INSURANCE TECHNOLOGIES

Firm Management - September 2.26

FIRELIGHT BASE

FireLight®

Platform

FIRM MANAGEMENT - SEPTEMBER 2.26

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iConnect 268110 Design Approach - Firm Management – Phase 2 (Sep 2.26)

Project Overview

This enhancement is building on the changes in the 2.25 release for Firm Management (iConnect 263186). This phase of the project will further allow Sub Firms (Firm Orgs) to manage their Products. Changes will be made to the Admin and App side that will:

- Extend Sales Agreements such that they can be associated with specific Sub Firms
- Add the ability for Admin users of a Sub Firm to deploy modifications they have made in the Groups (Product activation and state refinement) to higher environments
- Add the ability for an Organization to enable Auto Deploy by default
- Add the ability for Packages to be automatically added to activities based on Role Codes.

Impacts:

- Product Config -> Sales Agreements
- Utilities -> Deployments: Sub Firm Admins will have access to the Group Configuration Scope for just their Sub Firm
- Organization Configuration -> Organization Settings -> Admin tab: New Setting: Enable Auto Deploy
- Product Config -> Sales Agreements (Auto Deploy)
- Product Config -> Packages

1 Firm Management: Sales Agreements

Sales Agreements will be extended so that they can be associated with specified Sub-Firms.

1.1 Admin Rights: Firm Association with Sales Agreement

Firm Orgs will be added to the Sales Agreement Page. This will allow the Carriers to deploy the Sales Agreements for the products for the Firm Orgs, and allow the main org to not have to manage the Sales Agreements.

This will be visible to Carriers and main distributor.

Firm Orgs will be added as a hyperlink under the Selling Org. When that link is clicked, it will display a dialog box that contains the Firm Orgs (if any are set up) for the Selling Org that is selected in the Selling Org dropdown.

If the Firm Org is selected, that SA will be tagged for the Firm Org

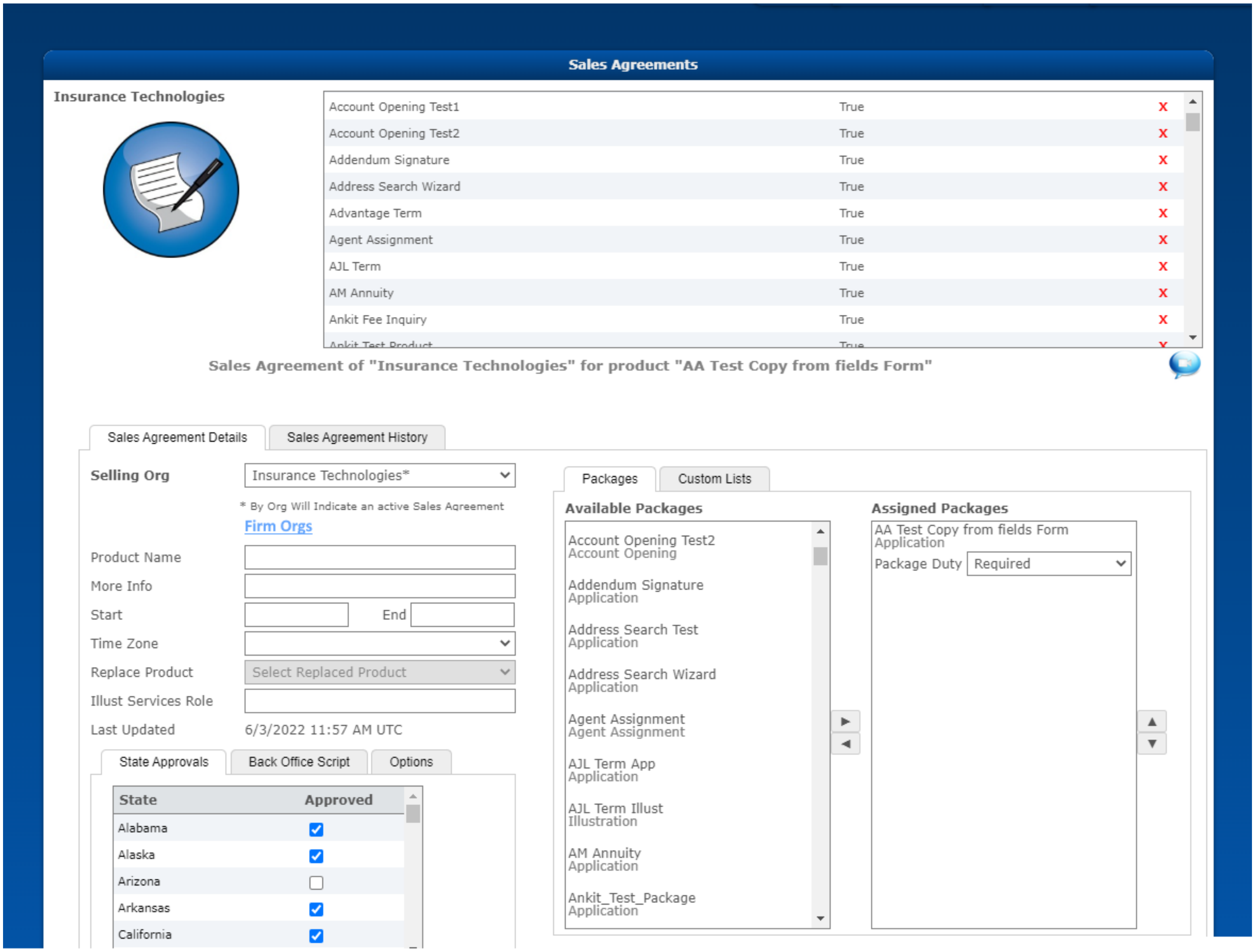
If the Firm Org is selected, the associated Product will be visible to the Firm Org. If it is not, even though it is deployed to the main Org

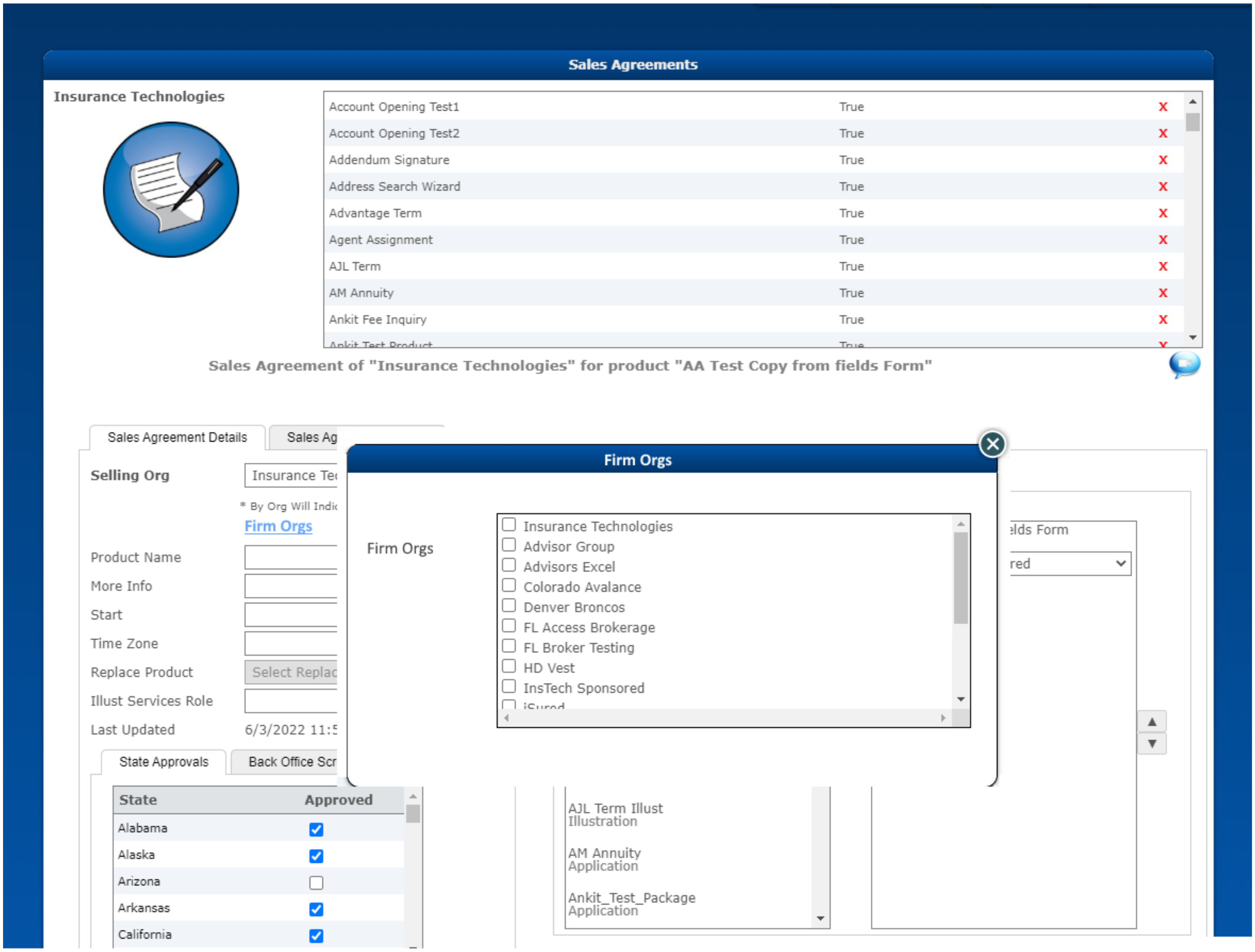
If the Org that has logged in is not setup as an Org w/Firm Orgs, the Firm Orgs option will NOT be visible, thus making it so that any changes will NOT affect the current workflow.

