
Add org control for total file upload limit of form bundle

FIRELIGHT BASE



Platform

ADD ORG CONTROL FOR TOTAL FILE UPLOAD LIMIT OF FORM BUNDLE

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Table of Contents

iConnect 240283 Design Approach - Add org control for total file upload limit of form bundle	4
1 Admin - Create Org Setting for cumulative upload file size	4
2 App - Display file size total in Upload Documents.....	6

iConnect 240283 Design Approach - Add org control for total file upload limit of form bundle

Project Overview

FireLight currently allows the admin user to set file size limits for individual uploaded documents. This enhancement will add the capability to specify a cumulative file size maximum ranging from 5–50 MB in 5 MB increments. If the uploaded documents exceed the stated maximum, a message will be presented to the user requesting that they reduce the size of the uploaded documents to comply with the stated maximum.

Impacts: This is an optional setting that each client can control in the admin tool. For clients that elect to use the setting, please see the impacts below.

1. Admin - Organizations will be allowed to define a new upload limit parameter named "Maximum Upload File Size", "Cumulative". This setting will be added to Organization Settings on the Activity tab.
2. Application UI - Under "Other Actions", "Documents", When a file is selected for upload, Individual file size and total file size of uploaded documents will be displayed on attached documents screen for an application. Values "Maximum cumulative upload limit" and size remaining after each document uploaded will also be shown to keep track of cumulative upload limit. A restriction will be imposed to upload documents beyond set cumulative upload limit — in case total size of uploaded documents exceed max upload limit, a message will be shown to reduce cumulative upload size. These disclosures will also be visible when using "Client Fill", and "Client Fill & Sign".


1 Admin - Create Org Setting for cumulative upload file size

To allow an upload limit to package size of an application, a new org setting in Admin will be added under Home -> Organization Configuration -> Organization Settings -> Activity (tab) -> 'Cumulative'. This will indicate the upper limit of total size of uploaded documents for an application that includes - Supplement Documents uploaded for an activity.

Implementation: Highlighted sections in below mockup indicates new setting to be added on Organization Settings page.

- Existing setting 'Maximum Upload File Size' will be shown on the screen to be as Single file upload limit
- New file size limit to be added for Cumulative file size

Organization - FL Access Carrier - Test



FL Access Carrier - Test

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

Last Updated: 5/28/2021 5:45 AM UTC

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

Organization

Security

Activity

Signature

Admin

Edit Masks [Add](#)

None

▼

Allow Client E-Fill

☒

Allow Client Fill & Sign

☒

E-Delivery Reminder Frequency

Weekly

▼

Allow NIGO Printing

☒

Use DMARC

☒

Expiration Reminder Frequency

Weekly

▼

Prevent Email Editing

☒

Print Submitted Only

☐

Submit Reminder Frequency

Weekly

▼

E-Delivery Expiration Warning Threshold

4

days (0 for never)

Expiration Warning Threshold

4

days (0 for never)

Maximum Upload File Size

Single

Cumulative

4

▼

MB

5

▼

MB

Requests Timeout

3

days (0 for never)

Validation Message Style

Inline

▼

Save Organization

Validation:

- Cumulative size should be greater than Single file size.

When selecting/saving cumulative size from the drop down there will be a check that selected value should be greater than single files size.

- No upload file limit.

Drop down will have 'Null' value selection in case Admin does not want to set a cumulative size limit.

3. Cumulative file size drop down should have values from 5 MB to 50 MB with increment of 5 MB, such as 5, 10, 15, 20, 25, 30 and so on to 50.

Acceptance Criteria

- There is a separate org setting to enter cumulative size of uploaded documents at application level.
- Cumulative file size limit is greater than single file size limit.
- Cumulative file size limit is in MB and the drop down shows values from 5 MB to 50 MB with increment of 5 MB, like 5, 10, 15, 20, to 50 MB.
- There is option listed in the drop down to not have any cumulative file size limit ('Null' value as no limit).
- There is a default value set for cumulative file size limit, if there is no value selected for an Organization - 'Null' value is set as no limit.
- When Single file size is changed, all validations work correctly for Cumulative file size.
- Single file size limit functions the same way as it works now.

