Whitespace Platform

Release Notes v3.2.0

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Headlines

Brokers can restrict underwriters to only approved stamps as part of the 'Approved (Re)Insurers' functionality.
Mandatory defined data fields can be enforced on a contract, preventing it from being shown as a firm order until they are completed.
Stamps can be linked to a registered office address and/or a billing address.
Section heading titles can be hidden in exported documents, enhancing formatting options.
Tagged data fields can be set to show dates in US date format.

Release Details

Brokers can enforce the use of approved stamps as part of the 'Approved (Re)Insurers' system

To give brokers more granular control over placing business, the 'Approved (Re)Insurers' functionality now includes approval over the specific stamps that underwriters can select when writing a line. In addition to setting individual stamps as unapproved or approved, brokers can create groups of specific approved stamps that can be assigned to user teams.

- When active, the 'Approved (Re)Insurers' functionality now includes control over stamp selection for contracts.
- The 'Approved Stamps' panel in the Admin portal lets broker admins toggle approval for individual stamps used by approved (re)insurers.
- Using the 'Stamp Groups' panel in the Admin portal, broker admins can assign approved stamps to one or more stamp groups.
- Stamp groups can then be assigned to one or more user teams.
- Teams without any assigned stamp groups default to an auto-generated 'All Approved Stamps' group.
- When showing a contract at the Bindable Quote or firm order stages while 'Approved (Re)Insurers' is active, broker users can only suggest stamps that are in a stamp group assigned to their user team.
- As per previous releases, stamps that a (re)insurer has set to 'inactive' cannot be suggested.
- If no approved stamp is manually suggested when showing the contract, all of the (re)insurer's stamps that are approved for that broker are automatically suggested.
- The underwriter can only select a previously suggested stamp when writing a line on that contract.
- Although an underwriter can manually suggest a stamp correction to an unapproved stamp after writing their line, brokers are not able to approve such corrections.
- Brokers should note that if an unapproved stamp is already written on a facility agreement, that stamp may still be used on declarations to that facility.

(Re)Insurer stamps may be linked to the organisation's physical addresses

To ease regulatory verification and tax calculations, (re)insurers' stamps may now be associated with a registered address and/or an invoice address, where different. Broking organisations can access this information to facilitate their stamp approval processes as appropriate.

- (Re)Insurer admins can associate a stamp with up to two physical addresses.
- A stamp may be associated with one registered address and/or one invoice address, or with one address for both purposes.
- Since DUNS codes are allocated on a branch-by-branch basis, they should be included as part of address information where available.
- Addresses created for adding to a stamp are also added to the list of addresses in the 'Stamp Addresses' tab, so that they can be re-used easily.

- The addresses assigned to a stamp can be changed and/or updated as required, with these updates applying to new written lines.
- All users with visibility of a stamp on a contract can see that stamp's addresses via API.
- Broker admins are able to freely see the address data of all stamps belonging to approved (re)insurers via the 'Approved Stamps' tab.

Templates and editable contracts can be assigned sets of mandatory data tags that brokers must complete

Specific items of Defined Data can now be set as mandatory for particular templates and contracts, allowing broking organisations to enforce data tagging in outgoing contracts. A contract with outstanding mandatory defined data tags cannot be shown as a firm order. This provides a way of guaranteeing that contracts will meet integration needs and automation objectives, as well an ensuring consistent data capture for internal reporting, business flow calculation, and down-stream processing.