When a user is logged in on the App side via a Firm Org, the SA will be checked to determine if it is tagged with that user's Firm Org

When a user is logged in on the App side via an Org that is NOT a Firm Org, the SA will not be checked to determine it if is tagged w/that user's Org, making it so that these changes will NOT affect the current workflow.

The link would ALWAYS be visible to carriers, but would have no effect unless they are selecting a firm that has Sub-Firms/Firm Orgs, and the SA will not be deployed w/visibility until a sub firm is selected


Sales Agreements
Insurance Technologies
Account Opening Test1 True
Account Opening Test2 True
Addendum Signature True
Address Search Wizard True
Advantage Term True
Agent Assignment True
AJL Term True
AM Annuity True
Ankit Fee Inquiry True
Sales Agreement of "Insurance Technologies" for product "AA Test Copy from fields Form"
Sales Agreement Details
Sales Agreement History
Selling Org
Insurance Technologies*
* By Org Will Indicate an active Sales Agreement
Firm Orgs
Product Name
More Info
Start
End
Time Zone
Replace Product
Select Replaced Product
Illust Services Role
Last Updated
6/3/2022 11:57 AM UTC
State Approvals
Back Office Script
Options
State
Approved
Alabama
Alaska
Arizona
Arkansas
California
Packages
Custom Lists
Available Packages
Account Opening Test2
Account Opening
Addendum Signature
Application
Address Search Test
Application
Address Search Wizard
Application
Agent Assignment
Agent Assignment
AJL Term App
Application
AJL Term Illust
Illustration
AM Annuity
Application
Ankit_Test_Package
Application
Assigned Packages
AA Test Copy from fields Form
Application
Package Duty
Required



Acceptance Criteria

- Sales Agreements will be able to be tagged for Firm Orgs
- If a user in a Firm Org, the group Product Access tab will look to see if that Firm Org is checked in the Sales Agreement
- If a user is NOT in a Firm Org, no workflow changes will occur- visibility (all shown)
- When selecting Firm Orgs, the default will be to have none selected
- The Firm Orgs selection will only be saved when the Save button for the Sales Agreement is clicked

1.2 App Rights: Firm Association with Sales Agreement

With the addition of the Firm Orgs being associated w/Sales Agreements, the App Side will need to be updated to account for them. If a user logs in with a Firm ID, in addition to checking to see if the Distributor has a Sales Agreement for the product, FireLight will ensure that the user's firm is associated with the Sales Agreement

Acceptance Criteria

- When checking if a user has access to a product via the Sales Agreement, if the user has a Firm Org Role Code, FireLight will verify that the Firm Org is tagged on the Sales Agreement
- This new check will not interfere with the new State Refinement option on Product Access

1.3 Verify - Admin Rights: Error Handling - Sales Agreements

When a "Firm Org" is selected, there must be an active sales agreement for the corresponding "Selling Org". If the user attempts to activate a sales agreement for a "Firm Org" when a sales agreement is not active for the "Selling Org", error text will display at the bottom of the window after clicking "Save". The text will read, "Unable to activate Sales Agreement for a Firm Org without an active Sales Agreement for the Selling Org." When the error message is presented, any values entered by the user will be cleared and not retained.

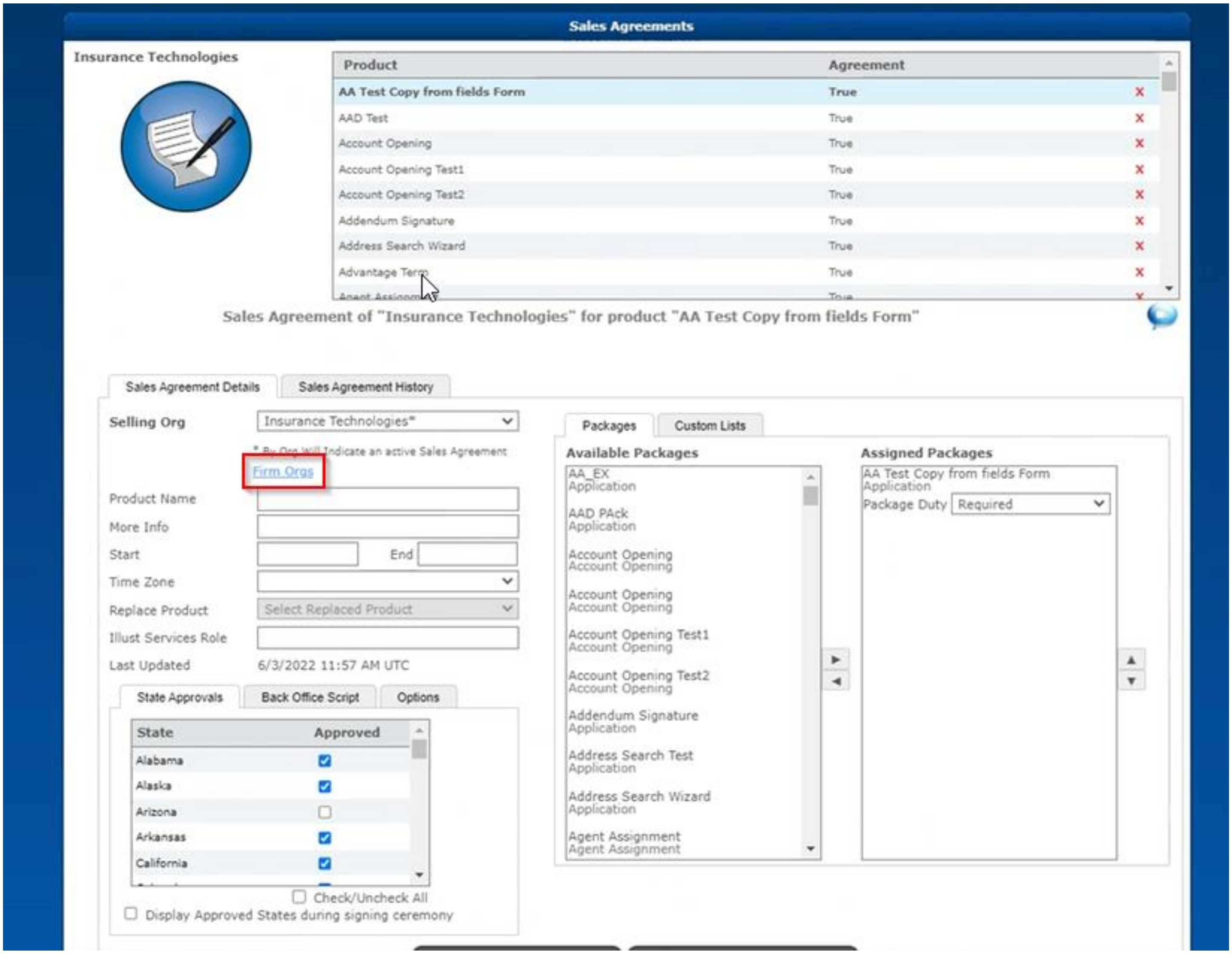
Acceptance Criteria

- Error is displayed to the user at the bottom of the page after clicking "Save" when attempting to add a sales agreement for a Firm Org without the sales agreement being active for the Selling Org.
- Values entered by the user are cleared/refreshed when the error message is presented. Nothing is saved and the user must re-enter the values originally selected for the "Firm Org(s)" after properly setting up the sales agreement for the "Selling Org".

