

# Whitespace Platform

## Release Notes v3.0.0

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Date: 6<sup>th</sup> December 2024

### Headlines

Questionnaires help brokers give useful data and details to underwriters that could otherwise be absent from contracts. The Contract Library permits users to create a library of standard headings, clauses, and wordings for easy repeat use. The Contract Builder lets brokers quickly build a contract/template from Library items and ensure it remains up to date.

### Release Details

#### Questionnaires can be Added to Templates to be Cloned at the End of Contracts

*Template Managers can now add pre-defined questions to the end of a template for brokers to answer. These let brokers share pertinent, structured supplementary information and data about the risk that might not be included within the contract itself, helping underwriters make informed decisions. Questionnaires are appended to all contracts that are cloned from the template they are part of. Template Managers can set default answers, but the questions should be checked and answered by the broker before the cloned contract is shown.*

- Template Managers can assemble template-specific questionnaires from a pre-defined library of questions.
- When the template is cloned to a contract, the questionnaire is appended for brokers to complete before showing.
- Questions either have a list of pre-set answers to choose from, a date field to select a date in, or free text fields for more open answers.
- It is possible to set a question to appear in response to specific answers to a previous question.
- Template managers may choose to provide default answers to questions that brokers can override as necessary.
- In addition to the Whitespace default question set, organisations can have their own question sets added that are visible only to their template managers.
- Underwriters can see questions and answers, and compare them between contracts as they would other contract content.
- It is possible to restrict the visibility of questionnaires to specific underwriters only in the Admin portal.
- Please note that at the current time, questionnaires are not being fully shared with Broking Partners.

#### The Contract Library Allows Users to Build a Database of Contract Headings and Their Text/Data

*By allowing the easy import of specific contract headings and their associated text and data, the new Contract Library system gives users with the new Library Admin permission simple access to the building blocks that make up a contract. This material is held in a database which supports versioning, is searchable in many ways, and has duplication-checking.*

- Clauses, wordings, and contract headings and their associated text and data – 'Line Items' – can be added to the Library manually, scanned from a PDF or MS Word document, or added from an existing contract or template in the Whitespace platform.
- Each Line Item is associated with a wide range of metadata to make it easy to search/filter for and work with, including several user-defined fields and labels.
- Once active, Line Items are fixed, ensuring consistency.
- To update a Line Item, a new version is created, and the old version is preserved for archival purposes.
- When adding a Line Item, duplicates of existing items are clearly highlighted and can be imported or ignored as required.
- All changes to the Contract Library are recorded in the detailed history.

## A Broker Companion to the Contract Library, the Contract Builder Allows New Contracts to be Quickly and Safely Built

Brokers with the Library Admin permission can use the Line Items held in the Contract Library to quickly and reliably assemble a new contract, or template providing the user has Template Manager permission. This ensures the new documents use the latest up-to-date versions of items, greatly increasing the consistency of terminology, data tagging, and formatting. By extracting the underlying structure of existing contracts and templates into layout guides, these new contracts can be assembled with just a few mouse clicks. When saved, the contracts are published to the Whitespace Platform like any other new draft.

- Layout Guides duplicate the structure of a contract's section headings and contract headings.
- These Layout Guides can be created from existing Whitespace contracts or templates, and then edited as required before being finalised.
- Contracts and templates can be assembled from Library Line Items using layout guides for quick construction or put together manually, and can be re-ordered as required.
- Completed contracts and templates are created in the Whitespace Platform as a new draft contract or template under the user's team.
- Library-created contracts and templates feature coloured icons that clearly show the status of the Line Item as compared to the matching Line Item in the library. Tagged data values may be excluded from this check. If the two items are identical, the icon is green. When the Library Line Item is updated, the icon turns yellow. If the Line Item in the Platform contract/template is revised to no longer match the Library, the icon turns red.
- This functionality allows brokers to very easily ensure that they are using the latest versions of clauses, wordings, or contract headings, helping eliminate costly errors, particularly at renewal.
- The links to the Library and the icon display functionality are preserved when the Platform contract/template is cloned.

