iConnect 114027 Design Approach

Project Overview

Provide the ability to disable "use E-Signature" process.

Features/Requirements

Need to enhance existing functionality to full fill requirement to disable ESignature process from form entry.

Use Cases / Workflow Changes

Yes, there are few changes in existing workflow. We need to add new check with existing checklist i.e. whether current application is required E-Signature process or not. As per requirement we will update status bar.

Admin Changes

No admin changes required. User just need to add check box with tag name "FLI_DECLINED_ESIGN" on application and set export value "true" for "E-Signature" not required and false for "E-Signature" required.

App Changes

To accomplish this task, we need to add new common tag called "FLI_DECLINED_ESIGN". "FLI_DECLINED_ESIGN" can be null/empty, true or false. By default, it will be null and add with application data items.

If "FLI_DECLINED_ESIGN" is set to null or empty, we do not to do anything and process will run as usual.

If "FLI_DECLINED_ESIGN" is set to true, then E-Signature process will skip and next defined step will take place.

If "FLI_DECLINED_ESIGN" is set to false, then user will have to accept E-Signature process.
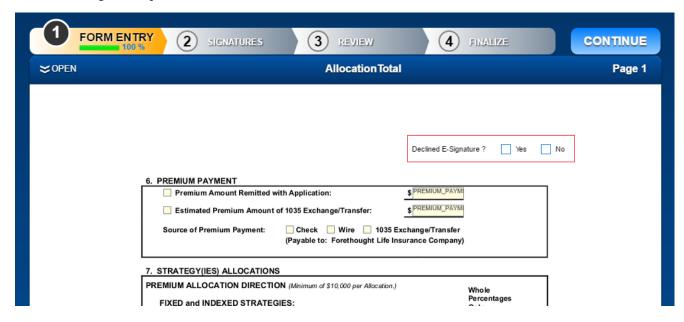
Integration Changes

No changes integration.

UI Mock Ups

On application form/other form, user will need to put check boxes for question. For example "Declined E-Signature? Yes or No".

Declined E-Signature question

User selected "No"

If user select "No" or do not select any option (Leave blank), will step in signature process.
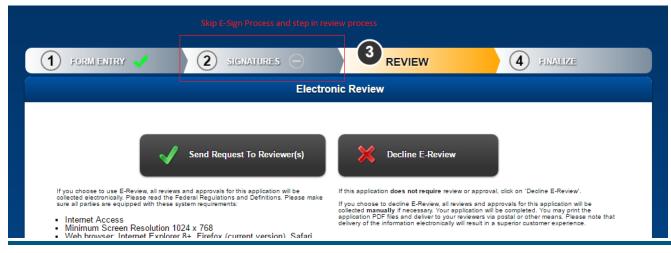
Page 2 of 5

If user select "Yes" option and press continue button. System skip E-Signature process and land to next defined process (in below example in review process).
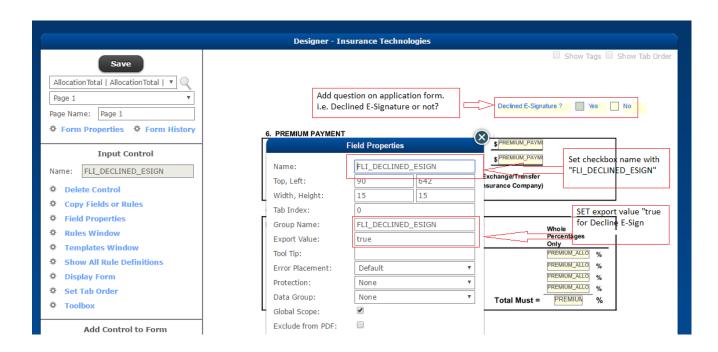
How to Enable and Use This Feature

User just need to add check box with tag name "FLI_DECLINED_ESIGN" on application form and set export value "true" for "Declined E-Signature?" and set false or empty if "E-Signature" required.

If organization has disable e-signature process (through setting "Allow E-Signature" option from Admin->Organization) and if user set "FLI_DECLINED_ESIGN" to false on application, E-Signature process will not be allowed.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**		
- **Profile Administration**		
- **Reports**		
- **Deployment**		

FireLight App		
- **New Application**		
- **Edit Application**	Yes	Add new condition with check list whether E-Signature process is required or not.
- **Signature Process**		
- **Review Queue**		
- **Manual Review**		
- **User Preferences**		
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		
- **Email System**		
FireLight Console		
- **Windows**		
- **iOS**		
Other Systems		
- **DTCC Integration**		
- **Commission Netting**		
- **Activity Reporting**		
- **Shared**	Yes	Add new common tag "FLI_DECLINED_ESIGN" and add it with other data items while new application is created.