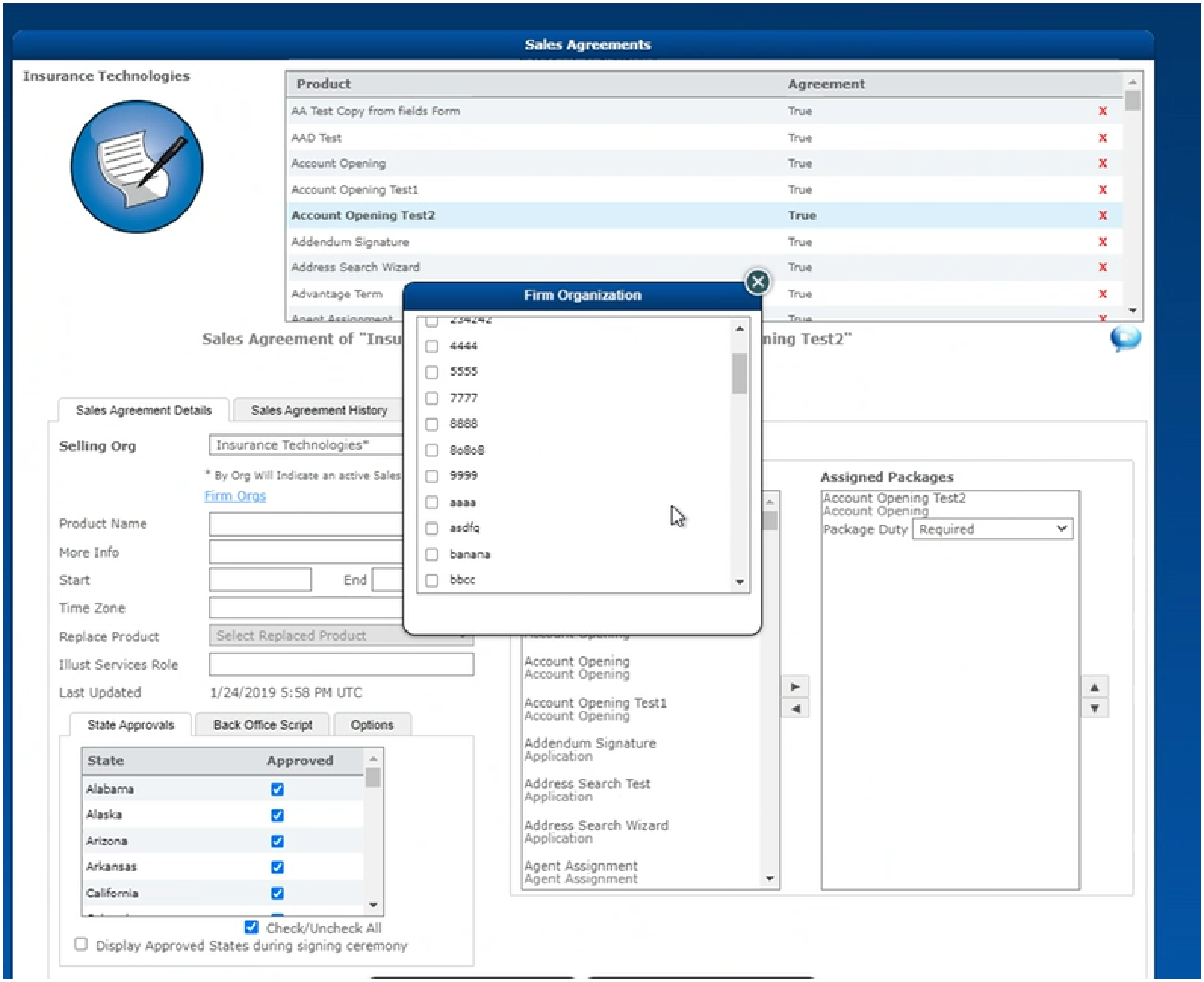
1.4 Admin: Check Firm Orgs for Active Sales Agreement

When a Firm Org accesses the Product Access tab on the Groups page, the products displayed for selection will be a reflection of the products with an active Sales Agreement only.

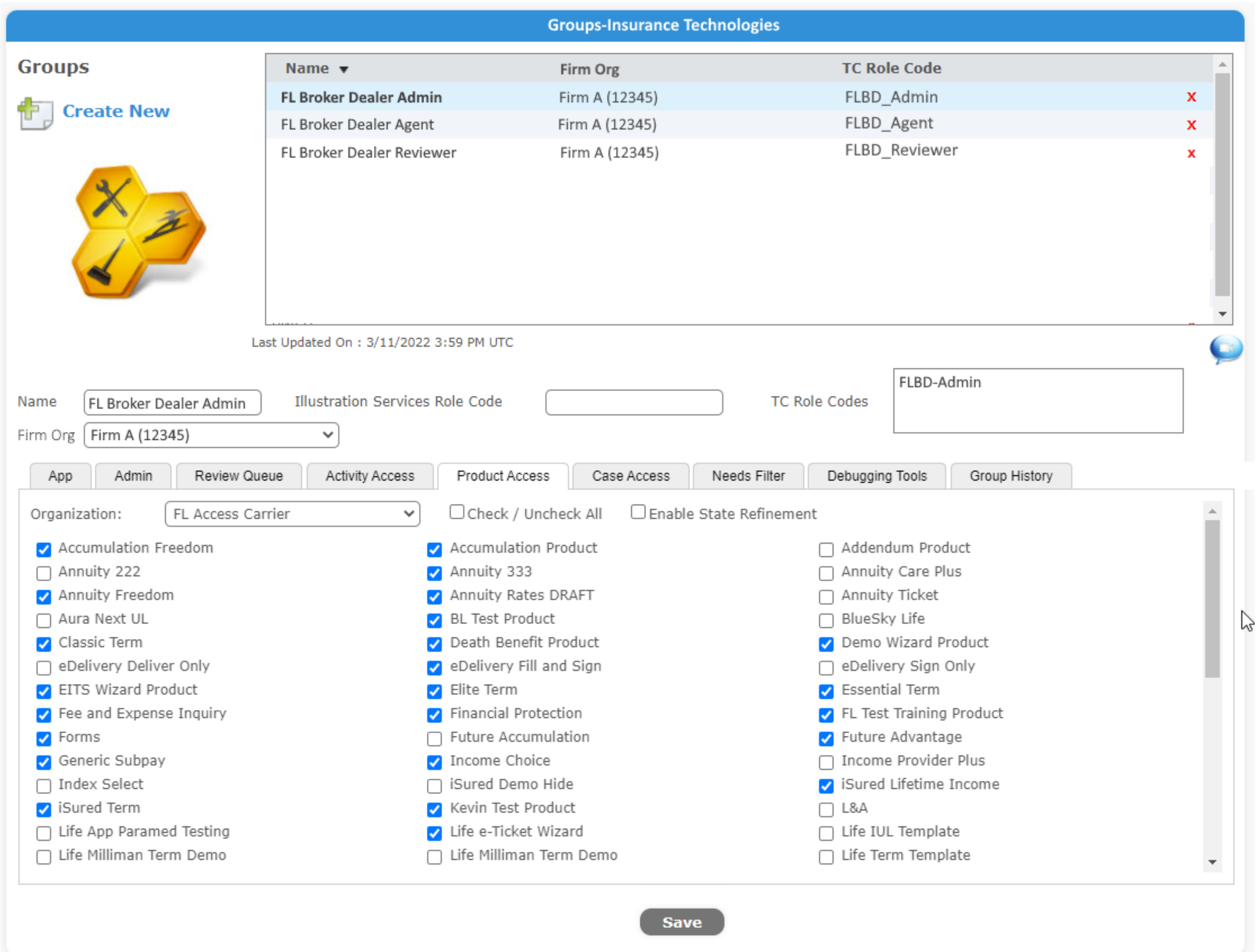
Selling Agreement is activated for the Firm Org by selecting the "Firm Orgs" hyperlink:



Firm Org is selected:



The list of available products is displayed on the Product Access tab based on an active selling agreement for the firm org:



Acceptance Criteria

- Products listed on the Groups, Product Access page are limited to products only with an active sales agreement for the firm org.

