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Common Tags Utility

# FIRELIGHT BASE

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FireLight

Platform

**COMMON TAGS UTILITY**  
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**Insurance Technologies, LLC**

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## Common Tags Utility

The Common Tags Utility provides a way for carriers and distributors to map their existing Field Names in the Form and Wizard Designer field properties to Common Tags to make client implementations easier and faster by eliminating mapping rules between carriers and distributors.

**IMPORTANT!** Depending upon the number of forms and/or wizards for the organization, it may take a moment for all the data to be loaded when the utility is first opened.

### Overview

The Common Tags Utility is located in the Admin Tool in the Utilities.

There are two tabs, Common Tag Name and Common Tag List Name that defaults to a Global view which allows you to set common tags globally in multiple form and wizard locations. There is also a Details view which provides the ability to drill down to the form and wizard page level. Most columns contain display-only data. The Status and the Proposed dropdown lists can be changed at the row level.

There are two action buttons on all views, DISCARD and UPDATE. UPDATE processes and saves all changes on the current page. DISCARD rejects all changes on the current page.

Specific field types have a common tag in Form Designer and Wizard Designer. If a field does not contain a Common Tag Name field property, it will not appear in the Common Tags Utility. Following are the related field types listed by designer:

- Form Designer: Text Box, Check Box, Calendar, Radio Button, Combo Box, Signature Box, and Signature Initials. Excludes: Label, Bar Code, Button, and Address Autocomplete.
- Wizard Designer: Text Box, Date Picker, Radio Button, Check Box, Dropdown List, and Slider. Excludes: Group, Panel, Text, Navigation Link, Divider, Increment Button, Image, Custom Action, Data Grid, Schedule, and Address Autocomplete.

Most columns have a filter and a sort. If you make a change on a page and have not run the update, a warning will appear to discard the changes and proceed with the filter or sort change, or to disregard the filter or sort change.

- The filter is used to refine the rows that you see in the current view, which will reset the page to page one if you were positioned on a different page number. You can enter multiple filters by entering values in more than one column to further refine what is displayed.
  - The Status filter is a dropdown list. It is key to finding the rows that need to be updated.
- The sort is available on most columns. It sorts columns in ascending to descending order by default. The sort can be used in tandem with the filter.

Next and Previous buttons are available to page among the pages. Because of the volume of data that is loaded in the Common Tags Utility for an organization, you can only make changes on the active page. If you make a change on a page and try to navigate to a new page and have not run the update, a warning will appear to discard the changes and proceed with the page change, or to disregard the page change and stay on the current page.

A Number of Rows option is available to set the number of rows shown on all views. It defaults to 25 rows. The minimum is 5 rows, the maximum is 100 rows.

**IMPORTANT!** Make sure the **Enable Common Tags Utility** check box on the Admin tab in Groups is checked.

## Common Tag Name – Global View

The Common Tag Name global view displays all valid field types with a current status and a field count. The goal of this view is to associate a common tag with a field name. Each row can be updated by selecting a Proposed Common Tag when applicable and setting the Status to either Approved or Rejected. You can also request a new common tag.

Common Tag Utility - FL Access Carrier

Common Tag Utility

Common Tag Name

Common Tag List Name

DISCARD

UPDATE

Global View

Status	Field Name	Existing Common Tag	Group	Proposed Common Tag	Field Count	Request New
<div>▼</div>	<div></div>	<div></div>		<div></div>		
Proposed <div>▼</div>	<a href="#">Annuitant_EmpDetails_TimeEmployed</a>		Annuitant	Annuitant_EmpDetails_TimeEmployed <div>▼</div>	19	<div>NEW</div>
Proposed <div>▼</div>	<a href="#">Annuitant_EmpDetails_Zipcode</a>		Annuitant	Annuitant_EmpDetails_Zipcode <div>▼</div>	19	<div>NEW</div>
Proposed <div>▼</div>	<a href="#">Annuitant_EmpStatus</a>		Annuitant	Annuitant_EmpStatus <div>▼</div>	19	<div>NEW</div>
Unassigned <div>▼</div>	<a href="#">Annuitant_ExpDate</a>			<div>▼</div>	1	<div>NEW</div>
Proposed <div>▼</div>	<a href="#">Annuitant_FirstName</a>		Annuitant	Annuitant_FirstName <div>▼</div>	43	<div>NEW</div>
Valid <div>▼</div>	<a href="#">Annuitant_FirstName</a>	Annuitant_FirstName	Annuitant	<div>▼</div>	1	
Unassigned <div>▼</div>	<a href="#">ANNUITANT_FNAME</a>			<div>▼</div>	3	<div>NEW</div>
Invalid <div>▼</div>	<a href="#">Annuitant_Gender_0</a>	Annuitant_Gender	Annuitant	<div>▼</div>	1	
Proposed <div>▼</div>	<a href="#">Annuitant_Gender</a>		Annuitant	Annuitant_Gender <div>▼</div>	2	<div>NEW</div>

