Whitespace Platform

Release Notes v2.15.0

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Date: 10th November 2023

Headlines

The Defined Data system now allows the automatic generation of MRC v3 supplementary subheading/keyword documents
New tag checking functionality quickly lets brokers verify that a contract meets MRC v3 expectations
Moving forwards, off-platform stamps will be validated for correct formation
It is now possible to fully verticalise contracts being declared to facility panels

Release Details

Using Defined Data to Generate MRC v3 Subheading/Keyword Supplementary Documents

During export, an MRC v3 supplementary document can now be generated alongside the full contract. Whitespace's new MRC v3 tag equivalence definitions use the contract's tagged data to list the required subheadings/keywords with their data values. The resulting supplementary document can then be used for data rekeying by transition services as per MRC v3 guidelines in the period leading up to full data-first contract processing.

- The Defined Data system allows for full compliance with Lloyd's new "subheading" requirements.
- Properly tagging your contracts provides the Whitespace system with all the information it needs.
- Contract export now also generates a supplementary document listing the MRC v3's subheadings/ keywords under each contract heading and properly populating them with the relevant data.
- When selected for inclusion, this supplementary document is automatically generated alongside the full contract, and the two files are placed together in a standard zip archive.
- Our new MRC v3 Tag Checker system detailed below allows you to validate that all the required data tags are properly in place before export.

Ensuring Data Compliance with the MRC v3 Tag Checker Beta

As the market moves to a greater reliance on tagged data, it becomes increasingly vital to ensure that all contracts have their data fully and correctly tagged.

- Whitespace's new Tag Checker examines a contract's data tags and compares them against the complete list of requirements specified in the MRC v3.
- Errors and possible issues are listed by contract heading in the validation pane, shown in contract view.
- Unfulfilled mandatory requirements are highlighted clearly in red.
- Conditionally-mandatory and contextual requirements are shown in yellow when potentially unfulfilled.
- The MRC v3 Tag Checker runs automatically for a contract when cloning as new, creating the first bindable quote, and creating the first firm order. It can also be run manually at any time.
- Organisations may opt out of the tag checking process entirely, and users at these organisations will not see the validation pane.
- Failing a mandatory requirement check does not restrict any platform functionality.
- MRC tag checks are documented in the contract's history.

Working with Validated Off-Platform Stamps

To help ensure that contracts placed on the Whitespace platform with off-platform (re)insurers do not cause problems down the line, stamps recording off-platform lines now offer the same range of options as on-platform stamps, and non-compliant stamps are marked as 'false' by Whitespace support.

- Each off-platform (re)insurer has an open list of associated stamps, fully visible to all brokers.
- Brokers writing a line on behalf of an off-platform (re)insurer may either select a validated stamp or create a new off-platform stamp to use on their contract.
- The full range of stamp categories is available when creating a new off-platform stamp.
- New off-platform stamps are immediately applied to the contract, and added to the (re)insurer's stamp list.
- New off-platform stamps will be reviewed by Whitespace Support and non-compliant stamps marked as 'false'.
- To add an off-platform (re)insurer to the Whitespace platform, contact Whitespace Support.

Showing Verticalised Terms to Underwriters on a Facility Panel

It is now possible to show verticalised contract terms to facility members on the Whitespace platform, alongside open market (re)insurers as required. This process is very similar to verticalising open market contracts.

- Contract headings can be verticalised on both open market and declaration contracts at the bindable quote and firm order stages using the drop-down arrow menu next to the contract heading's edit button.
- When assigning underwriters to a vertical term, the selection screen now has separate tabs for open market (re)insurers and for the broker's facilities.
- Selecting a facility allows the broker to freely select recipients for the term from a list of its subscribing underwriters.
- (Re)insurers already assigned terms in the contract are clearly labelled.
- Contract terms can be flexibly assigned however the broker desires, but non-participating facility members must be set to 'Does Not Apply'.
- All verticalised contracts are fully compatible with Whitespace's sectioning functionality.
- When showing, agreement and non/notify parties of a following facility given visibility of only the leader's stamp will see stamps for both the overall contract leader and their own facility's leader.

