
IXN Integration 2.21 August

FIRELIGHT BASE

FireLight®

Platform

IXN INTEGRATION 2.21 AUGUST

Document Version: 1.0

Published: May 27, 2021

Insurance Technologies, LLC

Copyright © 2021 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

Table of Contents

| | |
|--|----|
| iConnect 243544 Design Approach - IXN Integration 2.21 August..... | 4 |
| 1 UI Enhancements | 4 |
| 1.1 Document Tag for PDF of IXN Quote | 4 |
| 1.2 Share and Transfer | 4 |
| 1.3 Lockdown data on IXN Quote when Transfer is Selected | 5 |
| 1.4 Error Handling | 5 |
| 2 Enhancements to support Embedding FL into IXN | 5 |
| 2.1 Certificate Management | 6 |
| 2.2 FireLight Management of IXN Certificate | 11 |
| 3 Save Functionality | 12 |
| 3.1 Support IXN Life Quote Saving in FireLight | 13 |
| 3.2 Save Quote Dialog for Life Quote..... | 13 |
| 3.3 Save Changes to Life and Annuity Quote | 14 |
| 4 Quote Activity Report | 15 |
| 4.1 Create Quote Activity Report..... | 16 |

iConnect 243544 Design Approach - IXN Integration

2.21 August

With the IXN implementation of embedding FireLight, enhancements are required to provide improvements for supporting certificates between the two systems. There are also additional enhancements to FireLight from embedding IXN into FireLight, such as the ability to save, share and transfer quotes, general system clean-up and an activity report for quote.

Impacts:

e-Application-Available to IXN customers through IXN platform

Save functionality established for IXN embedded quote in FireLight

Ability to add a document tag for signatures to IXN Life Quote PDF attached to FireLight e-Application

Organization, Security Tab: Changes to IXN certificate management for ease of use

Activity Reports: New Activity Report for Quote

1 UI Enhancements

The PDF document of the IXN quote attached to the FireLight e-Application will have the ability to add a document tag. This will provide the ability to add a signature tag, if so desired. FireLight will also be enhanced to support child term rider values in units and not limited to dollars in the database. Agents will have the ability to share or transfer quotes created in the IXN Life Quote ALQ through FireLight.

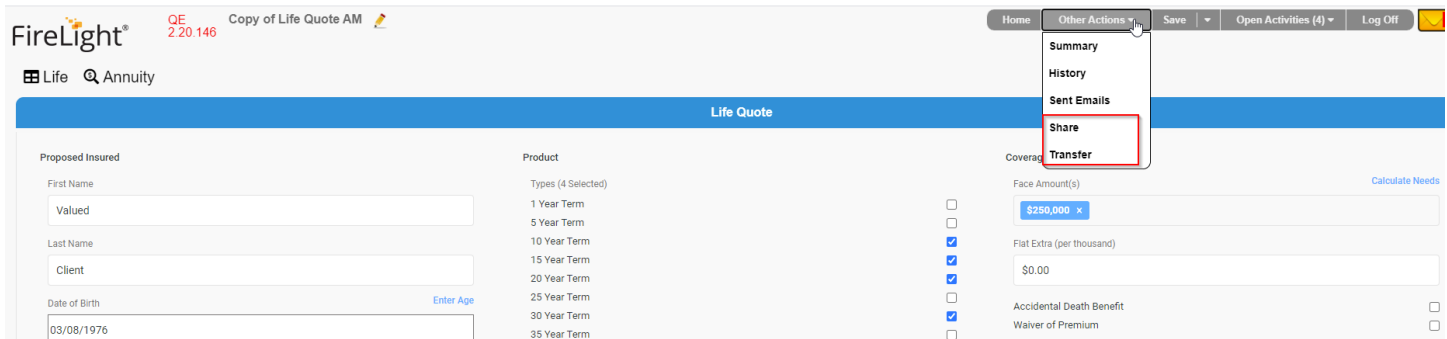
1.1 Document Tag for PDF of IXN Quote

Acceptance Criteria

- IXN Life single quote document template can be enhanced with a document tag allowing the addition of signature tag(s).

1.2 Share and Transfer

The Share and Transfer options in the Other Actions menu is not currently available for Life Quotes through the IXN embedded quote tool. FireLight will be enhanced to allow Life Quotes through the IXN quote tool to be Shared and/or Transferred.