- Template Manager brokers can create mandatory tag sets and assign them to new and existing templates.
- Each item in a tag set consists of a contract heading and a defined data tag field found under that heading.
- All new contracts cloned from a template with a mandatory tag set will inherit that tag set.
- Replacing a tag set on a template does not change the tag set applied to previously cloned contracts.
- Tag sets can be edited as needed, and revisions apply to both existing and new templates/contracts.
- Editable draft, Bindable Quote, and firm order contracts can also be assigned a mandatory tag set. Tag sets cannot be assigned to non-editable contracts.
- A template or contract can only have one mandatory tag set. Once applied, mandatory tag sets can be replaced, but not entirely removed.
- Mandatory tag sets can consist of as many tags as required.
- Contracts with mandatory tags have a new 'Mandatory Tags' tab which lists all contract headings with mandatory tags and clearly identifies those with outstanding tag requirements. Specific required tags are indicated when editing such contract headings.
- Mandatory tag fields with placeholder tag values must be updated to hold actual data.
- Outstanding tag requirements prevent the broker from proceeding when showing a firm order, recording an off-platform line on a draft firm order, adding vertical terms to a shown firm order, or showing a contract correction.
- If an update to a tag set results in a partially shown firm order having outstanding required tags, the firm order must be reverted to a draft state by removing existing written lines and requests in order to add the required data before re-showing. A fully shown firm order with newly-outstanding required tags can be signed normally.
- In this release, mandatory tag sets cannot be applied to endorsements, mid-term participant changes, data questionnaires, Contract Library line items, or contracts received from broking partners for placing. Additionally, mandatory tags cannot yet be triggered conditionally.

Section heading titles can be hidden in exported documents, giving much greater control over PDF/Word layout

The Whitespace Platform mirrors the MRC format for contracts. To permit users to easily format export contracts to other styles, it is now possible to hide individual section headings in exported documents. Combined with earlier options for hiding contract heading titles, this enables a powerful set of formatting and styling options in exported contracts.

- When in contract view, click on the three-dot icon in a section heading bar and select 'Hide Section Heading' to prevent that heading from showing when the contract is exported.
- Hidden section headings still show as normal in the Platform, but they are clearly marked with a badge that reads 'Heading hidden in export'.
- In conjunction with the earlier ability to hide individual contract headings in exported documents, users gain much greater control and flexibility over the appearance of their exported contracts.

Tagged data fields can be set to show dates in US date format at an organisation, template, or individual contract level

To more fully support international users, it is now possible to set tagged date fields to display the US date format. This option can be applied to the whole platform, and/or assigned on a per-contract basis.

- The Whitespace Platform now supports the US date format of Month DD YYYY in addition to the international date format of DD Month YYYY.
- All tagged and validated date fields, including those created before the date format was updated, display the date in the assigned format.

- Manually-entered plain text dates are not altered.
- Admin users can toggle the default date format for their organisation between the US and International formats.
- Template Managers can select a different date format to the organisational default for a template. All contracts cloned from it will inherit that date format.
- While a contract is at the unshown draft stage, brokers can set its date format, overriding the organisational and/or template defaults.
- Underwriters see shown contracts with the same date format specified by the broker.

Tagged data associated with a deleted section is clearly labelled and easy to reset

If a sectioned contract has one of its sections deleted, any groups (or 'pages') of data tags linked to that section are retained, but the data is effectively orphaned. These orphaned data pages are now flagged with an 'Orphaned Section' label for brokers.

- Deleting a previously-created section in the 'manage sections' box does not delete its section ID number from linked groups (or 'pages') of tagged data.
- In most circumstances, that linked ID is left 'orphaned' – that is, not representing any actual section in the contract.
- Data pages linked to a non-existent section are now labelled for brokers with an "Orphaned Section" label.
- Brokers can click the "Orphaned Section" label to remove the page's old section ID, and then click an existing section label from the top of the data tab to associated it with a valid section.

