Whitespace Platform

Release Notes v3.6.0

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Headlines

Fully tracked contract renewals added.
Brokers can search for underwriters by name.
Contracts can be shown to selected team members.
Stamps now accept authority registration codes.

Release Details

Renewing a Contract

The new Contract Renewal system allows brokers to formally renew expiring contracts whilst fully tracking all of the older contracts in the renewal chain. Simple functionality makes it easy to recognise renewed contracts in the Inbox, and to switch between any of the contracts in the chain.

- Renewing a contract duplicates the signed contract as a draft in a brand new contract record.
- As part of the process, the broker enters certain items of information to update, including unique reference, contract name, and, if tagged in the contract being renewed, the inception and expiry dates.
- The renewal contract is updated as specified, and otherwise exactly duplicates the previous contract, including corrections, Questionnaires, and any selected external attachments.
- All contracts in a renewal chain that the user's team have participated on are fully tracked, readily visible, and easy to switch between.
- Older renewed contracts are clearly labelled in the Inbox.
- Any signed contract can be renewed.
- At the current time, neither endorsements nor the list of prior participants is carried forward from the renewed contract to the renewal, and it is not possible to manually add old renewal contracts into existing chains.

Searching for Specific Underwriters by Name

Brokers often know the specific underwriter they wish to approach, and want to be able to present a contract directly to them. Scrolling through lengthy lists of organisations and teams to get to the individuals is inconvenient, even if the broker happens to know which user teams the underwriter is part of. Without that knowledge, it can be significantly challenging to locate the specific person. This new functionality allows brokers to search for – and select – individuals by name across Whitespace's entire underwriter user base any time a contract is being shown.

- When showing a contract, a new 'Individuals' tab is available while selecting participants.
- The 'Search Name' box in that tab filters the alphabetical list of all underwriter users to exactly match the search term.
- Each user's organisation name and logo is shown in the list to make it easy to correctly identify the recipient.
- After the correct recipient is selected, the broker is able to choose which of that user's teams the contract should be shown under.
- Further recipients can be added as usual, and may be freely selected by either user name or organisation.

Selecting Some of the Underwriters on a Team to Receive Notifications

Previously, when showing a contract, a broker has only been able to select either a single Underwriter or their entire team to send notifications to. This feature allows brokers to select some members of a team to receive notifications instead of either the whole team or just one member. This is of particular use when an underwriter is away, and the broker does not want to disturb the whole team.

- When showing a contract, brokers can select one, several, or all team members to receive email and in-browser notifications that the contract has been shown.
- Open market sectioned, verticalised, reshown, and individual layer contracts at all stages can be shown to multiple underwriters.
- Endorsements, declarations, off-platform contracts, and bulk-shown layers are not affected by this feature.
- Ownership of the contract is still only automatically assigned on showing when there is just one recipient.
- As usual, other team members can still see the contract and its 'Actions Required' count, and progress it if they choose to.

Adding Authority Codes to Stamps

To help brokers assess a stamp's compliance and suitability for conducting business, (re)insurer Admins can now link business registration codes from issuing authorities such as Lloyd's or Dun & Bradstreet (D-U-N-S) with their stamps. Future Platform releases will accommodate the capture of additional country and state-specific tax and regulatory information as authority codes. Adding authority codes to stamps helps support downstream processing and our upcoming LIMOSS SDC integration, regulatory and compliance checks, and provides reliable data-driven information for broker approval.

- The organisation's authority codes are configured via the 'Details' pane as usual.
- Edit an authority code on the 'Details' pane to select which stamps to associate with it.
- Authority codes can also be added to stamps during creation or via the 'Manage Stamps' action.
- Each stamp can be associated with one code for each authority type, and codes can be used with as many stamps as is required.
- Stamps do not show authority codes in the Platform. Broker Admins can view them in their 'Approved Stamps' pane, and the information is available to integrators via API.
- Duplicating the stamp also duplicates its associated authority codes.
- Codes may be replaced or removed from stamps at any time.
- To delete a code from the organisation's details or change an incorrect authority type, first remove all its stamp associations.
- At the current time, D-U-N-S numbers and Lloyd's Syndicate codes may be added to the organisation's profile.
- To prepare for LIMOSS SDC integration, please make sure that all Lloyd's Brussels Syndicate stamps have your organisation's D-U-N-S Number associated with them.

Enhancements

- (Re)Insurer Admins can now export a spreadsheet file that details which stamps each user has access to for each of their teams. This file is generated from the 'Stamps' panel using the 'Export Assigned Users' button.
  - Every row in the spreadsheet details one user's access to one stamp in one of their teams. Additional fields provide complete details of the assigned stamp, along with relevant unique ID system codes. This allows Admins to gain a complete overview of exactly which underwriter every stamp is assigned to.
  - The report lists all stamps that have been assigned to at least one user, regardless of each stamp's validation status or whether it has been enabled or disabled. Stamps that have not been assigned to any user will not be listed.
- New detailed user warnings specify the precise reason why a user cannot apply certain stamps, and inform them of who to approach to rectify the situation. There are several possible reasons why a stamp might be unavailable for use – it wasn't on the list of stamps suggested for a particular contract; the stamp is not on the broker's Approved Stamps list; or the stamp has not been authorised internally for use by that user.

