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Create New APIs for Documents

# FIRELIGHT BASE

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FireLight®

Platform

**CREATE NEW APIS FOR DOCUMENTS**

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**Insurance Technologies, LLC**

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# iConnect 211673 Design Approach - Create New APIs for Documents

## Project Overview

Clients would like a way to call a list of documents, retrieve PDFs of the documents requested and upload additional documents for use in embedded environments. To support this, new APIs will be created; one for a list of documents named "GetDocumentList", another for PDF document retrieval named "GetActivityPDF" and a third named "UploadDocument".

The API call "GetDocumentList" will request a list of documents using the parameter of Activity ID. The response will include a list of documents available for the activity using form metadata and document ID.

The "GetActivityPDF" API call will request PDF documents based on a requirement of Activity ID and an optional list of document IDs if the user would like to request a specific document ID. The response will be a collection of documents by associated document IDs and PDFs. If no documents are specified, all documents will be returned including metadata. If a specific form is requested, only that form will be returned.

The "UploadDocument" API call will allow documents to be uploaded individually at the end of an activity, allowing for wet signed documents to be included by sending the activity ID and list of attachments (one or more). The response will be a simple success or failure.

## 1 Create "GetDocumentList" API

Create a new API called "GetDocumentList" to call and retrieve a list of documents by Activity ID.

"GetDocumentList" API Request:

List of documents available for activity by Activity ID (required).

"GetDocumentList" API Response:

List of documents available for activity by Activity ID (required).

HTTP GET

Response contains a collection of DocumentPackageInfo

Include by metadata:

Activity ID

Document ID (unique)

Form Name

Form Number

Document Type/Attachment TC

Parameter (Required or Optional)

### ***Acceptance Criteria***

- FireLight has new "GetDocumentList" API and documentation.
- New API "GetDocumentList" requires Activity ID to request document list.
- New API "GetDocumentList" responds by returning a list of documents by Document ID, Form Name, Form Number, Document Type/Attachment TC and Parameter.

## **2 Create "GetActivityPDF" API**

Create a new API called "GetActivityPDF" to call and retrieve PDF documents by Activity ID. This API call can be used as a secondary call to "GetDocumentList" or as a stand-alone API if the call requests all documents by Activity ID.

"GetActivityPDF" API Request:

List of documents available for activity by Activity ID (required).

List by metadata:

1. Activity ID (required)
2. Document ID (optional)

HTTP POST

"GetActivityPDF" API Response:

List of documents available for activity by Activity ID (required).

Response contains a collection of DocumentFormInfo

Include by metadata:

Activity ID

Document ID

Form Name

Form Number

Document Type/Attachment TC

Parameter (Required or Optional)

In-line document (PDF Stream)

#### ***Acceptance Criteria***

- FireLight has new "GetActivityPDF" API and documentation.
- New API "GetActivityPDF" request includes required Activity ID and allows for Document ID, but Document ID is not required.
- New API "GetActivityPDF" request includes ability to select documents from list.
- New API "GetActivityPDF" response returns individual documents requested by Activity ID, Document ID in PDF stream.
- New API "GetActivityPDF" response returns all documents when no Document ID is provided on the request. All documents are returned including metadata of Activity ID, Document ID, Form Name, Form Number, Document Type/Attachment TC and Parameter in PDF stream.

### **3 Create "UploadDocument" API**

Clients would like a way to call an API to upload documents at the end of an activity, allowing for wet signed documentation to be uploaded. In order to support this, we will create a new API called "UploadDocument". This new API will use the "ActivityID", another parameter called "ActivityAttachment" and HTTP Post. Multiple documents can be uploaded individually one at a time and provide a simple success or failure response.

#### ***Acceptance Criteria***

- FireLight has new "UploadDocument" API and documentation.
- New API "UploadDocument" requires "ActivityID" and "ActivityAttachment" to upload documents.
- Multiple documents able to be uploaded individually, one at a time.
- API responds with a simple success or failure.

### **4 Audit Records for "GetActivityPDF" API**

"GetActivityPDF" API will create an audit record for the PDF documents retrieved through the API.

#### ***Acceptance Criteria***

- Record is created when PDF document(s) is/are requested from API.