FireLight® QE 2.20.146 Copy of Life Quote AM

Home Other Actions Save Open Activities (4) Log Off

Summary
History
Sent Emails
Share
Transfer

Life Quote

Proposed Insured

First Name
Valued

Last Name
Client

Date of Birth
03/08/1976

Product

Types (4 Selected)

1 Year Term
5 Year Term
10 Year Term
15 Year Term
20 Year Term
25 Year Term
30 Year Term
35 Year Term

Coverage

Face Amount(s)
\$250,000

Flat Extra (per thousand)
\$0.00

Accidental Death Benefit
Waiver of Premium

Acceptance Criteria

- IXN Life Quote can be Shared in FireLight.
- IXN Life Quote can be Transferred in FireLight.

1.3 Lockdown data on IXN Quote when Transfer is Selected

When transfer is selected in other activities across FireLight, the fields in the activity are locked down so the user who requested the transfer can no longer edit them. IXN will be implementing a configuration method for Insurance Technologies to use to call at the time transfer is selected to lock down the embedded fields.

Acceptance Criteria

- When a transfer is requested from a Life Quote in IXN embedded in FireLight, the user who transferred the activity can no longer edit fields.
- The user the activity is transferred to can edit fields as needed.

1.4 Error Handling

FireLight will continue to be evaluated for potential error handling additions to be added.

Acceptance Criteria

- Any additional error messages are added to FireLight, as needed.

2 Enhancements to support Embedding FL into IXN

With the enhancement to IXN for embedding FireLight's e-application, IXN certificate/service record enhancements are required within FireLight to easily support the connection between the two systems.

2.1 Certificate Management


Certificate information is stored at the Organization, Security level in the FireLight Admin settings. A certificate with a client secret key provides security between IXN and the FireLight environment. IXN will build a payload that uses the certificate to validate the request.

A base enhancement will be made to allow easier management of certificates/service records for IXN. A well-known service record for IXN will be established. An enhancement to base FireLight will allow for updating the certificate/service record in one location and all areas would be updated with the information through a database update.

Before Enhancement:

User is required to select the link to open a dialog window for adding the certificate.

Organization - FL Access Carrier


FL Access Carrier

[Mobile Configuration](#)
[Maintain Devices*](#)

Last Updated: 3/18/2021 2:50 PM UTC
NOTE: Items marked with * are not included in deployments for Organization Sync Scope

Organization Security Activity Signature Admin

1228 Validity Window minutes
Authentication Timeout minutes (0 for default)
IDP Identifier*

2-Factor Authentication ☐
Use Enhanced Security ☐
Use SHA1 for Signatures ☐

*Information in this table is not included in deployments for Organization Sync Scope

| Enabled | Name | Certificates | Client Secret | Services Supported |
|-------------------------------------|------------|-------------------|----------------------------------|--------------------|
| <input checked="" type="checkbox"/> | IDP | Certificates: 1 2 | | IDP X |
| <input checked="" type="checkbox"/> | API Access | Certificates: 1 | 019e142cff3e4f0baffd36d35e1ab435 | APIAccess X |

Add New Supported Service Record

CORS Origins

Save Organization

The dialog opens with multiple entries required by the user. The user also needs to make updates when the certificate expires:

Supported Services Configuration

Name

Supported Services

- ☐ IDP
- ☐ Embedded
- ☐ Illustration API
- ☐ API Access

Client Secret New

Certificates

+

Save

Supported Services Configuration

Name

Supported Services

- ☐ IDP
- ☒ Embedded
- ☐ Illustration API
- ☒ API Access

Client Secret New

Certificates

1 +


test

Save

After Enhancement:

A new link, "Add New Integration Service Record", is provided to add the IXN service record.

Organization - FL Access Carrier



FL Access Carrier

[Mobile Configuration](#)
[Maintain Devices*](#)

Last Updated: 5/6/2021 8:41 PM UTC
NOTE: Items marked with * are not included in deployments for Organization Sync Scope

Organization

Security

Activity

Signature

Admin

1228 Validity Window minutes

Authentication Timeout minutes (0 for default)

