

iConnect 180424 Design Approach

Project Overview

This deployment enhancement will add a new product scope that deploys product changes only.

The current product scopes options deploy more than the product, which is confusing. They actually deploy all forms, rule sets, sales agreements, and package definitions. Relabel these to something more suitable.

Features/Requirements

- Add a new Synchronization Scope to deploy the Product Configuration only. Product properties include the following:
 - Product Name
 - Product Type
 - Product Category
 - Rank Order
 - CUSIP ID
 - Billing Code
 - Product Code
 - Carrier Code
 - Product DTCC Member Id
 - Product Organization Name
 - Full Settling DTCC Member
 - Product Locale
 - Last Updated
 - Product Features
 - Transaction Types Approvals/Unapprovals
 - States Approvals/Unapprovals
- Exclude the following from the new Synchronization Scope option when only the product is deployed:
 - Packages
 - Sales Agreements
 - Rule Sets
 - Forms and Wizards

- There are currently three Synchronization Scope Product Configuration options, which deploy more than the Product Configuration. *Note:* We are recommending that we relabel the existing options to something more comprehensive.
- Add three new Synchronization Scope options to deploy only the Product properties.

Current Label	New Label	Description
Product Configuration	All Configurations	Includes the top level of data for the activity. This includes the Product, Sales Agreements, Rule Sets, and Forms and Wizards level of data.
Carrier Only Product Configuration	Carrier Only All Configurations	Includes the top level of data for the activity. This includes the Product, Packages, Sales Agreements, Rule Sets, and Forms and Wizards that are specific to the selected carrier. Distributors use this scope to deploy carrier configurations to distributor environments if not using Auto Deploy.
Distributor Product Configuration	Distributor All Configurations	Includes the top level of data for the activity. This includes the Product, Packages, Sales Agreements, Rule Sets, and Forms and Wizards that are specific to the selected distributors. Carriers use this scope to deploy carrier configurations to distributor environments.
None	Product Configuration	Includes the product configuration only. This excludes the Sales Agreements, Rule Sets, Form and Wizard level of data.
None	Carrier Only Product Configuration	Includes the product configuration only that are specific to the selected carrier. This excludes Packages, Sales Agreements, Rule Sets, and Forms and Wizards. Distributors use this scope to deploy carrier product configurations to distributor environments if not using Auto Deploy.
None	Distributor Product Configuration	Includes the product configuration only that are specific to the selected distributors. This excludes Packages, Sales Agreements, Rule Sets, and Forms and Wizards. Carriers use this scope to deploy carrier product configurations to distributor environments.

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		