

Whitespace Platform v2.5.0

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Headlines

You can now apply a greater range of defined data tags to ensure your contracts are both CDR compliant and GPM compatible.

Two new API calls give you access to the tagged data in a contract.

You can now compare any two contracts that are visible to you, including older contracts.

Brokers have better control over which stamps an underwriter sees on a verticalised contract.

The platform's help panel has been expanded and improved.

The process of sending a risk to team members for secondary approval is now known as "Internal Review" and offers more options when choosing reviewers.

Release Details

New Features

- Tagging Data for CDR Compliance
 - We've greatly increased the list of defined data tags available to you across all sections of the contract.
 - A new contract section heading, 'Placing Data', has been created for tags that do not fit into existing MRC headings. If you want to use these tags, add this section to the contract, then move the relevant text into it and tag it as required.
 - When you tag the column headers in a table, each subsequent row is automatically tagged correctly to ensure all the data is easy to capture. This is currently only available on browser.
 - Some tags have a specific list of values or formats that they require. When you apply them, they automatically update the contract text to reflect the correct usage.
 - Each Whitespace CDR-compliant tag has an ACORD GPM equivalent if one exists.
 - To improve clarity, tagged data can now be added to more than one 'Page' of tags on the platform.
 - A detailed Defined Data user guide can be found on our help guide repository site at <https://apidocs.whitespace.co.uk>.
- Using the API to Extract and Update Tagged Data
 - Two new API endpoints are available for working with a contract's defined data.
 - The GET /data/{RiskID} call returns all the tagged data within a contract, using either the default Whitespace CDR tags or ACORD's GPM tags.
 - The POST /data/{RiskID} call updates the contract's tagged data fields with new values. References obtained from GET /data ensure that the updated values are applied to the correct tag instance.
 - A /verify POST option allows you to check that the updated data is error-free before you attempt to change it.
- Sharing Stamps on a Verticalised Contract
 - Brokers now have extended options regarding who sees which underwriters' stamps on verticalised contracts.
 - Verticalised contracts may share all stamps, share only the underwriter's own stamp, or share the leader's stamp with their followers.
 - In addition to their own stamp, underwriters may now see the stamp of their leader, if any, or they may see the stamps of all the underwriters on that risk.
 - Underwriters will still only see the vertical terms that they have been assigned, regardless of which stamps are visible to them.

- If the broker shows the contract before verticalising it, it is locked to sharing the underwriters' own stamps only.
- Comparing Contracts
 - You can now select any two contract instances or any two endorsements for comparison.
 - New drop-down options in the compare screen let you switch between different instances of the same contract or endorsement, for example swapping from the firm order contract to the draft contract.
 - The comparison view defaults to showing only the differences between the two documents, but you can change this to show the full originals.
- Getting Help in the Platform
 - Clicking on the '?' help icon in the platform's top bar now opens a new 'Help Pane'.
 - Select the 'Contact Whitespace Support' button to open a pre-addressed email template to fill out and send to the support team. Full details on how to contact the support team manually are also shown in the pane.
 - Your organisation's own Whitespace platform administrators can also help you with a range of login and permission issues. Their email addresses are listed in the pane.
 - A range of detailed self-help resources will be available in the pane soon.
- Getting Secondary Approval for Risks
 - "Authorisation" has been renamed to "Internal Review" to make it clearer that the process involves sending a risk to a team-member for review before it progresses.
 - When you send a risk for review, it can now go to several specified team members. It can still also be sent to an individual team member or to the team as a whole.
 - The process is otherwise the same as before.

Enhancements

- Facility Outline Contracts Updated
 - Facility outline contracts now include a field for the risk name.
 - The unneeded "Maximum Limits of Liability" field has been removed.
- Whitespace iOS App Updated
 - Several elements of the iOS App have been made more consistent with the browser version.
 - Display functionality of several platform elements has been improved.
- Contract Digitiser Improved
 - Digitising a new platform contract from a PDF is now more reliable.

Resolved Issues

- When comparing draft contracts, the documents will now be properly named on the comparison screen.
- You can now unlink an unshown, draft attachment from an endorsement that has been previously shown.
- The list of underwriters is now in the same order on both the 'Manage Lines' screen and in the contract text.
- You can now mark a draft as a firm order even if several quotes are active.
- Underwriters will no longer see a progress circle that reflects contract sections that haven't been shared with them.
- The wording used when linking and unlinking attachments from an endorsement is now less ambiguous.
- Some buttons and text items have been tweaked to improve their functionality and appearance.
- The security of API calls used to show a risk has been tightened to remove a theoretical chance of data leakage.

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 telling you to refresh the page.