

Overview of the New Whitespace Admin Portal

The Whitespace Admin Portal has been extensively revised to improve usability and extend functionality.

Navigate between panes by clicking on the pane names in the left-hand menu.

Click on the pen-and-paper icon at the end of the 'Name' field to edit the organisation's display name.

The 'Stamps' pane is only available for underwriter admins. It is replaced by the 'Approved Carriers' pane for broker admins.

ORGANISATION DETAILS

Name*

Wantage Underwriting

System ID

TDUW

Role on Platform

Underwriter

Authentication Method

Microsoft Active Directory

Permitted Domains

@wspt.co.uk

Authority

Registration No.

Pseudonym

Lloyd's (Syndicate Number)

2350

TSD

Financial Relationship

Related Organisation Name

Whitespace Verisk

Parent Organisation

Subsidiary Organisation

Branch/Office

Partner Organisation

Black & White

Colour

Choose File

Choose File

Save

IMPORTANT NOTE:

Click on the blue 'Save' button, available on every pane, at any time before leaving the Admin Portal to apply changes made.

Failure to save **will** result in the loss of all unsaved changes.

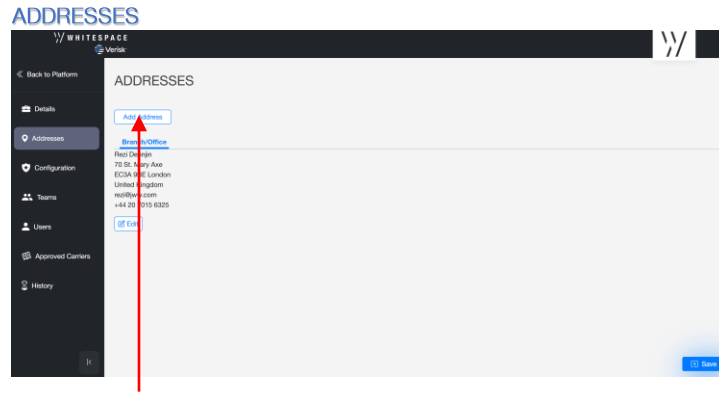
You can navigate between panes as desired without losing changes.

Click on the '+' in the 'Financial Relationship' header to add the name and status of affiliated organisations or, once confirmed with the tick symbol, click the pen-and-paper icon to edit the entry. This information is not visible to third parties.

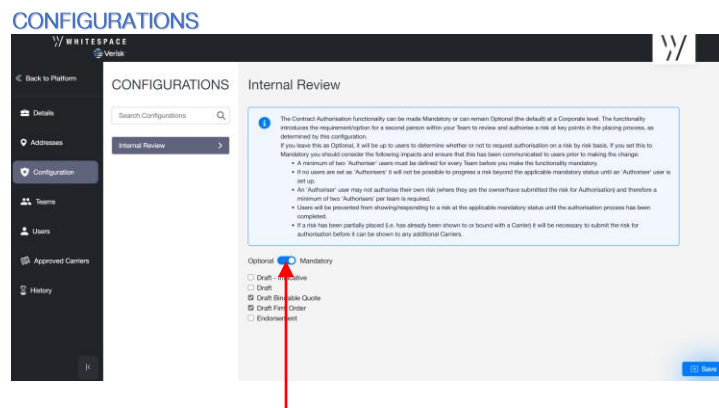
Organisations may add details of one or more of their authority registrations by clicking '+', or edit them via the pen-and-paper icon. Details are not visible to third parties.

Click 'Choose File' to select .png versions of corporate logo files for use in the Platform. File requirements are shown above the logo images.

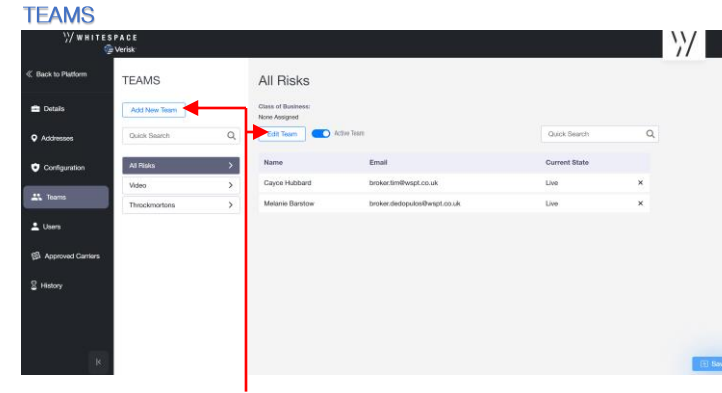
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Click 'Add Address' on the 'Addresses' pane to add an address, telephone, contact person and/or email for your organisation. Multiple addresses can be stored, and all can be edited freely. This information is not visible to third parties.

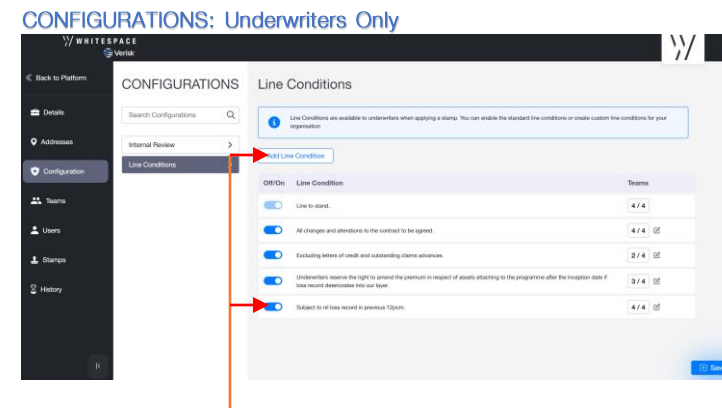


All organisations may choose to enforce mandatory internal reviews for contracts reaching certain stages in the placing progress. On the 'Configurations' pane, select the 'Internal Review' panel and toggle the switch to 'Mandatory'. The information box on the panel details the requirements and functionality of this system.



