

Whitespace Platform

Release Notes v2.18.0

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Headlines

More corrections features have been added to the platform:

- Underwriters can now propose changes to the stamp put down on an unsigned written line, and
- Brokers can propose the removal of a written line from an unsigned contract.

The flexibility of mirror stamps has been greatly increased.

It is now possible to append a block of table rows to the end of an existing table.

The first stages of an in-platform help system are being rolled out to enhance user experience.

Release Details

Correcting the Stamp on an Unsigned Written Line

Underwriters now have the ability to update a stamp used incorrectly when writing a line, and to revise certain details.

Broker acceptance is required for most operations, and some details cannot be altered.

- Until a contract is signed, underwriters may now change the stamp they incorrectly put down when they wrote a line, for example because the wrong stamp was applied, or because a split line or mirror stamp is required.
- This can be used to update incorrect capacity information, add or change necessary line splits and mirror stamps, and to revise references, risk codes, and other information.
- The underwriter should ask the broker to revert the contract to the firm order stage if a stamp on a signed contract needs to be corrected.
- It is not possible to use this functionality to change line size, quote validity, line conditions, or subjectivities. In these cases, the underwriter should ask the broker to either use the 'Propose a New Line Percentage' option shown under 'Manage Lines', or remove the existing line if necessary.
- Similarly, it is not possible to correct a stamp put down on a mid-term participant change endorsement to a firm order – instead, complete the MTPC endorsement and then update the stamp on the new version of the core contract.
- Stamp corrections require broker approval except when the underwriter is only updating references, risk codes or reference descriptions.
- All changes and approvals are fully tracked in the contract history and reflected in the MI reports.

Removing a Written Line From a Firm Order

Brokers now have the ability to remove a written line that is no longer required. The firm order can then be shown again as appropriate. Underwriter acceptance is required for most operations, and facility leaders' lines cannot be removed until all their followers' lines have been removed.

- Brokers may now remove a line written on an unsigned contract.
- When an underwriter's line has been removed, their contract is changed to 'Firm order withdrawn' status. The broker can then show the contract to them again as appropriate.
- Line removals require underwriter approval except when the broker is removing off-platform lines or lines binding (non-)notify parties.
- All removals and approvals are fully tracked in the contract history and reflected in the MI reports.
- The leader's line may not be removed from a contract declared to a facility while lines belonging to followers are still present, so those must be removed first.

Creating Custom Mirror Stamps

Mirror stamp description text is now completely customisable, and mirror stamps can be put down using any available full stamp, permitting flexible usage.

- Mirror stamps can have fully custom descriptions, and may be put down using any stamp available to the underwriter or off-platform (re)insurer.
- The current default description text of “Applying to EEA Risks” is still available as a toggled option.
- Mirror stamps can use all categories of Whitespace stamps.
- Mirror stamps with custom descriptions can be added whenever writing a full stamp, on- or off-platform.

Using Multiple Mirror Stamps

Stamps can now have multiple mirror stamps, permitting fully nuanced usage.

- Users are no longer restricted to a single mirror stamp when putting down a main stamp.
- Each stamp available to the underwriter or off-platform (re)insurer may be used as a mirror once per main stamp.
- Only one mirror stamp may use the default description text of “Applying to EEA Risks”.
- When writing an off-platform line, only the off-platform (re)insurer’s pre-existing stamps may be used as mirror stamps. Freshly created off-platform stamps are not available.
- Within those constraints, it is possible to add as many mirror stamps as required.

Suggesting Stamps on a Declaration

Brokers may suggest one stamp from the facility agreement contract each time they show a declaration to a facility panel, giving the opportunity for maximum flexibility in stamp recommendation.

- When showing a declaration to a facility panel member, brokers may choose to suggest a single stamp from amongst the stamps used on the original facility agreement contract, including any mirror stamps put down.
- Brokers can also suggest a stamp for (non-)notify parties when binding them to the declaration.
- Brokers may suggest a stamp each time they show the declaration, giving them the flexibility to make suggestions regarding individual sections or vertical terms, or to specific declaration participants.

Appending Data to a Table

Rather than entering data into a table one cell at a time, it is now possible to add a block of rows to the end of a table in a single operation. This greatly streamlines table usage and creation.

- Users can now quickly append multiple rows of data to a pre-existing table in a platform contract.
- The appended data must consist of full rows, and must have the same number of columns as the destination table.
- Tagged columns will apply their usual validation tests on the new cells and highlight failing data in red.
- This can be used to create empty ‘outline’ tables to be populated later, for use in templates.

