THE WHITESPACE ADMINISTRATION PORTAL USER GUIDE

The Whitespace Platform is designed to be as intuitive and user-friendly as possible, both when setting up your organisation and userbase on the platform and when managing its details. This guide, fully updated for v2.13 of the Whitespace Platform, details the full use of the Admin Portal in an onboarding-friendly order, so that your organisation can quickly and easily start working with Whitespace.

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Whitespace is a Verisk company

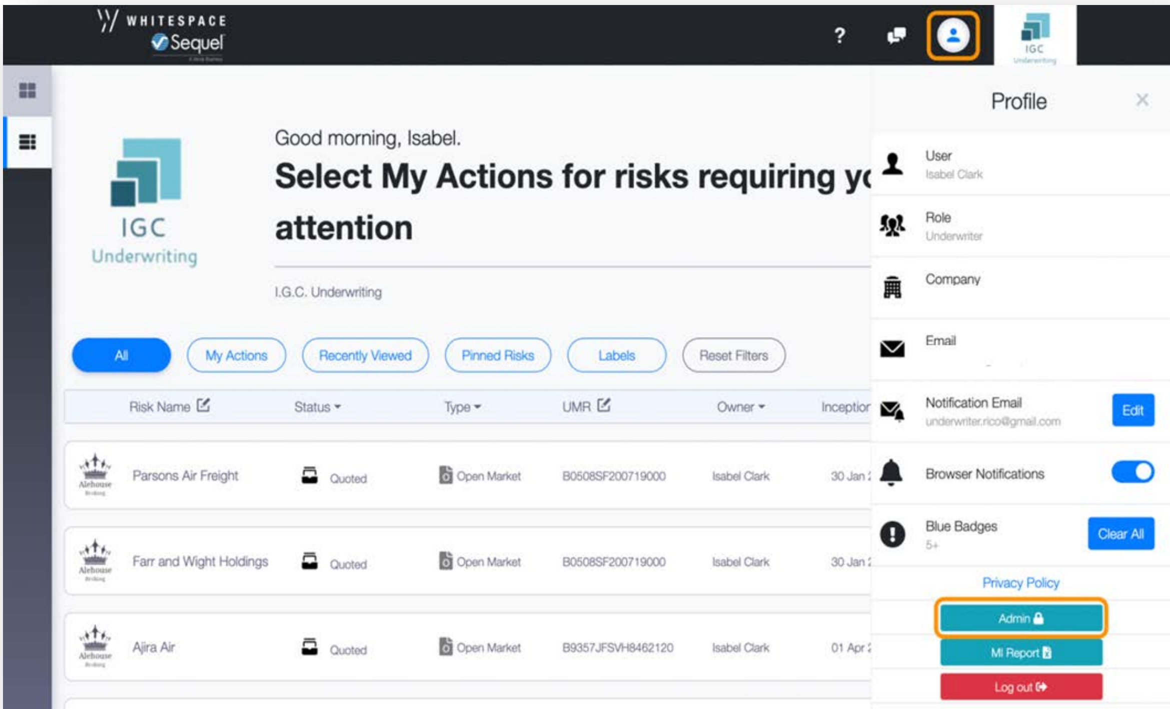
1. Overview of Onboarding

The onboarding process is made simple by Whitespace and follows these steps:

1. The Whitespace support team (email: `support@whitespace.co.uk`) creates the organisation's core account, associating it with your existing email domains, and provides your designated administrator with a Microsoft Azure Active Directory (AD) login to the platform. If onboarding is being performed for your organisation by Whitespace, your account manager will guide you through filling in the onboarding sheet, and our support team will take care of all your set-up under step 2.
2. For manual onboarding – and later management of users and options – an administrator logs into the platform and accesses the admin portal. There, they set up the organisation's users and assign them to teams, manage their logos, stamps, and other core elements, configure certain business options, and grant administrator status to other users as required. ***The remainder of this guide details these processes***.
3. Whitespace creates Microsoft AD platform logins for each user set up by the administrator.
4. Each user with a Microsoft AD platform login receives an invitation to sign in to the Whitespace platform.

2. Accessing the Administration Portal

The admin portal is available via the browser version of the platform, located at www.whitespaceplatform.com. To access it, log in to the platform with the credentials provided by Whitespace support, click the 'head and shoulders' user icon highlighted in orange below, and then press the light blue "Admin" button near the bottom of the profile tab, also highlighted. Users who do not have administrator status do not see the button on their profile tab.



3. Overview of the Administration Portal

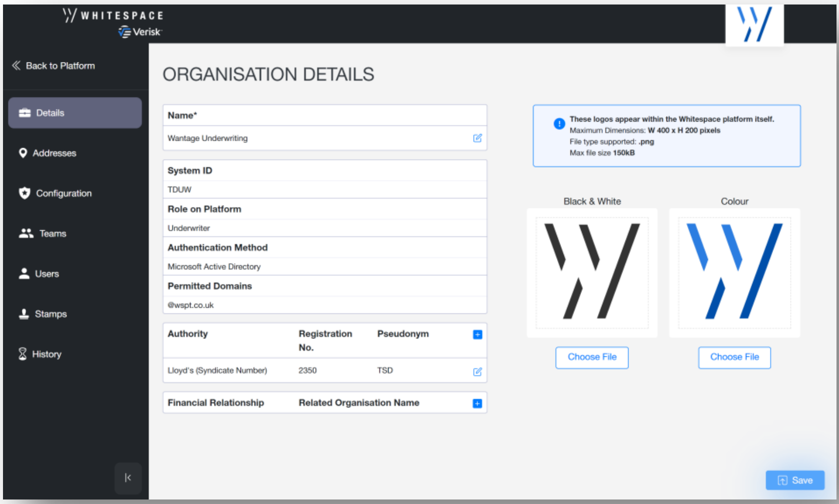
When opening the admin portal, you arrive at the panel that displays your organisation's details. The black sidebar to the left of the screen shows the panels available to you – brokers and re/insurers have slightly different configuration options.

The most important fact to remember about the admin portal is that to minimise complicated errors, **all** changes are pending until you click the blue '**Save**' button, which is located in the bottom right corner of each main panel.

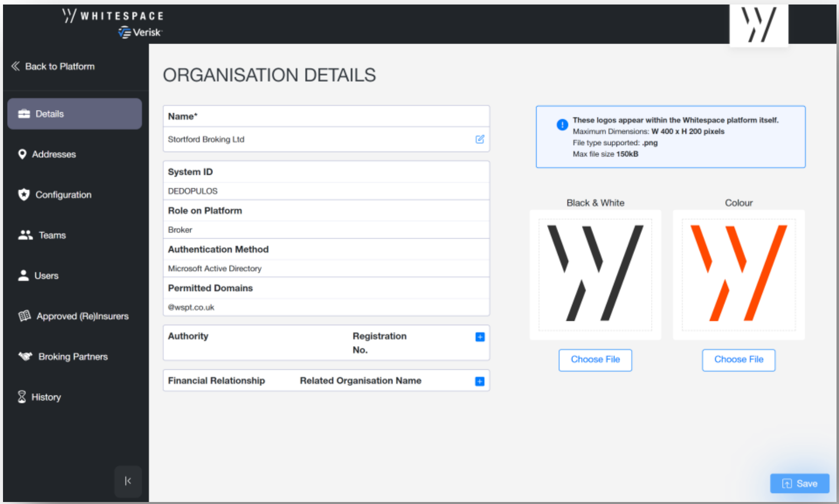
Several aspects of your organisation's configuration have on-going legal implications, and cannot be undone. Until 'Save' has been clicked, all pending changes can be undone, and if you navigate away from (or close) the admin portal, they will be permanently discarded. Once you click 'Save', the changes are logged in the History panel and propagated through the system, and some are permanent.

Please always remember to double-check your admin portal changes before they are locked in, and then to click 'Save' to confirm them before navigating away from the portal.

Re/Insurer Portal



Broker Portal



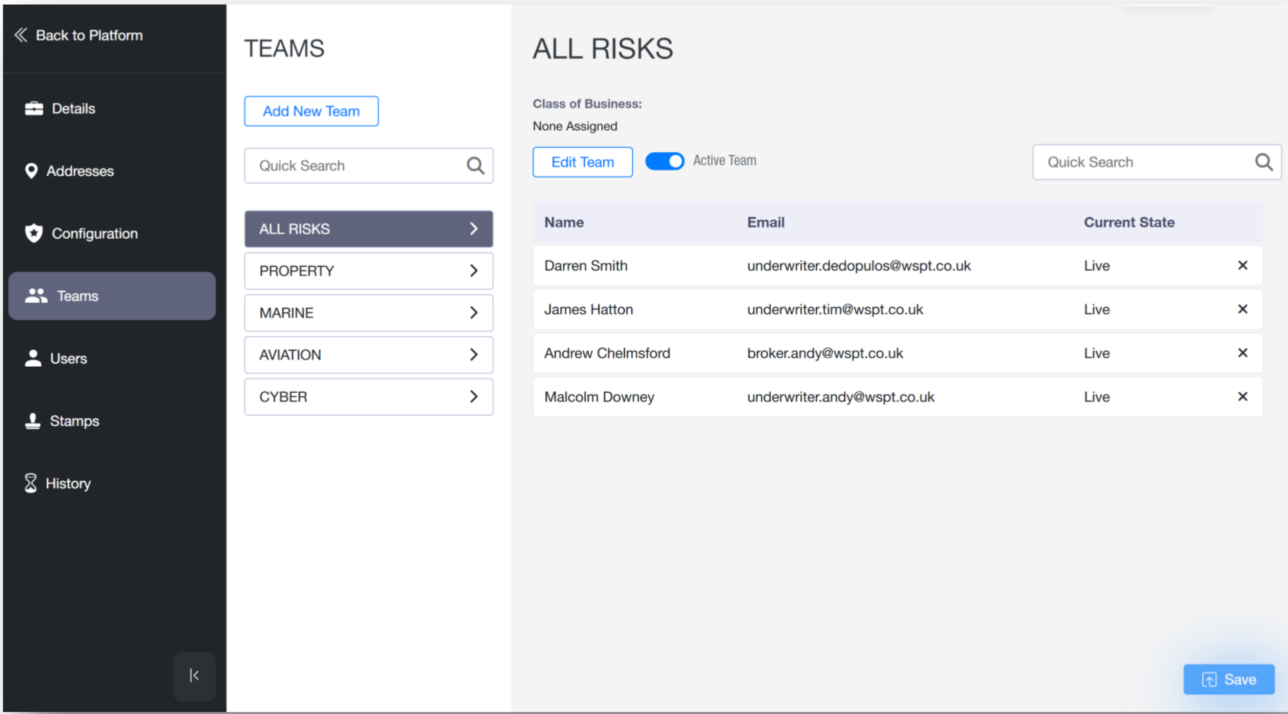
4. Configuring User Teams

Organisations on the Whitespace platform are subdivided into teams, which group colleagues, control access to information, and mediate contact between organisations. These teams consist of a name – often describing the class of business handled by the members of that team – and a list of the users who are team members.

Administrators create the organisation's teams, and can then assign users to them.

Before a user can access the core functionality of the Whitespace platform, they need to be assigned to one or more teams. Users and administrators who are not part of a team cannot access that team's contracts or other platform data. Please note that contracts are assigned to teams rather than users, so all active users need to be on at least one team.

To configure your teams, click on the 'Teams' button in the left-hand navigation pane to open the Teams panel.



The left-hand portion of the panel shows a full list of your existing teams in the order in which they were created. The darker right-hand portion of the panel shows the information of the currently selected team, including a full list of its members.