PREVIOUS

Page 67 of 354

25 rows

▼

NEXT

## Columns

There are two columns that can be changed, Status and Proposed Common Tag. The following columns are displayed on the Common Tag Name global view:

- **Status** – A dropdown list you can change to the desired result. It is set based on the Field Name, Existing Common Tag, and Proposed Common Tag fields. See the below section for details about each status.
- **Field Name** – Displays the field name, which cannot be changed in the utility. Contains an active link to open the Detail View.

- Existing Common Tag – Displays the current Common Tag Name, which may be blank. It is a display only field that cannot be changed in the utility. It can be set from the Proposed Common Tag field when the update is run.
- Group – Displays the group name of the selected Existing Common Tag Name, such as Owner if the Existing Common Tag is Owner\_FirstName. It is a display only field that cannot be changed in the utility.
- Proposed Common Tag – A dropdown list you can change to the desired result. If the status is set to Proposed, it will contain a default value. To change the value, type text in the search, such as 'phone number' to find a phone number proposed common tag.

It is highlighted when you change it, so you know which rows you are currently working on. Once the update is run, the value will be cleared and no longer highlighted.

**Note:** if the status is set to Approved, Rejected or In Review and you select a value and then click the UPDATE button, the value will be cleared and ignored.

- Field Count – Displays the total field count for all instances of the field name in the row. This is based on the Status, Field Name, and Existing Common Tag. It is a display only field that cannot be changed in the utility.

For example, there is a row with a field count of 20 that has a field name of ClientSex, no existing common tag and a status of Unassigned. This indicates that there are 20 instances of the field name ClientSex in multiple forms and/or wizards.

- Request New – This button allows a user to request a new common tag based on the current field name. When selected, a dialog opens to enter a description of the field. Please include all pertinent data that will assist in the decision to add it as a common tag to the data dictionary. When you click OK after entering the description, the status automatically changes to In Review and is saved when the UPDATE button is selected. Once a description has been entered, the button changes from NEW to an ellipsis so you can open it again. Note that the NEW button only appears on Proposed and Unassigned status rows.

## Statuses

The status column is pre-set by the utility when it is opened. There are two statuses to focus on when adding common tags to fields, Proposed and Unassigned. There are two statuses you can set fields to after determining if a common tag should be added or not, Approved and Rejected. See below for details about each status.

The status column is key to finding the rows that need to be updated. Use the dropdown list filter at the top of the row to refine the results.

When the utility is opened the following statuses may appear in one or more rows:

- Proposed – The Existing Common Tag is blank, and the search returns a value in the Proposed Common Tag field.

Note that there can only be one proposed common tag shown in the Proposed Common Tag field, so it may not be correct, but you can change it by typing and search for the correct value. You can also clear the value if no value applies.

- **Unassigned** – The search does not return a proposed value in the Proposed Common Tag and the Existing Common Tag is blank.

You can search for and select a Proposed Common Tag when it applies and change the status to Approved, or if no common tag applies, you can set the Status to Rejected.

- **Invalid** – The Field Name and Common Tag Name are different, and the Existing Common Tag is set to a value.

If you have named any field names to something other than an existing common tag, you will see this status in those rows. It is not incorrect to have a status of invalid. You do not need to change these rows to an Approved status since the Existing Common Tag is set, but it is acceptable when preferred.

- **Valid** – Field Name and Common Tag Name are an exact match.