## Enhancements

- The icons used to indicate that underwriters have seen or accepted an endorsement have been coloured to readily stand out.
- Defined Data time fields accept times in 24hr clock format, and the validation message for these fields has been updated to reflect this.
- A warning message alerts Template Managers who are about to delete a contract heading or an in-line attachment from a shared template.

## Known Issues

When showing a sectioned contract to a facility, notify and non-notify parties that are bound to sections after the first are only able to see their own stamps on the contract. This issue is not affected by the selected stamp visibility settings, and prevents these bound parties from seeing the facility leader's stamp or any other stamps the visibility settings ought to allow them to see. This issue does not affect any parties bound to section one, or the broker, leader, or agreement parties, all of whom can correctly see the stamps permitted by the visibility settings as usual. This will be corrected in an upcoming release.

## Defined Data Updates

*There are no new/deprecated defined data tags this update (but see 'Questionnaires' above).*

## Activity String Updates for Integrators Using MS Service Bus Queues

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

- **"Questionnaire Structure Updated"** – one or more questions have been added to, or removed from, a template's questionnaire by the user.
- **"Questionnaire Answers Updated"** – the user has saved default answers to one or more questions in a questionnaire.
- **"Questionnaire Removed"** – the user has completely removed the questionnaire from a template.

## WebSockets

The Platform now uses WebSockets to ensure users are kept informed of changes to their risks as they work, in real time. This reduces the operational load on the Platform, especially during peak periods. The prior mechanism, though less efficient, is available as an automatic fall-back where WebSockets are not available.

## Resolved Issues

### Browser

- When text is copied from a contract, either in Contract View or when editing, and then pasted into MS Word, the pasted text size now stays properly consistent.
- Brokers can now share attachments when showing a contract as Market Only.
- If a broker deletes an endorsement's section heading, this is now correctly reflected in the history panel.
- Sharing a template with another team no longer triggers email notifications to the brokers in the shared team.
- The icon for the 'Create Editable Draft' option in the blue drop-down 'Actions' menu is now correctly visible.
- The 'Lock Heading' option no longer erroneously appears under contract headings in Market Only contracts, firm order contracts, or endorsements.
- The MRC v3 compliance checker only warns that 'Surplus Lines Broker details must be entered' when that information has not been tagged if the 'US Classification' is 'US Surplus Lines' or the 'Additional Intermediary Role' is 'Surplus Lines Broker'.
- The system now correctly allows the binding of notify parties across all sections of a declaration when attached to the same sectioned facility.
- When a team is removed from a shared template, the message indicating that team access to the template has been updated displays properly.
- When adding a new leader as part of a Mid-Term Participant Endorsement, if the contract's stamp visibility settings are set to 'Share Leader's Stamp with Follower(s)', followers are able to correctly see the new leader in the MTPC agreement.
- When filtering stamps in the Admin Portal by stamp category, the filter options now only display each stamp category once.

### iOS App

- Brokers can no longer suggest a stamp which is not assigned to the selected user/team when showing a Bindable Quote or firm order.
- Contracts that have been withdrawn or declined now correctly do not display a 'stamp visibility' status icon.
- Following a contract correction, previous versions of the contract now properly display as they were when viewed in the version history.
- History timestamps now display correctly regardless of font size settings even when the dynamic font size is set larger than default.
- If an underwriter removes a tag that is the parent of a cross-reference tag used elsewhere in the contract, the cross-referenced tag is correctly replaced with a '#REF' market.
- When an underwriter updates stamp information, the organisation is now correctly displayed in the history trail.
- When an underwriter updates the main stamp's information on a written line the system correctly retains all existing mirror stamp information.
- When brokers open the 'Manage Sections' box after showing a firm order, the 'Save' button is only made available if and when new contract sections are added.

## 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.