

# Whitespace Platform

## Release Notes v2.19.0

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### Headlines

Brokers can now correct bound contracts, subject to underwriter acceptance, without issuing a full endorsement.

Text formatting has been substantially enhanced.

Users with multiple accounts can switch between them without logging out and back in.

### Release Details

#### Contract Corrections

*The new Contract Corrections system makes it easier for brokers to correct typos and other non-substantive errors in a signed contract or firm order contract with written lines, avoiding the need to issue a formal endorsement. Broker users with the new 'Contract Correction' permission set for their team in the Admin portal can issue correction documents to contracts with lines written on them. Once all participating underwriters have agreed to the changes, the contract can be updated.*

- This functionality allows brokers to fix typos and other non-significant contract errors without issuing a formal endorsement.
- It is possible to send a contract correction for internal review and, for organisations that have the mandatory internal review system enabled, to set all contract corrections as requiring mandatory internal review.
- Contract corrections can only be issued on contracts that are not already awaiting completion of an outstanding task, such as outstanding endorsements, unwritten lines, or subjectivity responses, and they cannot be issued for terms that have been verticalised within a contract.
- Once the broker has completed the required correction explanation field, the correction is sent to underwriters for approval.
- Underwriters are able to perform a side-by-side comparison of the correction and the existing contract as usual.
- Once all underwriters have accepted the correction, the broker can choose to apply it to the contract. Corrections that have been rejected by one or more underwriters must be revoked.

#### Greater Flexibility for Text Formatting

*As part of the ongoing process of providing greater flexibility to contract compilers, a number of text formatting improvements have been introduced. This includes a greater range of text colours, improvement to list functionality, simple table creation, and visual consistency enhancements.*

- Individual pieces of text can be set to one of six colours – black, red, orange, green, blue, and purple.
- Numbered lists and bullet lists can be built using convenient new editing controls, and offer multiple levels of indentation.
- Text size and paragraph spacing now show consistently between viewing and editing a contract.
- New tables can be created from a new 'table' button, defaulting to 3x3 but readily adjustable to whatever size you need.

## Streamlining the Process of Switching Platform Accounts

*Users with Whitespace accounts for more than one specific business entity can switch between these accounts without having to log out of the platform, making the process quicker and easier.*

- Users who have multiple accounts on the Whitespace Platform for different specific business entities can now change between those accounts without logging out.
- A new 'Switch' button has been added to the User Profile tab, taking the user to an overview of their accounts.
- Selecting an account from the overview page loads the user seamlessly into that account.

## Enhancements

- The 'Actions' menu has been redesigned to provide greater context for available actions, and to more easily fit onto smaller screens.
- The maximum file size of attachments and in-line attachments has increased to 50MB.
- Users are warned about possible tag removal when copying clauses with cross-reference tags from one contract to another.
- Contract and template lock stages have been relabelled to be more obvious and user-friendly, including increased clarity when unlocking contracts that have a mixture of locking types applied.

## Known Issues

**There is an issue affecting mandatory internal reviews of contract corrections at underwriting organisations.**

This issue occurs when all four of the following conditions are met:

1. A contract is shown to more than one team at the organisation;
2. That contract is subject to a correction;
3. A user is a member of two or more of the teams the contract is shown to; and
4. That user triggers an internal review of the correction.

The resulting internal review is applicable to just one of the user's teams. The other teams do not receive the required review. As a consequence, the user is left unable to respond to the correction. Furthermore, the user has no clear way of identifying which team was reviewed and which left outstanding.

To avoid this blockage, either:

- Have a user who is a member of an outstanding team – but not a member of any other teams receiving the correction – trigger an internal review and have it approved, and if necessary repeat until all teams are reviewed;

or:

- Disable mandatory internal reviews for contract corrections until the correction has been responded to, and then re-enable the mandatory review requirement.

## Resolved Issues

### General

- If a (re)insurer has changed their logo since agreeing an endorsement, exporting that endorsement shows the logo which was current when the line was written.
- It is no longer possible to exit the 'Record Off-Platform Lines' box in an unintended manner, only by using the 'x' button, preventing accidental loss of work.

- Long stamp descriptions are included in exported endorsements.
- PDFs can be included at the end of the contract when exporting endorsements.
- Showing an MTPC which changes the leader on a facility agreement no longer causes an error.
- Underwriters no longer receive an error message when removing a subjectivity requirement after a contract has been signed.
- When a broker is unable to satisfy a subjectivity requirement, the underwriter can remove their line from a signed contract without causing an error.
- When a Facility agreement progresses from Bindable Quote to Firm Order, off-platform line participation roles are correctly preserved.
- When a mirror stamp with default EEA text is applied, the stamp description correctly displays "Applying to EEA risks" when exporting the contract, whether exported on iOS or Browser.
- When a subjectivity requirement is removed, the contract's history now correctly only shows this once.
- When an MTPC adds a (re)insurer and is completed, notify parties on the endorsement are correctly visible to all parties.
- When an underwriter includes a cross-reference data tag in a Firm Order, the broker is correctly able to see the data value.
- When in-line attachments are exported at the end of a contract, they are no longer given page numbers. The final page number will be the last page of the contract.
- Whenever a declaration is shown to a facility leader, a contract heading specifying the facility agreement's UMR is added to the contract. If the facility leader declines the declaration, this contract heading is now retained in the declined contract.