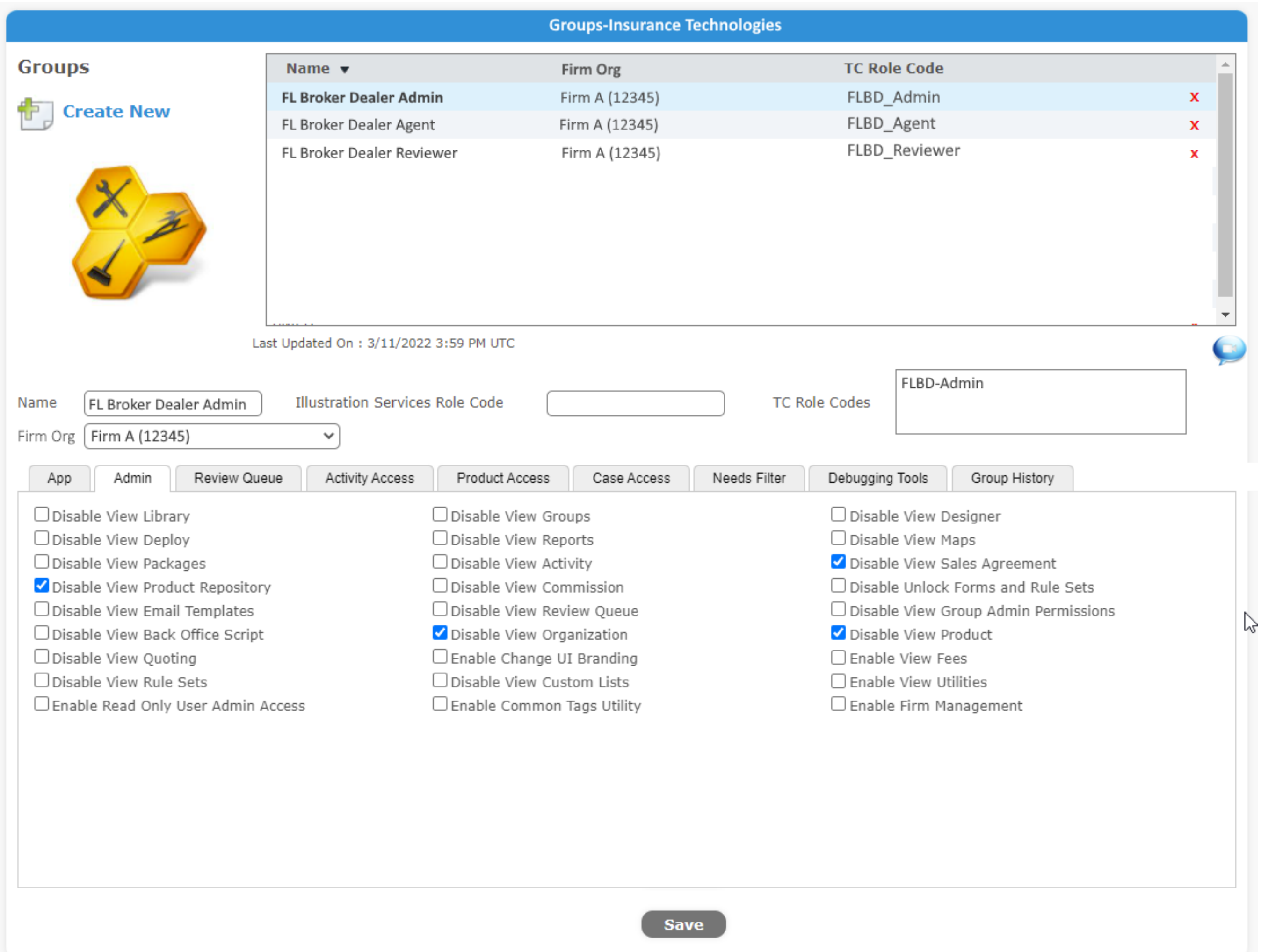
2 Firm Management: Defaults

2.1 Admin Rights: Groups Defaults

- Disable View Organization
- Disable View Product
- Disable View Product Repository
- Disable View Sales Agreement

When the Group is created, these will be the default values. However, if the admin user changes the values, those new values will be saved. If the admin user is a Firm Org admin, they will not be able to change the values, either at the time of creation of the group, or in subsequent visits.

*Note: When the Firm Org drop down is changed from a Firm Org to blank, the default options listed above will be unchecked. If the group should have those options checked (disabled), and the Firm was changed to blank in this case, the options will need to be re-checked and saved.



Acceptance Criteria

- The following options will be selected by default on the Admin tab of the Groups page when an admin creates a Group for a firm. These will be the initial values, with any changes the admin makes being saved.

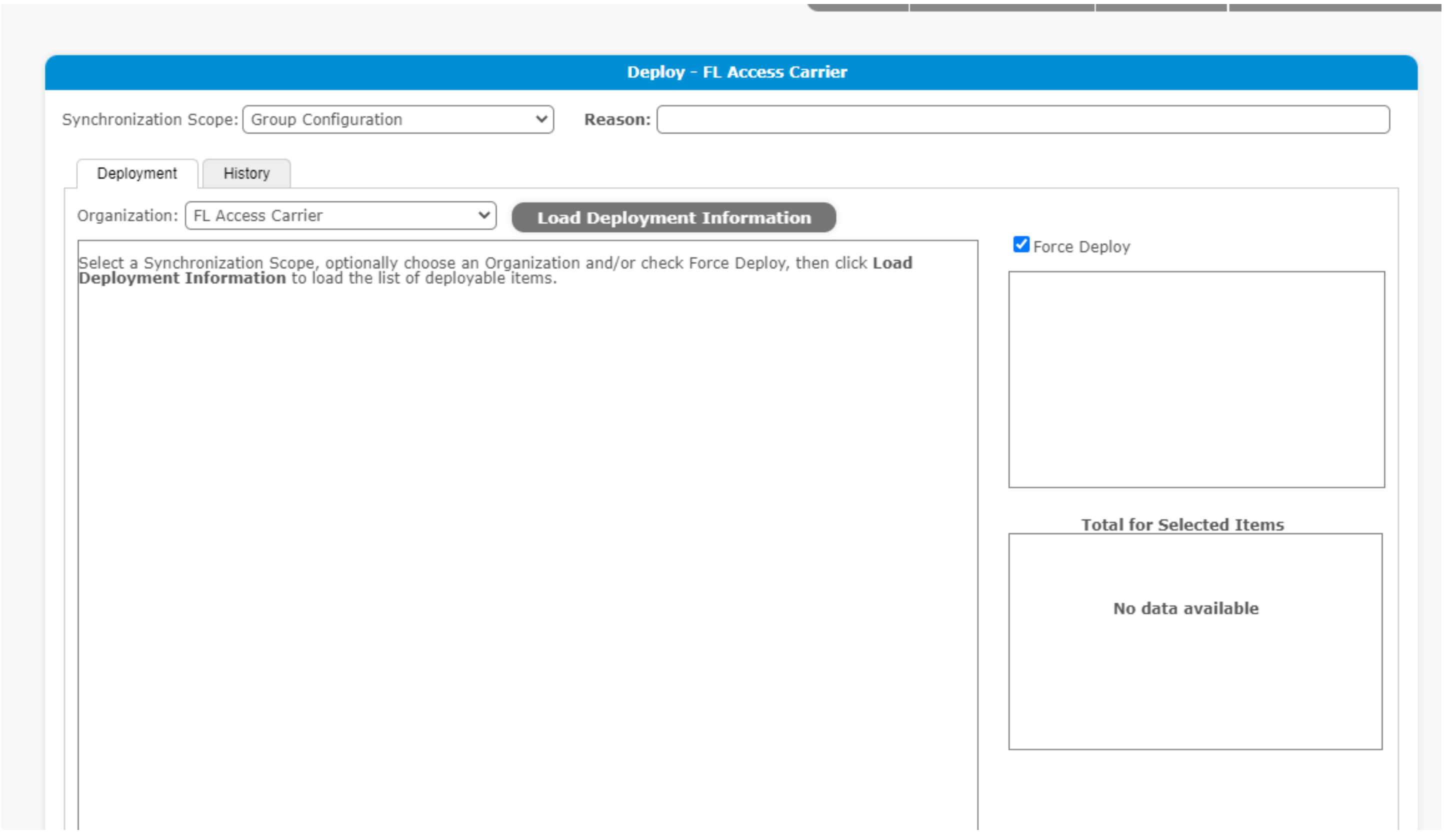
- Disable View Organization
- Disable View Product
- Disable View Product Repository
- Disable View Sales Agreement
- If the admin user is a Firm Org admin, they will not be able to change the values of these selections.
- Note: When the Firm Org drop down is changed from a Firm Org to blank, the default options listed above will be unchecked. If the group should have those options checked (disabled), and the Firm was changed to blank in this case, the options will need to be re-checked and saved.

