisation.
- The number of stamps unavailable because of broker use of Approved Stamps and/or Suggested Stamps is clearly listed.

- Additionally, the number of otherwise available stamps that are not assigned for use by the underwriter are also displayed.
- Underwriters wishing to use an unavailable stamp should reach out to the party concerned.

Setting Multiple Email Notification Addresses

Users may now specify up to five email addresses within their organisation to receive copies of their Whitespace notifications. This helps facilitate collaboration, centralised information processing, and automation.

- Existing functionality is that each Whitespace user account is held under one 'organisation' entity, which may or may not be an exact reflection of a real-world business structure.
- Users may now specify up to five email addresses at their Whitespace organisation for their Platform notifications to be copied to.
- Multiple notification destinations allows for easier team collaboration, managerial oversight, centralised notifications, and/or automation.
- Users with accounts in multiple Whitespace organisations must set extra notification emails for each user account separately.
- Users are advised not to copy their notification emails to their team's general contact address, as the volume of notifications may obscure other messages.

Exporting PDF and Word Documents With Just One Underwriter's Stamp/s per Printed Page

Extending the export functionality, there is now an option in the export settings to print one underwriter's stamp/s per page when saving a contract as a Word or PDF document.

- Exporting with one stamp per page places each written line's stamp/s together on a single page of the exported document, including split stamps, mirror stamps, or section stamps.
- Each stamp page contains a full copy of the contract heading and its text to ensure there are no gaps in the contract for any participant.
- If a (re)insurer's stamps require a lot of space, they are continued over to a second page without being run onto another participant's details.
- After the last stamp in a contract, there is a further page break before any following contract heading/s or other content.
- Mid-Term Participant Change endorsements are not split into individual pages since the alteration to the list of participants is the matter requiring agreement.

Restarting a Contract Section's Page Numbers From One

When exporting a contract, page numbering can be restarted from page 1 for any or all contract sections.

- In the export screen, the contract sections are listed individually, and now include a checkbox to restart page numbering at the beginning of that section.
- Tick the section's checkbox to start that section at page number 1.
- Page numbering can be reset for all, some, or none of the contract sections.

Enhancements

- The 'Coverholder' contract heading is now available for inclusion in contracts under the 'Risk Details' contract section
 - 'The Coverholder' is an alternate synonym for the new contract heading.
- Previously, when creating a new contract, the 'Full Contract' option created an empty contract with a large number of blank contract headings. This has been removed, and the 'Create New +' menu has been re-ordered.
- Having written a line on an off-platform contract, underwriters now only receive notification emails when the broker sends them a chat message about the contract, signs it, or adds a post-signing attachment.
- When brokers update signed lines, the total percentage value of all lines is shown in the same way that it is when originally signing the lines.
- The 'Subjectivity response(s) received' action is removed when either the broker satisfies the subjectivity requirement and the underwriter accepts the response, or the broker marks the subjectivity as 'Unable to satisfy' and removes the line.
- Having been sent a request to write a line on an unsectioned contract at the firm order or Bindable Quote stages, underwriters no longer receive notifications if the broker adds a section to the contract.

- When cloning an existing contract or template which does not have an extended data Q&A questionnaire, it is now possible to also import a questionnaire from a user-selected template.
- A new 'Attaching to Facility' column in the Management Information Report identifies the specific facility reference number of each participating panel member's line written on a contract shown to that facility panel.
- User lists downloaded from the Admin Portal now include 'User Created' and 'Last Active' date fields for each user created under that organisational entity or sub-entity.
 - Some very early users do not have creation dates because of the way that users were originally added to the system. These date fields will be blank.
- When exporting the history of changes made in the Admin Portal, the administrator's user ID number is now accompanied by the administrator's name.

Integration Changes

Rather than requiring integrators to perform checks to compare the relative update status of a Library-linked contract heading with its Library Line Item, a new API call has been implemented to return the heading's current status.