You do not need to change these rows to an Approved status since the Existing Common Tag is set and matches the field name, but it is acceptable when preferred.

There are three statuses that users can choose from:

- **Approved** – Selected by the user when the Proposed Common Tag field is set to a value or when an Existing Common Tag has already been set to a value.

This status allows you to know which rows have been reviewed and approved. It is highlighted when you change it to Approved so you know which rows you are currently working on. Once the update is run, the status will be changed to Approved and no longer highlighted. You can also change a Rejected status to Approved if it applies.

- **Rejected** – Selected by the user when an Existing Common Tag is blank and does not apply. Note if the Proposed Common Tag field contains a value, it will be cleared when the row is updated to a rejected status through the UPDATE button.

This status allows you to know which rows do not have a common tag since it does not always apply. It is highlighted when you change it to Rejected so you know which rows you are currently working on. Once the update is run, the status will be changed to Rejected and no longer highlighted. You can also change an Approved status to Rejected if it applies.

- **In Review** – The status is changed to In Review when the NEW button is selected to request a new common tag. The Insurance Technologies governance team will review your request and notify you if it is accepted and added or denied. You can also change an In Review status to Approved or Rejected if it applies.

## Common Tag Name – Detail View

The Common Tag Name detail view opens when you click on the link of a Field Name. It displays all instances of the selected row by Form / Wizard Name and Page Name. For example, if the Field Count on the global view is 10, when the detail view is opened you will see 10 rows, unless a duplicate field exists on the same page, then a field count will be shown greater than 1 in the details for those rows and less than 10 rows will appear.

You can use this view for reference purposes only to see where the field names are located, or you can optionally update one or more rows individually when it applies. For example, both life and annuity products may apply, where some will be set to Insured\_FirstName and others will be set to Annuitant\_FirstName. Once any row is updated in the detail view and the dialog is closed, the global view will be updated to reflect the changes.

The detail view displays all valid field types with a current status. These can be updated by selecting a Proposed Common Tag when applicable and setting the Status to either Approved or Rejected. You cannot request a new common tag from the detail view.

**Common Tag Details**

**Common Tag Utility**

DISCARD
UPDATE

**Detail View**

Status	Field Name	Existing Common Tag	Group	Proposed Common Tag	Form/Wizard Name	Page Name	Field Count
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	iSured Lifetime Income Appli...	Client ...	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	NonNatural Ownership	Page 1	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Test Wizard	Client	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Annuity App Autofill Wiz...	Annuit...	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Test Workflow Separator	Annuit...	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	1035 EXCHANGEROLLOVERT...	Page 1	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Life Template Wiza...	Insured	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Application_exported fro...	Page 1	1
Proposed	Annuitant_FirstName		Annuitant	Annuitant_FirstName	Annuity Wizard	Annuit...	1

PREVIOUS

Page 1 of 2

25 rows
NEXT

CLOSE

If you have not run the UPDATE when the detail view is closed by selecting CLOSE, a warning will appear. Select OK to discard any changes on the page and proceed or select CANCEL to stay on the page and retain your changes.

**Navigation Warning**

Changes will be discarded if you click OK. Do you wish to proceed? Click OK to continue and discard your changes or Cancel to stay on this page.

CANCEL
OK



## Columns

There are two columns that can be changed, Status and Proposed Common Tag. The following columns are displayed on the Common Tag Name detail view:

- **Status** – A dropdown list you can change to the desired result. It is set based on the Field Name, Existing Common Tag, and Proposed Common Tag fields. See the below section for details about each status.
- **Field Name** – Displays the field name, which cannot be changed in the utility.
- **Existing Common Tag** – displays the current Common Tag Name, which may be blank. It is a display only field that cannot be changed in the utility. It can be set from the Proposed Common Tag field when the update is run.
- **Group** – Displays the group name of the selected Existing Common Tag Name, such as Owner if the Existing Common Tag is Owner\_FirstName. It is a display only field that cannot be changed in the utility.
- **Proposed Common Tag** – A dropdown list you can change to the desired result. If the status is set to Proposed, it will contain a default value. To change the value, type text in the search, such as 'phone number' to find a phone number proposed common tag.