The 'Teams' pane displays user teams; that is, collections of users who can see the same contracts. Click 'Add Team' to add new teams as required, and 'Edit Team' to add/remove members. Both team and member lists are searchable.

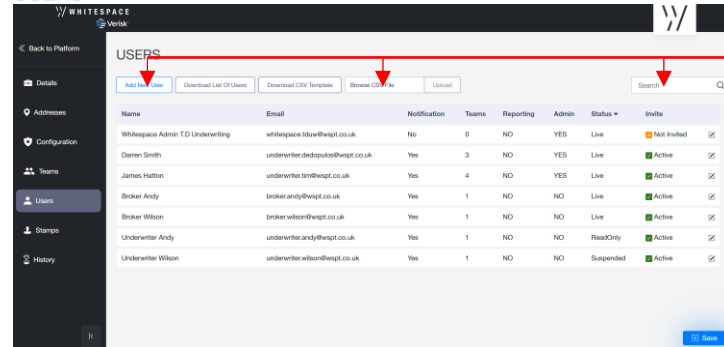
Please Note:
All teams must have at least one unsuspended member. Teams cannot be deleted, but they can be set as inactive. Adding a user to a team may have billing implications.



Underwriter organisations have access to a 'Line Conditions' panel under the 'Configurations' pane. Toggle a line condition to make it un/available to users when writing a line, or use the 'Add Line Condition' button to make a new option available. The 'Line To Stand' condition is always available to users.

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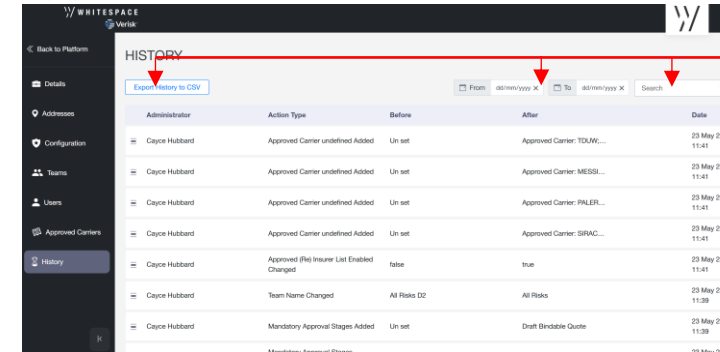
USERS



Users can be added individually or, using the 'CSV Template', uploaded in bulk. The list's email names can be filtered by typing in the search field, and the whole list can be downloaded.

The 'Users' pane contains a complete list of all the organisation's user accounts. **Please note** that users cannot be deleted for legal reasons, but they can be set as suspended, denying them all access. Edit users via 'Edit' icon to revoke 'Template Manager' or grant 'Self-Approver' statuses.

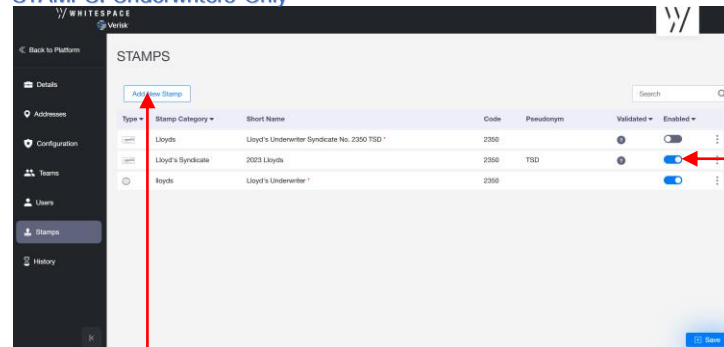
HISTORY



The list of admin actions can be downloaded in full, or filtered by date range and/or action type.

All admin actions are recorded in the 'History' pane by date and name, and include a summary of both previous and new settings. The nature of the change is summarised in the 'Action Type' column.

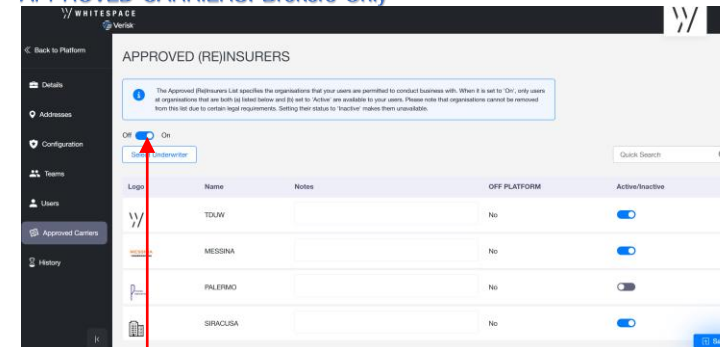
STAMPS: Underwriters Only



Please Note: For legal reasons, stamps cannot be deleted, but they can be toggled from enabled to disabled so that users cannot access them.

Underwriter organisations have access to the 'Stamps' pane, which allows them to add both full and button stamps and assign them to whole teams and/or individual users. New stamp creation has been significantly improved, and the process includes validation by Whitespace support. Please see the 2.12 **Managing Stamps** guide for detailed information.

APPROVED CARRIERS: Brokers Only



Similar functionality restricting the users of underwriting organisations to dealing with an approved list of brokers is currently in development.

Broker organisations may choose to restrict the (re)insurers that their users are able to do business with. If this functionality is toggled to 'On', they can only share contracts with underwriters at organisations already added to the list.