

Whitespace Platform Roles and Permissions for Underwriter Users

Roles that apply across the whole platform – whether email **notification** is enabled, number of **teams** joined, **MI reporting** and **administrator** permissions, and **status** of user account – are summarised on the main users tab alongside the user's name and email. Type in the search box to filter by user name/email, and click on a line to edit that user.

To enable email notifications for significant events on the platform, enter an email address in the user's '**Notification Email**' box.

Toggle the '**Administrator**' radio button to 'Yes' to give the user access to the admin portal. Admin permission extends to the whole corporate account, not just to an administrator's teams. To create a dedicated administrator-only account, set the user status to '**ReadOnly**' and do not assign any teams.

Each contract and template on the Whitespace Platform is associated with a single user team. Users can be added to as many teams as needed. Click '**Add Team**' and select an available team from the blank dropdown that appears as a new entry in the Teams list.

User permissions for each team are shown to the right of the team name. Click on the drop-down configurations box to add a permission, or click on the 'x' after a permission to remove it.

User roles on the Whitespace Platform are assigned/managed via the 'Users' tab of the administration portal.

USERS

Buttons: Add New User, Download List Of Users, Download CSV Template, Browse CSV File, Upload, Search

Name	Email	Notification	Teams	Reporting	Admin	Status	Invite
Bobby Wilson	whitespace.tduw@wspt.co.uk	No	1	NO	YES	Live	Not Invited
Darren Smith	underwriter.dedopulos@wspt.co.uk	Yes	3	NO	YES	Live	Active

Edit User

Name*: James Hatton

Email*: underwriter.tim@wspt.co.uk

Notification Email: underwriter.tim@wspt.co.uk

Status: Live (Dropdown: Draft, Live, Suspended, ReadOnly)

Administrator: ☐ No ☒ Yes

Allow Reporting: ☐ No ☒ Yes

Teams: Add Team

Configurations per Team

Team	Permissions
ALL RISKS	Reviewer X, Self Approver X
MARINE	Reviewer X
AVIATION	

Buttons: Cancel, Confirm

PLEASE NOTE that some role and permission changes may incur charges. Please contact hello@whitespace.co.uk for more information.

'**Status**' determines the user's level of access to the Platform.

- Users who are still being set up can be set to '**Draft**'. They cannot access the platform.
- '**Live**' users have full platform access.
- '**Suspended**' users cannot access the platform and are hidden from other users. To request deletion of a user, set them to '**Suspended**' and notify support.
- '**ReadOnly**' users can access the platform and read and export their teams' contracts and attachments, but they cannot make changes or conduct any business.

Toggle the '**Allow Reporting**' radio button to 'Yes' to give the user permission to create new MI Reports for the teams that they are a member of.

'**Reviewer**' permission allows the user to assess contracts sent for Internal Review and authorise/deny progress to the next stage.

'**Reviewer**' users with the additional '**Self Approver**' permission can authorise their own contracts. Only reviewers can have self-approver status.

PLEASE NOTE that clicking '**Confirm**' returns you to the 'Users' tab, but does not finalise your changes. You must click the '**Save**' button to the bottom right of all admin portal main pages to permanently commit your updates.