It is highlighted when you change it, so you know which rows you are currently working on. Once the update is run, the value will be cleared and no longer highlighted.

**Note:** if the status is set to Approved, Rejected or In Review and you select a value and then click the UPDATE button, the value will be cleared and ignored.

- **Form/Wizard Name** – Displays the name of the form or wizard where the field name is located.
- **Page Name** – Displays the page name where the field name is located.

**Tip:** Form page names are Page 1, Page 2, Page 3, etc. Wizard page names have the text name entered in the wizard designer. This helps determine which is on a form verses a wizard if you are using both forms and wizards in your organization and looking for the correct fields.

- **Field Count** – Displays the total field count for all instances of the field name in the row. This is based on the Status, Field Name, and Existing Common Tag along with the Form/Wizard Name and Page Name. It is a display only field that cannot be changed in the utility.

The field count will typically be 1 unless you have a page with the same field name in a form or wizard. Then the field count will be 2 or more.

## Statuses

The status column is pre-set by the utility when it is opened. There are two statuses to focus on when adding common tags to fields, Proposed and Unassigned. There are two statuses you can set fields to after determining if a common tag should be added or not, Approved and Rejected. See below for details about each status.

The status column is key to finding the rows that need to be updated. Use the dropdown list filter at the top of the row to refine the results.

When the utility is opened the following statuses may appear in one or more rows:

- **Proposed** – The Existing Common Tag is blank, and the search returns a value in the Proposed Common Tag field.

Note that there can only be one proposed common tag shown in the Proposed Common Tag field, so it may not be correct, but you can change it by typing and search for the correct value. You can also clear the value if no value applies.

- **Unassigned** – The search does not return a proposed value in the Proposed Common Tag and the Existing Common Tag is blank.

You can search for and select a Proposed Common Tag when it applies and change the status to Approved, or if no common tag applies, you can set the Status to Rejected.

- **Invalid** – The Field Name and Common Tag Name are different, and the Existing Common Tag is set to a value.

If you have named any field names to something other than an existing common tag, you will see this status. It is not incorrect to have a status of invalid. Since the Existing Common Tag is set, you do not need to change the status to Approved, but it is acceptable when preferred.

- **Valid** – Field Name and Common Tag Name are an exact match.

You do not need to change these rows to an Approved status since the Existing Common Tag is set and matches the field name, but it is acceptable when preferred.

There are three statuses that users can choose from:

- **Approved** – Selected by the user when the Proposed Common Tag field is set to a value or when an Existing Common Tag has already been set to a value.

This status allows you to know which rows have been reviewed and approved. It is highlighted when you change it to Approved so you know which rows you are currently working on. Once the update is run, the status will be changed to Approved and no longer highlighted. You can also change a Rejected status to Approved if it applies.

- **Rejected** – Selected by the user when an Existing Common Tag is blank and does not apply. Note if the Proposed Common Tag field contains a value, it will be cleared when the row is updated to a rejected status through the UPDATE button.

This status allows you to know which rows do not have a common tag since it does not always apply. It is highlighted when you change it to Rejected so you know which rows you are currently working on. Once the update is run, the status will be changed to Rejected and no longer highlighted. You can also change an Approved status to Rejected if it applies.

- In Review – The status is changed to In Review when the NEW button is selected to request a new common tag. The Insurance Technologies governance team will review your request and notify you if it is accepted and added or denied. You can also change an In Review status to Approved or Rejected if it applies.

## Common Tag List Name – Global View

The Common Tag List Name global view displays all valid field types that have an Existing Common Tag and an associated list. The goal of this view is to link the list name values to a common tag list name. This applies to dropdown list, combo box, check box and radio button field types with an associated common tag name. If an Existing Common Tag has not been added to the Field Name, first add it on the Common Tag Name view. Once that step is complete, it will appear in Common Tag List Name global view.

Each row can be updated by selecting a Proposed Common List Name when applicable and setting the Status to either Approved or Rejected. You can also request a new common tag list name.

**Note:** Many Checkbox and Radio Buttons fields do not need a common tag name, they only need an export value. If no common tag name is selected, they will not appear in this view. If a common tag is selected only one list name value applies, which will be the original export value. This may or may not map to a list name value for the selected common tag. If one of the values applies to the export value, select it in the Proposed Common List Name, change the status to Approved and run the update. If nothing applies, change the status to Rejected and run the update.

