iConnect 147003 Support Uploaded Signature Controls

Project Overview

This enhancement will allow the use of dynamically placed signature controls on template forms. FireLight will scan uploaded template documents for hidden labels which contain data in the form of json. The json will contain the metadata for signature controls to be added to the application template form. The signature metadata for the uploaded form will be used to place signatures on the form template in the edit application view and pdf view of the application.

Features/Requirements

- The uploaded pdf will contain the hidden metadata for the signature controls in the form of json.
- Metadata will include the control type, dataitemid, group name, height, left, signer type, top, and width. For example:
  <text xml:space="preserve" x="37.5" y="433.25" font-size="1" font-family="ArialMT" fill="rgb(255, 0, 0)" textLength="60.42" xmlns="http://www.w3.org/2000/svg">{ "ControlType": 0, "DataItemId": "Owner_Signature", "GroupName": "Owner_Signature", "Height": 72, "SignerType": 16, "Width": 216 }</text>
- FireLight will scan uploaded document for signature control metadata for use in creation of signature controls on template form
- If metadata is not found, original signature controls on form library template form will be used
- Signature control metadata will be used to place signatures on the template form in the edit application and pdf view of the application
- Package form rules will have access to uploaded signature controls to enable/disable signatures when application is active

Use Cases / Workflow Changes

The ability to add hidden signature controls to an uploaded document will allow for greater flexibility for uploaded illustrations. For illustrations where the length of the document is variable, this allows the signature controls to be placed at the end of the illustration, for example, without knowing in advance the exact location for these signature controls on the template form.

Template form will be included in the package within the Admin tool. This template form may have signature controls for use when uploaded document does not contain hidden signature controls. As currently happens, the template form will be replaced during the edit application process with the use of the upload feature. To upload a document, the user navigates to Other Actions/Documents, selects the template tag from the document type drop-down menu, and uploads the desired document. In order to make use of the dynamically placed signature controls, the uploaded document must have hidden tags which contain the necessary metadata for creating the signature controls embedded within the pdf. FireLight will then use this metadata to create the necessary signature controls to use in place of any controls that may have been added to the original template form.

Admin Changes

No changes required.

App Changes

- FireLight will scan uploaded template document for hidden fields containing signature control metadata.
- If signature control metadata is found, the data will be stored in the application form table- new column added for metadata.
- Form model will be updated to replace form definition from original template stored in the form library with the new metadata in the application form table. This definition will then be used for the rules engine to enable/disable signature controls, the edit application view for displaying disabled signature controls, and signing ceremony for signature placement on the final pdf.

Integration Changes

None

How to Enable and Use This Feature

- Create application package within the Admin and include a form that has been designated as a template form in the Forms tab.
- Within the edit application process in the FireLight App Portal, select Documents from the Other Actions drop-down menu.
- Select the template document tag in the Document Type drop-down menu.
- Upload the pdf that has the invisible metadata within the document.
- Close the upload dialog box and then verify that the disabled signature controls are based on the metadata sent in the uploaded document in the edit application view during active and locked status, Display/Print PDF view, and the signature process.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**		
- **Profile Administration**		
- **Reports**		

- **Deployment**		
FireLight App		
- **New Application**		
- **Edit Application**		Uploaded signature controls visible, previous controls deleted
- **Signature Process**		Uploaded signature controls should change list of signers and location of new signature controls on the uploaded template forms.
- **Review Queue**		
- **Manual Review**		
- **User Preferences**		
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		Uploaded signature controls should be visible, previous controls deleted
- **Email System**		
FireLight Console		
- **Windows**		
- **iOS**		
Other Systems		
- **DTCC Integration**		
- **Commission Netting**		
- **Activity Reporting**		