

## iConnect 157517 Design Approach – Improved Mapping Functionality

### Project Overview

Add simplified mapping feature to the Admin Tool for Inbound data. This will support mapping data from another source, such as ForeSight or Salesforce, to FireLight.

### Features/Requirements

1. Must be located in the Admin Tool.
2. Target audience – Business Analysts; assumes user has knowledge of ACORD.
3. Inbound data only.
4. Mapping will be to common tags.
5. Includes these ACORD transactions: tx103
6. Expose carrier common tags to distributors.
7. Add ability to translate all export values.
  - a. Convert OLife enumeration export values.
8. Add ability to map trigger data items.
9. Conditional mappings based on rules.
10. Map single ACORD value to multiple values when applicable.
11. Maintain support of existing Provider mapping code; support backwards compatibility.
12. Support combining mappings with existing Provider mapping code. If applicable, Provider will override any defined mappings, or if not defined, may be concatenated to the Admin Tool mappings.

### Out of Scope – Day 2

1. Outbound data.
2. Advanced mode – add some type of mode for our advanced users.
3. Includes these ACORD transactions: tx1228, tx216, tx105, tx113, tx107.
4. Add OLife extensions.
5. Provide migration path for existing clients.

### Use Cases / Workflow Changes

Before the app calls into the provider to set the dataitems, we will grab auto-mapping information from the database. In addition, uses that information to set default dataitems.

### Admin Changes

Added Organization Setting to enable AutoMapping.

Allow E-Approval	<input checked="" type="checkbox"/>	Allow E-Signature	<input checked="" type="checkbox"/>
Allow Client E-Fill	<input checked="" type="checkbox"/>	Allow Client Fill & Sign	<input checked="" type="checkbox"/>
Use Enhanced Security	<input type="checkbox"/>	Allow NIGO Printing	<input type="checkbox"/>
Allow Submit on E-Sign Decline	<input checked="" type="checkbox"/>	Print Submitted Only	<input checked="" type="checkbox"/>
Prevent Email Editing	<input type="checkbox"/>	Allow Branding of UI	<input checked="" type="checkbox"/>
Validate Identity Verification	<input type="checkbox"/>	Use DMARC	<input checked="" type="checkbox"/>
Enable Force Deploy	<input type="checkbox"/>	Validate rule name for uniqueness	<input type="checkbox"/>
<b>Enable AutoMapping</b>	<input checked="" type="checkbox"/>		
Requests Timeout	<input type="text" value="15"/>	days (0 for never)	

## Integration Changes

Provider will need to be aware of changes, and overwrite any unwanted data items added through auto mapping.

## How to Enable and Use This Feature

Enable AutoMapping on Admin.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration	Y	Organization Setting Added.
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application	Y	Added AutoMapping when creating a new application
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		

- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		