Common Tag Utility - FL Access Carrier									
Common Tag Utility									
Common Tag Name		Common Tag List Name							
Global View								DISCARD	UPDATE
Status	Field Name	Existing Common Tag	Group	Existing Caption	Rules Override	Caption Override	Proposed Common List Name	List Count	Request New
Approved	Annuitant_Relationship	Annuitant_Relationship	Annuitant	Child	Child			1	
Approved	Annuitant_Relationship	Annuitant_Relationship	Annuitant	Grandchild	Grandchild			1	
Approved	Annuitant_Relationship	Annuitant_Relationship	Annuitant	Trustee	Trustee			1	
Rejected	Annuitant_Relationship	Annuitant_Relationship	Annuitant	Trust	Trust			1	
Proposed	Annuitant_Type	Annuitant_Type	Annuitant	Same As Own...	-3		Same as Owner(s)	1	NEW
Valid	Annuitant_Type	Annuitant_Type	Annuitant	Individual	-1			1	
Valid	Annuitant_Type	Annuitant_Type	Annuitant	Joint	-2			1	
Approved	Annuity_Hypothetical_RateType	Annuity_Hypothetical_RateType	Annuity	Gross	G			2	
Approved	Annuity_Hypothetical_RateType	Annuity_Hypothetical_RateType	Annuity	Net	N			2	
Proposed	Annuity_TaxQualification	Annuity_TaxQualification	Annuity	Inherited IRA	-1		IRA - Inherited	1	NEW

## Columns

There are two columns that can be changed, Status and Proposed Common List Name. The following columns are displayed on the Common Tag List Name global view:

- **Status** – A dropdown list you can change to the desired result. It is set based on the Field Name, Existing Common Tag, Existing Caption, Rules Override and Proposed Common List Name fields. See the below section for details about each status.
- **Field Name** – Displays the field name, which cannot be changed in the utility. Contains an active link to open the Detail View.
- **Existing Common Tag** – Displays the current Common Tag Name. It is a display only field that cannot be changed in the utility.
- **Group** – Displays the group name of the selected Existing Common Tag Name, such as Owner if the Existing Common Tag is Owner\_Gender. It is a display only field that cannot be changed in the utility.
- **Existing Caption** – Displays the existing caption for the field name and existing common tag, which may be blank.
- **Rules Override** – If applicable, displays the export value.

In previous FireLight list formats, in dropdown list and combo box fields this is the value after the pipe. For example, old list format entered was Alabama|AL, where AL is the export value. In checkbox and radio button fields this is the export value entered in the field properties.

Note that this may be set to the caption if the value was blank.

- **Caption Override** – If applicable, displays a value that is different than the existing caption. This is what the user sees in the list in the App.

The Caption Override can be set in the form and wizard designers list dialog or in the utility. In the utility, when a Proposed Common List Name is selected and approved and the update is run, the Proposed Common List Name becomes the Existing Caption, and the original value is copied to the Caption Override if it is different. For example, the old list format entered for the state of Alabama was AL, which was the caption. When the update is run, the Existing Caption will be Alabama and the Caption Override will be AL.

- **Proposed Common List Name** – A dropdown list you can change to the desired result. If the status is set to Proposed, it will contain a default value. To change the value, type text in the search, such as 'texas' to find a state of Texas in the proposed common list name.

The list that appears on the Proposed Common List Name is the list associated with the Existing Common Tag. For example, if the existing common tag is Owner\_Gender, the list will contain all the common genders, Female, Intersex, Male, None, Other, Unisex.

It is highlighted when you change it, so you know which rows you are currently working on. Once the update is run, the value will be cleared and no longer highlighted.

**Note:** if the status is set to Approved, Rejected or In Review and you select a value and then click the UPDATE button, the value will be cleared and ignored.