Enhancements

- Implicit Tags Generated by the GET /data API Endpoint
  - Calling the /data endpoint for a contract returns all the tagged data associated with the contract.
  - This data now includes several items of information retrieved and tagged by the endpoint itself.
  - Examples include date and time of contract creation, system information about stamps, and so on.
  - These implicit data tags are labelled with the term 'Controlled' to clearly identify them.
  - To access this implicit data, please use the endpoint /api/v23.09/data instead of the older /api/v22.04/data endpoint.
  - The /api/v22.04/data endpoint will remain fully active. It will not be deprecated, and there is no need to change systems unless the new functionality is required.
- Updates to Broking Partners Functionality
  - The 'History' tab tracks more detailed information about several aspects of the Broking Partners functionality.
  - Chat messages between broking partners are more user-friendly.
- Improvements to Facility/MGA Contract Systems When Using Bindable Quoting
  - Facility contracts have a greater range of options with respect to the bindable quote system, bringing them more in line with open-market contracts.
  - Certain infrequent issues surrounding line percentages and available underwriters have been resolved.

Known Issues

As of the release of 2.15, there are three outstanding issues relating to the export of supplementary data documents:

1. When exporting a supplementary data document that has '???' as a placeholder data value for the UMR, neither the contract nor the supplementary data document is exported, and the resulting zip file is empty. This empty zip file is just named with a dash on Windows machines, since '?' is not a valid character for Windows file names.
2. When exporting a supplementary data document for a contract that has a non-MRC contract heading mapped to an MRC heading, data tags applied to the text under that heading are exported under the destination MRC heading rather than the original non-MRC heading.
3. Cross-reference data tags are not included in exported documents.

Resolved Issues

- On the Broking Partners tab of a contract shared between producing and placing brokers, display issues in the compare function screen have been resolved.
- On the Broking Partners tab of a contract, when comparing a Placing and a Producing Broker's versions of a signed advice the signed percentage is now displayed correctly.
- On the Broking Partners tab of a contract shared between producing and placing brokers, the filters now function as expected without requiring a browser refresh.
- In the iOS app, the Broking Partner screen now shows the correct logo and organisation name when viewing as either the placing broker or the producing broker.
- In the iOS app, when viewing an advice from the Broking Partner screen it is now possible to view tagged data.
- In the iOS app, having shared a contract between Producing and Placing brokers and vice versa, the history now displays details of both the broker who shared the advice and the broker who received it.
- In the iOS app, chat messages between placing and producing brokers are displayed and history-tracked correctly.
- In the iOS app, when assigning Facility participants to vertical terms on a contract the Facility name is now correctly displayed.
- In the iOS app, it is no longer possible to edit the line % on contracts shown to a facility such that the participant lines exceed 100% in total.
- In the iOS app, bindable lines recorded by facility participants are now carried forwards when shown to the same facility as a firm order.
- In the iOS app, searching on a tag now highlights only values with the relevant tag applied.
- In the iOS app, when completing the additional data entry configured for a specific Custom Activity, if a set list of numbers has been defined then the list is now displayed as integers.
- In the iOS app, if no custom actions have been configured for a specific team then the Custom Action option no longer appears in the Actions menu.
- A contract with type Declaration now must be shown to a facility leader before being shown to an open market participant. Previously an error was being generated.
- Bindable Lines for an off-platform organisation can now be recorded on a sectioned contract declared to a facility with an off-platform leader.
- When showing a bindable quote or a firm order to a Facility with an off-platform leader, the list of Facilities is now correctly populated when the broker attempts to record the off-platform line.
- In the risk overview, the thumbnail now correctly shows the UMR on all displays.
- The screen display no longer obscures the section heading when a new one is added above the first section heading in the contract.
- When editing a contract and choosing to cancel, the prompt that asks whether you want to discard changes now works consistently and as expected.
- Images are scaled to fit the page based on image height, not just on image width, when exporting a contract.
- Having selected to view tagged data for one or more headings in a contract, clicking on the back button returns the user to the risk overview as expected and no longer triggers a save prompt.
- When preparing a Mid Term Participant Change endorsement it is no longer possible to modify underwriter participations whilst the record is in edit mode.
- When assigning users to stamps in the Admin module, read-only users no longer appear in the list and so can no longer be assigned to a stamp.
- The admin module now displays Team Name rather than Team ID in the Users screen, making it more consistent with the Teams screen.
- Azure service bus queue names can no longer incorrectly accept spaces as a valid character.
- The MI Report now correctly shows the latest status of all contracts.

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.

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