Enhancements

- New off-platform stamps in the Non-Bureau, MGA, and Non-Bureau MGA categories must be given a short description by the creating broker.
    - Short descriptions must be unique, and should clearly identify the stamp's capacity.
- The in-platform help and self-support system is now accessible within the Admin module as well as the main platform.
    - Admins can click the headset icon in the top bar to open the help pane and access the Knowledge Base.
- When adding an inline image below a contract heading, it is now possible to paste the desired image into the 'Add Image' box or drag-n-drop it onto the box as well as using the file system to locate and select it.
- Once the subjectivity requirement on a written line is satisfied, the red warning icon is removed.
- The line percentages and stamps used on a facility agreement have been removed from the information displayed on declaration contracts shown to that facility's panel, making them easier to read.
- Underwriters see groups (or 'pages') of data tags that fall into three categories – pages linked to sections they have been shown, pages associated with sections they have not been shown, and pages associated with the contract as a whole.
    - To clearly highlight the difference between the latter two types of page, pages associated with sections they have not been shown, including orphaned data pages, are now clearly identified by a new "Unshown Section" label.
- Various selection lists in the platform and the Admin portal have been alphabetised for easier use, including internal reviewers, team names, and users within teams.
    - In addition to seeing alphabetised team and user lists, brokers showing a contract can also now search for specific underwriters using the new 'Search for name' box when showing a quote, bindable quote, or firm order to a (re)insurer.
- Users can choose to export a contract with the stamps set to display strictly horizontally, rather than in the default naturalistic 'wonky' alignment.
- Prior to the introduction of Defined Data, the Platform identified dates, numeric amounts, and other key structures of data values, and in the JSON files representing the contract, template, or endorsement, automatically converted these into "placeholder" references that specified the type of data involved as well as the value. Please note that these JSON file structures have nothing to do with the "???" value that all Defined Data tags accept as a temporary value. We are completing the decommissioning of JSON placeholder references as follows:
    - *Placeholders are no longer applied to any newly created contracts or templates.*

- *When a contract heading in an existing contract or template is saved, any existing placeholders in the JSON for that contract heading will be removed.*
- *The MI report now depends on newly-created/updated contracts and templates having the following key Defined Data tags properly populated:*
  - Inception Date
  - Expiry Date
  - Premium Amount
  - Excess Amount *(already required for all contracts)*
  - Attachment Point Amount *(already required for all contracts)*
- *The dashboard/Inbox now depends on newly-created/updated contracts and templates having the* Inception Date *Defined Data tag properly populated.*

Activity String Updates for Integrators Using MS Service Bus Queues

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

- "`Mandatory Tag Set Assigned`" (broker users) – A mandatory tag set has been assigned to a template or contract.
- "`Mandatory Tag Set Removed`" (broker users) – A mandatory tag set has been removed from a template or contract.
- The service bus queue messages for the 'Declaration Shown to Facility' activity now include the line guidance of the section the activity refers to.

Information for Integrators

- When an off-platform stamp is added to an open market contract, participating underwriters can see that activity in the contract's History tab and in their service bus queues.
- If a contract includes stamps with associated addresses, those addresses are included in the contract's JSON. Keys consist of 'Address Type', 'Address Line 1', 'Address Line 2', 'City', 'Sub-entity', 'Country', 'Postcode/Zip', and 'DUNS Code', and only keys with values are included.

Known Issues

- When viewing a contract set to use CDR 3.2 tag names rather than default tag names, and which has a mandatory data tag set applied, the asterisk used to signify mandatory tags is missing when using the Defined Data view.
- The structure of DUNS and DUNS+4 codes added to stamp addresses is not being validated by the system. (Re)insurer admins should take extra care to ensure their DUNS codes are correct in stamp address blocks.

Resolved Issues

Browser

- After a broker has signed down some written lines, underwriters can now update their stamp references.
- After a sectioned bindable quote has one section shown to a facility and has lines added for the facility leader, agreement parties and notify/non-notify parties, and then the bindable quote is marked as firm order and a second section is shown to the facility, it is now possible to show the second section to the agreement parties.
- After a verticalised firm order has been shown for one section, it is now possible to show newly added sections.
- Brokers are no longer able to assign vertical terms for declarations to facilities which are in different teams.
- Data validation is now being correctly applied to values entered under the 'Order Hereon' tag field.
- MI Reports no longer time out when being produced.
- Notifications are no longer sent when changes are made to a template shared with multiple teams.
- 'Test-Only' underwriters can no longer be added to the 'Approved (Re)Insurers' list.
- The contents appearing under a contract heading now always start on the same page of an exported PDF as the contract heading title.