- **List Count** – Displays the total list count for all instances of the field name with the existing caption in the row. This is based on the Status, Field Name, Existing Common Tag, Existing Caption and Rules Override. It is a display only field that cannot be changed in the utility.  
For example, there is a row with a list count of 20 that has a field name of ClientMailingState, the Existing Common Tag is Insured\_MailingAddress\_State, and the Existing Caption is AL with a status of Proposed. This indicates that there are 20 instances of the field name and common tag with an existing caption of AL in multiple forms and/or wizards. The Proposed Common List Name in this example should be preset to Alabama.
- **Request New** – This button allows a user to request a new common tag list name based on the Existing Common Tag selected for the Field Name. When selected, a dialog opens to enter a description of the field. Please include all pertinent data that will assist in the decision to add it as a common tag list name to the data dictionary. When you click OK after entering the description, the status automatically changes to In Review and is saved when the UPDATE button is selected. Once a description has been entered, the button changes from NEW to an ellipsis so you can open it again. Note that the NEW button only appears on Proposed and Unassigned status rows.

## Statuses

The status column is pre-set by the utility when it is opened. There are two statuses to focus on when adding common tag list names to fields, Proposed and Unassigned. There are two statuses you can set fields to after determining if a common tag list name should be added or not, Approved and Rejected. See below for details about each status.

The status column is key to finding the rows that need to be updated. Use the dropdown list filter at the top of the row to refine the results.

When the utility is opened the following statuses may appear in one or more rows:

- **Proposed** – The Existing Caption is not equal to a name in the list for the associated common tag, and the search returns a value in the Proposed Common List Name field.  
Note that there can only be one proposed common list value shown in the Proposed Common List Name field, so it may not be correct, but you can change it by typing and search for the correct value. You can also clear the value if no value applies.
- **Unassigned** – The search does not return a proposed list value in the Proposed Common List Name and the Existing Caption is not equal to a name in the list for the associated common tag.

You can search for and select a Proposed Common List Name when it applies and change the status to Approved, or if no common list name applies, you can set the Status to Rejected.

- Valid – Existing Caption and a caption in the list for the associated common tag are an exact match.

For example, the Existing Common Tag is Insured\_MailingAddress\_State, and the Existing Caption is Alabama.

You do not need to change these rows to an Approved status since the Existing Caption is set and matches a list name for the associated common tag, but it is acceptable when preferred.

There are three statuses that users can choose from:

- Approved – Selected by the user when the Proposed Common List Name field is set to a value or when an Existing Caption has already been set to a value.

This status allows you to know which rows have been reviewed and approved. It is highlighted when you change it to Approved so you know which rows you are currently working on. Once the update is run, the status will be changed to Approved and no longer highlighted. You can also change a Rejected status to Approved if it applies.

- Rejected – Selected by the user when an Existing Caption is blank or is not equal to a name in the list for the associated common tag and the available list name values do not apply. Note if the Proposed Common List Name field contains a value, it will be cleared when the row is updated to a rejected status through the UPDATE button.

This status allows you to know which rows do not have a common tag list name since it does not always apply. It is highlighted when you change it to Rejected so you know which rows you are currently working on. Once the update is run, the status will be changed to Rejected and no longer highlighted. You can also change an Approved status to Rejected if it applies.

- In Review – The status is changed to In Review when the NEW button is selected to request a new common tag list name. The Insurance Technologies governance team will review your request and notify you if it is accepted and added or denied. You can also change an In Review status to Approved or Rejected if it applies.

## Common Tag List Name – Detail View

The Common Tag List Name detail view opens when you click on the link of a Field Name. It displays all the instances of the selected row by Form / Wizard Name and Page Name. For example, if the List Count on the global view is 10, when the detail view is opened you will see 10 rows, unless a duplicate field exists on the same page, then a list count will be shown greater than 1 in the details for those rows and less than 10 rows will appear.

You can use this view for reference purposes only to see where the field names are located, or you can optionally update one or more rows individually when it applies. Once any row is updated in the detail view and the dialog is closed, the global view will be updated to reflect the changes.

The detail view displays all valid field types with a current status. Each row can be updated by selecting a Proposed Common List Name when applicable and setting the Status to either Approved or Rejected. You cannot request a new common tag from the detail view.