Enhancements

- Using the Downloadable User List to Facilitate an Organisation’s Permissions Auditing
 - The user list downloadable from the Admin Portal has been enhanced.
 - The spreadsheet of data is now pivot-friendly, and includes full information regarding the user’s internal review, self-approval, and template manager status on a team-by-team basis, as well as whether they have Admin and MI Report permissions.
 - Users in multiple teams have one full row of data per team membership.
- In-Platform Help
 - A new in-platform self-support system is being introduced over the next few releases to complement our existing Support systems.
 - In this release, tooltips that activate on hover provide some simple guidance on several pieces of new functionality, including the stamp correction system and mirror stamp enhancements.
 - A very short introductory tour that introduces self-support will auto-play on first login, and a tour will also highlight the stamp correction system to underwriters putting down a line.

- Other Enhancements
 - MRC v3 validations are being further refined.
 - Having previously logged into the Platform, a user's email address is remembered on subsequent login attempts.

Known Issues

- If a broker has a Mid-Term Participant Change in progress against a facility contract, and has also partially placed a declaration to that same facility, then a warning message advises that they must either sign the declaration or remove all its written lines before completing the MTPC. At the current time, removing all the written lines will erroneously leave the MTPC blocked from completion, so it is necessary to sign the declaration instead of removing its lines.

Resolved Issues

Browser:

- Brokers are able to send endorsements for mandatory internal review after they have been shown to (re)insurers as well as beforehand.
- Brokers are now correctly unable to create an endorsement before accepting/rejecting a (re)insurer's line written with conditions and subjectivities.
- Brokers with the Template Manager permission can upload a new file to a draft contract using the digitizer without generating errors.
- The MI report now accurately reflects the status of a contract which has been shown as a request for quote following a previously declined request for quote.
- Brokers without the Template Manager permission may edit the value of items of tagged data under contract headings with the 'Text Template Locked' restriction without seeing error messages.
- The Compare function no longer displays data twice under contract headings containing tagged data.
- When a placeholder data value of '???' or unsupported windows characters are present under a contract heading, exporting the contract now correctly produces a PDF or Word document as expected rather than a zip file.
- The 'Group numbers' indicating associated groups of tagged data falling under a given MRC heading in the 'Defined Data Supplementary Document' are now aligned with the 'Pages' which number the groups of tagged data items on the Platform.
- Brokers can now correctly propose a new written line for (non-)notify parties on a declaration using the browser, which was already possible in the iOS app.
- When adding an off-platform stamp, the short name has now been corrected to contain the Stamp Category, Code, and Pseudonym. Previously, the Stamp Category was missing.
- MRCv3 validation results are now correctly appearing when a draft contract is created from a JSON file.
- Updating the corporate logo in the Admin Portal no longer updates the logo on previously bound or completed endorsements.
- Administrators no longer receive an error message incorrectly advising another user has made updates when adding line conditions in the Admin Portal.
- Brokers are now able to send an endorsement for a second mandatory internal review after uploading an inline attachment.
- The heading in the dialog box has been corrected to say 'Create Bindable Quote' when creating a Bindable Quote from a quoted contract, instead of 'Mark as Firm Order'.
- An issue has been resolved with stamp images on MTPC endorsements on sectioned contracts. When the line percentage is amended, it now reflects accurately in the stamp image instead of duplicating the signed line from the previous section.
- When brokers mark a Bindable Quote as Firm Order, they do not see a message asking if they wish to mark other quotes as 'Not Taken Up' if no other quotes exist.
- An issue has been resolved where following the creation of an MTPC, if there were any off-platform (re)insurers that had not had changes applied to them, the broker was unable to record lines for those specific (re)insurers.
- Additional spaces and headings are no longer being added when copying and pasting from a 'Text and Tags locked' contract heading.
- Brokers are now able to successfully record agreement for multiple off-platform (re)insurers on an MTPC at the same time, resolving an issue where the agreement box was not visible for some (re)insurers.

- The MI report now displays the correct data in the 'Contract/Section Leader' column for vertical declarations.
- When downloading the list of users from the Admin Portal, all users with administrator permission are now accurately identified as admins in the list.
- When a broker withdraws a firm order from one (re)insurer or when a (re)insurer declines a firm order, the broker is now able to show the firm order to further (re)insurers or sign the contract without any issues.
- If the MRC validation checker finds multiple issues in the data, all errors are now returned at once. The broker can then fix all the errors and run the validation check once more, instead of needing to repeat the process multiple times.

iOS App:

- Multiple tagged items under the same assigned tag headings are now grouped together in the tag summary rather than appearing separately.
- The chat function was not displaying, and the app was subsequently crashing when a broker tried to send a broadcast message with a request to quote. This has been resolved.
- When brokers correct a signed line and the changes are successfully applied, they no longer see an incorrect 'Action Failed' message.
- Brokers are no longer able to respond to a partially-placed MTPC endorsement against a facility where a declaration firm order has been shown to the facility. Instead, the broker is presented with a warning message advising them that they must sign the declaration or remove all its written lines, then return to complete the endorsement.

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.