2 App - Display file size total in Upload Documents

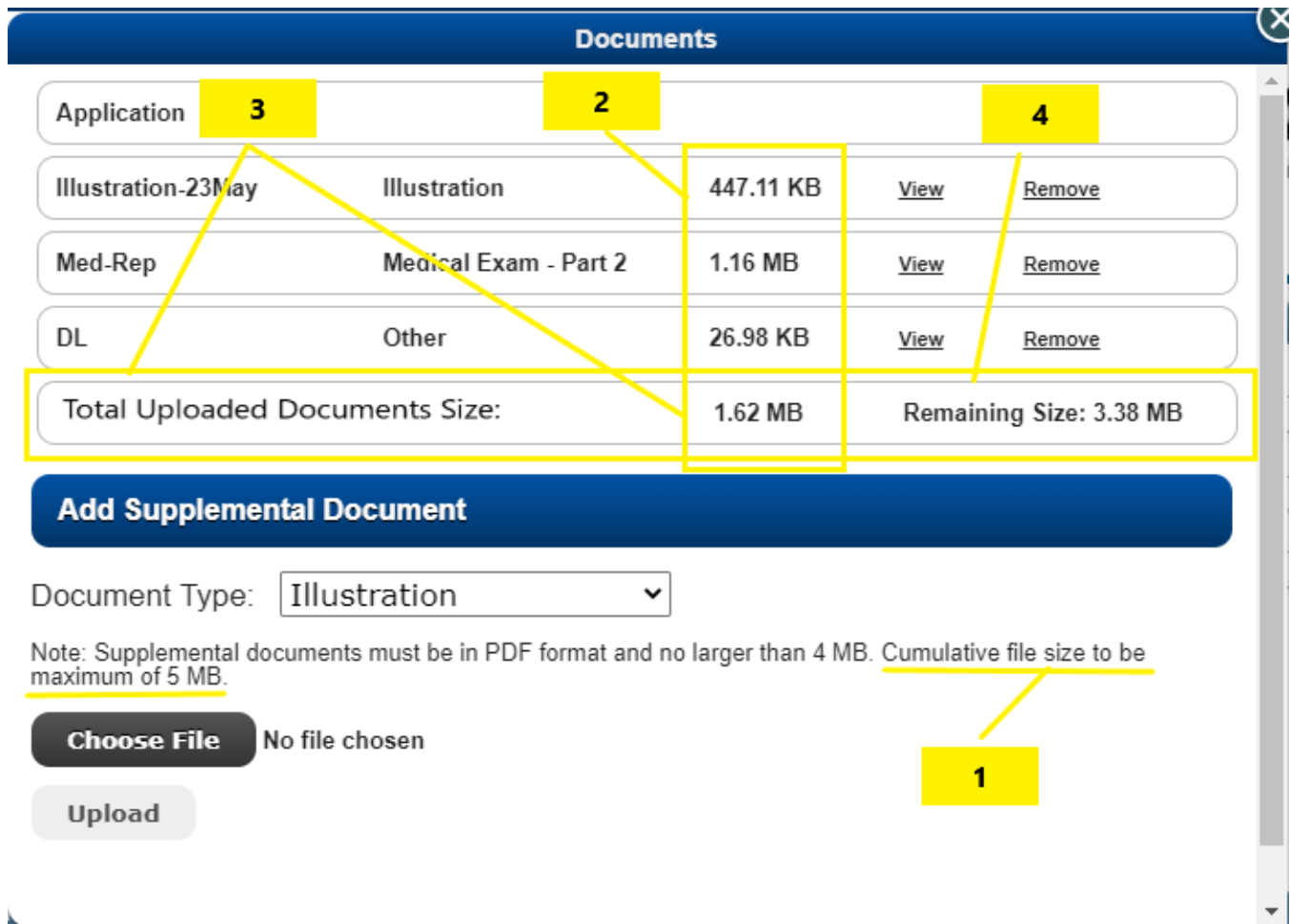
In an application/activity, while uploading supplemental documents, the dialogue box will show size of each file uploaded, total upload file size and remaining size as per the limit set in Organization (Org) Settings.

Implementation:

A. In the following mockup of the upload documents dialogue box for Forms, highlighted sections will be added to show:

1. Maximum cumulative upload document limit set at Org Settings
2. File size of each uploaded document(s)
3. Total file size of uploaded documents for the application

4. Remaining size that client/agent can use to upload supplemental documents (= Max cumulative upload size - Total file size of uploaded docs)



The screenshot shows a 'Documents' dialog box. At the top is a table with columns: Application, Document Name, File Size, View, and Remove. It lists three documents: 'Illustration-23May' (447.11 KB), 'Med-Rep' (1.16 MB), and 'DL' (26.98 KB). Below the table, a summary row shows 'Total Uploaded Documents Size: 1.62 MB' and 'Remaining Size: 3.38 MB'. Below this is a section titled 'Add Supplemental Document' with a 'Document Type' dropdown set to 'Illustration'. A note states: 'Note: Supplemental documents must be in PDF format and no larger than 4 MB. Cumulative file size to be maximum of 5 MB.' There are buttons for 'Choose File' (labeled 'No file chosen'), 'Upload', and a '1' callout pointing to the 'Cumulative file size' part of the note. Numbered callouts 1-4 are present: 1 points to the cumulative size limit, 2 points to the file size column, 3 points to the application column, and 4 points to the remaining size.

Application	Document Name	File Size	View	Remove
Illustration-23May	Illustration	447.11 KB	View	Remove
Med-Rep	Medical Exam - Part 2	1.16 MB	View	Remove
DL	Other	26.98 KB	View	Remove
Total Uploaded Documents Size:		1.62 MB	Remaining Size: 3.38 MB	

Add Supplemental Document

Document Type: Illustration

Note: Supplemental documents must be in PDF format and no larger than 4 MB. Cumulative file size to be maximum of 5 MB.