3 Firm Management: Deployments

3.1 Admin Rights: Deployments

When an admin user for a Firm Org is logged in, they will have access to Deployments. However, that access will be greatly restricted. Admin users of the Firm Orgs will have the Synchronization Scope default to "Group Configuration", and that will be the only item available to them in the dropdown list.

The list of Groups that they will see will only be Groups that are associated with their Org.



Acceptance Criteria

- When an admin user for a Firm Org is logged in, they will have access to Deployments. That access however will be limited.
- The Synchronization Scope will be defaulted to "Group Configuration"
- There will be no other scopes in the dropdown list
- The list of Groups that they see will only be Groups that are associated w/their Firm Org.

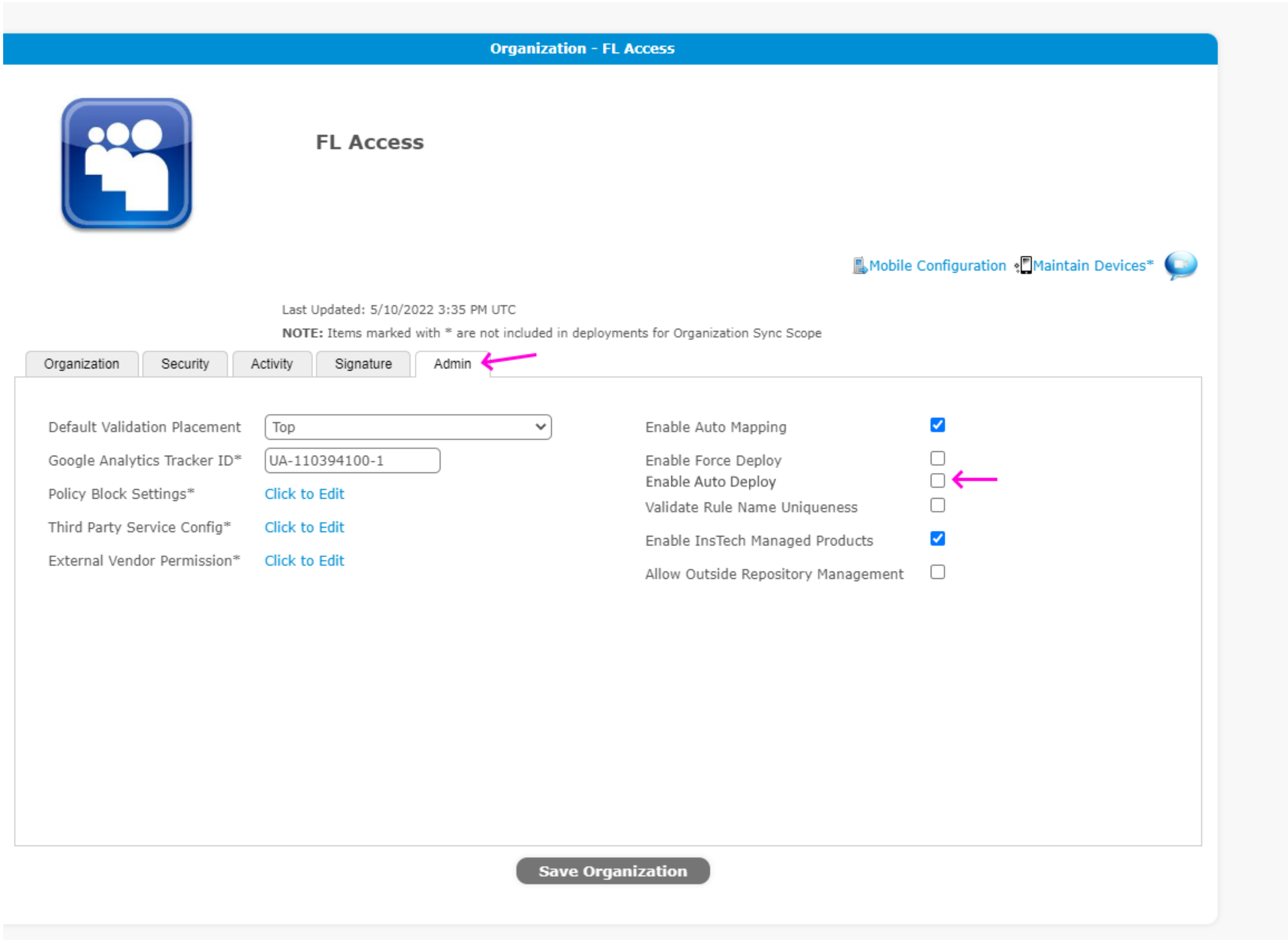
3.2 Admin: Org Auto Deploy Setting

The Organization settings in Admin will be updated to include the ability for a Distributor to elect to always have Carrier deployments into their environments Auto Deploy to their (Distributor's) Staging and Production environments.

This will be accomplished by a checkbox on the Admin tab of the Organization Settings (under Organization Configuration).

This new setting will only be available to Distributors.

When this option is checked, it will cause Auto Deploy to be enabled by default for all new Carriers.



Please Note:

If the option is set, either the Organization scope will need to be deployed to the higher environments, or the setting will need to be updated directly in the higher environments for it to take effect.

While the setting will have Auto Deploy turned on for all new Carriers, the Distributor will be able to go in and deselect Auto Deploy for individual Carriers.

Acceptance Criteria

- A new Organization Setting will be added to the Admin tab for Distributors, called "Enable Auto Deploy"
- When this setting is enabled, Auto Deploy will be turned on for all new carriers by default
- Distributors will still be able to disable Auto Deploy for individual Carriers if this new option is enabled, as it will just set the default for Auto Deploy to be enabled.

4 Firm Management: Packages

4.1 Admin: Auto Added Packages

FireLight will now allow for packages to be automatically added to Activities based on Role Codes. This will allow for these packages to be added to the Activity for users with the specified Role Code without it being included in a Sales Agreement.

Add a new free form text box on the right next to the "Role Codes" text box. It will feature the text "Auto Add to These Role Codes" in the upper left-hand corner and a "Firm Orgs" hyperlink on the top right.

When the new "Auto Add to These Role Codes" box on the right is used, the "Role Codes" box will be ignored.

The textbox will support the use of the wildcard "*". The wildcard will allow users to specify:

- Everything: *
- Begins With ex: "ABC_*" Would match all Role Codes that start with "ABC_"
- Ends With ex: "*Agt" Would match all Role Codes that end with "Agt"
- Contains ex: "*Asst*" Would match all Role Codes that contain "Asst"

When matching for Begins With, Ends With, and Contains, the text comparison will NOT be case sensitive.

There will be a link to the Firm Orgs Selection on top of the box.

Firm Orgs link will display a dialog box of Firm Orgs to be selected.

If the text box for the Auto Add Role Codes is populated, and there is a wildcard entry for a Firm Org, that Firm Org will be selected when the dialog box is displayed. **Note that the wildcard must be the exact wildcard for the Firm Org for this to occur. For example, "ABC_*" would cause Firm Org ABC to be selected, but "AB*" would not.

When a user selects from the list in the Firm Orgs link, the text in the Auto Add Role Codes box (if any exists) will be replaced with the wildcard entries for the selected Org(s) will be placed in the box.

