

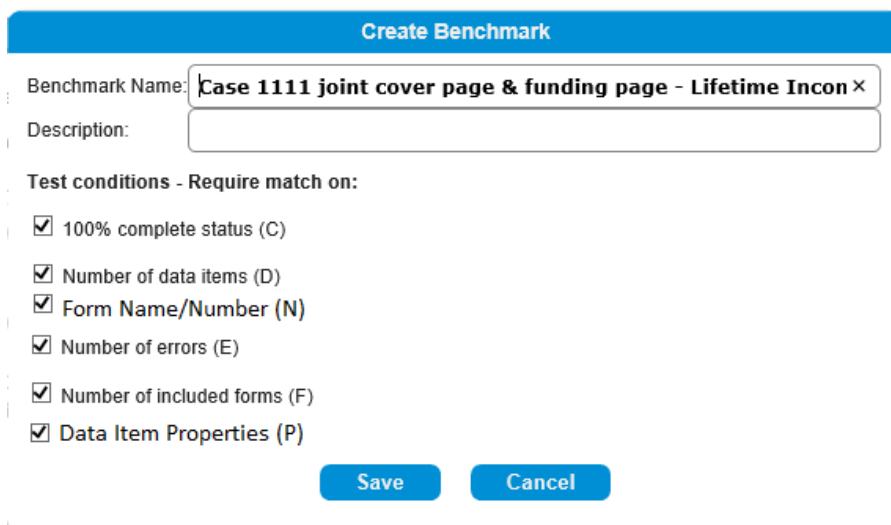
iConnect 170466 Design Approach

Project Overview

This enhancement will add a test condition to compare form name and form number for pass/fail of benchmark.

Features/Requirements

- Add additional test conditions for “Form Name/Number (N)” that can be specified in the other actions/Create Benchmark. This will include the Form Name, Form Number, and excluded. (Per dev, these properties are already being stored in the output json files under Form.)
- This test condition will be checked by default.



- This will be an additional test for pass/fail. (In addition to the existing benchmark pass/fail rules, the benchmark will only pass if all the Forms’ name, number, and exclude matches.)
 - This new property will be included in the benchmark compare to determine if the benchmark passes.

- The status column hover over/tool tip will include the number of differences in the Form Name/Number and exclude in the benchmark and results only for the forms that existed in both. Meaning, if you have a different number of forms that existed in the benchmark compared to the results, only the forms that are in both will be in the compare.

	Benchmark:
	Timestamp: 11/10/2017 10:56:02 AM
	% Complete: 100
	Data Items: 398
	Errors: 0
	Included Forms: 3
Update	
	Results:
12/14/2017 2:41 PM	Timestamp: 12/14/2017 2:45:12 PM
	% Complete: 97
	Data Items: 420
12/14/2017 2:41 PM	Data Item Differences: 10
	Errors: 8
	Included Forms: 4
12/14/2017 3:15 PM	Form Differences: 0
12/14/2017 2:45 PM	CDNEFP Fail
12/14/2017 3:15 PM	CDNEFP Pass

- Add a new Condition to the Conditions Column for N for Form Name/Number and exclude.

<input type="checkbox"/>	test - 222 Annuity	Annuity 222	AL	katherine_FLADemo	11/10/2017 10:56 AM	12/14/2017 2:45 PM	CDNEFP	Fail
<input type="checkbox"/>	Test Benchmark - Death Benefit Product	Death Benefit Product	AL	katherine_FLADemo	12/14/2017 2:41 PM	12/14/2017 3:15 PM	CDNEFP	Pass

- Include the additional condition in the hover over/ tool tip for the condition.

Home
Quoting
New Application
All Applications
Review Queue
Benchmarks

Benchmarks

Run
Refresh
Export
Delete
Accept

☐ Case 1111 joint cover page & funding page - Lifetime Income
Lifetime Income
AL
katherine_FLADemo
12/14/2017 3:09 PM
12/14/2017 3:09 PM
CDNEFP
New

☐ test - 222 Annuity
Annuity 222
AL
katherine_FLADemo
11/10/2017 10:56 AM
12/21/2017 1:01 PM
CDEF
New

☐ Test Benchmark - Death Benefit Product
Death Benefit Product
AL
katherine_FLADemo
12/14/2017 2:41 PM
12/21/2017 1:14 PM
CDEF
New

Require match on:
100% Complete Status
Data Items
Date Item Differences
Errors
Included Forms
Form Differences

Use Cases / Workflow Changes

No workflow changes.

Admin Changes

None

App Changes

None

Integration Changes

None

UI Mock Ups

Home
Quoting
New Application
All Applications
Review Queue
Benchmarks

Benchmarks

Run
Refresh
Export
Delete
Accept

<input type="checkbox"/>	Benchmark Name	Product Name	Jurisdiction	User Name	Created	Updated	
<input type="checkbox"/>	App for Benchmark Lifetime Need Determination	Lifetime Income	AL	katherine_FLADemo	11/9/2017 9:43 AM	12/14/2017 2:45 PM	
<input type="checkbox"/>	App for Benchmark Lifetime Need Determination v2	Lifetime Income	AL	katherine_FLADemo	11/13/2017 6:08 PM	12/14/2017 2:45 PM	
<input type="checkbox"/>	Case 1111 joint cover page & funding page - Lifetime Income	Lifetime Income	AL	katherine_FLADemo	12/14/2017 3:09 PM	12/14/2017 3:15 PM	
<input type="checkbox"/>	test - 222 Annuity	Annuity 222	AL	katherine_FLADemo	11/10/2017 10:58 AM	12/14/2017 2:45 PM	CDNEFP Fail
<input type="checkbox"/>	Test Benchmark - Death Benefit Product	Death Benefit Product	AL	katherine_FLADemo	12/14/2017 2:41 PM	12/14/2017 3:15 PM	CDNEFP Pass

Benchmark:
Timestamp: 11/10/2017 10:56:02 AM
% Complete: 100
Data Items: 398
Errors: 0
Included Forms: 3

Results:
Timestamp: 12/14/2017 2:45:12 PM
% Complete: 97
Data Items: 420
Data Item Differences: 10
Errors: 8
Included Forms: 4
Form Differences: 0

How to Enable and Use This Feature

Refer to enable benchmark.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		[List subsections affected]
- 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		