IDP Identifier*

2-Factor Authentication ☐

Use Enhanced Security ☐

Use SHA1 for Signatures ☐

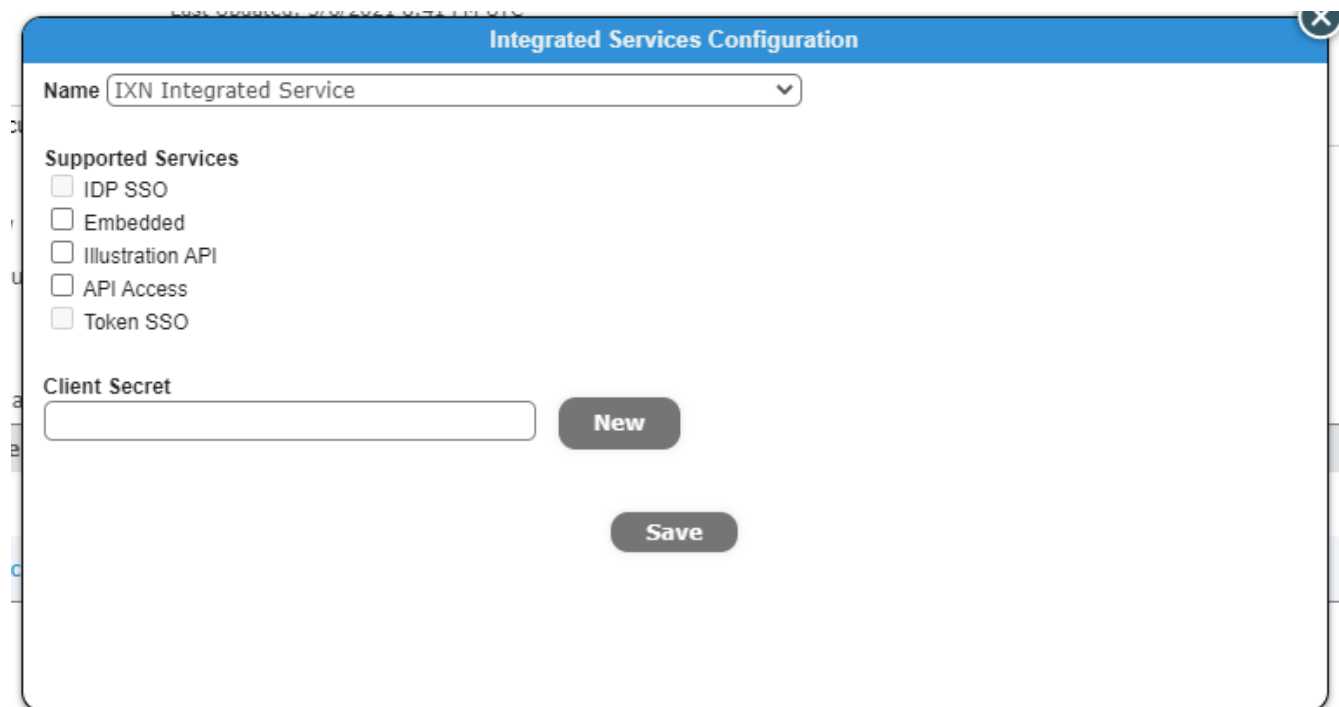
*Information in this table is not included in deployments for Organization Sync Scope

| Enabled | Name | Certificates | Client Secret | Services Supported |
|-------------------------------------|------------|-------------------|----------------------------------|--------------------|
| <input checked="" type="checkbox"/> | IDP | Certificates: 1 2 | | IDP X |
| <input checked="" type="checkbox"/> | API Access | Certificates: 1 | 019e142cff3e4f0baffd36d35e1ab435 | APIAccess X |

[Add New Supported Service Record](#)
[Add New Integration Service Record](#)

Save Organization

Upon selection, a revised dialog window will open with the ability to select any available integration that has not yet been configured, with the compatible supported services available for selection.



Integrated Services Configuration

Name: IXN Integrated Service

Supported Services

- ☐ IDP SSO
- ☐ Embedded
- ☐ Illustration API
- ☐ API Access
- ☐ Token SSO


Client Secret

New

Save

After selecting "Save", a new record will be added:

Organization - FL Access Carrier



FL Access Carrier

[Mobile Configuration](#) [Maintain Devices*](#)

Last Updated: 3/18/2021 2:50 PM UTC
NOTE: Items marked with * are not included in deployments for Organization Sync Scope

