

iConnect 147676 Design Approach

Project Overview

This enhancement will help clients tag their forms and wizards using the FireLight common tags by providing “autocomplete” functionality in a field name in the field properties.

The field property name will provide context-aware suggestions of common tags based on the data as it is typed. For example, if a user starts to type "Owner", the field will begin to display the Owner common tags. If the user continues to type "OwnerF", the options will continue to narrow down to OwnerFirstName and other fields that contain "OwnerF". Or, if a user types in “Name” then all the common tags that contain “Name” will appear in the list.

The list of common tags will be managed by Insurance Technologies.

Features/Requirements

- Create common tag list by group with a description.
- Load common tags into FireLight database.
 - Data location will be the Master Config database, ACORD Mapping table.
- Admin Tool, Field Properties: Add the ability to search at the field level.
 - Type ahead functionality.
 - Contains search.
 - Display description for each common tag shown in the search.

Deferred Day 2:

- Additional common tag functionality:
 - Create database schema for List Type codes and descriptions.
 - Finalize type code export values.
 - Load XPath with design to navigate through multiple locations when applicable (primary XPath with subsequent XPaths such as a Party Address).
- Admin Tool: Add option for online common tag dictionary.
 - Display breakdown by group (see Rule Node help – leverage this design).
 - Display common tags within each group.
 - Add search option
 - Add ability to launch from a field and return to a field.
- Admin Tool: Update Mapping with all common tags.

Use Cases / Workflow Changes

None

Admin Changes

Changes to the Admin are.

UI Mock Ups

How to Enable and Use This Feature

To use this feature, open a form or wizard and edit the properties of a field. In the field name, start typing. A list will appear with all common tags that contain what is typed.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- 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		