4a. Finding Teams

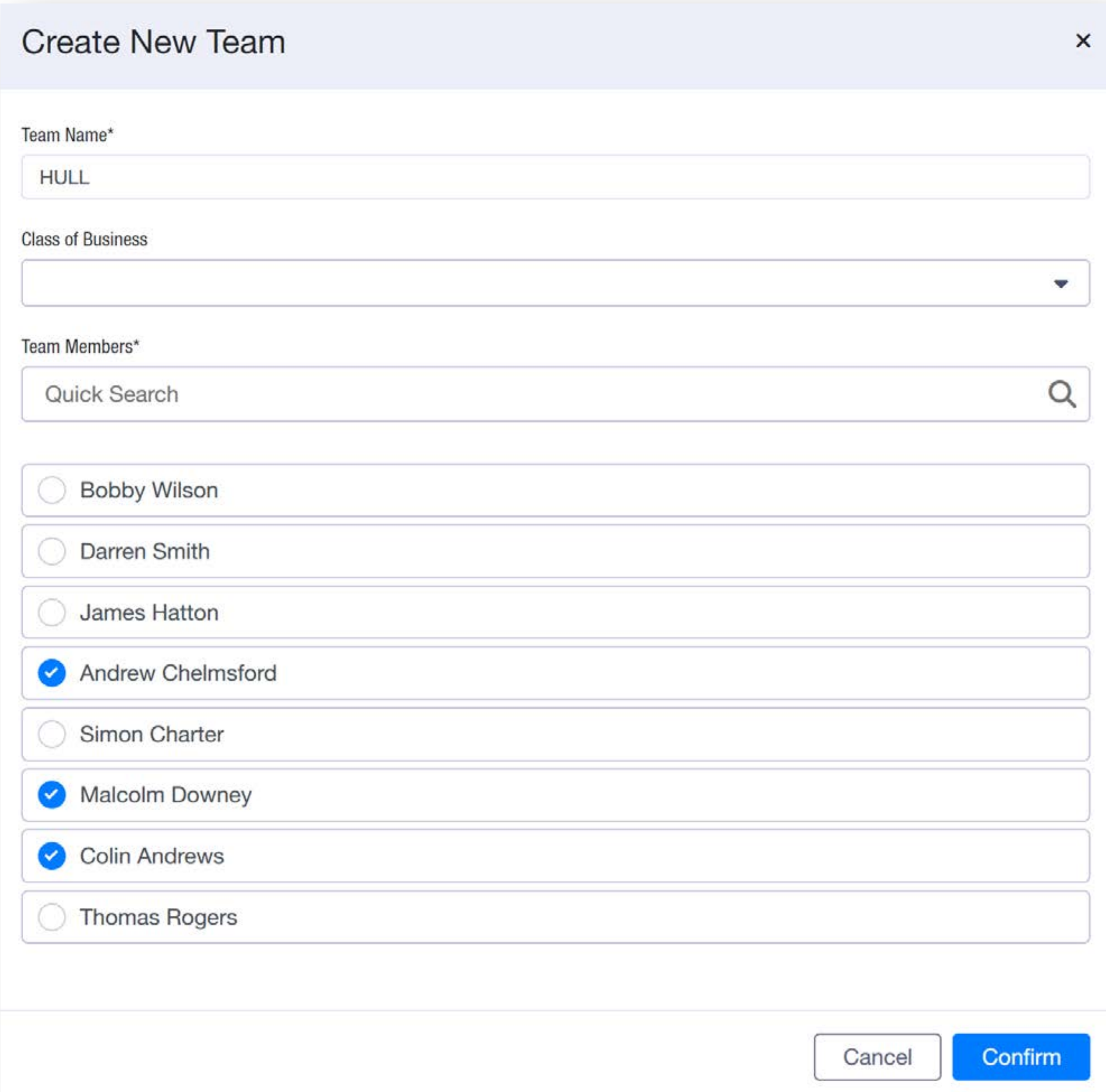
To search the list for a specific team, click in the 'Quick Search' box below the 'Add New Team' button, and type. The list of teams will be filtered to display only those team names that match the text you enter. The list is also scrollable if long enough.

4b. Adding Teams

To add a new team, click on the 'Add New Teams' button. Please note that for legal reasons, saved teams are permanent, although they can be renamed and deactivated. The internal system name assigned to the team is likewise impossible to alter, and is used when assigning users to teams as well as in some other places, so if it is vital to have a completely new name for an existing team, you are strongly encouraged to create a new team and deactivate the previous one rather than repurposing the existing one.

When you click on the 'Add New Teams' button, the Create/Edit Team Box is displayed.

- Enter the name of the new team in the 'Team Name' field.



- The 'Class of Business' field is functional, reserved for future use.

- All the organisation’s users are selectably listed under the ‘Team Members’ heading. You may scroll the list, or type into the ‘Team Members’ quick search to filter the list to names matching the text you have typed.
- Click on a user’s name to toggle them as a list member, shown by the tick in their selection circle.
- All teams must have at least one non-suspended user as a member.
- During manual onboarding, when users have yet to be configured, you can add yourself temporarily to teams so that they can be created. This is more efficient than creating your users first, particularly when you will have fewer teams than users.
- There is no limit to the number of teams a user can belong to, and teams may have as many members as you have users.
- When you have finished adding users to the team, click ‘Confirm’ – and remember, when the team is correct, click ‘Save’.

4c. Editing Teams

To edit a team’s name or member list, select the team and click ‘Edit Team’.

The Edit Team Box is identical to the Create New Team Box except for its title bar, and functions as detailed above: click users to add or remove them, and/or click and type in the ‘Team Name’ field to change it, and click ‘Confirm’ then ‘Save’ when done.

4d. Deactivating Teams

As mentioned elsewhere, saved teams cannot be deleted. However, they may be set to inactive, which will prevent any new business from being transacted under them. To make a team inactive, select it and click on the blue ‘Active Team’ toggle immediately to the right of the ‘Edit Team’ button. Inactive team names appear in a lighter shade of grey in the team list. Please note that inactive teams must still have at least one non-Suspended user member at all times in case existing contracts or new endorsements need servicing or attention.

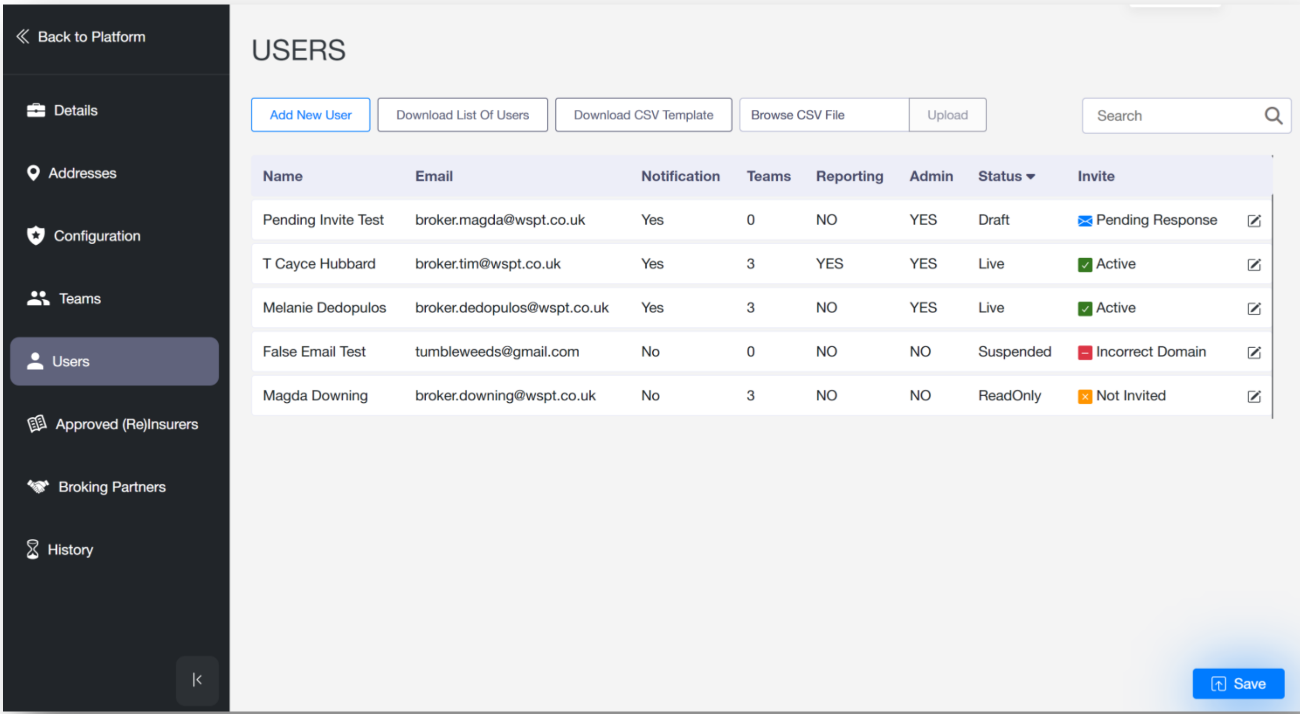
5. Configuring Users

Before a member of your organisation can access the Whitespace Platform, they need to be issued an invite which includes their personal Microsoft Active Directory login. These logins may not shared with any other user. To issue an invite, an administrator adds the intended recipient to the user list via the admin portal. Users can be added individually or in bulk using a template as discussed below.

Invites can only be issued to unique email addresses on one of the company email domains that your organisation registered with Whitespace during the sign-up process. These domains must be wholly-owned by your organisation. Please note that invites will NOT be issued to email addresses at mass-market providers such as Gmail or AOL.

If you need to add a user with an email address at a new domain, you can contact `support@whitespace.co.uk` to get the new domain associated with your organisation.

To configure your users, click on the ‘Users’ button in the left-hand navigation pane to open the Users panel.



The Users panel displays a full list of all your organisation’s Whitespace users, ordered chronologically by default.

Each row in the user table gives a summary of one user – name, email address, whether the user has a separate email registered for platform notifications, the number of teams they are a member of, whether they can generate Management Information Reports, whether they have access to the admin portal, their status on the system, and the status of their Active Directory invitation – note that only ‘Active’ users are able to log in. Click on the paper-and-pen icon at the end of the row to open the user’s details for editing.

5a. Finding Users

You can filter the list by either name or email by typing into their ‘Search’ box in the top right, and scroll as usual when the list is long enough. You may also filter users by status by clicking on the drop-down arrow to the right of the ‘Status’ header and ticking the statuses to display.

You can click the ‘Download List of Users’ for a downloadable .csv spreadsheet version of the table displayed on the Users panel. There are two primary differences between the on-screen list and the downloaded list – the latter specifies the teams that the user is part of, and also omits the information in the ‘Invite’ column.

5b. User Access to the Platform

A user's status can be 'Live', 'ReadOnly', 'Draft', or 'Suspended'. 'Live' users have regular full access to the Whitespace Platform. 'ReadOnly' users can log in and examine any contracts associated with their teams, but they cannot make any changes or conduct any business. Users can be set to 'Draft' during the set-up and invite process, and cannot log in to the platform. 'Suspended' users have no platform access, and do not appear as members of any teams on the platform, either internally or externally. Already-active users will become 'Suspended' when set to 'Draft'.

Please note that for legal reasons, you cannot delete users. To revoke a user's access, set them to 'Suspended'.

5c. Inviting Users

When a new 'ReadOnly' or 'Live' user is saved, they are automatically generated an invitation email for the platform that provides them with the credentials to log in. The current state of that process is shown in the 'Invite' column.

'Incorrect Domain', shown with a red "-" icon, indicates that the user's email domain is not one of your authorised domains. You can contact Whitespace Support (email: `support@whitespace.co.uk`) if you need to add a new email domain, but please note that shared domains and public email providers are forbidden for security reasons.

'Not Invited', shown with a yellow "x" icon, indicates that the while the email domain is valid, the mail system for that domain has not yet accepted an invite email for that specific email address. It can take a minute or two for the system to issue the invite, but if the 'Not Invited' condition persists, check to ensure that the actual email address is valid.

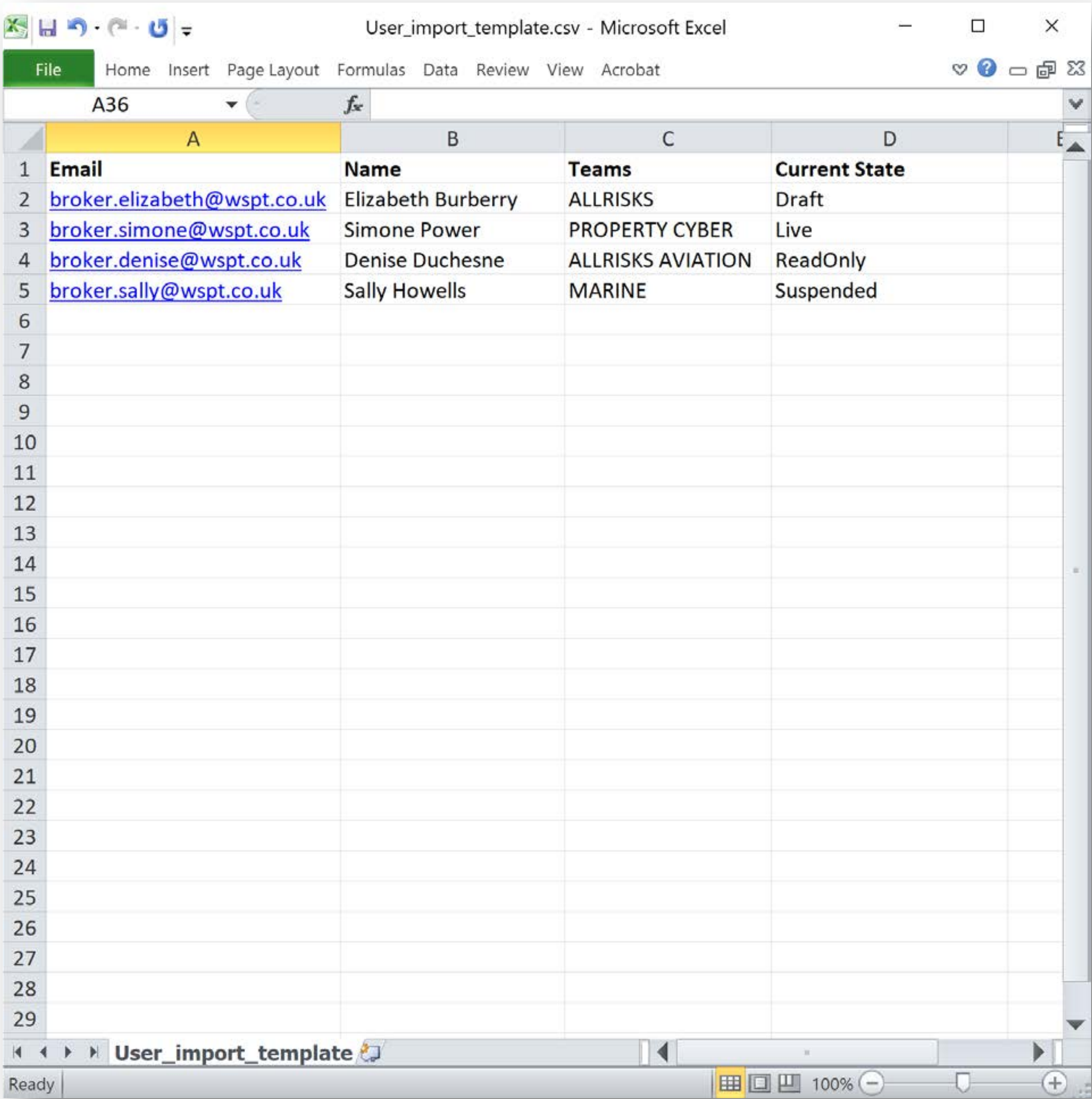
'Pending Response', shown with a blue envelope icon, indicates that an invite email has been successfully sent, but the user has not yet used the provided credentials to log into the platform. If the user has somehow lost the invite, a new one can be issued by setting the user to 'Draft', saving the change, then re-setting to them 'Live' or 'ReadOnly', and saving that change as well.