Organization

Security

Activity

Signature

Admin

1228 Validity Window minutes
Authentication Timeout minutes (0 for default)
IDP Identifier*

2-Factor Authentication ☐
Use Enhanced Security ☐
Use SHA1 for Signatures ☐

*Information in this table is not included in deployments for Organization Sync Scope

| Enabled | Name | Certificates | Client Secret | Services Supported | |
|-------------------------------------|--|-------------------|----------------------------------|--------------------|---|
| <input checked="" type="checkbox"/> | IDP | Certificates: 1 2 | | IDP | X |
| <input checked="" type="checkbox"/> | API Access | Certificates: 1 | 019e142cff3e4f0baffd36d35e1ab435 | APIAccess | X |
| <input checked="" type="checkbox"/> | IXN Integrated Service | | 03d9125688ca4b97906cfa757f4e16a1 | Embedded,APIAccess | X |

[Add New Supported Service Record](#)
[Add New Integration Service Record](#)

CORS Origins

Save Organization

The record will contain the details of:

Name: IXN Integrated Service (default name displayed as a hyperlink)

Client Secret: Secret code from dialog

Services Supported: Selected in dialog

The user will have the ability to select "Enabled" and/or delete using the red "X".

The link to "Add New Integrated Service Record" will be hidden once all available services have been configured. The existing record(s) for configurable services will need to be deleted before the link will be shown again.

Once an integrated service of a particular type has been added, another record of the same type cannot be added without removing the original record. No duplicates are allowed for Integrated Service records. The dropdown in the Integrated Service dialog will reflect this.

Acceptance Criteria

- Base enhancement made to support easier maintenance of IXN certificates/service records.
- All areas are updated with the certificate/service record when updated in one location.
- Client secret for Organization is unique for the relationship between the client and IXN.
- Name of "IXN Integrated Service" is a hyperlink.
- Record is added with the values selected on the dialog window with defaulted name.
- Link to Add New Integration Service Record is hidden once all available service records have been configured. (Example: IXN and another service are available in dropdown menu for configuration. IXN is configured, then the other available service will remain as configurable. Once that other service is configured, the link to Add New Integration Service Record is hidden.)
- Link to add IXN record is displayed again once an existing configurable service record is deleted. The service available in the dropdown selection on the dialog will only display the available service(s) remaining for configuration.
- Only one record can be added for each Integrated Service.

2.2 FireLight Management of IXN Certificate

IXN certificates will be updated automatically upon expiration in FireLight so the client does not have to update on the Organization settings.

Last Updated: 5/11/2021 7:29 PM UTC

NOTE: Items marked with * are not included in deployments for Organization Sync Scope

Organization Security Activity Signature Admin

1228 Validity Window 0 minutes

Authentication Timeout 50 minutes (0 for default)

IDP Identifier* firelight_idp_test

2-Factor Authentication ☐

Use Enhanced Security ☐

Use SHA1 for Signatures ☐

Supported Service Records

*Information in this table is not included in deployments for Organization Sync Scope

| Enabled | Name | Certificates | Client Secret | Services Supported | |
|-------------------------------------|------------------------|-------------------|----------------------------------|--|---|
| <input checked="" type="checkbox"/> | IDP | Certificates: 1 2 | | IDP | X |
| <input checked="" type="checkbox"/> | API Access | Certificates: 1 | 019e142cff3e4f0baffd36d35e1ab435 | Embedded, IllustrationAPI, APIAccess, TokenSSO | X |
| <input checked="" type="checkbox"/> | IXN Integrated Service | Certificates: | 1c0b56fed6244369a29b6982399181a5 | Embedded, IllustrationAPI, APIAccess | X |

[Add New Supported Service Record](#)
[Add New Integrated Service Record](#)

Global Certificates

*Information in this table is not included in deployments for Organization Sync Scope

| Name | Certificates |
|------|------------------------|
| | No certificates loaded |

[Add New Global Certificate Record](#)

CORS Origins

https://localhost, https://jkorzekwa, https://fldev.insurancetechnologies.com, http://test.com, https://alq.ixn.tech

Save Organization

Acceptance Criteria

- IXN service records are automatically updated in necessary locations across FireLight upon expiration.
- If an IXN service record exists prior to this enhancement, clients will be advised to delete and reconfigure with new method.

3 Save Functionality

FireLight will be enhanced with the ability to save a Life quote provided through the embedded IXN quote tool. This enhancement will allow quote activity to be saved and re-called as desired by users.