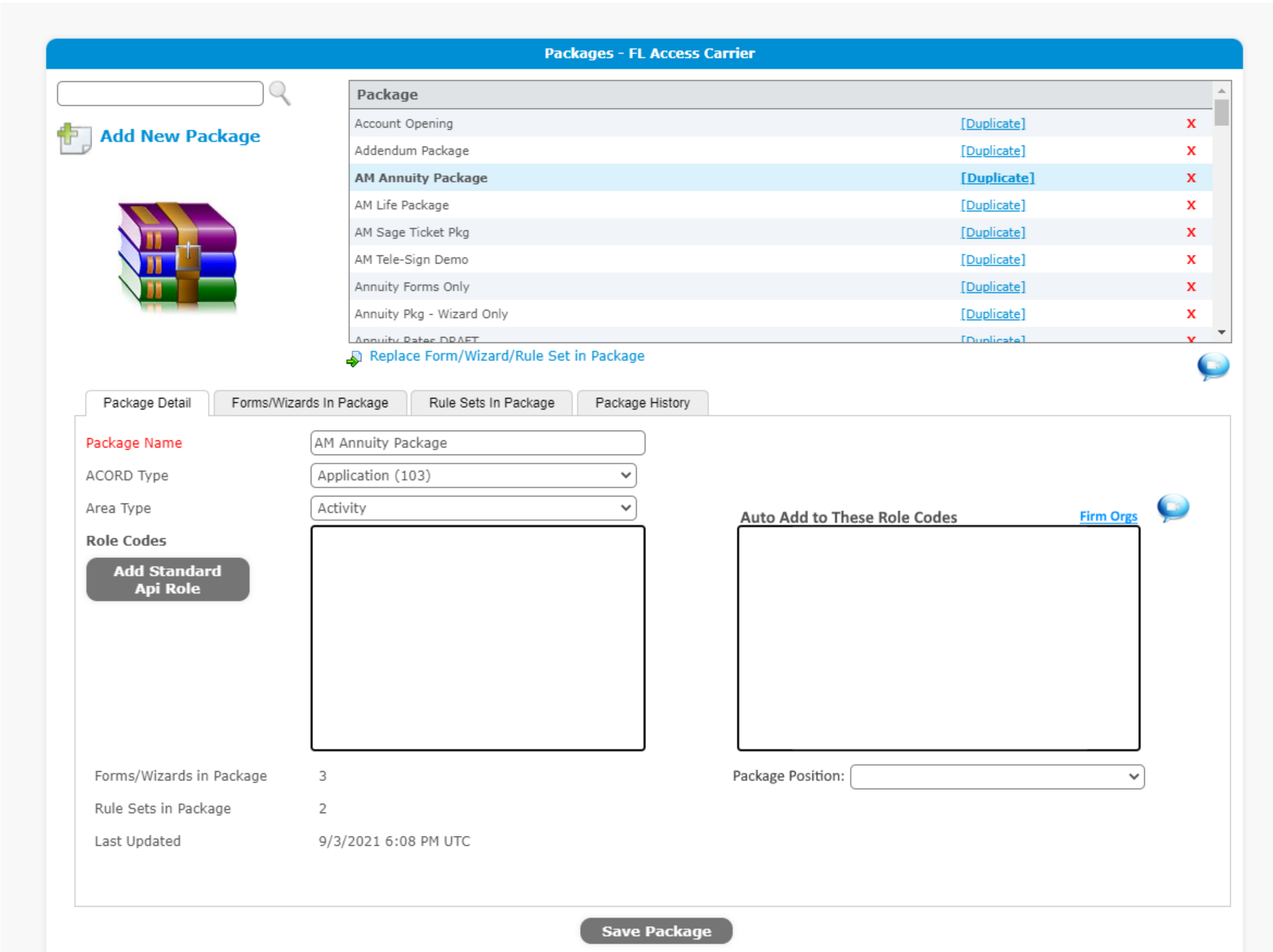
If a Firm Org is selected, the wildcard for all of that Firm Orgs Role Codes will be added to the new Auto Add Role Codes textbox (i.e. "ABC_*")

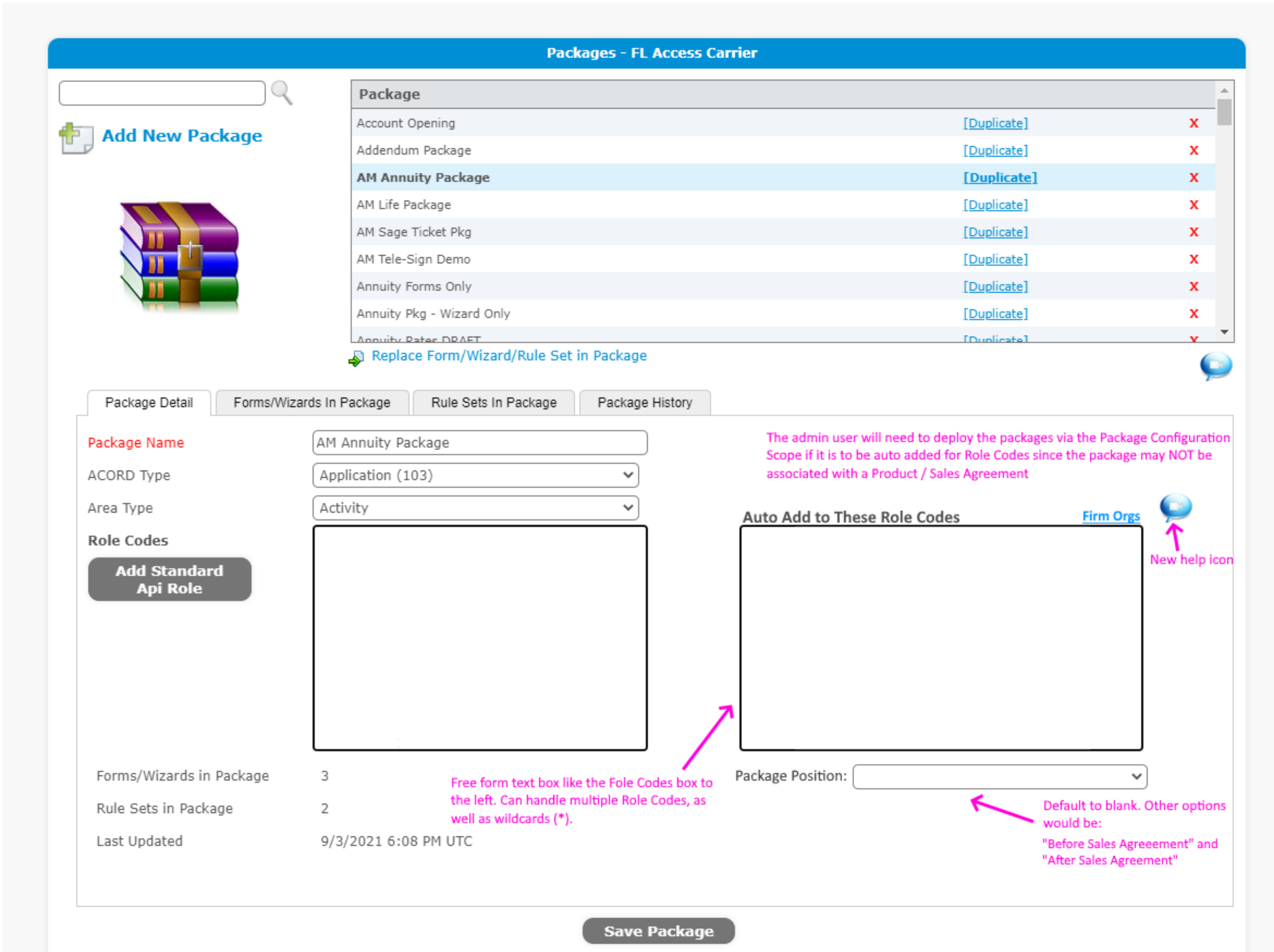
The selections made in the "Firm Orgs" list will be saved when "Save Package" is selected on the main "Packages" screen. If the user navigates between packages and does not save after each "Firm Orgs" list selection, the changes will be lost.