'Active', finally, shown with a green tick icon, indicates that the user has successfully logged into the platform.

5d. Adding Users in Bulk

Whilst users can be added one by one, as detailed in the next section below, a downloadable template is provided to allow administrators to add any number of users in a single operation. Please note that for security reasons, only basic user information is permitted when adding bulk users – the user's name, email address, team memberships, and activity status. Advanced or sensitive permission flags, such as Administrator status, must be set manually. Some advanced flags can have serious implications for your organisation, and so must only be assigned with the requisite degree of caution.

To obtain the template for bulk-adding users, click on the 'Download CSV Template' in the top line of the Users panel, and save the file somewhere accessible. Navigate to the file in your operating system and double-click it to open it in your spreadsheet or, if necessary, word processor. Put one user in each row, with the email address in Column A, name in Column B, the **internal system** team name/s in Column C (separated by a single space when adding the user to more than one team), and their desired activity status in Column D.



	A	B	C	D
1	**Email**	**Name**	**Teams**	**Current State**
2	broker.elizabeth@wspt.co.uk	Elizabeth Burberry	ALLRISKS	Draft
3	broker.simone@wspt.co.uk	Simone Power	PROPERTY CYBER	Live
4	broker.denise@wspt.co.uk	Denise Duchesne	ALLRISKS AVIATION	ReadOnly
5	broker.sally@wspt.co.uk	Sally Howells	MARINE	Suspended

Please note that the team names used in the Users panel and while adding users are the teams' internal system names, rather than the in-platform display names. These take the form of the original team name in capital letters, with all spaces removed. Renaming the team can change the display name, but cannot alter the internal system name, so if teams have been renamed, there may be some disparity between the Teams and Users panels.

Internal system names are not currently shown on the Teams panel. To verify an internal system team name, use the Users pane.

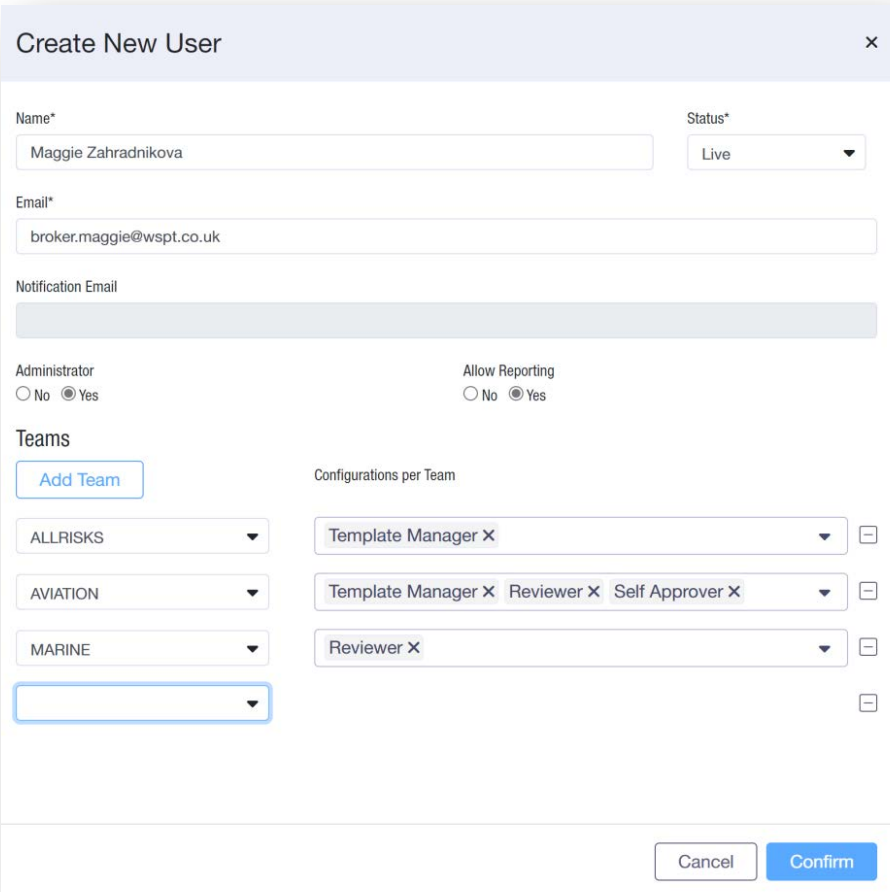
Open any user, including your own entry, for editing by clicking anywhere on their row. When the 'Edit User' window pops up, the teams the user is on will be listed by internal system name below the 'Teams' heading. To see all other internal system team names, click on 'Add Team', and then click on the new entry in the list. This will open a drop-down showing all the active teams that the user is not already assigned to, again by internal system name.

You may wish to make a note of these internal system names before adding bulk users.

When the user detail spreadsheet is complete, save it with a memorable name, retaining the .csv format, and turn back to the Users panel. Click on the 'Browse CSV File' button next to the 'Download CSV Template' button, and when prompted, navigate to the saved spreadsheet. Select the file and click 'open' in your operating system dialog to tell the admin portal which file you want to use. Then click the 'Upload' button next to the 'Browse CSV File' button to actually import the new users. When you are happy with the result, click 'Save' to finalise the additional users and begin the invitation process.

5e. Adding Users Individually

To add a single user to the platform, click the 'Add New User' button on the Users panel.



In the 'Create New User' window, add the user's name and email address. Notification email addresses do not need the same degree of security as login emails, and can be set by the user, or added/edited once the user is active. The user's activity status defaults to 'Live', and can be altered by clicking on the 'Live' entry and selecting a different status from the drop-down menu.

To assign the user to a team, click the 'Add Team' button to add a blank row in the teams list. Click on the blank entry to open a drop-down list of all active teams that the user is not currently on, and select the team name from the list. You can type the first letter of the team name to rotate between all teams beginning with that letter.

As mentioned above, the window shows teams' internal system names, not in-platform display names. These take the form of the original team name in capital letters, with all spaces removed. Renaming the team can change the display name, but cannot alter the internal system name, so if teams have been renamed, there may be some disparity between the Teams and Users panels.

Advanced user permissions and team configurations are discussed in detail below. When you are happy with the new user, click 'Confirm' and then 'Save' to issue their platform invite.

5f. Editing Users

To edit a user, click anywhere in their row in the user list of the Users panel. Remember that you can type their name into the 'Search' box at top right to filter them out of the larger list.

Other than its title, the 'Edit User' window is identical in all respects to the 'Create New User' window, so please refer to 'Adding Users Individually' above for core functionality, or keep reading for advanced options.

5g. Setting Advanced User Permissions

There are a number of user flags that provide access to more advanced functionality and systems within the platform. For security reasons these cannot be added in bulk, but they can be freely added or removed by administrators when adding or editing an individual user.

These options come with a variety of considerations. It is strongly recommended that users not be given more permissions than they need.

5g-i. Administrator Permission

The Administrator role carries a significant degree of power over your organisation's use of the Whitespace Platform, including the ability to create a unique team inaccessible to other users from which business can be conducted. As such, giving your organisation's brokers and underwriters access to the admin portal may constitute a significant compliance hazard. Please very carefully consider whether a user needs Administrator authority before assigning them this permission.

To set a user as an administrator, click the ‘Yes’ radio button under the ‘Administrator’ heading, located on the Create/Edit User window above the list of teams, then click ‘Confirm’ and ‘Save’. Similarly, to revoke administrator access, click the ‘No’ button, confirm, and save.

5g-ii. Management Information Reporting Permission

Users with Reporting permission can generate MI Reports as needed that detail all the business that their assigned teams have carried out on the platform to date. These reports are computationally expensive to generate, and as such, giving Reporting permission to a user may have financial implications for your Whitespace account. Please contact your Whitespace account manager for more detailed information.

To allow a user to generate MI Reports, click the ‘Yes’ radio button under the ‘Allow Reporting’ heading to the right of the ‘Administrator’ options, then click ‘Confirm’ and then ‘Save’. Similarly, to revoke reporting permission, click the ‘No button, confirm, and save.

5g-iii. Internal Reviewer Permission

If a team includes at least one reviewer, team members may at any time choose to send a contract for internal review. The contract can then not be progressed until the reviewer has approved it. Similarly, organisations may choose to make internal reviews mandatory for contracts reaching certain stages in the placing process.

Permission to conduct an internal review of a contract is granted on a team-by-team basis. Reviewers are responsible for authorising that a contract is fit to progress to the next stage in the placing process, and so should be suitably qualified for this role. They cannot by default review their own contracts. If internal reviews are mandatory in your organisation, each team needs have two members with the ‘Reviewer’ permission, because otherwise, the reviewer will never be able to progress their own contracts.

To give a user the ‘Reviewer’ permission for a team, click on the down-arrow at the right hand side of the long box next to the name of the team in question, and click ‘Reviewer’ from the drop-down that opens. The label then appears within the box associated with that team, and can be removed by clicking the ‘x’ at the end of the label. When you have set all team permissions needed, click ‘Confirm’ and then ‘Save’.

5g-iv. Self-Approver Permission

In cases where it is needed – for example, a team that is too small to have two internal reviewers, or a user for whom oversight would be inappropriate – you can give a reviewer the ‘Self-Approver’ permission for one or more teams. This allows the reviewer to also review their own contracts, so that their work does not require a second reviewer. Please note that where possible, it is better to give a second qualified user the ‘Reviewer’ permission.

To give a reviewer the ‘Self-Approver’ permission for a team, click on the down-arrow at the right hand side of the long box containing the ‘Reviewer’ flag for the team in question, and click ‘Self-Approver’ from the drop-down that opens. The ‘Self-Approver’ flag appears within the box along with the 'Reviewer' flag. Please note that it is not possible to grant 'Self-Approver' status to a user who is not already a reviewer. To remove the permission, click the 'x' at the end of the label. When you have set the permissions that are required, click 'Confirm' and then 'Save'.

5g-v. Brokers Only: Template Manager Permission

New contracts on the Whitespace platform are typically created from pre-defined templates. These mix standard clauses and common wordings with tagged data fields that can hold the specifics of the contract in a CDR-friendly format. Such templates often require significant amounts of work to prepare, and so should not be altered casually or accidentally.

The 'Template Manager' permission allows a user to create and edit templates freely for a given team. Users without the permission can access and clone templates to create a new contract and then edit that, but they cannot manipulate the templates. Some organisations will want to keep the number of template managers per team strictly controlled, while others will prefer to allow that functionality to the majority of users. Any team without at least one template manager will be unable to create new templates.

Please note that brokers can lock contract text in whole or in part to prevent later changes, and can also undo such locks as required. Template managers have access to a higher-level locking function that only other template managers can unlock. Regular users are unable to remove template managers' locks. Both levels of locking can be applied to templates. When a user clones a template which has been wholly or partially locked, the resulting new contract inherits the same locking as the template.

To give a broker the 'Template Manager' permission for a team, click on the down-arrow at the right hand side of the long box next to the name of the team in question, and click 'Template Manager' from the drop-down that opens. The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.

5h. Removing Users

For legal reasons, saved users cannot be deleted from the user list, but they can be suspended. This prevents all platform access and ensures that their name does not show as part of any teams on the platform. To suspend a user, edit their user details by clicking anywhere on their entry in the user list of the Users panel. You can type their name or email into the 'Search' box at top right to filter the list and find them quickly.

