iConnect 170075 Design Approach

Project Overview

Restrict size of attachments. While completing the application or in review queue process, FireLight allows users to upload document/attachment. Sometimes big uploads leads to several issues. Organizations want a new setting to define maximum size of any upload so the end user or agent cannot upload file larger than the defined size.

Features/Requirements

- We need to create an Organization level property to define maximum size of a file attachment in an upload.
- Organization can save its setting of maximum size of any upload in MB format.
- While uploading in application, if a user tries to upload a file larger than defined size, a message will appear.
- For distributors, restrict the file size to the minimum of the carrier or distributor setting, whichever is the most restrictive.

Use Cases / Workflow Changes

There are no changes to the normal workflow of the system.

Admin Changes

Add a new field to the Organizations page so to define the maximum upload file size in MB format. This field (Maximum Upload File Size) will be a drop-down with numbers listed from 1 to 20 so user cannot save value larger than 20 MB. Add a new column (MaxUploadFileSize) in the Organization table to store the setting of maximum upload file size. Also, add new property (MaxUploadFileSize) in OrganizationEntity.

App Changes

There are several locations to upload files.

1. In data entry, "Other Actions" -> "Documents" menu.
2. Through a button control on a form or wizard (from Admin->Designer) with a "Action Type" property and "Custom File Upload".
3. In the Client Fill and Client Fill and Sign menu, "Attach Documents".
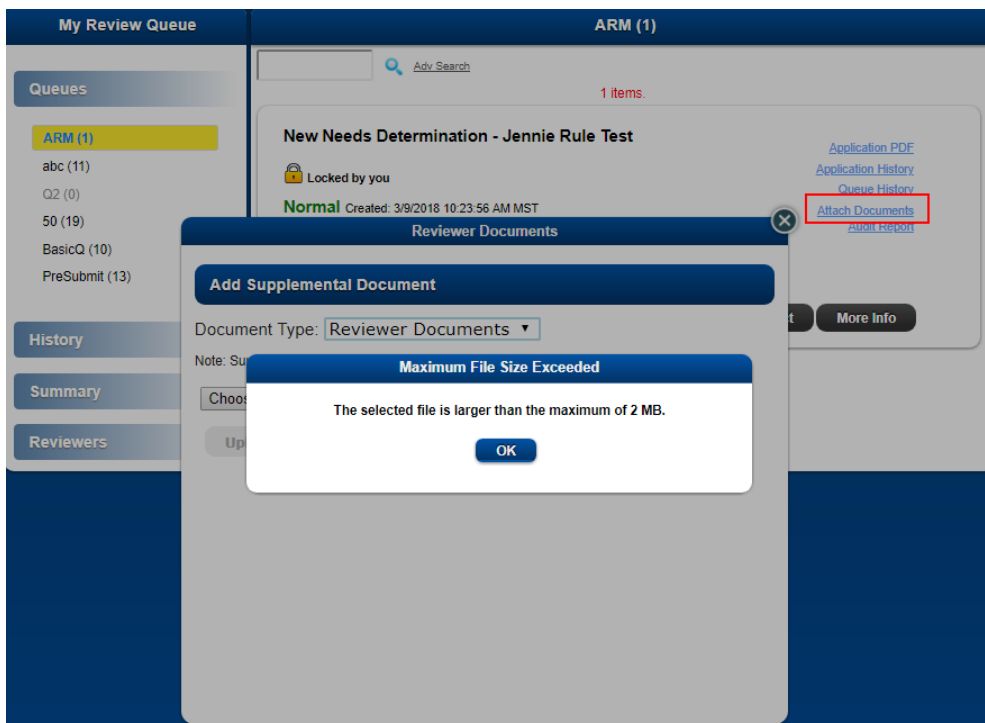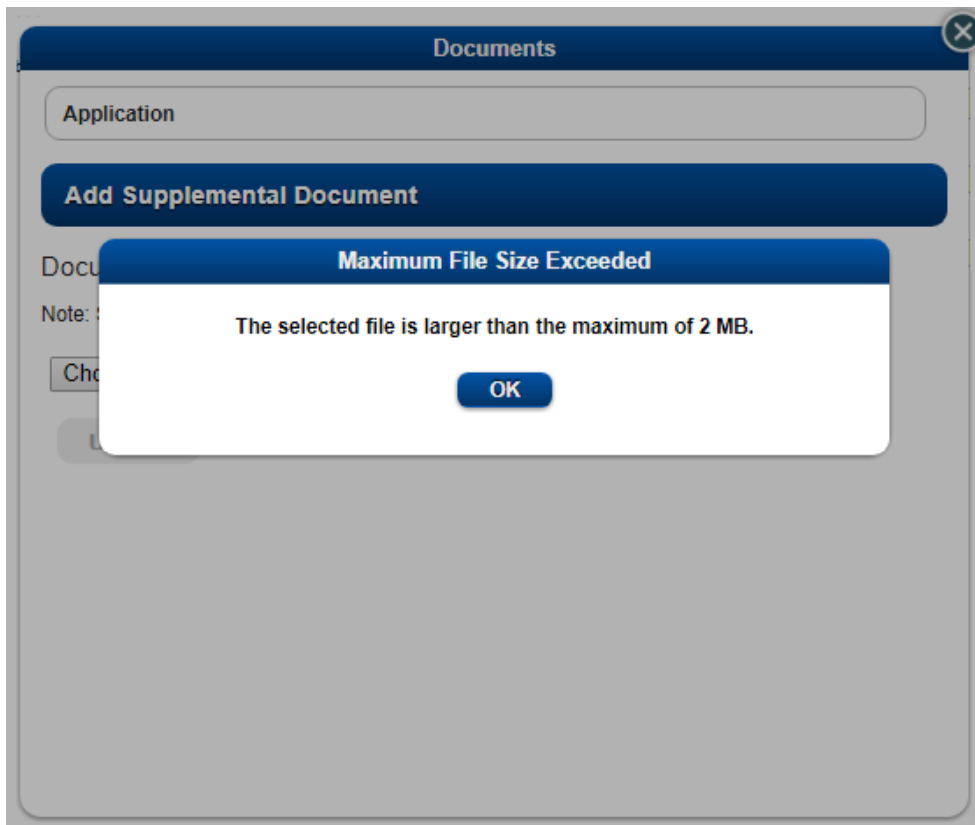4. In the Review Queue, "Attach Documents".

