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FL Access Import Termination Capabilities

FIRELIGHT BASE

FireLight®

Platform

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iConnect 233332 Design Approach - FL Access Import Termination Capabilities

Project Overview

Clients will be able to use the import tool to deactivate any active user from the manage users screen through the FireLight Access platform. Since we currently have the capabilities to add/change users through the import tool, this will allow clients to fully manage their users in a bulk capacity.

To bulk update user status, change will be made to import csv and import process to update user status field imported users.

Impact (this will impact only FireLight Access clients): FireLight Access Manage Users - On this screen in Firelight Access, both import process and import sample CSV file will have an impact to bulk update user status through import CSV.

1   Update user "Status" in import CSV

To allow bulk updating user status through import process, a new column will be added to the import CSV file as "Status". This column will have either of the two below values:

1. Active - status field for user will be set as "Active" and user account will be activated.

2. Disabled - status field for user will be set as "Disabled" and user account will be disabled.

Import process will read this value for each of the user that will be imported into the system and based on its status in the CSV file, set the value into the system.

Validations:

1. In the CSV, for new users Status will be set as Active irrespective of the value in the CSV file.

2. In CSV, for existing users Status will be set with value present in the CSV.

3. In the CSV, if the Status field is blank for a new user, in that case user will be added to FL Access with an active account status.

4. In the CSV, if the Status field is blank for an existing user, in that case no change will be made to that user status info.

Below is a mockup of the new column (highlighted) that will be added to import user csv file.

Organization ID	Firm ID	Branding	Brokerage CRD	First Name	Last Name	Email	User Role	Address Line 1	Address Line 2	City	State	Zip	SSN	CRD	NPN	ExternalMapCode	Status
ORGID	2307	1	89-999393	John	Doe	jdoe@gmail.com	100	22 Main Street	PO Box 100	Denver	CO	80123	222-33-4444				Active
ORGID	2304	1	89-999393	Sally	Smith	ssmith@yahoo.com	101	5 Broadway		Denver	CO	80123	333-44-5555				Disabled

This change will also be reflected into the sample import csv file (attached) and in the help guide.

Acceptance Criteria

- Import process updates user status from the CSV file.
- If the CSV has Active status for the user then that user account gets activated in FL Access.
- If the CSV has Disabled status for the user then that user account gets disabled in FL Access.
- If status field for a new user is blank in the CSV, then by default that user is added with an active account.
- If status field for an existing user is blank in the CSV, then status for that user changes with import process.