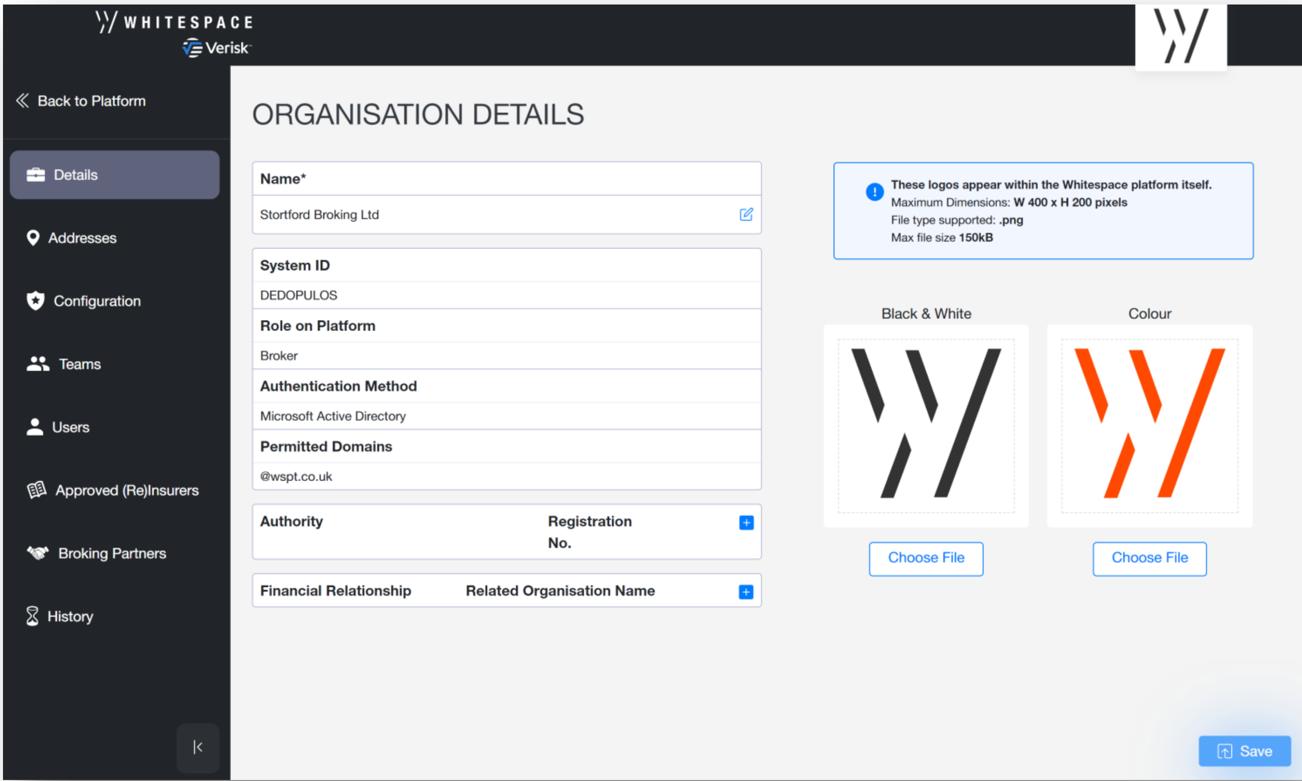
In the Edit User box, click on their 'Status' entry towards the top right, and select 'Suspended' from the drop-down list. You can also remove them from any teams by clicking the small '-' box at the end of the team's entry in the 'Teams' list. Suspended users cannot access the platform, and so have no access to the admin portal or MI Report functionality, but it is best practice to ensure those options are set to 'No'. When ready, click 'Confirm' and then 'Save'. Remember to mention suspended users to your account manager and email details to support@whitespace.co.uk for billing calculations.

6. Configuring the Organisation's Logos

Your organisation's colour logo appears throughout the platform – on your user's dashboards, PDFs exported, contracts sent, endorsement agreements put down, when selecting organisations from a list, and more. The black and white logo appears on most stamps, and other places. Therefore, it is important to have logos correctly configured.

Before setting logos, make sure to have the image files prepared. You will need two files, one black and white/greyscale, and one full colour. These should depict the same logo. The files must be in .png format, with maximum width of 400px, maximum height of 200px, and a maximum file size of 150kb.

When you have your logo files readily available, click on 'Details in the admin portal's sidebar to navigate to the 'Organisation Details' pane.



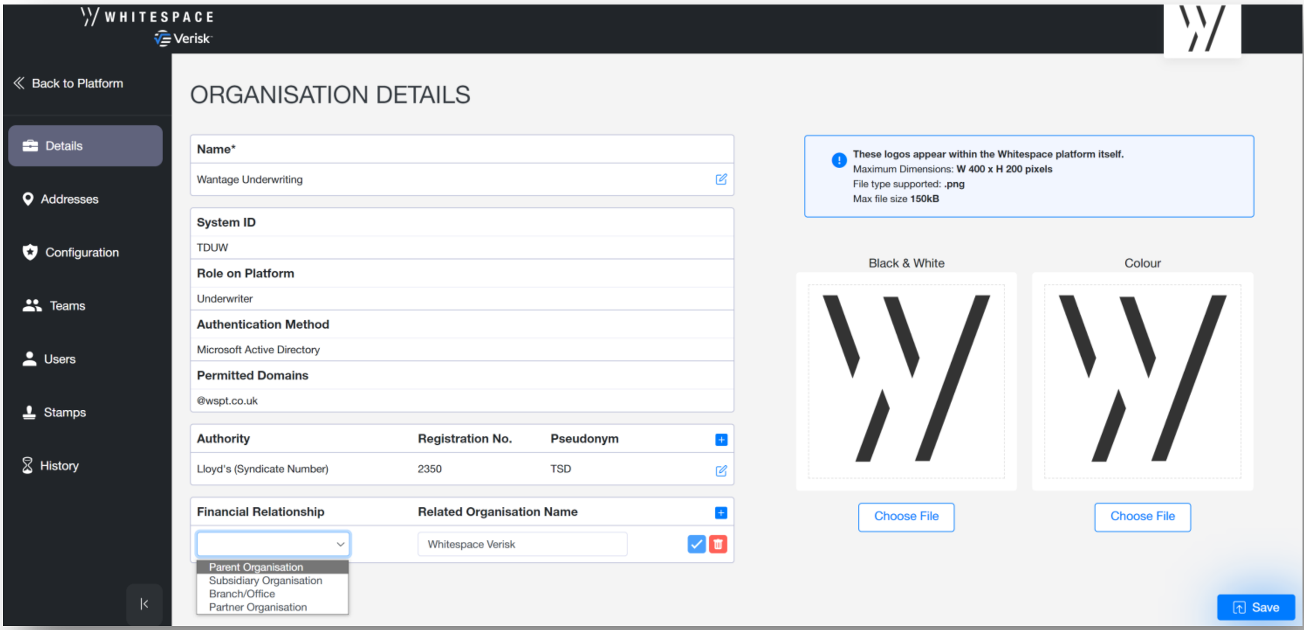
For the greyscale logo, click the 'Choose File' button under the 'Black & White' logo space, navigate to and select the black and white/greyscale logo file, click 'Open', and then click 'Save'. If you only have access to a colour logo, the 'Black & White' logo box will convert it to a functional greyscale version, but for the best results, please use internally-created greyscale logos.

Similarly, for the colour logo, click the 'Choose File' button under the Colour logo space, navigate to and select the colour logo file, click 'Open', and then 'Save'. If you only have access to a greyscale logo, you can upload it into this box to use it in places where a full-colour logo would normally display.

7. Editing the Organisation's Details

It is possible to enter a range of organisational details into the admin portal. Your chosen organisation name is displayed throughout the platform, but the rest of the details covered in this section are intended for future use against eventual CDR compliance, and are not currently displayed or used in any location outside of the admin portal panels concerned.

The organisation name and some other details are configured on the 'Organisation Details' panel. Click on 'Details' in the admin portal's sidebar to open the panel.

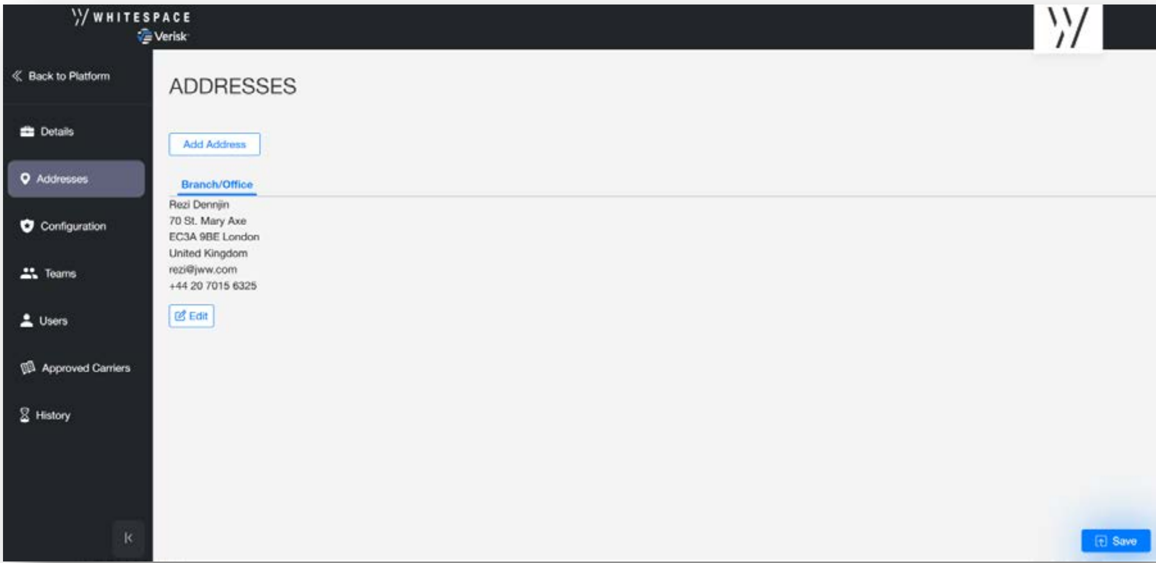


To edit your organisation's displayed name, click on the blue pen-and-paper icon at the end of the name just below the 'Organisation Details' heading. You can then type and edit the name freely in the box. When ready, click the blue 'tick' icon to continue with the changes, or the black 'x' icon to discard the edits. If you have made a change, click 'Save'. The name can be changed freely at any time.

The 'Financial Relationship' list permits you to enter the names of financially-related organisations. Click the blue '+' icon at the end of that header bar to add a new line, then click on the drop-down box to open a list of possible financial relationships. Select the appropriate option – for example, 'Parent Organisation' for the organisation that yours is a subsidiary of. In the adjacent field, type the organisation's name. When ready, click the blue 'tick' icon to continue, or the red 'trash can' icon to delete the line you added. If you have made a change, click 'Save'. Financial relationships can be edited or deleted freely at any time by clicking the blue pen-and-paper icon.

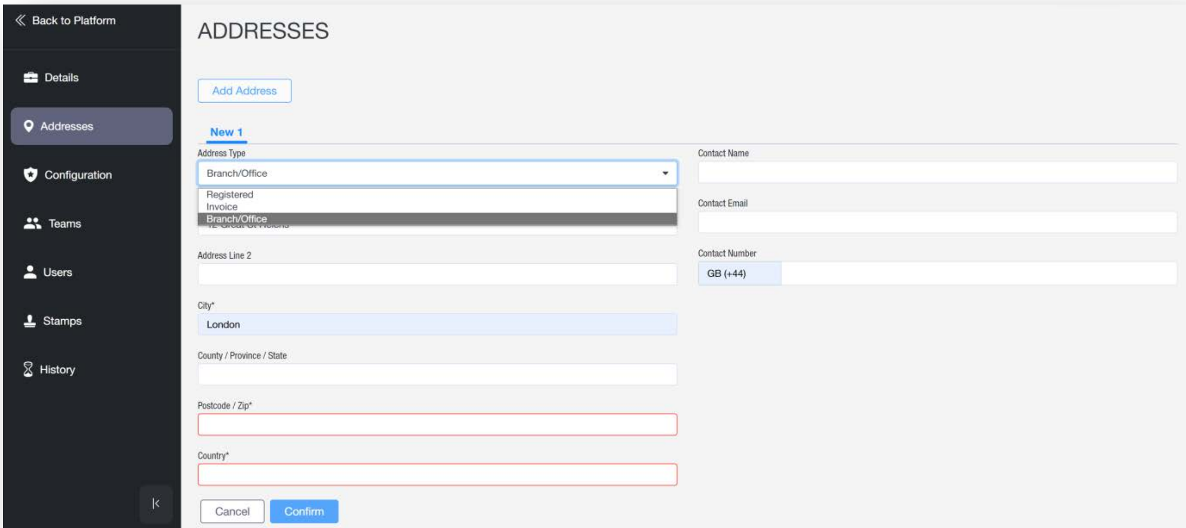
The 'Authority' list allows you to enter information about your registrations. Re/Insurers, please note the information here is not used within the 'Stamps' panel.

Click the blue '+' icon at the end of that header bar to add a new line, click the first drop-down box to select the appropriate authority registration, and type the relevant details into the adjacent box/es. All organisations may add Dun & Bradstreen DUNS codes. Brokers may also add Lloyd's of London Broker Numbers, and Re/Insurers may also add Lloyd's of London Syndicate Numbers. When ready, click the blue 'tick' icon to continue, or the red 'trash can' icon to delete the line you added. If you have made a change, click 'Save'. Authority details can be edited or deleted freely at any time by clicking the blue pen-and-paper icon.



To add a physical address for your organisation, click on the 'Addresses' panel. Any addresses that you have already added with this panel will be displayed on the 'Addresses' panel. These can be freely edited at any time by clicking the 'Edit' button below the address. Editing uses the same interface as when adding a new address.

To add an address, click 'Add Address'.



Select the business function of the address from the drop-down list in the 'Address Type' box, and then click and type in each field to add the relevant information. The mandatory fields are 'Address Line 1', 'City', 'Postcode/Zip', and 'Country'. No fields are validated by the system, so please double-check to avoid typos. When ready, click 'Confirm' to proceed, and then 'Save'.