Resolved Issues

Browser

- When a broker is unable to satisfy a subjectivity requirement on a line, and the underwriter removes the line or the subjectivity, the 'Subjectivity response(s) received' action is removed from the dashboard.
- Suspended users no longer appear in the list of underwriters that a declaration contract can be shown to.
- Mandatory tags now correctly only require one data field to have a properly tagged value even if there are other instances of that data field present but untagged in other groups ('pages') of data held under that contract heading.
- Brokers cannot show a declaration contract to a facility panel if the total line percentage is less than the previously-declared 'Order to This Facility' percentage.
- When a participant's line on a declaration has been rounded to 0, brokers are correctly unable to proceed, and are shown instructions on how to resolve the issue.
- Dashboard actions for the Internal Review process can be dismissed, and are cleared when the review is completed.
- In the Admin portal, when an authority record's type is changed from Lloyd's Syndicate to DUNS, the Lloyd's pseudonym field is properly cleared in the back-end data.
- Stamps intended for use by brokers with access to off-platform teams are no longer being erroneously offered to other brokers recording off-platform lines for on-platform (re)insurers.
- Synonymous contract headings now correctly have asterisks next to their names in Mandatory Tagging screens to show that they are synonyms.
- It is now possible to filter the history tab by underwriter using the 'carrier' filter.
- Drafts approved by an internal review can be successfully deleted from the contract record.
- The settings in the Export tab now only show one instance of the option to include the Unique Reference in the page header.
- When previewing a sectioned contract, underwriters now clearly see each section's name.
- When a contract is exported without a contract section that contains the source tag for cross-reference tags, any cross-reference tags in the exported material are correctly displayed.
- Filtering Feedback tab results for unsectioned contracts now returns the correct results.
- Brokers can no longer show the same section of a sectioned contract to the same underwriter more than once.
- Filtering Feedback tab results for an empty list now displays an empty list.
- A JSON contract imported from a file does not include any mandatory tag settings that the original may have had. Brokers are now informed of this when importing a JSON contract.

- When choosing to forward a quote as a new quote request, attachments are successfully shared and the broker's message is properly recorded in the contract's conversation history.
- Written lines added via the API are correctly limited to 7 decimal places.
- When an Admin updates a user's email notifications in the Admin Portal, those changes are correctly displayed in both the user's profile panel and their entry in the Admin Portal.
- It is now possible to use the version history tab to export an archived contract that includes a Defined Data Supplementary Document.
- When the mirror stamps on a written line have different stamp address details from the main stamp, the correct addresses for all stamps are being properly displayed on export and preview.
- When a declaration has been shown to a facility panel by a user on one team and the declaration's user team assignment is changed, a user on the new team can correctly reshown the declaration to the same facility panel provided that facility is accessible to the new team.
- When previewing an older verticalised contract with the export option to "Include terms in a single combined document" selected, currency amounts are correctly displayed.
- Underwriters can now correctly confirm that a 'No cover given' line's subjectivity has been satisfied using the API.
- When a user with Whitespace accounts in multiple corporate (sub)divisions opens a link for a contract that is not available to the user account that they are currently logged into, they are properly warned that the contract is not accessible from that account.
- The activity string generated for renaming a draft contract version now correctly displays the old draft name as well as the new one when called via the /activities API endpoint.
- Box sizes have been increased so that underwriters can now see the entirety of an unusually long percentage value on facility and declaration lines.
- Underwriters can no longer incorrectly use certain API calls to add a written line with an unapproved stamp.
- It is no longer possible to use the API's createEndorsement endpoint to start an endorsement to a signed contract using the docID of the contract's firm order instance.
- When exporting an endorsement, the endorsement agreement heading and text are kept on the same page.
- When a stamp includes different registered and invoice addresses, both addresses are correctly displayed under the stamp.
- When a Bindable Quote declaration is marked as a firm order and re-shown to the same facility, the facility leader will automatically be set to the same leader as on the Bindable Quote.
- When agreeing to an MTPC endorsement which includes a stamp with a pending update, users are properly warned about the status of that stamp.

iOS App

- Brokers can now successfully show a declaration contract to open market carriers as well.
- Facilities marked as inactive are no longer offered as a valid option when choosing which facility to show a declaration to.
- When an underwriter sends a Request to Quote for internal review, a duplicate copy is no longer created.
- When trying to show a firm order with outstanding mandatory tagging requirements, the "Show Outstanding Mandatory Tags" button now correctly takes the broker to the list of outstanding tags.
- Brokers can now delete sections from a sectioned contract.
- Once an off-platform facility has been shared with another team, the toggle to set it as inactive is no longer incorrectly being displayed.
- When a contract in a side-by-side comparison has contract section headings hidden in export, these headings are clearly labelled.
- When a declaration uses fewer decimal places of accuracy than the facility it is being shown to, and this results in a (non-)notification party's line exceeding their written line on the facility, the broker is warned of the issue and prevented from proceeding.
- Section headings are not reordered when cloning a contract.
- Brokers on the iOS app can now create an editable draft instance of a quoted contract sent by an underwriter.

- When showing a firm order declaration to a facility with the number of decimal places set to 'auto', lines are no longer calculated inconsistently in certain edge cases.
- Drafts approved by an internal review can be successfully deleted from the contract record.
- If a firm order with mandatory tags is withdrawn and then one of the mandatory tag fields is deleted from the contract, the system correctly recognises that the tag is now outstanding without the user having to refresh first.
- Stamp addresses are correctly displayed both when adding a line and looking at a contract's written lines.
- Underwriters can no longer edit a broker's proposed new written line percentage when accepting the proposal.
- When an open market participant is the contract leader of a verticalised contract that includes facility participants, the contract leader's stamp is now correctly shown first.

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. 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.