Choose File No file chosen

Upload

1

B. In the following mockup of the upload documents dialogue box for Wizards, highlighted sections will be added to show:

1. Maximum cumulative upload document limit set at Org Settings
2. File size of each uploaded document(s)
3. Total file size of uploaded documents for the application
4. Remaining size that client/agent can use to upload supplemental documents (= Max cumulative upload size - Total file size of uploaded docs)

Documents

Uploaded Documents

Illustration-23Ma	Illustration	447 KB	View Remove
Med-Rep	Medical Exam - Part 2	1.16 MB	View Remove
DL	Other	27 KB	View Remove
Total Uploaded Documents Size:		1.62 MB	Remaining Size: 3.38 MB

Add Supplemental Document

Document Type

Illustration

Note: Supplemental documents must be in PDF format and no larger than 4 MB. Cumulative file size to be maximum of 5 MB.

Choose File

No file chosen

Upload

Close

C. In the following mockup of Upload Documents dialogue box for an application after it is locked/complete and Upload Documents menu is clicked to view uploaded files for the application. Highlighted sections will be added to show:

1. Maximum cumulative upload document limit set at Org Settings
2. File size of each uploaded document(s)
3. Total file size of uploaded documents for the application
4. Remaining size that client/agent can use to upload supplemental documents (= Max cumulative upload size - Total file size of uploaded docs)
5. File size for the application will be left blank since the scope only includes calculating file sizes of uploaded documents.

Documents

Application				
Application222 Copy	Application222 Copy		View	
Illustration-23May	Illustration	447.11 KB	View	Remove
Med-Rep	Medical Exam - Part 2	1.16 MB	View	Remove
DL	Other	26.98 KB	View	Remove
Total Uploaded Documents Size:		1.62 MB	Remaining Size: 3.38 MB	

Add Supplemental Document

Document Type:
Illustration

Note: Supplemental documents must be in PDF format and no larger than 4 MB. Cumulative file size to be maximum of 5 MB.

Choose File
No file chosen

Upload

Conditions:

1. When creating an application at the Distributor end, at that time the system will check upload limits set by the carrier and by the distributor. The lesser value amongst both these values will be the maximum upload limit for that application.

For example, Limit set at Carrier "A" Org Settings is 20 MB and Distributor "X" has 30 MB (or 'Null') set at their Org Settings.

When Distributor 'X' creates an application using Carrier "A" product, in that case max upload size for the application package that will be transmitted to Carrier "A" will be 20 MB.

2. This Max limit will be shown at the application level when

- Documents are uploaded within the application using a custom action button

- Other Actions (when application is in data entry, locked/unlocked mode)

3. In Case no cumulative file size limit is set at Org Setting level, Cumulative file size limit and Remaining upload size should not be displayed on Upload Documents window.

Error Prompt:

If the application package size already exceeds cumulative upload limit set at Org Setting, there should be a prompt to user to reduce the size of attached documents. The error prompt will be shown on a toast message the same way as it currently shows for single file upload limit exceeded. Message "Addition of this file will cause the cumulative limit to be exceeded. Reduce the file resolution on this or one of the other files uploaded to proceed." will be shown as a toast message for cumulative maximum file size exceeded.

Application should not proceed to transmission/submission which are beyond the set size limit. This will be managed by not allowing user to exit Upload Documents box unless total size of uploaded documents is reduced to cumulative file size limit.

All new changes on Upload Documents UI should be added to Localization scope.

Acceptance Criteria

- Cumulative upload limit impacts all upload document boxes - Forms, Wizard, Custom Action button, Other Actions, and all other places where documents upload activity is done for an application.
- On Upload Documents window, cumulative document upload limit gets displayed for user to know the max limit.
- On Upload Documents window, size of each of the uploaded documents shows along with total and remaining size so that user is aware and can manage sizes of uploaded documents.
- For a distributor, cumulative upload size limit for both distributor and their carrier is checked and the lesser value between them is displayed and considered (for calculation) on Upload Documents window.
- In case cumulative file size of uploaded documents get beyond the max limit, there is an info/msg for user to guide how they can reduce size of the document and reupload to get total size below the max upload limit.

- In case cumulative file size of uploaded documents get beyond the max limit and user wants to continue further, there is a prompt and user is not allowed to proceed unless they reduce the size of documents and get the cumulative size below the max upload limit.
- Total upload size is not limited if no limit is specified at Org setting.
- When there is no cumulative file size limit set at Org Setting level, Upload Documents window still shows size of each uploaded document and total size of all uploaded documents.
- Single file size limit should function same way how it works now.
- When individual file size limit is set, and cumulative file size has 'Null' - there is an alert when single document is uploaded. But no alert for total uploaded documents.
- When limits are set for both individual file upload and cumulative file upload, the system prompts for both the alerts.
- Upload cumulative file limit change does not impact reviewer document upload section.
- File size of uploaded documents shows for an external request such as Client Fill and Sign.
- File size of uploaded documents shows on Attach Documents screen for a locked and complete application.
- All new UI changes are included into Localization scope.
- Attach Document dialogue box in Application Closed state shows file size of uploaded documents, Total Uploaded Documents Size, and Remaining Size to keep the dialogue layout consistent.