3.1 Support IXN Life Quote Saving in FireLight

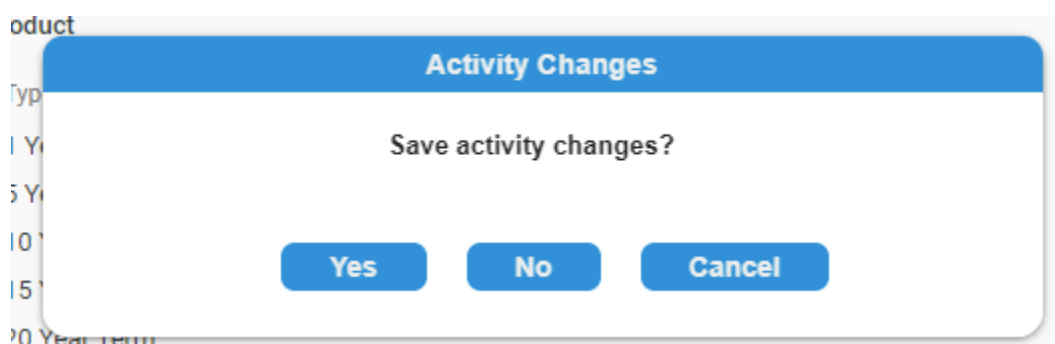
The ability to save an IXN Life quote in FireLight will provide users the ability to open the quote without re-entering client information. Quote data will transfer over through a "method" provided by IXN. Insurance Technologies will have the ability to call the "method" from IXN at any point in the process that will provide the information entered into IXN's quote module. Quote results and output will not be saved, but the information entered upfront will be saved for ability to recall within FireLight. Providing the save functionality will allow users to resume with the quote information already captured and continue with application entry through FireLight.

Acceptance Criteria

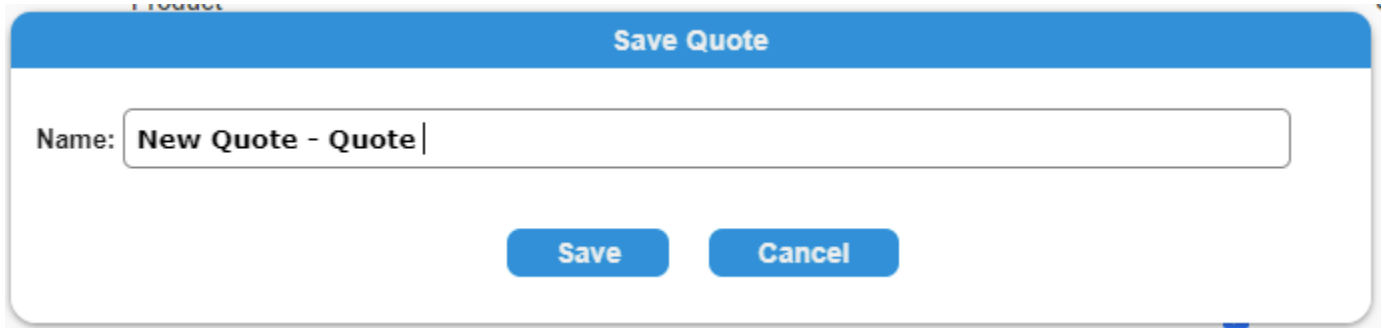
- "Method" is provided by IXN to Insurance Technologies.
- Insurance Technologies can call into the "method" provided by IXN at any point in the process to capture quote data items.
- Data items entered for quoting are called to save; quote results and quote cards produced by IXN are not saved for reuse. Quote data would be saved for ability to re-run the quote and continue with the application process through FireLight.

3.2 Save Quote Dialog for Life Quote

The ability to save the quote activity will provide the user a way to re-enter the quote with the information retained from the saved entry. When a user chooses to exit the IXN Life quote embedded in FireLight, they will be presented with a FireLight message asking if they would like to save the activity:



If "Yes" is selected, the user will be prompted with another window to rename activity (if desired) and save the quote:



The image shows a 'Save Quote' dialog box. It has a blue header bar with the text 'Save Quote'. Below the header, there is a text input field labeled 'Name:' containing the text 'New Quote - Quote'. At the bottom of the dialog, there are two blue buttons: 'Save' and 'Cancel'.

If "No" is selected, the quote will not be saved and the user will be directed to the page of their desired navigation selection.