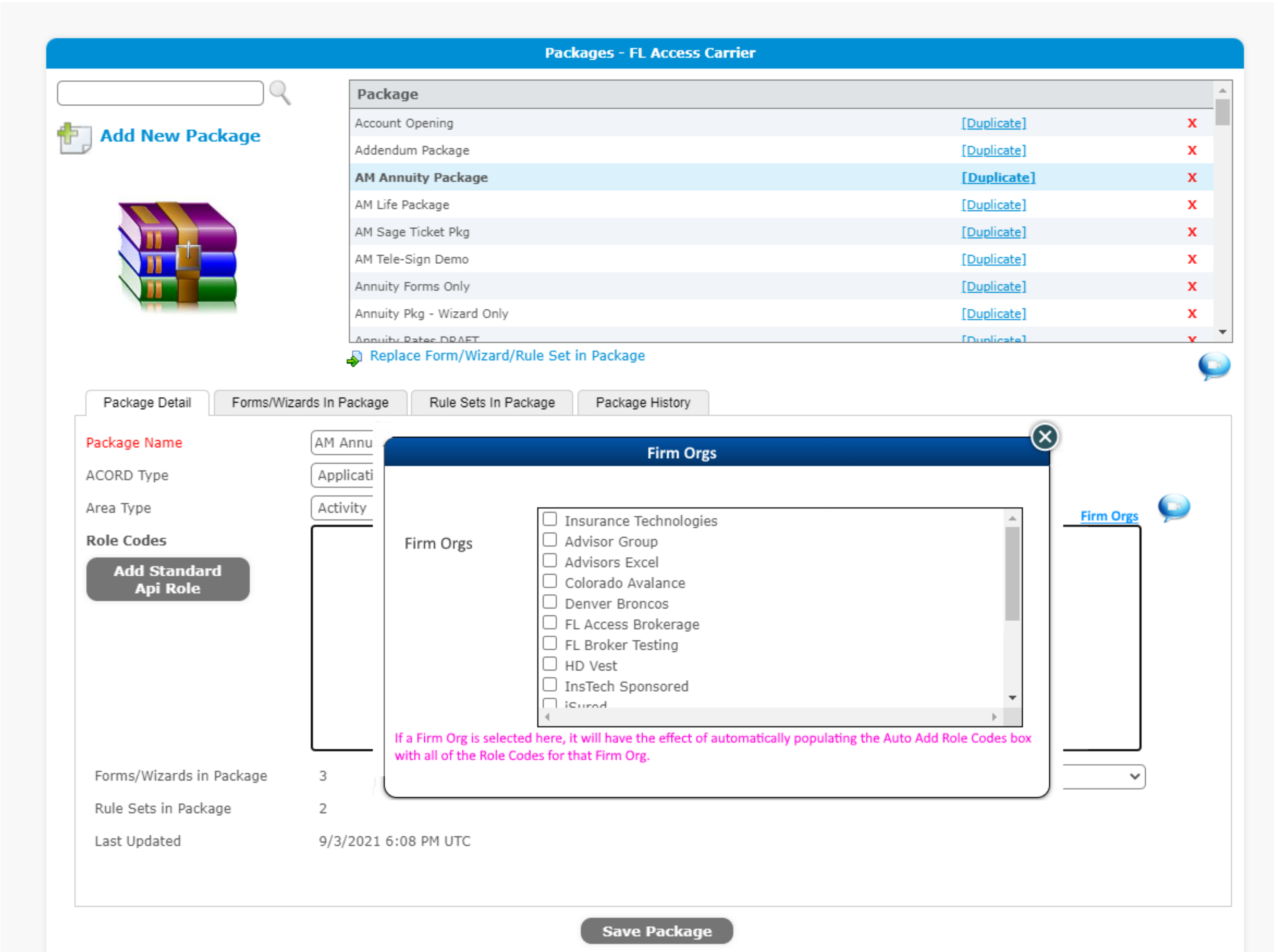
There will be a dropdown list box that will determine the package position. The options will be:

- Blank (default)
- Before Sales Agreement
- After Sales Agreement

If an Activity is locked, the packages will not be automatically added (or removed).




Packages - FL Access Carrier
Add New Package
Package
Account Opening [Duplicate] X
Addendum Package [Duplicate] X
AM Annuity Package [Duplicate] X
AM Life Package [Duplicate] X
AM Sage Ticket Pkg [Duplicate] X
AM Tele-Sign Demo [Duplicate] X
Annuity Forms Only [Duplicate] X
Annuity Pkg - Wizard Only [Duplicate] X
Replace Form/Wizard/Rule Set in Package
Package Detail
Forms/Wizards In Package
Rule Sets In Package
Package History
Package Name
AM Annuity Package
ACORD Type
Application (103)
Area Type
Activity
Role Codes
Add Standard Api Role
The admin user will need to deploy the packages via the Package Configuration Scope if it is to be auto added for Role Codes since the package may NOT be associated with a Product / Sales Agreement
Auto Add to These Role Codes
Firm Orgs
New help icon
Forms/Wizards in Package
3
Rule Sets in Package
2
Last Updated
9/3/2021 6:08 PM UTC
Free form text box like the Fole Codes box to the left. Can handle multiple Role Codes, as well as wildcards (*).
Package Position:
Default to blank. Other options would be:
"Before Sales Agreeement" and "After Sales Agreement"
Save Package



Acceptance Criteria

A new textbox will be added to the Packages screen in Admin.

- Above it on the left-hand corner will be the text "Auto Add to These Role Codes"
- Above it on the right-hand corner will be a hyperlink for "Firm Orgs".
- If a user clicks on the hyperlink, a dialog box will appear for the user to select the Firm Org(s) that will be used to populate the text box
- When a user selects a Firm Org and closes the window, the contents of the text box will be updated to include the wildcard entries for the selected Firm Org(s). Example: Selecting Firm Org ABC would result in "ABC_*" being entered into the text box.

- If there are entries in the text box and a user clicks on the "Firm Orgs" link, if there is a wild card for a Firm Org in the box (exact match - i.e. "ABC_*" would match for ABC Firm Org, but "AB*" would not), that will cause that Firm Org to be selected in the Firm Orgs dialog box.
- There will be a dropdown box under the new Auto Add Role Codes textbox. It will be labeled: Package Position. It will contain the entries 1) Blank (default) 2) Before Sales Agreement and 3) After Sales Agreement
- The items in the new Auto Add textbox will only be saved upon clicking the Save button for the Package, regardless of if they used the "Firm Orgs" link to populate or not
- Auto add will be available for all ACORD types with the exception of:
  - E-Delivery (121-12100)
  - E-Delivery Deliver Only (121-12123)
  - E-Delivery Sign Only (121-12122)
  - Illustration (111)
  - Quote (212)
- Auto add will be limited to the "Area Type" of "Activity" only; "Reviewer" and "Reviewer Optional" will not be included in this scope.

4.2 Admin: Auto Added Packages and Package Position Audits

Audits are made and visible in the Package History tab when changes are made to:

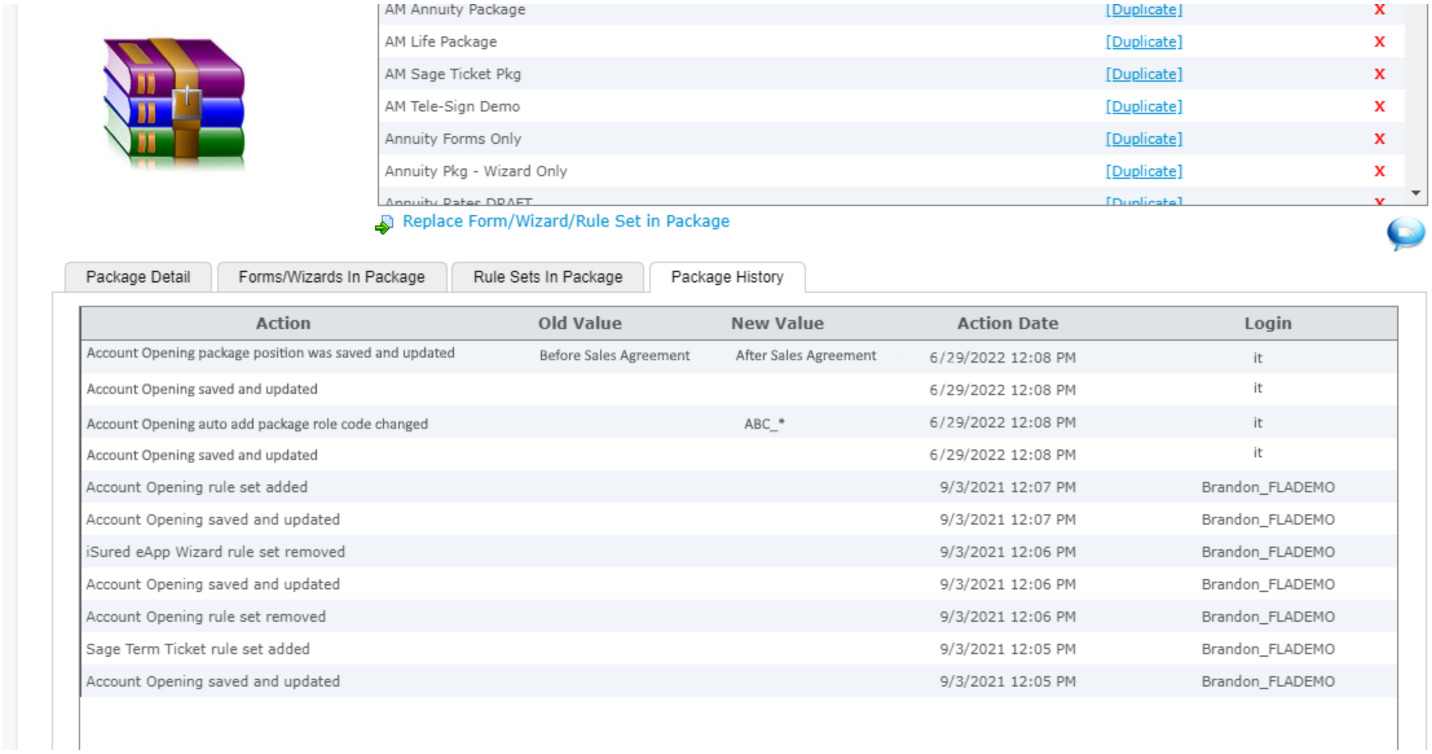
- Auto Add Role Codes
- Package position dropdown list

