INSURANCE TECHNOLOGIES

Addition of Form and Ruleset Name lookup in the Common tag conversion tool

FIRELIGHT BASE

FireLight®

Platform

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Project Overview

The addition of form and ruleset lookup within the Mapping data page of the Common tag conversion/Mapping tool will give the user more information on where both common and non-common tags can be found in the Firelight admin.

Impacts:

Firelight admin: Generate Mapping data page

Firelight Admin: Download tag list page

1 Addition of Form and Ruleset lookup

The addition of a form lookup and Ruleset lookup within the generate mapping ruleset will allow users to identify which forms and rulesets contain the tags that are being mapped. Therefor a new column within the Generate Mapping Ruleset entitled Form Name and Ruleset Name will need to be added. These columns will show all form names and Ruleset names associated with the tag.

If more than three forms and Rulesets are generated in the form name list and Ruleset name list, an ellipsis will show and be available to allow for the user to view all applicable forms. The first three forms and Rulesets will be separated by a comma.

Example:

Generate Mapping Rules - IT Training

Generate Mapping Rule Set

Upload Mapping Spreadsheet

Drop excel file here, or click to select file

Test mockup.csv

Mapping Data

Form Name	RuleSet Name	Group	From DataItem	From Value	To DataItem	To Value
Form A, Form B, Form C ...	Ruleset A, Ruleset B, Ruleset C ...		FirstName		Owner_FirstName	
Form A, Form B, Form C ...	Ruleset A, Ruleset B, Ruleset C ...		ResidentialAddress1		Owner_ResidentialAddress1	
Form A, Form B, Form C ...	Ruleset A, Ruleset B, Ruleset C ...		SSN		Owner_SSN	
Form A, Form B, Form C ...	Ruleset A, Ruleset B, Ruleset C ...		Home_PhoneNumber		Owner_Home_PhoneNumber	

PREVIOUS   Page 1 of 26   10 rows   NEXT

As with the Generate Mapping Ruleset, the Excel csv file that is generated through the tag list upload will need to be updated. For this the addition of two columns, one titled form name and the other titled Ruleset name will be added. Each Form and Ruleset name will be separated by a semicolon in this excel file.

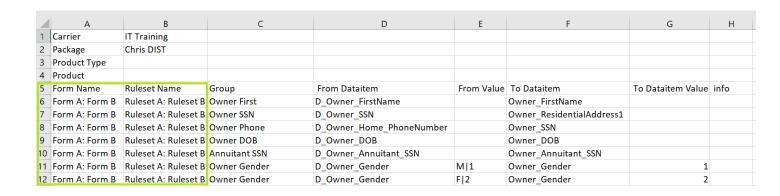|	A	B	C	D	E	F	G	H
1	Carrier	IT Training						
2	Package	Chris DIST						
3	Product Type							
4	Product							
5	Form Name	Ruleset Name	Group	From Dataitem	From Value	To Dataitem	To Dataitem Value	info
6	Form A: Form B	Ruleset A: Ruleset B	Owner First	D_Owner_FirstName		Owner_FirstName		
7	Form A: Form B	Ruleset A: Ruleset B	Owner SSN	D_Owner_SSN		Owner_ResidentialAddress1		
8	Form A: Form B	Ruleset A: Ruleset B	Owner Phone	D_Owner_Home_PhoneNumber		Owner_SSN		
9	Form A: Form B	Ruleset A: Ruleset B	Owner DOB	D_Owner_DOB		Owner_DOB		
10	Form A: Form B	Ruleset A: Ruleset B	Annuitant SSN	D_Owner_Annuitant_SSN		Owner_Annuitant_SSN		
11	Form A: Form B	Ruleset A: Ruleset B	Owner Gender	D_Owner_Gender	M|1	Owner_Gender	1	
12	Form A: Form B	Ruleset A: Ruleset B	Owner Gender	D_Owner_Gender	F|2	Owner_Gender	2	

Acceptance Criteria

- Form name column is added to the mapping data grid
- Ruleset name column is added to the mapping data grid
- Form name will appear for all applicable forms that the specific data item is found on.
- Ruleset name will appear for all applicable forms that the specific data item is found on.
- An ellipsis will show if more than 3 forms are found. The user will be able to highlight on the ellipses to view other applicable forms.
- An ellipsis will show if more than 3 Rulesets are found. The user will be able to highlight on the ellipses to view other applicable Rulesets
- Form Name column is added to CSV file
- Ruleset Name column is added to CSV file
- Form names are separated by semicolon.
- Ruleset names are separated by semicolon.