When a user tries to upload a file in any of these locations, compare the file size to the maximum file size from organizations settings. If size of file is larger than defined size, display a message.

Integration Changes

None

UI Mock Ups

Profiles/Organizations:

Organizations

Insurance Technologies	x
Insure Now	x
iSured	x
IT Brokers	x
IT Brokers Int	x
IT Training	x
Jackson Life	x
Kestler Financial Group	x
Kinetic Agency	x

Add New Organization

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Mobile Configuration   Maintain Devices

Organization Name	Insurance Technologies	Allow E-Approval	☑	Allow E-Signature ☑
Organization Type	Carrier ▼	Allow Client E-Fill	☑	Allow Client Fill & Sign ☑
Data Partition	ALL	Use Enhanced Security	☐	Allow NIGO Printing ☐
External Map Code	IT	Allow Submit on E-Sign Decline	☐	Print Submitted Only ☐
Shared Key	FireLight#123	Prevent Email Editing	☑	Allow Branding of UI ☑
Localization	Click to Edit	Validate Identity Verification	☐	Use DMARC ☑
DTCC Member ID	6407	Enable Force Deploy	☐	Validate Rule Name Uniqueness ☐
Full Settling DTCC Member	☐	Enable Auto Mapping	☐	Use SHA1 for Signatures ☐
Company Rating	1	2-Factor Authentication	☐	
App Signout URL Type	ThankYou ▼	Requests Timeout	15	days (0 for never)
App Site Signout URL	ThankYou	1228 Validity Window	0	minutes
Support Email	Email@Go.com	Authentication Timeout	60	minutes (0 for default)
Deployment Notification Email		IDP Identifier	https://localhost/egsts/trust	
Edit Masks Add	None ▼	IDP Certificates (primary)	Click to Edit	
Default Validation Placement	Top ▼	IDP Certificates (backup)	Click to Edit	
Submit Reminder Frequency	Daily ▼	Policy Block Settings	Click to Edit	
Agent Signing Order	Default ▼	Third Party Service Config	Click to Edit	
Signature Fonts	Click to Edit	Web Service Token Secret	019e142cff3e4f0baffd36(	New
Purge Uncompleted Apps	121 days	Web Service Token Certificate	Click to Edit	
Purge Completed Apps	121 days	Web Service Token Expiration	1 ▼ Hours	
Expiration Warning Threshold	0 days (0 for never)	Google Analytics Tracker ID	UA-110400193-1	
Maximum Upload File Size	2 ▼ MB			

Save Organization

Maximum File Size Exceeded dialog:

How to Enable and Use This Feature

Define Maximum Upload File Size on Admin->Profiles/Organizations. Select a value from the drop-down list (1 through 20) and click [Save Organization]. For testing purposes, consider the following:

1. To test in a carrier organization attempt to upload a file larger than the maximum file size setting.
2. To test in a distributor organization attempt to upload a file larger than the maximum distributor file size setting with a carrier that has a lower file size limit – FireLight will restrict you to the carrier's limit.
3. Next, test with a carrier that has a higher file size limit – FireLight will restrict you to the distributor's limit.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
-	Yes	Organization – We need to add a field so user can define maximum size of any upload.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application	Yes	While uploading, need to validate whether size of file is less than or equal to defined file size specified in organization setting.
- Signature Process		
- Review Queue	Yes	While uploading, need to validate whether size of file is less than or equal to defined file size specified in organization setting.
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		

- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		