

Whitespace Platform

Release Notes v2.16.0

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Headlines

Contract headings and all their associated text, tags, and formatting can now be easily dragged from one contract into another.

JSON export/import allows contracts to be exported and perfectly recreated in a different Whitespace team, user, or environment.

Release Details

Drag and Drop Full Contract Headings into Another Contract with the Insert Content Tool

When editing a contract or endorsement, there will often be contract headings in other templates or contracts that need to be inserted into the new contract. This new feature allows the broker to copy a contract heading from one contract to another, complete with all its text and tags, by simply dragging and dropping.

- The new 'Insert Content From Contract/Template' option will be available as a broker action on all editable and verticalisable contracts. Clicking it lets the user navigate to and select a second contract or template, which is then shown side-by-side with the current contract.
- The user can click on any contract heading or inline attachment in the second, 'source' contract and drag it over to the first ('destination') contract. The copied contract heading preserves all its text, tags, formatting, tables, and other content.
- If the copied contract heading already exists in the destination, users can overwrite the heading in the destination, insert a duplicate ('alternative') version to use in manual edits/comparisons that should be deleted once done, or insert a verticalised version of the heading if at bindable quote/firm order stage.
- If a contract heading is inserted into the destination contract as a verticalised heading from an underwriter's quote, the underwriter is assigned to the heading as a label in the destination, to make it easy to show the correct vertical term to the correct recipient.
- If the copied contract heading does not exist in the destination, it can be inserted as a new heading.
- Once a firm order or bindable quote has been shown to an underwriter, only verticalised contract headings can be inserted.
- Insertions are shown as edits when highlighting the destination contract's prior edits, and are also tracked in the destination contract's history.
- Inserted contract headings retain the same lock status as they had in the original contract, and cannot overwrite locked content in the destination contract.
- To guarantee that contract integrity is preserved at all times, content insertion operations cannot be cancelled, but each individual action can be reverted as needed by using the 'undo' option next to that inserted heading.

Easily Transfer Contracts From One Team or User to Another with JSON Export/Upload

The new JSON export option makes it easy to duplicate a template or contract from one user or team to another by saving an archive file of a contract's database entry, including all its data tags, attachments, formatting and other features. This file can then be imported to other environments, teams, and/or users as a new template or contract, perfectly recreating the original.

- Selecting the JSON option when exporting a template or draft contract creates a Zip-format archive containing all the files required to perfectly duplicate the contract in the Whitespace Platform. This includes all defined data tags, attachments, inline images, formatting, locking, and other contract features.

- The archive contains copies of the JSON documents and attachment files that define the contract in the Whitespace database.
- The archives will always remain 100% compatible with future versions of the platform.
- There is never any need for the user to open or otherwise manipulate the archive. Tampering with the files in the archive may result in the contract being rejected for upload.
- When creating new contracts, users can select JSON upload as an option.
- Exported contracts retain their status as draft or template, so exported template contracts can only be uploaded by users with the 'Template Manager' permission. Users without this permission should obtain an archive created by exporting a new draft contract based on the template.
- A single JSON contract can be uploaded to multiple teams that the user is a member of.
- Users can upload multiple files at the same time, bearing in mind that multiple uploaded contracts of the same status type have to be assigned to the same selection of teams.
- JSON export/upload allows users to copy contracts from one Whitespace environment to another, for example from the SANDBOX test system to the live PRODUCTION system.

Enhancements

- Outstanding validation results from the MRC v3 Tag Checker beta are now clearly indicated.
 - When the MRC v3 Tag Checker has validation results that have not yet been viewed by the logged-in user, a blue dot is shown next to the 'Validation' tab.
 - The 'Validation' tab is visible on the navigation bar towards the top of the screen in contract view.

Resolved Issues

- UMR will now be correctly retained when cloning a contract which has its UMR recorded outside the 'Risk Details' section of the contract.
- Users will no longer see a broken option to access deprecated functionality for creating declarations when viewing a facility.
- Outstanding internal review notifications will no longer erroneously re-appear on reviewed endorsements after completion.
- In the iOS app, the total percentage placed will no longer appear on the slipcard of withdrawn firm orders.
- In the iOS app, converting a market-only contract into a request for quote now correctly allows brokers to share supporting attachments.
- In the iOS app, the option to select or deselect all attachments when showing to one or more underwriters is disabled when all the available attachments have already been shared with those recipients.
- In the iOS app, sharing an attachment linked to a draft endorsement no longer lets underwriters see the link to the draft before it is properly shared.
- In the iOS app, searching for a tagged value now correctly only highlights matching tagged values.
- In MI reports, lines for contracts with multiple Periods will now retrieve the first dates in the contract that are tagged as inception and expiry dates.

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.