The text for the Action will be:

- {Package Name} auto add package role code changed. Old value: {Old value} New Value: {New Value} {Action Date} {Login}
- {Package Name} saved and updated {Action Date} {Login}

The old value will be the previous value, New Value will be the value after the update, the Action Date will be the date and time the update occurred, and the Login will be the user that made the update.

Example: {Package Name} auto add package role code changed. Old value: New Value: ABC*DEF*



Acceptance Criteria

- When the new fields for Package Position and Automatically Added Role Codes are updated, an audit will be created and displayed in the Package History tab.
- The text for Action in the Audits will be
  - package position was saved and updated
  - auto add package role code changed
- The other values (Old Value, New Value, Action Date, and Login) will follow normal audit conventions

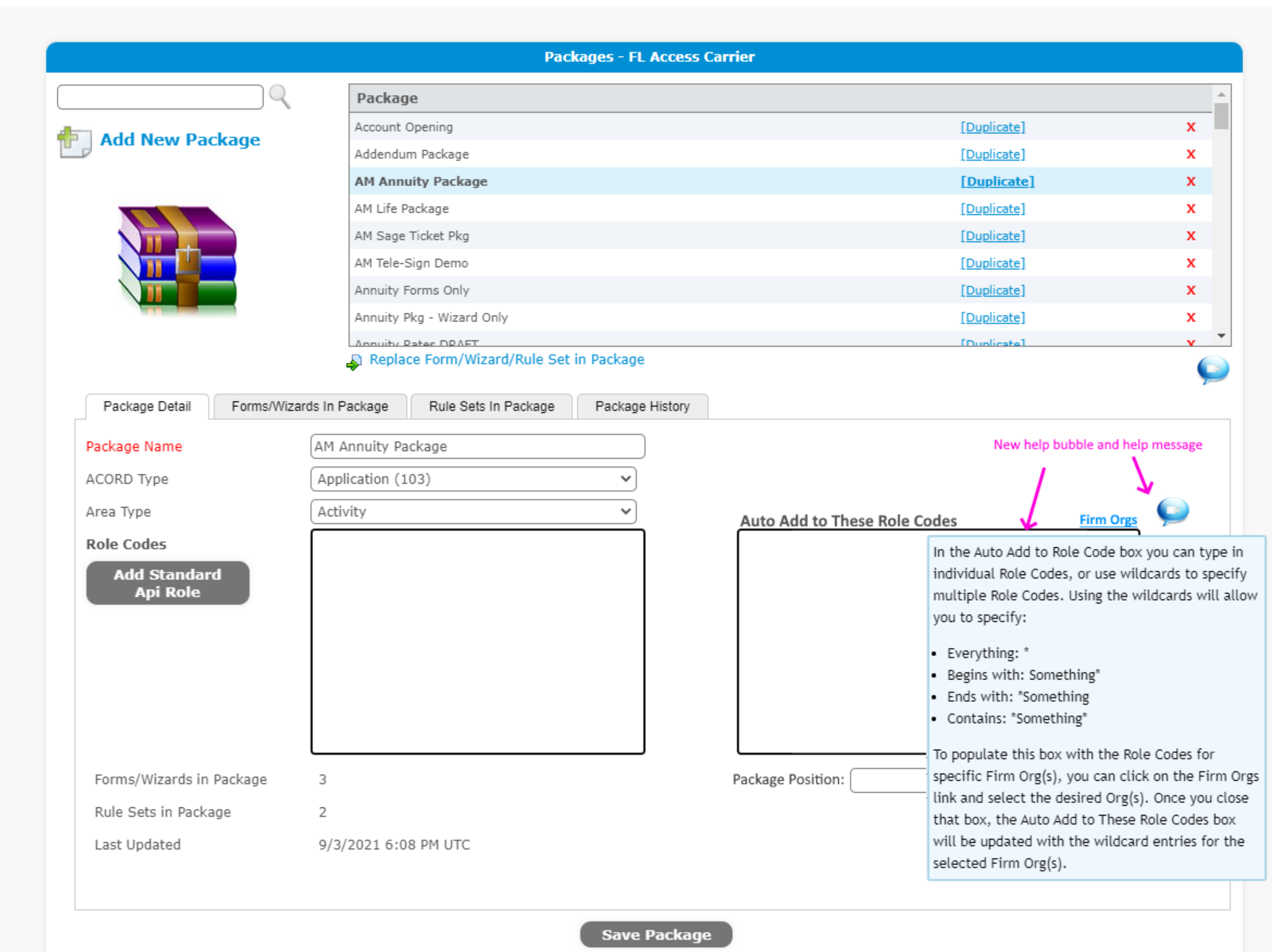
4.3 Admin: Help information for Auto Added Packages

A new Help bubble will be placed next to the Firm Orgs link. When a user hovers over it, it will display the following help text:

In the Auto Add to These Role Codes box you can type in individual Role Codes or use wildcards to specify multiple Role Codes. Using the wildcards will allow you to specify:

Everything: *
Begins with: Something*
Ends with: *Something
Contains: *Something*

To populate this box with the Role Codes for specific Firm Org(s), you can click on the Firm Orgs link and select the desired Org(s). Once you close that box, anything in the Auto Add to These Role Codes box will be updated with the wildcard entries for the selected Firm Org(s).



Acceptance Criteria

- A new help bubble will be added for the Auto Add to These Role Codes box.
- The help text will be:
  In the Auto Add to These Role Codes box you can type in individual Role Codes, or use wildcards to specify multiple Role Codes. Using the wildcards will allow you to specify:

  Everything: *
  Begins with: Something*
  Ends with: *Something
  Contains: *Something*

  To populate this box with the Role Codes for specific Firm Org(s), you can click on the Firm Orgs link and select the desired Org(s). Once you close that box, the Auto Add to These Role Codes box will be updated with the wildcard entries for the selected Firm Org(s).

4.4 App: Auto Added Packages

FireLight will now allow for packages to be automatically added to Activities based on Role Codes. This will allow for these packages to be added to the Activity for users with the specified Role Code without it being included in a Sales Agreement.

When a user creates a new Activity, FireLight will check to see if that user's Role Code matches any entries in the new Auto Add Role Codes (including the wild cards) for that Activity type.

If it does, it will add the package to the Activity in the position indicated by the new Package Position entry on the Package

If no match is found, no Package will be automatically added

This check will only occur at Activity creation. If a Role Code is added or removed after an Activity is created, it will not affect the packages attached to that activity

Acceptance Criteria

- When a new Activity is created, a check will be made to determine if the user's Role Code(s) is listed in the new Auto Add Role Codes box for the Activity type
- If a match is found, that package will automatically be added at the position indicated by the new Package Position entry on the Package
- If no match is found, nothing will change
- The check and any addition of packages will only occur at the time of the Activity creation. Should the values in the Auto Add Role Codes change after the Activity is created, it will not affect the Activity
- Any forms in the package that is auto added are included in the forms dialog in the application entry.

    - Signing Ceremony Only forms are not displayed (these forms are not displayed today, so regression)
- Auto add will be available for all activity types, except for:
    - E-Delivery (121-12100)
    - E-Delivery Deliver Only (121-12123)
    - E-Delivery Sign Only (121-12122)
    - Illustration (111)
    - Quote (212)
- If the session user has multiple role codes associated with them, the first role code from the session user's role code list will be used.