Please note that at the current time, addresses cannot be completely deleted, but they can be blanked by placing a '-' or similar character in the mandatory fields and then confirming and saving.

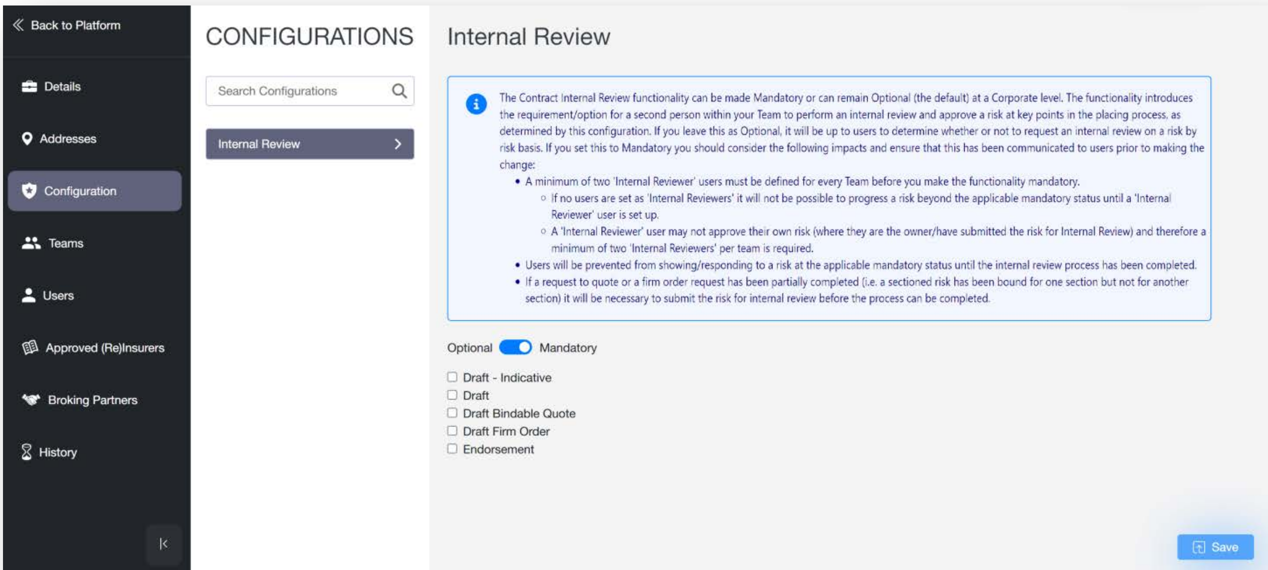
8. Configuring Internal Review

If a team includes at least one reviewer, team members may at any time choose to pass a contract to a fellow team-member for authorisation to proceed. The contract can then not be progressed or shown until the reviewer has approved it. This is referred to as 'Internal Review' in the Whitespace platform.

The opportunity to review a contract is available at several key stages in the placing process, and requires at least one user on each team who has been flagged as an 'Internal Reviewer' in the 'User' pane. (See section 5g-iii of 'Setting Advanced User Permissions'.)

By default, internal reviews are optional, but organisations can instead choose to make them mandatory for all users for one or more of the key contract stages. When making internal review mandatory, it is vital to ensure that each team has a minimum of two internal reviewers – or, if necessary, one user with both 'Reviewer' and 'Self-Approver' status – as for security purposes, it is not otherwise possible for a user to authorise their own contracts.

To toggle the internal review functionality from optional to mandatory, select the admin portal's 'Configuration' panel, and if necessary, click on the 'Internal Review' configuration option.



Please carefully read the information in the internal review window. To switch internal reviews from optional to mandatory, click on the toggle below the information box. When internal reviews are set to mandatory, a list of contract stages is displayed. To enforce reviews for a specific stage, tick the box to the left of the stage's name. When you are ready to proceed, click 'Save'.

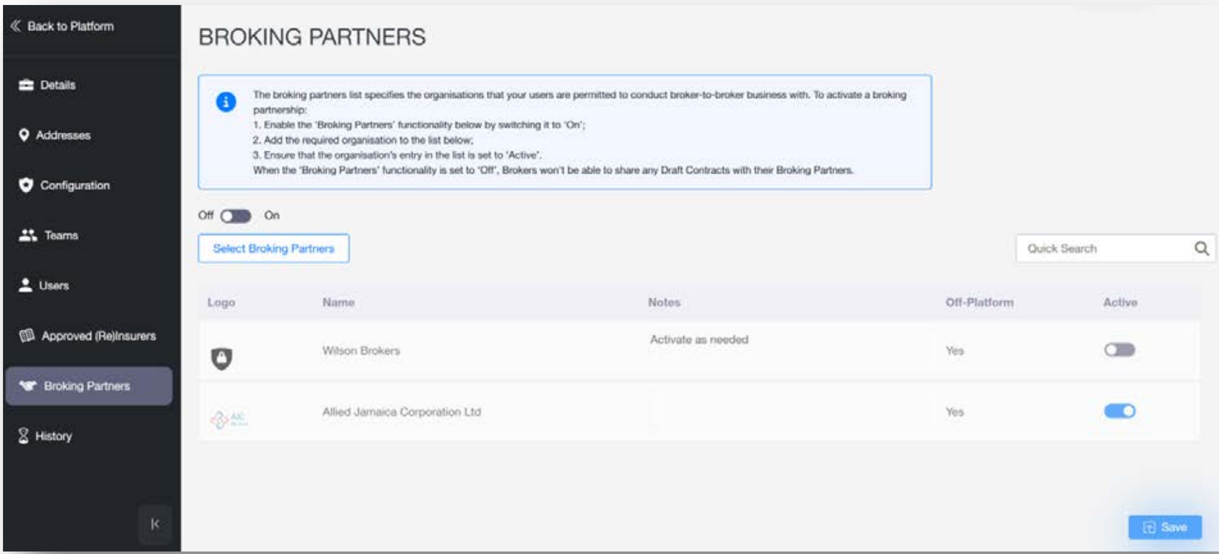
9. Configuring Broking Partners (Brokers only)

Version 2.13 of the Whitespace Platform (August 2023) introduces the new Broking Partners system. This functionality allows a 'producing' broker in one market to send a contract to a 'placing' brokers in another market. The placing broker then negotiates – and places – the contract on behalf of the producing broker.

For full details, see the user guide 'Working With Broking Partners', released with v.2.13.0 of the platform.

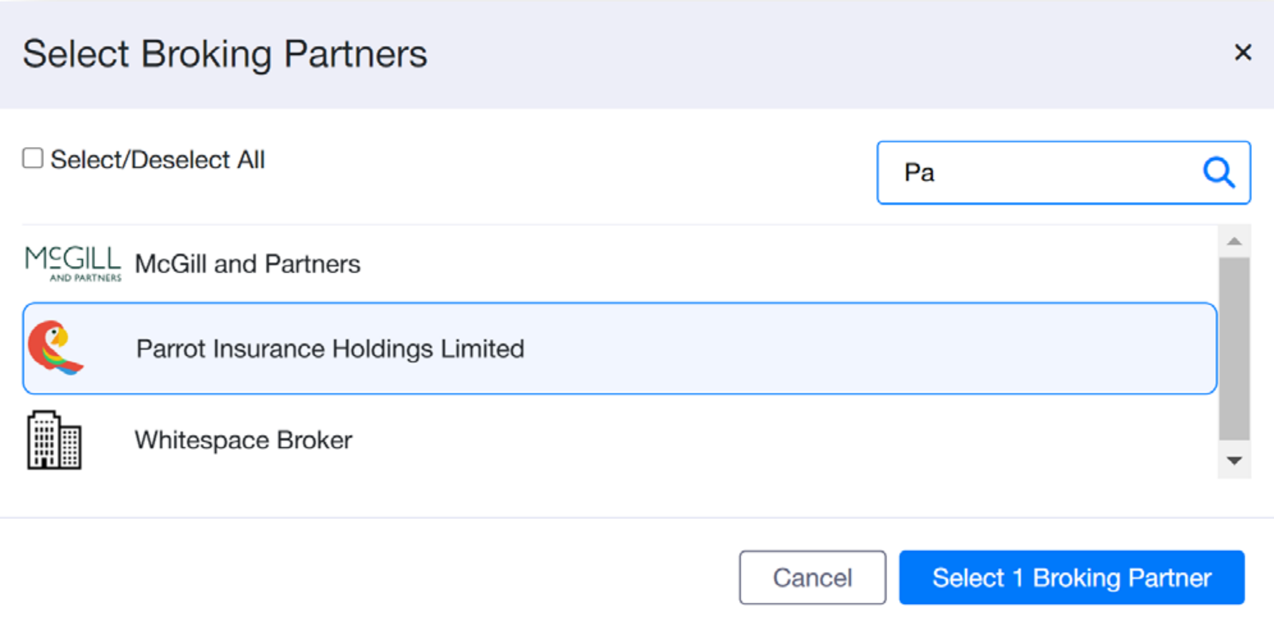
Since sharing business with another organisation is extremely sensitive, Broking Partners functionality is disabled by default. Do not activate this functionality without making absolutely sure that it is the right choice for your organisation. Before your users can act as producing brokers, the system must be turned on in the admin portal and the desired placing broker/s whitelisted as potential recipients.

To activate Broking Partners, navigate to the 'Broking Partners' panel by clicking 'Broking Partners' in the left-hand panel of the admin portal.



Please read the warning text, and then click on the toggle below to set the functionality to 'On'. While it is off, any already whitelisted brokers will be displayed greyed out.

Click the 'Select Broking Partners' button to add a new broker to the whitelist.



The selection window shows a list of brokers on the platform. This can be scrolled, or filtered by typing into the 'Search' box in the top right.

It is also possible to clear all selections by clicking the 'Select/Deselect All' button – please note, this ignores any filtering, and always selects all the brokers in the platform – and then clicking it a second time. It is strongly suggested that you not add all the platform's brokers to your broking partners list, not least because new brokers are being added all the time, and new arrivals will not be automatically whitelisted.

When you have selected the broker/s to whitelist, click the blue 'Select' button, which displays the number of new organisations you have chosen, double-check your selections, and then click 'Save' to finalise those changes.

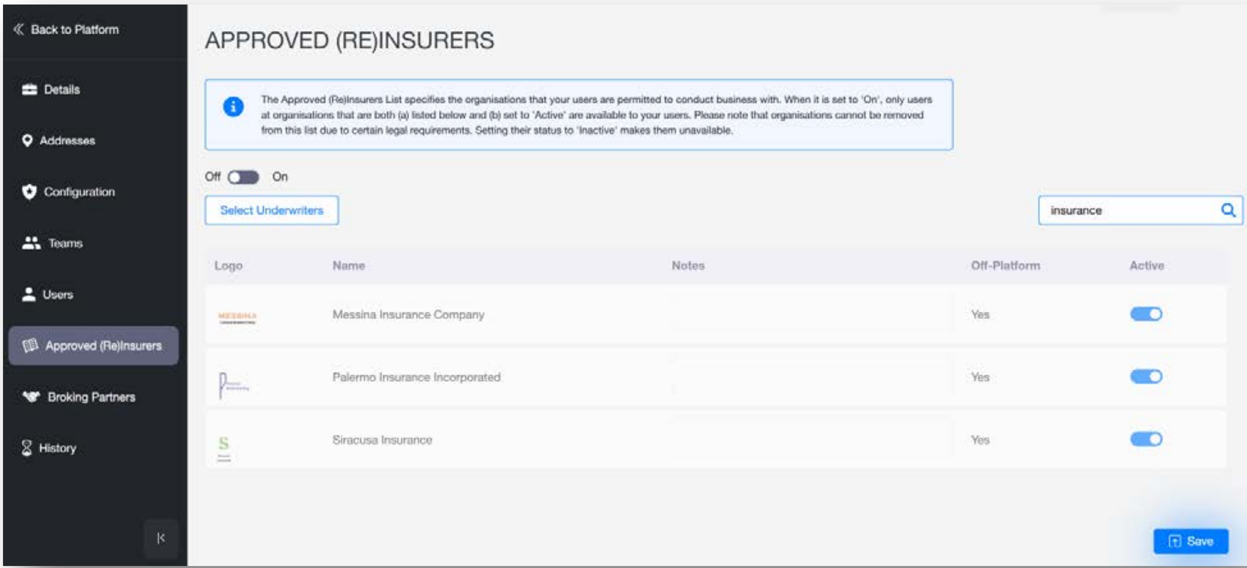
Broking Partners functionality can be activated or deactivated at any time. Whitelisted brokers cannot be deleted from the list, but they can be removed as potential placing brokers by clicking on their 'Active' toggle, turning it grey. You can also freely type into/edit the 'Notes' field for a broker at any time. These notes are only displayed in this panel of the admin portal.

10. Configuring Approved (Re)Insurers (Brokers only)

The Approved (Re)Insurers functionality restricts users only to conducting business with underwriters from a specific list of organisations that have been manually added to a whitelist in the admin portal. When it is active, users can see the full list of (re)insurance organisations available as usual, but only those on the whitelist can actually be selected.