Common Tag Details										
Common Tag Utility										
<span>DISCARD</span> <span>UPDATE</span>										
Detail View										
Status	Field Name	Existing Common Tag	Group	Existing Caption	Rules Override	Caption Override	Proposed Common List N...	Form/Wizard Name	Page Name	List Count
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	TD Third-Party In...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Multi data Life Ins...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Client Coversheet	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Application	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Life Insurance Ap...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Ravinder Applicati...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	CC Signature De...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Test Form Multipl...	Page 1	1
Proposed	Owner_Residential...	Owner_Residentia...	Owner	AL			Alabama	Application222	Page 1	1

PREVIOUS
Page 1 of 1
25 rows
NEXT

CLOSE

If you have not run the UPDATE when the detail view is closed by selecting CLOSE, a warning will appear. Select OK to discard any changes on the page and proceed or select CANCEL to stay on the page and retain your changes.

Navigation Warning	
Changes will be discarded if you click OK. Do you wish to proceed? Click OK to continue and discard your changes or Cancel to stay on this page.	
<span>CANCEL</span> <span>OK</span>	

## Columns

There are two columns that can be changed, Status and Proposed Common List Name. The following columns are displayed on the Common Tag List Name detail view:

- **Status** – A dropdown list you can change to the desired result. It is set based on the Field Name, Existing Common Tag, Existing Caption, Rules Override and Proposed Common List Name fields. See the below section for details about each status.
- **Field Name** – Displays the field name, which cannot be changed in the utility.
- **Existing Common Tag** – displays the current Common Tag Name. It is a display only field that cannot be changed in the utility.
- **Group** – Displays the group name of the selected Existing Common Tag Name, such as Owner if the Existing Common Tag is Owner\_Gender. It is a display only field that cannot be changed in the utility.
- **Existing Caption** – Displays the existing caption for the field name and existing common tag, which may be blank.



- Rules Override – If applicable, displays the export value.

In previous FireLight list formats, in dropdown list and combo box fields this is the value after the pipe in the list. For example, old list format entered was Alabama|AL, where AL is the export value. In checkbox and radio button fields this is the export value entered in the field properties.

Note that this may be set to the caption if the value was blank.

- Caption Override – If applicable, displays a value that is different than the existing caption. This is what the user sees in the list in the App.

The Caption Override can be set in the form and wizard designers list dialog or in the utility. In the utility, when a Proposed Common List Name is selected and approved and the update is run, the Proposed Common List Name becomes the Existing Caption, and the original value is copied to the Caption Override if it is different. For example, the old list format entered for the state of Alabama was AL, which was the caption. When the update is run, the Existing Caption will be Alabama and the Caption Override will be AL.

- Proposed Common List Name – A dropdown list you can change to the desired result. If the status is set to Proposed, it will contain a default value. To change the value, type text in the search, such as 'Texas' to find a state of Texas in the proposed common list name.

The list that appears on the Proposed Common List Name is the list associated with the Existing Common Tag. For example, if the existing common tag is Owner\_Gender, the list will contain all the common genders, Female, Intersex, Male, None, Other, Unisex.

It is highlighted when you change it, so you know which rows you are currently working on. Once the update is run, the value will be cleared and no longer highlighted.

**Note:** if the status is set to Approved, Rejected or In Review and you select a value and then click the UPDATE button, the value will be cleared and ignored.

- Form/Wizard Name – Displays the name of the form or wizard where the field name is located.
- Page Name – Displays the page name where the field name is located.

**Tip:** Form page names are Page 1, Page 2, Page 3, etc. Wizard page names have the text name entered in the wizard designer. This helps determine which is on a form verses a wizard if you are using both forms and wizards in your organization and looking for the correct fields.

- List Count – Displays the total list count for all instances of the field name in the row. This is based on the Status, Field Name, Existing Common Tag, Existing Caption and Rules Override along with the Form/Wizard Name and Page Name. It is a display only field that cannot be changed in the utility.

The list count will typically be 1 unless you have a page with the same field name and existing caption in a form or wizard. Then the list count will be 2 or more.



## Statuses

The status column is pre-set by the utility when it is opened. There are two statuses to focus on when adding common tag list names to fields, Proposed and Unassigned. There are two statuses you can set fields to after determining if a common tag list name should be added or not, Approved and Rejected. See below for details about each status.

The status column is key to finding the rows that need to be updated. Use the dropdown list filter at the top of the row to refine the results.