### Browser Only

- Brokers can correctly create endorsements on firm orders that have a written line with outstanding subjectivity requirements, so long as at least one written line on the endorsement has either no subjectivities or has subjectivities that have been accepted.
- Cross-reference tags are now correctly displayed in the correction summary of Endorsements.
- During export, contract sections that are not selected for export can no longer be set to have page breaks removed.
- In Firefox, the horizontal scroll bar now correctly appears if pasting a table which exceeds the width of the displayed text.
- It is possible to append rows to a table without including the header row.
- Removing an off-platform line from the contract leader role on a draft Firm Order does not cause an error.
- Showing a declaration to a facility at firm order no longer causes an error if the declaration line has decimal places.
- Underwriters are now correctly able to respond to declaration quote requests received as facility panel members from unapproved brokers blocked at the organisational level, including when they populate the Quote Details section.
- When a broker adds a new off-platform follower to a contract via MTPC, the new (re)insurer can no longer be set as contract leader if the contract already has a leader.
- When a broker creates an endorsement for a Firm Order which features a written line with an accepted 'No Cover Given' subjectivity, the (re)insurer for that line is now shown.
- When a broker proposes a new written line which is accepted by the (re)insurer, other participants can correctly see the updated line value.

- When a placing broker adds vertical terms to a Bindable Quote and returns the contract to the producing broker, both brokers can correctly view the terms but not amend them.
- When a sectioned Firm Order is shown and fully withdrawn, and then all sections are removed, the overview card no longer shows the contract as sectioned.
- When a significant amount of text is pasted into a contract heading's text box, the page is scrolled to the bottom of the pasted text as required.
- When an underwriter accepts a contract from an unapproved Broker, and subsequently tries to add a line at Bindable Quote or Firm Order, the scroll function now only affects the Bindable/Written line module when it is open.
- When an underwriter adds a mirror stamp and clicks 'Done', the 'Manage Lines' window is correctly positioned at the relevant stamp.
- When an underwriter receives a Firm Order contract both as a facility member and via the open market, they now receive only one action notification for that contract.
- When an underwriter updates stamp information on a Bindable Quote that has progressed to a Firm Order, other lines are no longer set to 'Pending' status.

### iOS Only

- Adding a written line to a contract which includes both the 'Settlement Details' contract heading and also the 'Settlement Due Date' data tag appearing under more than one section headings no longer causes an error.
- Firm Order contracts can be properly exported.
- If subjectivities have been accepted for a Signed contract, all (re)insurers can now correctly see the subjectivity statuses of all lines.
- Showing a facility agreement with multiple (re)insurers given the 'Leader' role but only one set to 'Contract Leader' now correctly shows the designated contract leader in the overview.
- When a Bindable Quote or Firm Order is shown to a specific individual, their name is correctly logged in the history.
- When a broker reverts a signed contract to a firm order, the history correctly records the broker's name and organisation.
- When a broker selects a (re)insurer as leader when showing a Bindable Quote or Firm Order, that (re)insurer can not be given a non-leader role.
- When a broker selects the event notification for a stamp update, the 'Manage Lines' panel is opened so that the changes can be accepted or rejected.
- When a broker withdraws a Firm Order from the leader, they are now correctly warned that this will also withdraw all followers.
- When a Declaration is shown to a facility and the Declaration written line exceeds the signed facility agreement line for the facility leader, there is no longer an error.
- When a producing broker shares a draft contract with a placing broker, the placing broker is given the opportunity to set themselves as the contract owner when they first open the draft.
- When a producing broker shares a draft contract with a placing broker, the placing broker's name is correctly recorded in the history.
- When adding a line to a facility agreement, only the leader is given the option to select a Year Of Account.
- When an underwriter manages their line and selects 'Update Stamp Information' but does not make any changes, it is not possible to click the 'Update Stamps' button.

### Admin Portal

- Deletion of financial relationships in the company details can be saved.
- When making changes to the 'Approved (Re)Insurers' list, it is possible to click 'Save' more than once without having to change to a different Admin Portal tab.

### MI Reporting

- All Firm Order and Signed contracts now include 'Written Line Carrier Date'.
- When a Firm Order is rejected, the 'Firm Order Requested Date' for the (re)insurer is no longer incorrectly updated with the rejection date.

## 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.