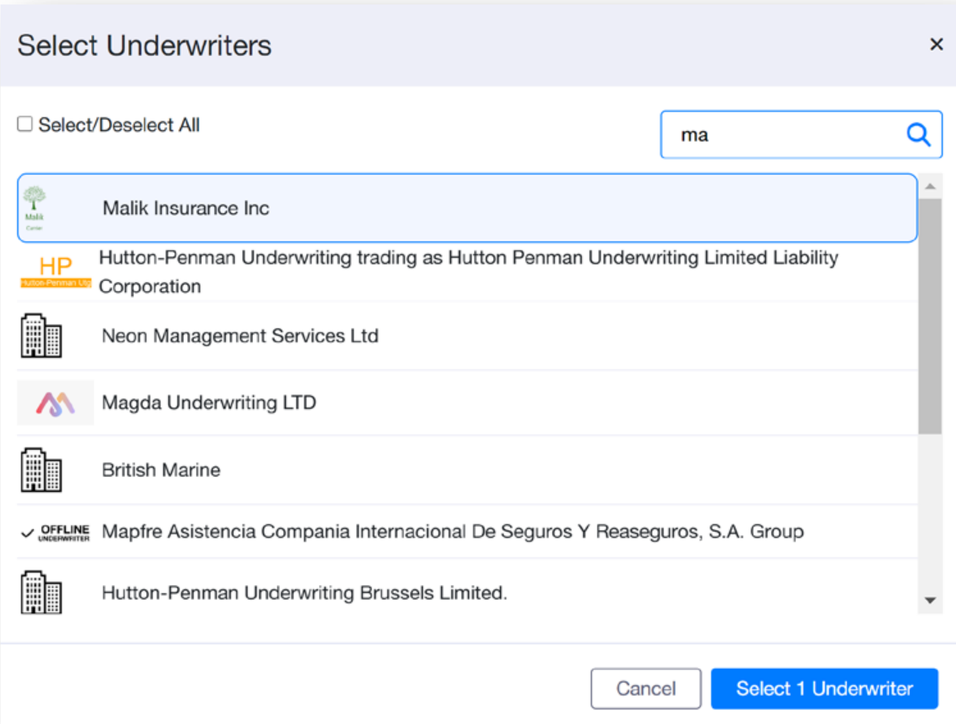
Enabling this functionality can have a significant impact on your organisation's business, so do not activate it without making absolutely sure that it is the right choice for your organisation.

To enable/disable the system or add new (re)insurers to the whitelist, click on ‘Approved (Re)Insurers’ in the left-hand pane of the admin portal.



Read the warning text carefully, and click the toggle beneath it to enable (or disable) the restriction. Whitelisted organisations are displayed in the table, and are greyed out when the functionality is off. This list can be scrolled, or filtered by typing into the search box above it. You can also freely type into/edit the ‘Notes’ field of a given organisation at any time. These notes are only visible in this panel of the admin portal.

To add a new organisation to the whitelist, click ‘Select Underwriters’. The Approved (Re)Insurers system does not have to be set to ‘On’.



The selection window shows the full list of unselected underwriters on the platform. This can be scrolled, or filtered by typing into the 'Search' box in the top right.

It is also possible to clear all selections by clicking the 'Select/Deselect All' button – please note, this ignores any filtering, and always selects all the underwriters in the platform – and then clicking it a second time. It is **strongly** suggested that you not add all the platform's underwriters to your Approved (Re)Insurers list, not least because new (re)insurers are being added all the time, and new arrivals will not be automatically whitelisted.

When you have selected the (re)insurer/s to whitelist, click the blue 'Select' button, which displays the number of new organisations you have chosen, double-check your selections, and then click 'Save' to finalise those changes.

Please note that once saved, whitelisted (re)insurers cannot be deleted from the list, but they can be set as not approved by clicking on the 'Active' toggle, turning it grey. This prevents your users from conducting any business with them exactly as if they had not been added to the whitelist.

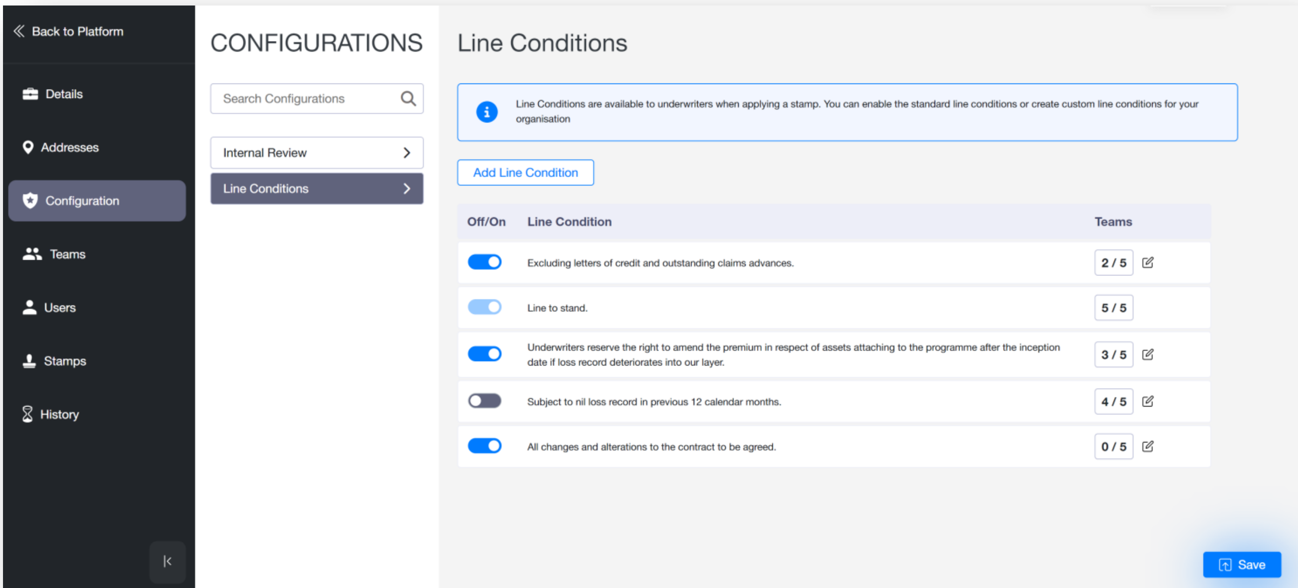
11. Approved Brokers Will Arrive in 2.14 (Re/Insurers only)

This functionality is scheduled for release in v2.14 (October 2023), and permits underwriting organisations to restrict the brokers that your users can deal with. As such, it will be similar to the 'Approved (Re)Insurers' system detailed in section 10 of this document.

12. Managing Line Conditions (Re/Insurers only)

Underwriter users may specify conditions under which they are writing a line on a contract. These are selected from a drop-down list of line conditions, pre-configured on a team-by-team basis in the admin portal.

Click on the 'Configuration' panel and select the 'Line Conditions' window.

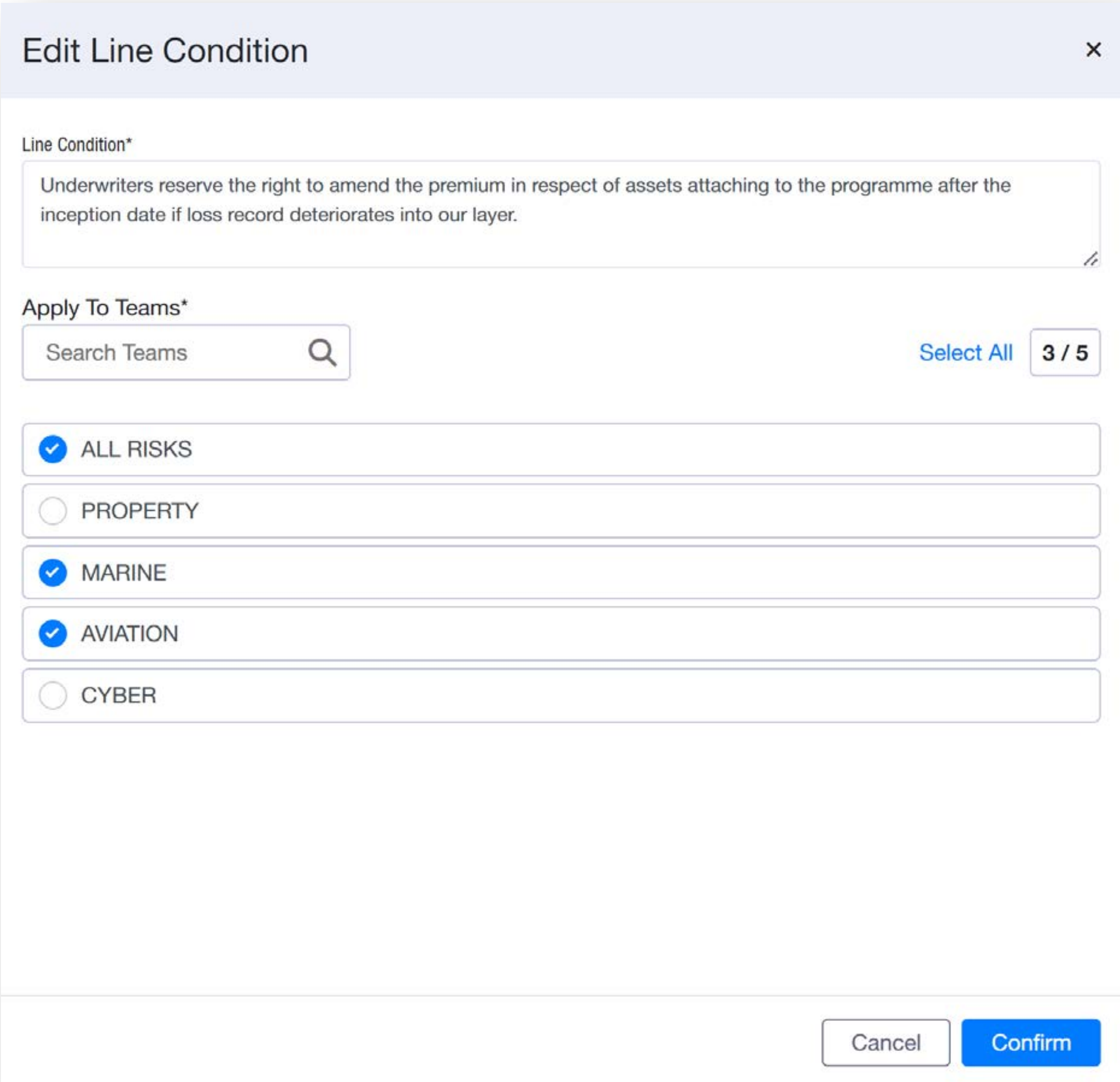


The window displays the list of line conditions available to your users. Each condition is shown in full, along with a switch to toggle it on or off, a summary of how many of your organisation's teams have access to the condition, and a button to edit the condition and the teams that can see it in the platform.

All underwriters have permanent access to the "Line to stand" condition. Several other standard conditions are also provided by default. All conditions other than "Line to stand" can be freely edited at any time.

You cannot completely delete an entry for a line condition once it has been saved. To make it unavailable, turn it off by clicking the Off/On toggle, or edit it to remove all the teams permitted to see it.

To add a new condition, click the 'Add Line Condition' button, or to edit an existing condition, click on the pen-and-paper icon in its row.



Click and type in the 'Line Condition' box to specify the precise line condition to be made available to your users.

Click on a team name shown in the 'Apply To Teams' list in the lower portion of the window to tick or untick it, with ticked teams having visibility of the condition.

You can click the 'Select All' button to tick all your organisation's teams, and click the resulting 'Unselect All' button to untick them all. You can also type into 'Search Teams' box to filter team names by text typed.

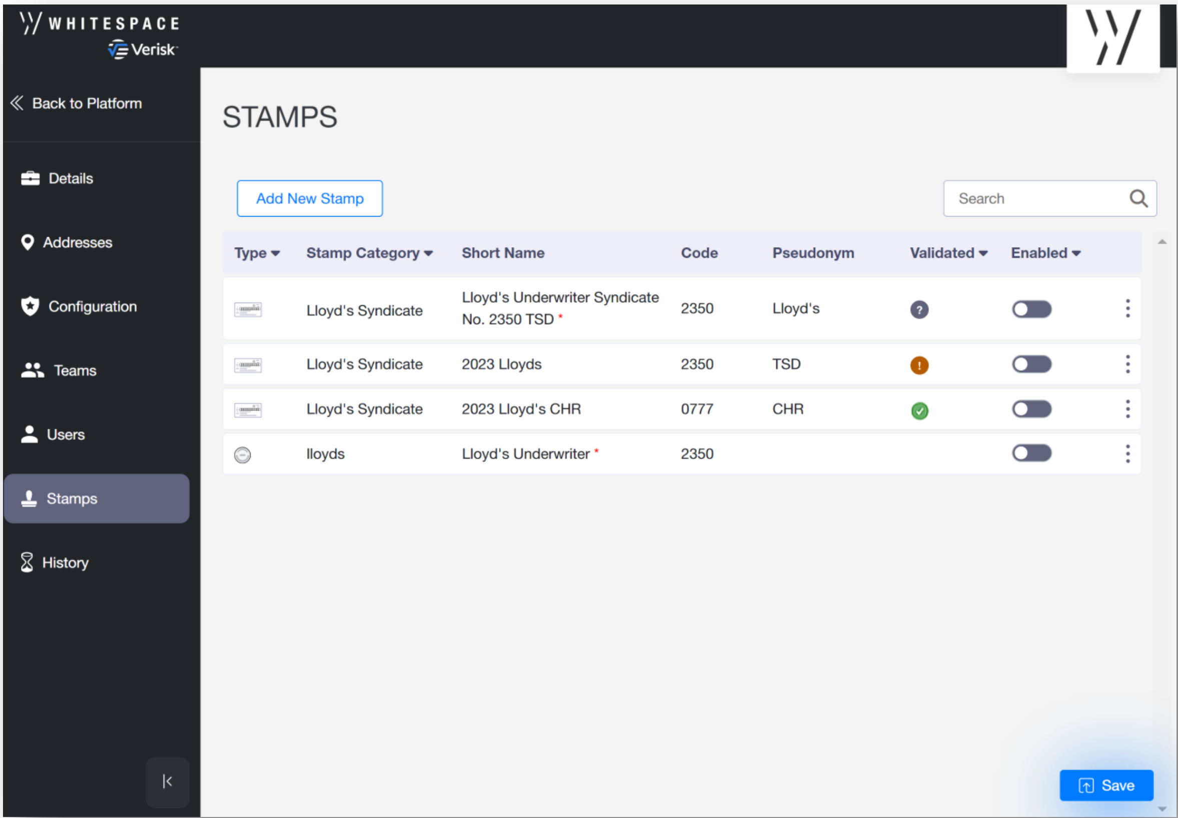
When you are satisfied with the condition, click 'Confirm' to return to the 'Line Conditions' window, and then click 'Save'.

