Whitespace Platform v2.4.0

Author: Tracey Hardaker
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Release Summary
New effortless 'Outline' contracts are lightweight risk records intended to hold the actual contract as an attachment, whilst still supporting the standard Whitespace Platform placing process.
Brokers can choose how and when to share attachments with specific underwriters on a case-by-case basis.
Attachments can be replaced, deleted (if not shared), linked to endorsements, and have their history viewed.
When exporting a contract to PDF, attachments can be placed before the contract as well as after it.
Brokers have the option of manually marking a quote as NTU (not taken up).

New Features
- **Outline Contract**
  - Brokers have the ability to create an 'Outline Contract' from a small subset of fields which then generates a summary 'Draft' contract
  - Selected fields are automatically data-tagged
  - Once the outline is created, an attachment can be uploaded with the full contract, allowing for faster contract creation
  - The outline contract can be shown to underwriters using the existing functionality.

- **Sharing Attachments with Specific Underwriters**
  - When a Broker uploads an attachment, it is created in a 'Draft' state and is not automatically shared with anyone
  - A Broker can choose to share uploaded attachments with participating underwriters via the 'Attachments' pane
  - Brokers are prompted to consider sharing attachments when showing a contract for quote or at firm order
  - For declarations, brokers are prompted to consider sharing attachments with the 'Notify' and 'Non-Notify' parties when these party are bound
  - Brokers can delete attachments that have not yet been shared, regardless of contract status.

- **Versioning of Attachments**
  - Attachments can be replaced, and this is tracked in the attachment specific version history
  - If an attachment is replaced it is automatically shared with any party who had access to the previous version
  - The 'Attachment Version History' screen is accessible for each attachment, which shows:
    - All previous versions of the attachment
    - Who the attachment has been shared with and when
    - Whether the attachment is linked to any endorsements
    - A preview of the attachment
    - An option to download each version of the attachment

- **Linking Attachments to Endorsements**
  - Attachments can be linked to endorsements
  - Attachments can be previewed from the endorsement once linked
  - When showing an endorsement, brokers are prompted to consider sharing attachments with any underwriter assigned as the 'Leader' or 'Agreement Party' role
  - When completing an endorsement, brokers are prompted to consider sharing attachments with any underwriter assigned as a 'Notify Party' or a 'Non-Notify Party'.

Enhancements

- Updated 'Create New' contract flow
    - When creating a new contract, a pop-up screen now presents the various contract creation options, including the existing 'Digitiser' process, as well as cloning from a template and using the new 'Outline Contract'
- Appending Attachments
    - When exporting attachments, users can now choose to add PDF attachments to the front of the exported contract as well as appending them to the end
- Marking Quotes as NTU
    - Quotes are no longer automatically marked as NTU
    - When a quote is marked as the firm order, the broker can choose to NTU all remaining quotes, to manually NTU them, or to leave them active as required

Resolved Issues

- It is now possible to drag and drop a Declaration when uploading it to a Facility
- Contracts with a non-MRC format can now be fully digitised
- When digitising a document, bold, italics and underlining are now retained
- An underwriter may now participate under the terms of a facility on one section of a declaration and as an open market participant on another section of the same declaration
- Titles of 'In-Line Attachments' are now contained within the contract
- Re-signed lines now only permit numerical values to be entered.

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.