

FireLight Localization Design

Project Overview

The current FireLight localization supports only two languages (locales). There are also areas that are lacking localization such as input masking, and client requests. This design approach will layout the areas of the system that require changes as well as the changes to the Users workflow when localization is taken into consideration.

Features/Requirements

- Support multiple locales
- Ability to customize the localized text for a locale
- Ability to localize email templates
- Use the correct localized email template based on the locale of the Activity (App)
- Manage product locale by creating multiple products for each locale where each product is configured with the correct locale and localized forms and rules but has a common CUSIP.
- Provide the administrator the ability to select from the locales the organization supports
- Filter products based on the selected locale
- Dates and Currencies in the base system will be formatted based on the selected locale.
- Upon opening an Activity with a locale the base system will change to the products locale.
- Ability to filter applications in All Applications by locale
- User is prompted to select locale on first entry into the system.

Use Cases / Workflow Changes

All Use Cases assume the organization is configured to support multiple locales.

Agent enters the system for the first time and creates an Application.

1. Agent logs in for the first time and is prompted to select their preferred language (locale).
2. Agent is redirected to the Home (** or Preferences) page and the system is localized to the selected language.
3. ** If preferences then they can select preferred jurisdiction (or Country)
4. Agent creates new application and is taken to the New Application view.
5. The products are filtered to the selected language (locale)
6. Agent selects the product and creates App. Since the product is configured to the correct locale and using localized forms the new application as well as the base UI will use the same language (locale).
7. The Signature process, Review Queue etc. will use the same locale as the Application.

Agent creates a French Application then an English application.

1. Agent's selected language (locale) is French.
2. Agent creates new application and is taken to the New Application view.
3. The products are filtered to the all French products.
4. Agent selects the product and creates App. The product is localized to French.

5. Agent closes app and goes back to Home view.
6. Agent goes to Preferences view and changes language (locale) to English.
7. Agent goes to Home view and creates new application and is taken to the New Application view.
8. The products are filtered to only English products.
9. Agent selects the product and creates App. The product is localized to English.
10. Agent closes app and goes back to Home view.
11. Both French and English applications are in Recent list.

Agent filters on language and opens both French and English applications.

1. Agents selected language (locale) is French.
2. Agent navigates to All Applications view to see all Applications (both English and French)
3. Agent can filter applications based on language (locale). They select English.
4. Agent opens an English application.
5. The selected language (French) is changed to English to be in sync with the application.
6. Both application and all base UI are localized to English. This includes Signatures, Dialogs etc.
7. ** Agent closes the English app and navigates to Home page. Home page stays in English. Essentially the locale setting is dynamic based on the Application's locale.
8. Agent opens French app and UI changes to French to be in sync with the application.

Admin Changes

Organization View

The Organization view replaces the Country selection with a Localization dialog. The dialog lets the admin select one or more locales the organization will support. The list will contain all locales FireLight supports. This list will then drive other locale lists in the system – Product locale, Email locale and the user Locale preference. All organizations will have the English (en-US) locale selected by default and this option cannot be unselected.

Masks

The only change required to support localized masks was to allow for a currency symbol on the right of the value (i.e. 1.234,00 \$). Other than this change the admin can create a locale specific mask that can be used on locale specific forms/wizards.

The base system does not display currency values outside of forms. However, dates are displayed in audits and app information (Create Date, Last Update etc). The date formats will follow the sessions locale

NOTE: When a product is localized and two different formatted versions of a value can be provided the Integration developer will likely need to be aware of these differences. The Integration developer may need to use the Product Locale to determine what the expected format is. (i.e. must distinguish ##/##/#### with mm/dd/yyyy or dd/mm/yyyy).

Example Date Time: March 13th 2018 3:19:42 PM

en-US - 3/13/2018 3:19:42 PM

en-CA - 2018-03-13 3:19:42 PM

fr-CA - 2018-03-13 15:19:42

Products View

The Product view now includes a Product Locale selection where the admin can specify a non English (en-US) locale for a product. The available options listed are based on the options configured in the Organization view. This selection will control the FireLight UI localization when an Activity using this product is opened. This selection will also control the localized emails sent related to activities created with the product.

Note: The suggested approach to managing localized products is to create a separate product for each locale (i.e. Term English & Term French). Both products would have the identical identifiers like CUSIP, Billing Code, Product Code etc but the Product Locale would be different. Localized forms and rule sets would be created to manage the locale specific functions. The sales agreement for each product would contain the relevant localized forms and rules. Finally, the agent would create a English or French version of the product according to their clients preferences. Whenever this product is opened in FireLight the system will change to the correct locale.

Email View

The Email view includes a Locale selection which gives the admin the ability to customize emails for each locale the organization supports. The admin would select the email template they want to edit and then select the localized version. The localized version will be displayed below in the email template. If the localized email has not been setup the initial version will default to the English email. The admin can then update and save this version as the localized version.

App Changes

FireLight Header

The FireLight header is displayed on all primary views. The header contains the logo and menu options. It previously contained the selection to change the system locale. This selection has been moved to the User Preferences view. The reasoning is that this is not an option that will need to be manually changed often and therefore does not need to occupy space in the header.

Preferences View

The Preferences view now contains a selection to change the users default Locale. The Locale will only be displayed if the organization has more than one locale configured. If the organization has a single locale configured (English en-US) then the default locale will be English en-US. The user can select their preferred locale and once the preferences are saved the UI will switch to the selected locale.

Users Initial Entry

When the user first enters FireLight they will be prompted for the Default Locale they prefer. This prompt is only displayed if the organization has more than on locale configured and the user has not specified a default locale. When the user selects their preferred locale they are redirected to the appropriate view.

New Application

When the user creates a new Application (Activity) the New Application view is displayed with an additional Locale selection. This selection is only displayed for organizations with multiple locales configured. The default value in Locale will be the current sessions locale and only products configured for this locale will be displayed. If the locale is changed the products will be filtered to products for that locale.

Opening an Application (Activity)

When opening a localized activity FireLight changes locale according to the products locale. This ensures continuity between the system and the forms, wizards, messages etc. Once the system has changed locales the session stays in that locale until the user changes locale, opens another localized activity or re-enters FireLight. This does not change the users default locale set in their preferences, so each time the users enters FireLight the system will revert to the users default locale.

All Application View

The all applications view will provide the ability to filter applications based on locale. The default value of the locale field will be set to the locale of the session.

Client Requests

There are email requests sent to clients where they are required to enter FireLight and complete some task (i.e. Fill Application, Sign etc). When entering FireLight the client is first prompted to authenticate. This view is now localized according to the associated product locale. After authentication the system will use the product locale to ensure continuity with the locale of the application.

Integration Changes

Generally, the integration provider will not need to change its logic or where it needs to send data to. However, when a product is localized and two different formatted versions of a value can be entered the Integration developer will likely need to be aware of these differences.

For example: The Integration developer may need to use the Product Locale to determine what the expected format is. (i.e. must distinguish ##/##/#### with mm/dd/yyyy or dd/mm/yyyy).

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How to Enable and Use This Feature

The admin will need to first enable the locales they wish to support in the Organization view. Once this is saved they can then setup localized products and emails.

The client will want to review the localized version of the UI and contact IT if any text labels or messages need to be changed.

The Form/Rules developer will need to create localized versions of forms, wizards, rules and masks. Care in managing localized rulesets is recommended to reduce duplication in packages.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	Organization, Masks, Products, Emails
- Reports		
- Deployment		
FireLight App		
- New Application	X	Locale filter
- Edit Application	X	Locale changes based on open applications Product locale.

- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences	X	Default Locale option
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		