13. Creating and Assigning Stamps (Re/Insurers only)

Underwriter users cannot write lines on a contract without at least one full stamp being available to them, either individually or as part of a team. Stamps are created and their availability managed from the 'Stamps' panel of the admin portal.

New functionality available for stamp management includes granular stamp availability down to a user-by-user basis, carriage returns in stamp descriptions, detailed options for the organisational logos displayed on stamps, and more.

To manage your organisation's stamps or add new full or button stamps, click on 'Stamps' in the left-hand pane of the admin portal.



The Stamps panel shows a list summarising all of your organisation's stamps. You can type into the 'Search' box to filter on the text of the 'Short Name' field, or scroll the list if it is long enough. To see a stamp in full detail, click on the three-dot icon at the end of the stamp's row, and selecting 'Preview Stamp'.

There are also several other options for filtering the list. Click on the 'Type' column heading to filter by full stamps, shown with a rectangular icon below, or button stamps, shown with a circular icon. 'Stamp Category' lets you filter by the authority associated with each stamp. 'Enabled' lets you filter for active or inactive stamps, and 'Validated' lets you filter by validation status.

All new full stamps are manually validated by the Whitespace support team to ensure that they follow correct usage requirements. This does not need notification, and may take up to two working days.

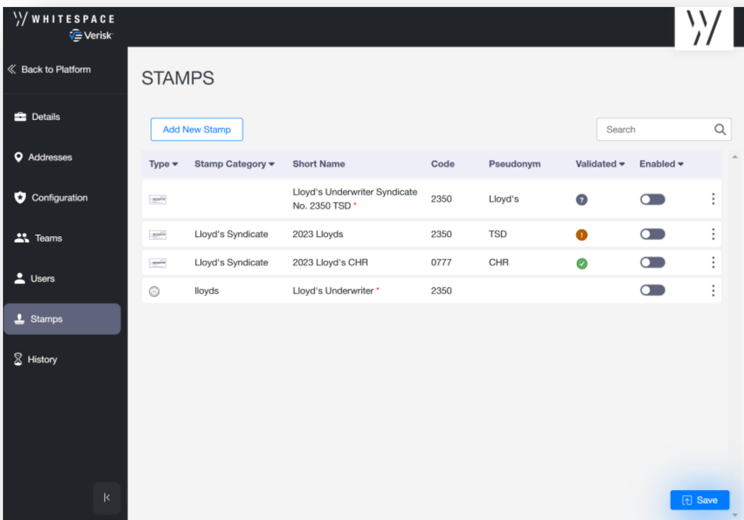
Valid stamps are available to be assigned for users to apply when writing lines, and are shown in the 'Validated' column with a green tick icon.

Existing stamps at release of 2.12 were automatically granted valid status, and are shown with a grey question mark icon. Stamps that have not yet been validated are not visible to users in the platform, and are shown with a red exclamation mark icon.

Button stamps, finally, are not validated, and so are immediately available for use once they have been saved.

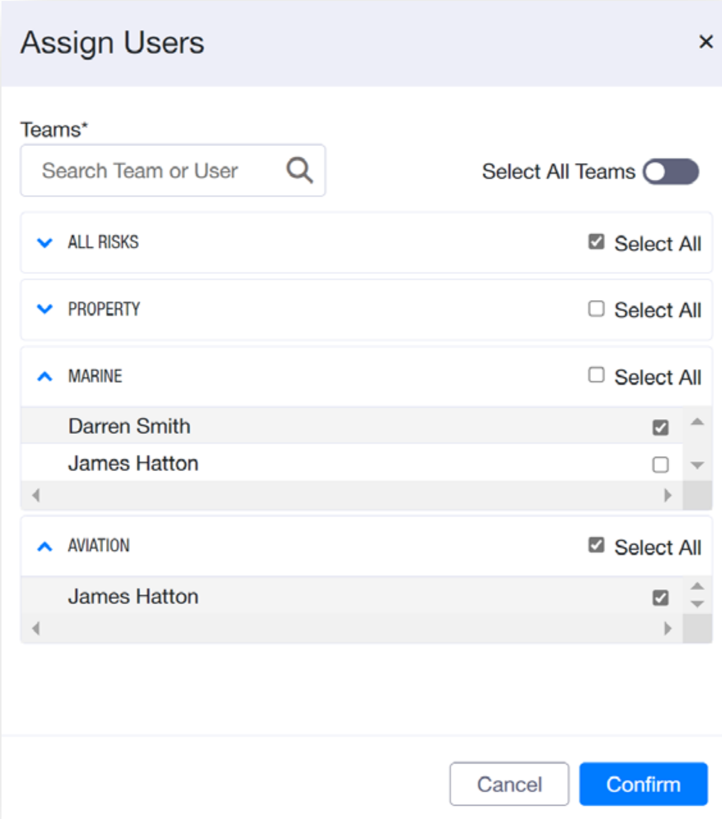
13a. Disabling Stamps

Please note that for legal reasons, stamps can not be deleted or edited after they have been saved. To disable a stamp, hiding it from all platform users, click on it's 'Enabled' status in the Stamps panel to toggle it to disabled, shown as dark grey, and click 'Save'.



13b. Assigning Users to a Stamp

Users must be assigned to a stamp before they can see it or apply it in the platform.



The Assign Users window can be accessed from the Stamps panel by finding the row summarising the stamp to assign users for, clicking on the three-dot icon at the end of the row, and selecting 'Manage Users'. This window also appears as part of the process when first creating a new stamp.

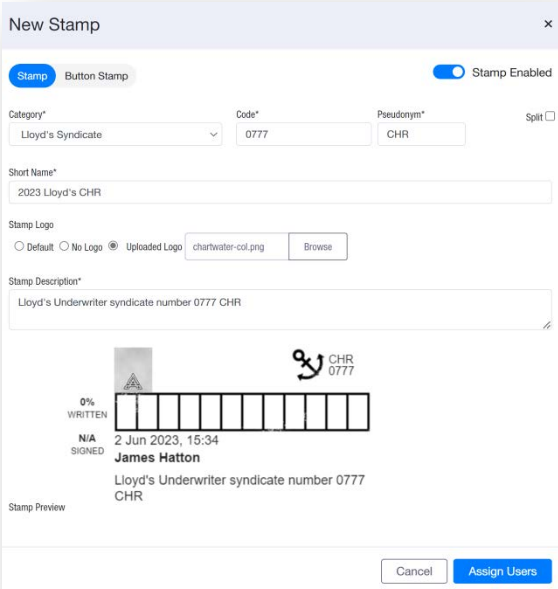
By default, all teams are given access to a stamp. Toggling the 'Select All Teams' switch will deselect and then reselect all users. An entire team's user list can be de/selected by toggling the the 'Select All' checkbox to the right of that team's name. You may also click on the blue down-arrow to the left of a team's name to show the users on that team, and then select them individually as required using the checkbox to the right of their name/s. Manually selecting all the users on a team will automatically tick the team's 'Select All' checkbox.

You can also filter the list of teams and users by typing into the 'Search Team or User' box. The list will shrink to display only the names of individuals and/or teams matching the typed text, and these can then be selected as above. Please note that a user given access to a stamp under one team does not automatically get access to that stamp when acting as part of a different team.

Once you are ready, click 'Confirm' and then 'Save' to apply the new availability. Stamp availability can be freely altered at any time.

13c. New Lloyd's of London Syndicate Stamps

To create a new Lloyd's Syndicate stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Syndicate' from the drop-down list.



Enter the syndicate's four-digit London registration number in the 'Code' field, and its three-capital letter pseudonym in the 'Pseudonym' field. To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. To create a split stamp, tick the 'Split' box and enter the second syndicate's number and pseudonym in the new row. You must also add the split percentages for both rows, and ensure that they total 100%.

In the 'Stamp Description' field, enter the phrase "Lloyd's Underwriter syndicate number" followed by the code and pseudonym. For a split stamp, follow this by the percentage for that syndicate, and then add a "/" symbol followed by the code, pseudonym, and percentage for the second syndicate. Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

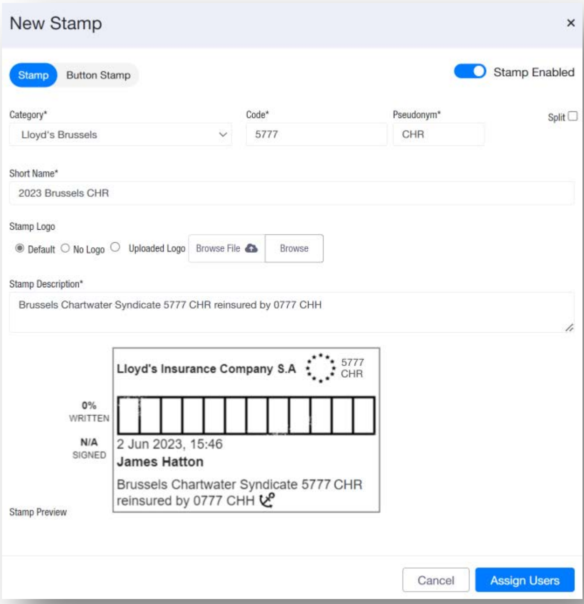
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Lloyd's syndicate stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos follow the same guidelines as for organisation logos, and are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13d. New Lloyd's Brussels Syndicate Stamps

To create a new Lloyd's Brussels syndicate stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Brussels' from the drop-down list.



Enter the syndicate's four-digit Brussels registration number beginning with '5' in the 'Code' field, and its three-capital letter pseudonym in the 'Pseudonym' field. To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right.

To create a split stamp, tick the 'Split' box and enter the second syndicate's Lloyd's Brussels number and pseudonym in the new row. You must also add the split percentages for both rows, and ensure that they total 100%.

In the 'Stamp Description' field, enter the Brussels syndicate's name, Code, and Pseudonym followed by the phrase "reinsured by" and then the Lloyd's of London code and pseudonym of the reinsuring syndicate. For a split stamp, follow this with the percentage for this first syndicate, add a "/" symbol, and then repeat all the above information for the second syndicate.

Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

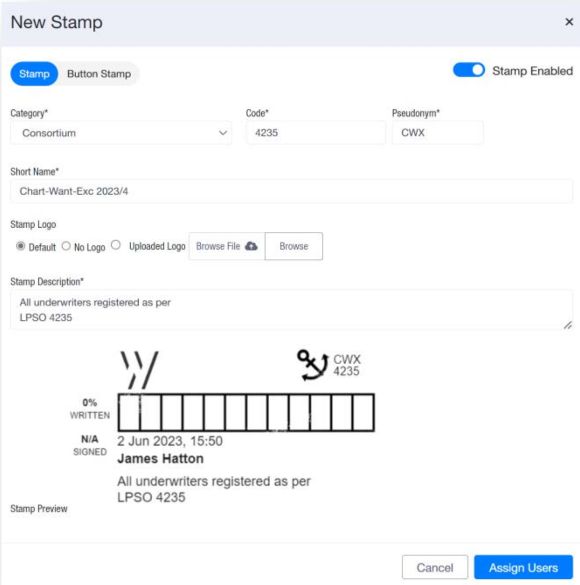
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Although the logo bar is visible, Lloyd's Brussels stamps cannot display organisational logos.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13e. New Lloyd's of London Consortium Stamps

To create a new Lloyd's Consortium stamp, click 'Add New Stamp', click 'Category', and select 'Consortium' from the drop-down list.



Enter the consortium's four-digit London registration number beginning with '4', '7', or '9' in the 'Code' field, and the consortium leader's three-capital letter pseudonym in the 'Pseudonym' field. To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. Consortium stamps cannot be created as always split.

In the 'Stamp Description' field, enter the consortium's full name if required, followed by the phrase "All underwriters registered as per LPSO" and the Code.

Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

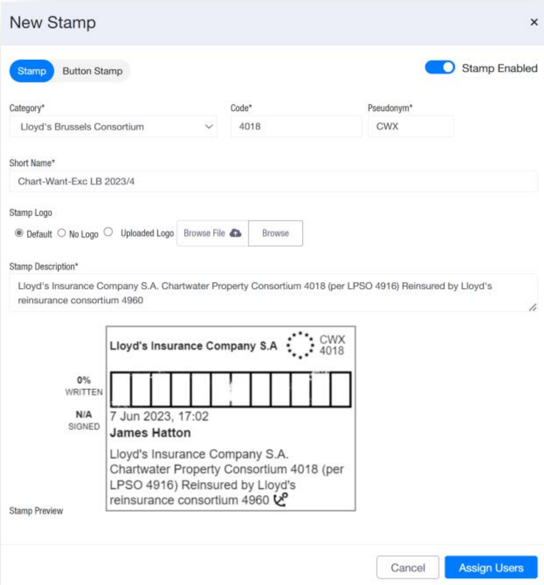
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Lloyd's consortium stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos follow the same guidelines as for organisation logos, and are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13f. New Lloyd's Brussels Consortium Stamps

To create a new Lloyd's Consortium stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Brussels Consortium' from the drop-down list.



Enter the consortium's four-digit London registration number beginning with '4', '7', or '9' in the 'Code' field, and the consortium leader's three-capital letter pseudonym in the 'Pseudonym' field. To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. Consortium stamps cannot be created as always split.

In the 'Stamp Description' field, enter the consortium's full name if required, followed by the Lloyd's Brussels consortium number, the phrase "All underwriters registered as per LPSO" followed by the LPSO registration number of the associated non-Europe consortium, and then the phrase "Reinsured by" and the name (if required) and Lloyd's of London registration number of the reinsuring consortium.

It is critical that the registration numbers of the Lloyd's Brussels, LPSO, and Lloyd's Reinsurance consortiums all be present and clearly differentiated in the description. Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

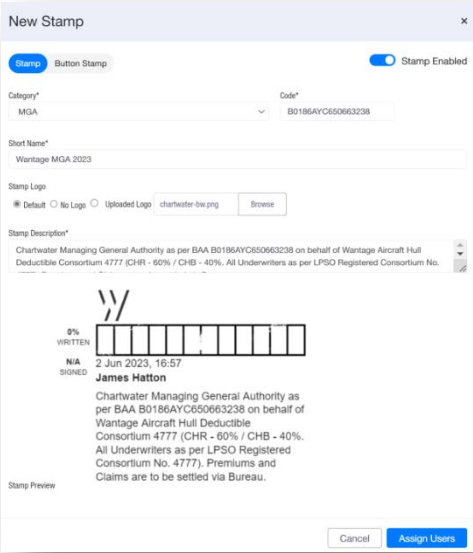
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Although the logo bar is visible, Lloyd's Brussels consortium stamps may not display organisational logos.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13g. New MGA Stamps

To create a new Bureau-settled Managing General Authority stamp, click 'Add New Stamp', click 'Category', and select 'MGA' from the drop-down list.



In the 'Code' field, enter either the UMR (up to 17 digits beginning with B) of the Binding Authority Agreement, the Binders agreement number, or any other appropriate agreement number or code for the capacity behind the MGA, such as a syndicate code, LIRMA number, consortium registration, and so on. Please note that the Code is not shown in the stamp. To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. MGA stamps cannot be created as always split.

In the 'Stamp Description' field, best practice is to enter the full details of the BAA, followed by the phrase "on behalf of" and the details of the delegation to be included, and end with the phrase "Premiums and claims are to be settled via Bureau." If required, the description can also include LPSO registration details. All important information to appear on the stamp must be present. Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

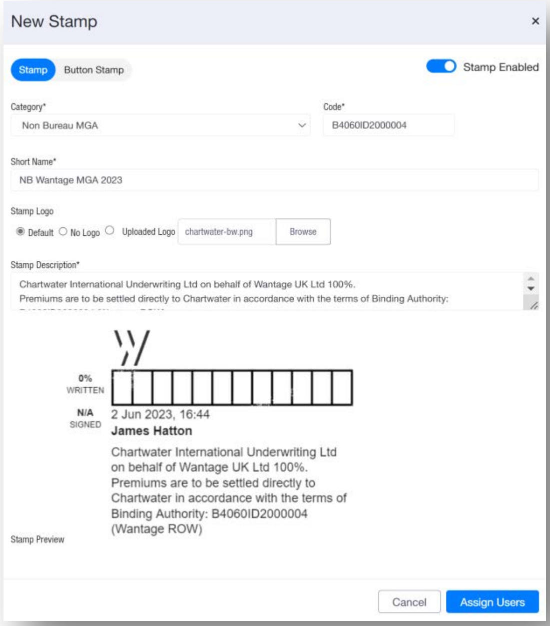
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

MGA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13h. New Non-Bureau MGA Stamps

To create a new Managing General Authority stamp settled outside the Bureau, click 'Add New Stamp', click 'Category', and select 'Non-Bureau MGA' from the drop-down list.



In the 'Code' field, enter the UMR (up to 17 digits beginning with B) of the Binding Authority Agreement, the Binders agreement number if different, or any other appropriate agreement number or code for the capacity behind the MGA, such as a DUNS code. Please note that the Code is not shown in the stamp.

To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. Non-Bureau MGA stamps cannot be created as always split.

In the 'Stamp Description' field, enter the full details of the BAA, the delegation to be included, and end with the settlement terms. Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

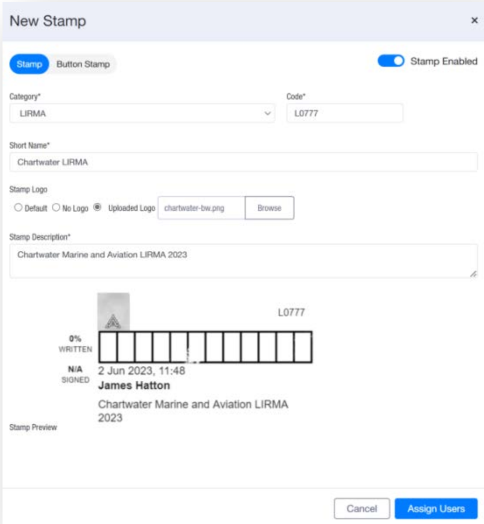
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Non-Bureau MGA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13i. New LIRMA Stamps

To create a new stamp for a non-Lloyd's carrier settling premiums via the Bureau with a LIRMA number, click 'Add New Stamp', click 'Category', and select 'LIRMA' from the drop-down list.



In the 'Code' field, enter the five-character LIRMA code consisting of one capital letter followed by four digits, which cannot all be 0. This will appear on the stamp, and the logo 'XIS' will be added once the stamp is fully saved.

To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. LIRMA stamps cannot be created as always split.

In the 'Stamp Description' field, enter the organisation name, specifying LIRMA as the authority.

Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

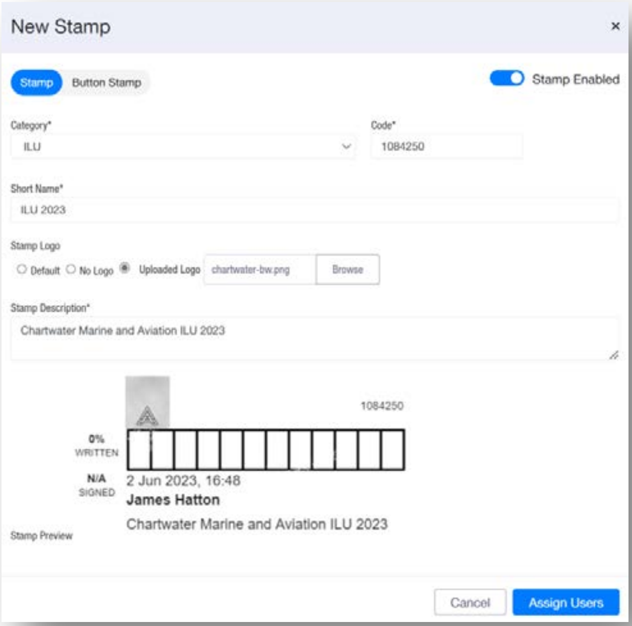
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

LIRMA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13j. New ILU Stamps

To create a new stamp for a non-Lloyd's carrier settling premiums via the Bureau with an ILU number, click 'Add New Stamp', click 'Category', and select 'ILU' from the drop-down list. In the 'Code' field, enter the six or seven-digit ILU code. The first digit of this code cannot be



'0'. This will appear on the stamp, and the logo 'XIS' will be added once the stamp is fully saved.

To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. ILU stamps cannot be created as always split.

In the 'Stamp Description' field, enter the organisation name, specifying ILU as the authority.

Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

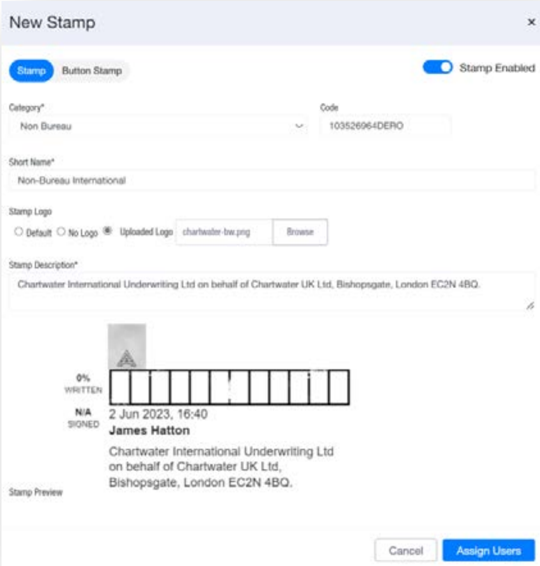
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

ILU stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13k. All Other New Full Stamps

To create a new full stamp that does not fall into any of the existing categories, click 'Add New Stamp', click 'Category', and select 'Non-Bureau' from the drop-down list.



In the 'Code' field, you may optionally enter the D-U-N-S or D-U-N-S+ code of your organisation, consisting of 9 digits for a D-U-N-S code, followed by four further alphanumeric characters for a D-U-N-S+ code. Please note that this code is not shown in the stamp.

To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. Non-bureau stamps cannot be created as always split.

In the 'Stamp Description' field, enter the regular details of your organisation. Please note that you can now enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

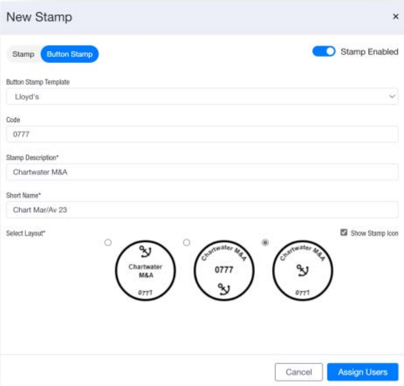
In the 'Short Description' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

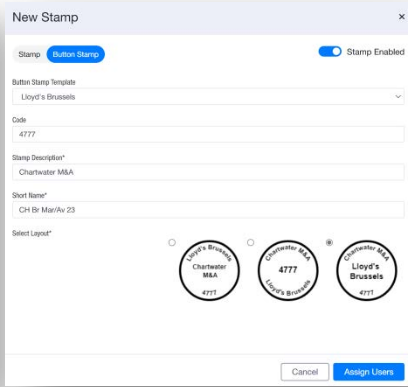
Non-Bureau stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

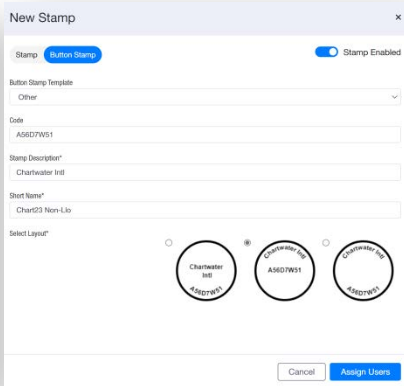
Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13b above, and click 'Confirm' and 'Save' when done.

13l. New Button Stamps

To create a new button stamp, click ‘Add New Stamp’, and click the grey ‘Button Stamp’ oval next to the blue ‘Stamp’ oval in the top left corner.







By default, button stamps display a Lloyd’s of London logo, but this be removed or altered to a Lloyd’s Brussels logo or to display no logo by clicking the ‘Button Stamp Template’ drop-down and selecting ‘Lloyd’s Brussels’ or ‘Other’ respectively from the list.

Enter your consortium number or other reference into the ‘Code’ field, using four digits for Lloyd’s of London, four digits beginning with ‘5’ for Lloyd’s Brussels, or up to eight alphanumeric digits for other button stamps.

In the ‘Stamp Description’ field, you may enter up to 25 characters of text to display on the stamp, and in the ‘Short Description’ field, enter text to precisely identify the button stamp in the Stamps panel’s display list. It is not used anywhere else, and may be up to 15 characters in length.

Click on your preferred stamp layout from the three options provided to select it. You may choose to hide the Lloyd’s symbol on Lloyd’s template buttons, which is functionally equivalent to selecting an ‘Other’ template button stamp.

Button stamps may not include organisational logos or carriage returns. Click ‘Proceed’ to progress to the ‘Assign Users’ screen, detailed in section 13b above, and click ‘Confirm’ and ‘Save’ when done.

Please note that button stamps are not validated by Whitespace Support, so as soon as they have been saved, they are final, non-editable, and ready for use