When the utility is opened the following statuses may appear in one or more rows:

- **Proposed** – The Existing Caption is not equal to a name in the list for the associated common tag, and the search returns a value in the Proposed Common List Name field.

Note that there can only be one proposed common list value shown in the Proposed Common List Name field, so it may not be correct, but you can change it by typing and search for the correct value. You can also clear the value if no value applies.

- **Unassigned** – The search does not return a proposed list value in the Proposed Common List Name and the Existing Caption is not equal to a name in the list for the associated common tag.

You can search for and select a Proposed Common List Name when it applies and change the status to Approved, or if no common list name applies, you can set the Status to Rejected.

- **Valid** – Existing Caption and a caption in the list for the associated common tag are an exact match.

For example, the Existing Common Tag is Insured\_MailingAddressState, and the Existing Caption is Alabama.

You do not need to change these rows to an Approved status since the Existing Caption is set and matches a list name for the associated common tag, but it is acceptable when preferred.

There are three statuses that users can choose from:

- **Approved** – Selected by the user when the Proposed Common List Name field is set to a value or when an Existing Caption has already been set to a value.

This status allows you to know which rows have been reviewed and approved. It is highlighted when you change it to Approved so you know which rows you are currently working on. Once the update is run, the status will be changed to Approved and no longer highlighted. You can also change a Rejected status to Approved if it applies.

- **Rejected** – Selected by the user when an Existing Caption is blank or is not equal to a name in the list for the associated common tag and the available list name values do not apply. Note if the Proposed Common List Name field contains a value, it will be cleared when the row is updated to a rejected status through the UPDATE button.

This status allows you to know which rows do not have a common tag list name since it does not always apply. It is highlighted when you change it to Rejected so you know which rows you are currently working on. Once the update is run, the status will be changed to Rejected and no longer highlighted. You can also change an Approved status to Rejected if it applies.

- **In Review** – The status is changed to In Review when the NEW button is selected to request a new common tag list name. The Insurance Technologies governance team will review your request and notify you if it is accepted and added or denied. You can also change an In Review status to Approved or Rejected if it applies. You will see the new common list items at the top of the list unselected, and the existing list items directly following, each selected.

## Merging List after Common Tag is Added

When a common tag is added to a field with an existing list, the common list items for the selected common tag are added to the list. By default, they are not selected. The goal is to merge the existing list with the new common list items where there is an equivalent choice.

**Tip:** The utility is designed to only show the selected items in the list. If desired, before the list is merged, open the form or wizard designer and edit the properties of the applicable field to see the full list.

When the update is run, the utility will move the Proposed Common List Name to the Existing Caption and if applicable, the Existing Caption to the Caption Override. After selecting the Approved status and UPDATE, each row will be merged into a single row. For example, if a state field contains the abbreviated states, AK, AL, AR, AZ, etc. When the common tag is added, the list now also contains Alaska, Alabama, Arkansas, Arizona, etc. After the update, there will be one row for each state. This can be verified by opening the form or wizard designer and editing the field properties and reviewing the merged list.

**Note:** If a list contains a {blank} to insert a blank row as the default at the top of the list, or values not contained in the common list, set the status to Rejected and select UPDATE.

## Updates

Update processes and saves all changes on the current page by selecting the UPDATE button. Once all your changes are made to the Status and optionally to the Proposed Common Tag field or Proposed Common List Name field, select UPDATE. The changes are processed immediately, and the changed values are updated in both the utility as well as in the field properties in the form and wizard designers. If you have an active filter on the page, you may not see your changes after the update is run. You may need to alter the filter or refresh the page to clear the filter.

Because of the volume of data that is loaded in the Common Tags Utility for an organization, you can only make changes on the active page. If you try to navigate to another page or change the filter or sort after you have started to make changes, a warning will appear.

Navigation Warning	
Changes will be discarded if you click OK. Do you wish to proceed? Click OK to continue and discard your changes or Cancel to stay on this page.	
<div> <div>CANCEL</div> <div>OK</div> </div>	

Select OK to discard any changes on the page and proceed or select CANCEL to stay on the page and retain your changes.

**Note:** an update cannot be processed without changing the status to a valid option.