- The informal 'Quote Details' information is no longer included in Defined Data View.
- The ‘Send Invite’ button no longer appears inappropriately when updating user information in the admin portal.
- When a broker has enabled extended data for an underwriter, this is now correctly reflected in the admin portal’s history.
- When a contract heading is center-aligned, the spacing shown in the Platform between the title and the contents is now the same whether there are any tags under the heading or not.
- When a section of a declaration is shown to a facility as a firm order, and then withdrawn and deleted, it is now possible to bind notify parties for other sections on the declaration.
- When a signed contract with in-line attachments has an underwriter added to it via mid-term participant change, users can export the signed contract as a PDF without an error message.
- When a tag value is removed in Defined Data View, the '???' placeholder value is now entered in its place.
- When a written line is added to an open market contract using auto stamp, leader information is no longer available for followers if the broker selected the ‘Own Stamp’ stamp visbility option for the contract.
- When adding vertical terms, the default font size for the contract is now correctly inherited by those terms.
- When an endorsement on a firm order is shown to an underwriter and then all lines for that underwriter are removed from the firm order, the underwriter can now correctly agree the shown endorsement.
- When an underwriter is added via mid-term participant change to a signed contract with the "Share All Stamps" stamp visibility option selected, once the mid-term participant change is complete, existing underwriters on the contract can see the signed line % values against the new underwriter's stamp.
- When an underwriter is the leader of the leading facility on a declaration, and the same underwriter is also participating on the declaration as an open market follower, they no longer have the option to enter a YOA for the declaration when writing a line as follower.
- When an underwriter self-approves an internal review for an endorsement, they can now accept the endorsement without refreshing.
- When an underwriter self-approves internal reviews for sections on a firm order, they can now see those sections on the Risk Overview page without having to navigate to the WRITTEN LINES contract heading first.
- When contract heading title visibility is changed in 'Edit All' mode, that change is now immediately visible when navigating away from the contract heading.

iOS App

- After a declaration is shown to a facility on a bindable quote, stamp details are now correctly copied over when the the declaration is shown to the same facility as a firm order.
- Brokers are now correctly prevented from showing bindable quotes or firm orders when there is no INSURER'S WRITTEN LINE contract heading present.
- Brokers can delete sections on draft contracts.
- Brokers must now use the Touch ID authentication when completing a contract correction.
- Contract corrections on declarations can be completed after Leader and Agreement parties agree the correction.
- Dates can now be tagged with or without leading zeros for single digits (e.g. 1 January 2025 or 01 January 2025).
- If a broker is removed from a team whilst logged in to the iOS app, that team's contracts are no longer still displayed to the user.
- The informal 'Quote Details' information is no longer included in Defined Data View.
- Users can now see the tag category for contract headings.
- When a bindable quote is marked as a firm order and the broker is choosing underwriters to show to, the underwriters on the bindable quote are now shown at the top of the list.
- When a broker corrects a signed original master facility, the history for both the master and shared facilites now correctly shows the activity as "Shared Facility - Contract Correction".
- When a broker opens a shared facility, the internal chat now correctly names the team the facility was shared to, rather than deceptively listing the original master facility's team.
- When a broker opts to cancel rather than confirm a line removal request, the removal request is correctly cancelled, rather than being processed anyway.

- When a firm order is shown to a facility, and the leader and agreement parties have added their lines, the ‘Bind Notify Parties’ button is now present.
- When a mid-term participant change is completed, underwriters can now see the ‘View Archive’ option in the contract history.
- When a signed contract is reverted to firm order and then the broker requests a line removal which is accepted by the underwriter, the archived signed contract can be viewed.
- When a tag value is removed from in Defined Data view, the '???' placeholder value is entered in its place.
- When an underwriter is selecting an internal reviewer for a firm order, the list of users is now displayed in alphabetical order.
- When an underwriter self-approves an internal review for multiple teams and adds notes, those notes are now correctly displayed for all relevant teams in the internal review history.
- When searching for a ‘Risk Location Country’ in Defined Data View, the search box now stays at the full screen width.

Production Installation and Access Guide

iOS App

iOS users 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.

Please note that we are no longer able to include support for iOS v16. The Whitespace App requires iOS v17 to run.

Browser

The Whitespace Platform on Browser updates automatically. If you are already logged in at the time of the update, you will see a notice requiring you to refresh the page.