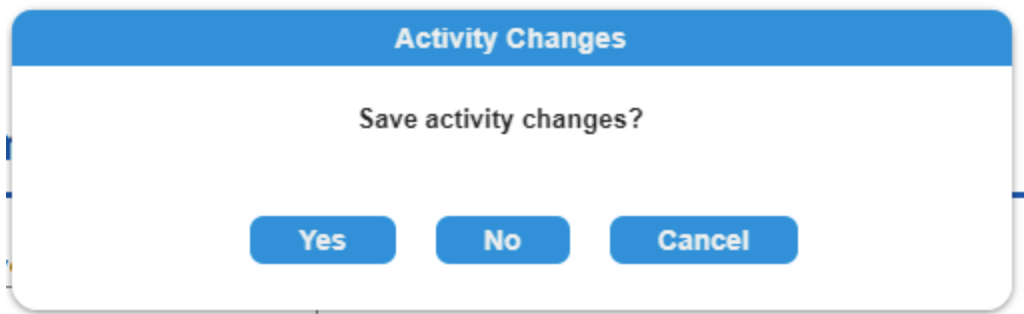
If "Cancel" is selected, the user will remain on the quote window.

Acceptance Criteria

- Quote can be saved within FireLight for the embedded IXN Life quote.
- Quote activity can be renamed, as desired.
- When "No" is selected, the quote entry is not saved.
- When "Cancel" is selected, the quote is not saved and the user remains on the quote in process.
- IXN Life quotes can be renamed upon re-entry, as desired.
- IXN Life quotes can utilize the "Save As" option to create a saved copy of the activity with a different name.

3.3 Save Changes to Life and Annuity Quote

When a saved Life or Annuity quote is re-opened and additional changes are made, the user is prompted with a FireLight message upon exiting the activity asking if they would like to save changes:



When "Yes" is selected, the quote activity is updated with the changes made by the user.

When "No" is selected, the previously saved quote activity is not updated with any changes made by the user.

When "Cancel" is selected, the user remains in the quote where changes are being made without exiting.

Acceptance Criteria

- Saved Life quote is re-opened, changes are made, activity change message is presented, "Yes" can be selected.
- Changes made are retained on saved activity when Life quote is re-opened.
- Saved Annuity quote is re-opened, changes are made, activity change message is presented, "Yes" can be selected.
- Changes made are retained on saved activity when Annuity quote is re-opened.
- When "No" is selected for changes made to a Life quote, the changes are not retained.
- When "No" is selected for changes made to an Annuity quote, the changes are not retained.
- When "Cancel" is selected, the user is not navigated to any other part of the system; the user remains in the open quote activity for Life.
- When "Cancel" is selected, the user is not navigated to any other part of the system; the user remains in the open quote activity for Annuity.
- When a saved Life quote is opened and no changes are made, the user can exit without being prompted to save any changes.
- When a saved Annuity quote is opened and no changes are made, the user can exit without being prompted to save any changes.

4 Quote Activity Report

A new activity report will be created for quote featuring Life and Annuity quote data values.

4.1 Create Quote Activity Report

An Activity Report will be used for data gathering based on IXN quotes requested from the IXN embedded ALQ within FireLight Quote.

New Activity Report is available for details related to:

- Number of quotes run by FireLight login user
- Type of quote requested (Life or Annuity)
- Number of quotes linked to an e-Application by line of business [Use application relation table-parent app ID. Need to set relation type?]
- Quotes will be shown in descending create date order.
- "Total Annuity Quotes Linked to e-Application" and "Total Life Quotes Linked to e-Application" labels will only display on the report if the count is greater than zero. If the data for those items are equal to zero, the labels will not show at the bottom of the report.

Report Name: Quote Activity

Description: Lists all quotes by FireLight user and number of quotes linked to an e-Application by line of business.

Default Columns: Quote Name, Create Date, Quote ID, Product Type (only available if quote is linked to an e-application), Agent Name, Linked e-Application, Linked Policy Number, Linked e-Application Status

Options: N/A

Frequency: Daily, Weekly, Monthly

Format: PDF, CSV

The CSV and PDF files will be in landscape orientation with the same formatting as existing activity reports.

Totals will be added to the bottom of the report for:

- Total Quotes
- Annuity Quotes with Linked e-App (only displayed if count is greater than zero)
- Life Quotes with Linked e-App (only displayed if count is greater than zero)
- Total Quotes with Linked e-App (only displayed if count is greater than zero)

Acceptance Criteria

- Quote Activity Report available displays:
- Title: FireLight Quote Activity Report
- Start Date
- End Date
- Number of quotes run by FireLight login user
- Quotes linked to an e-Application
- Quote report totals are correct according to the data presented.