

Whitespace Platform v2.12.0

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Date: 9th June 2023

Headlines

A new 'Template Manager' role gives organisations granular control over template creation and editing.

The Admin Portal has been completely overhauled to improve usability and control.

Managing your underwriting organisation's stamps is now significantly more advanced and user-friendly.

New contract heading and Defined Data tag fields bring the Whitespace Platform to full CDR 3.2 compliance.

Release Details

New Features

- Controlling Template Modification with the 'Template Manager' User Role
 - Broker admins may now edit their users' 'Template Manager' permission status in the 'Users' pane of the new Admin Portal.
 - Only Template Managers may create, edit, and un/lock templates.
 - By default, all users are set as Template Managers.
- Managing Your Organisation with the New Admin Portal
 - The Admin Portal has been completely rebuilt to improve usability and extend admin functionality while still retaining access to all existing functions in a familiar manner.
 - Teams and users are more readily searchable, downloadable as lists, and easier to add and manage.
 - Using the new Users panel, the 'Template Manager' and Internal Review 'Self-Approver' roles can be toggled simply for users.
 - Extra organisational details can now be added for future use in CDR-compliant environments.
 - Underwriting organisations may now add and remove line conditions and select the availability of conditions for specific teams.
 - The Admin Module now tracks all changes in a straight-forward 'History' pane, including the identity of the admin who committed the changes.
- Adding and Controlling Underwriters' Stamps with the New Stamp Management System
 - The 'Stamps' pane in the new Admin Portal now provides full stamp management functionality.
 - Access to specific stamps can easily be toggled on and off for teams and even individual users. By default, all stamps are available to all users.
 - It is easy to search and filter the list of stamps, and stamps can be set to inactive to prevent them from appearing in the platform.
 - New stamps are created using a wide range of categories, including splits, consortiums, MGAs, LIRMA, and more.
 - All new full stamps are validated manually by Whitespace Support before activation to ensure complete reliability.
- Adding a Broker's Message to a Contract When Showing to Underwriters
 - Brokers may now add a text message when showing a contract to an underwriter for the first time.
 - This message will be shown to the recipient, but does not form part of the contract.
 - Messages may be sent to multiple underwriters, or they can be customised for each recipient.
 - Broker's Messages are available at the marketed contract, quote, bindable quote and firm order stages.

Enhancements

- Full MRC v3 Support

- All contract headings detailed in the MRC v3 document published in Blueprint Two are now recognised by the Whitespace Platform, either as entirely new headings or as synonyms for existing headings with the same business function.
- Subheadings and keywords are fully supported via corresponding data tags in the Defined Data system.
- Contracts composed following MRC v3 guidelines are completely compatible with the Whitespace Platform.
- More Data Tags in the Defined Data System
 - A raft of new data tags have been added to the Defined Data system to reflect the cutting edge of data standards.
 - Existing tags have also been refined to maximise useability.
 - The Whitespace Defined Data system is now fully compliant with CDR v3.2 and the MRC Open Market Guidance v3/Blueprint Two documents.

Resolved Issues

- Stamp references are now updating correctly in all cases.
- Exporting contracts with in-line attachments no longer breaks minor page elements.
- Consistency has been improved for the blue drop-down 'Actions' menu across different contexts.
- Certain advanced elements of endorsement functionality have been improved.
- Side-by-side contract comparisons now always display the correct way round.
- Table-scrolling functionality has been improved.
- In-line images behave more rationally.
- Bullet points now play nicely with Defined Data tag fields.
- Certain uncommon issues with edge cases on facility agreements and contracts declared to facilities have been resolved.
- Advancing a bindable quote to a firm order now reliably retains participant roles.
- Brokers may now re-show a bindable quote to an underwriter who has removed their previously bindable line.
- Confirmation messages have been made more consistent.
- Indicative contract flags display more consistently on 'Overview' and 'History' pages.
- Certain iOS app instability issues have been resolved.
- Text copied between Whitespace contracts now properly retains tabbing.
- Draft Bindable Quotes may now have vertical terms.
- Some occasional minor display issues have been fixed.
- Self-approved requests to quote can now be quoted properly.
- Facility leaders can now properly add bindable lines to bindable quotes in all circumstances.

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.