- Invoice addresses are no longer mandatory for inclusion on stamps. They may still be added to a stamp if desired.
- Previously, when an off-platform facility agreement included lines that were shown to on-platform users, the user's entire team received copies of all notifications for that agreement. Similarly, for both on and off-platform declarations, notify participant lines were sending notifications to that whole team.
    - In both of these cases, ownership of the contract – i.e., the receipt of email and browser notifications – is now assigned to the specific user who wrote that line on the facility agreement.
- The character limits on stamp address fields have been adjusted.
    - The name and address lines can now hold up to 100 characters, as can the county, province, or state field. The city name can be up to fifty characters, and the post/zip code up to fifteen. The D-U-N-S Number must be nine digits. This change does not impact pre-configured addresses.
- When uploading a JSON contract to the Platform, the new contract or template's creation date now shows the date of upload, rather than the original creation date of the contract that was then exported.

Integration Changes

- A new broker endpoint is available for use when showing a declaration contract to a facility panel, `POST /api/declarations/{declarationID}/showToFacility/{facilityRootID}`. Full details are available on the Swagger microsite. This endpoint is an improved alternative to the older `POST /api/showDeclarationToFacility` call. Although integrators are encouraged to switch over, the `/showDeclarationToFacility` endpoint will remain available.
- Two new activity strings have been added in this update:
    - `"Contract Renewed"` *(Broker)* – An existing contract has been renewed as a new contract.
    - `"Created New Renewal"` *(Broker)* – A new renewal contract has been created.

Known Issues

- At the current time, underwriters writing a line on a Declaration contract are unable to see the value of the information-only 'Order to Facility %' field. The 'Declaration Line %' box is correctly pre-populated as usual.
    - If the 'Declaration Line %' value is accidentally deleted, it is difficult to deduce the correct line value with the 'Order to Facility %' value invisible. Users may need to close the 'Add a Line' window and re-click the 'Add a Written Line' button, which will repopulate the 'Declaration Line %' box with the correct value.
- When showing different sections of the same contract to different underwriters in a team, email notifications for all sections will go to the owner of the section that was shown first. So if first Section 3 of a contract is shown to Alice, and Section 2 is then shown to Bob – and Alice and Bob are team-mates – then Alice will receive all the email notifications for both Section 3 and Section 2, and Bob will not receive any email notifications.
- When a broker selects multiple (but not all) underwriter team members to receive an email and in-browser notification that a contract has been shown, the recipients are currently also being subscribed to all future notifications for that contract. To unsubscribe to a contract's notifications, users can click on the contract in the inbox to open its 'Overview' page, click the 'Settings' tab, and click on the 'Notifications' toggle to disable their own notifications for the contract. Please note that the contract's owner always receives notifications.
- The history timeline entry for firm orders shown to specific underwriters is not always displaying the individuals selected. The information is being recorded, but it is not being shown in the History tab's 'Requested a Line' entries. If needed, please contact Support to retrieve the information.
- The new report detailing users' stamp assignments – available via the Admin Portal – currently includes suspended users who still have stamps assigned to them. The report does not yet have a 'User Status' column, so there is no visible indicator that a given user has been suspended.
- Users with the 'Library Access' permission cannot currently use the Contract Builder without also having the 'Contract Builder' permission for the team they are working in. In the Library, they can access the builder and go through the process of creating a contract, but are unable to publish it. In the Platform, they do not have access to the Contract Builder option in the 'Create New +' menu. As an interim measure, Librarians should request that 'Contract Builder' permissions be added to their teams from their Whitespace Admin team.

Resolved Issues

- The optional 'Quote Details' information panel added by underwriters now appears correctly when exporting a quoted contract.
- When exporting a contract to PDF with page numbering set to restart at the beginning of specific contract sections, page numbers now properly restart at the beginning of selected contract sections and then continue on without restarting for unselected ones.
- Quotes forwarded as 'Market Only' (i.e., read-only) now correctly include shown attachments and broker's messages.
- A small typo has been corrected in the Internal Review system's approval banner.
- When editing a stamp address, the pre-existing fields of the old address are now retained 'as-is' until they are edited, as opposed to all being blanked, making it much easier to correct typos.
  An issue has been resolved where 'Appetite Matching' responses were referring to the version numbers of firm orders despite firm orders not having version numbers in the Whitespace Platform.
- An issue has been resolved where internal review details were not being exported if a contract had an attachment positioned to be included after the end of a contract.
- Underwriters can no longer incorrectly accept endorsements via API if the broker has also requested the removal of a written line.
- When exporting a contract to a Microsoft Word document, the contract heading title "Unique Reference" now correctly appears alongside the UMR, policy number, or other reference appearing in that contract heading.
- When previewing quoted contracts, underwriters' button stamps are now correctly displayed.
- An unnecessary radio button has been removed when only one underwriter is visible on the role selection screen for endorsements.
- Exports now correctly only include attachments when the option to include them has been selected.
- In the Admin Portal, it is now possible to click 'Save' after toggling one or more 'Stamp Visibility' configuration screen 'Enforced default' sliders to 'On'.
- Having uploaded a template using the digitiser, contract headings containing HTML elements are now appearing correctly when previewed and/or exported

Production Installation and Access Guide

Browser

The Whitespace Platform updates automatically. If you are logged in at the time of the update, you will see a notice requiring you to refresh the page.

iOS App

The iOS app has been temporarily withdrawn whilst we redesign it. Watch for news of its exciting relaunch.