

DataXchange Online
SmartLink for iPipeline
User Guide

SmartOffice®



Copyright © 2005, E-Z Data, Inc., All Rights Reserved

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street

Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

Table of Contents

Introduction	1
License and Roles	1
Initial Load.....	2
Other Notes.....	3
Registering for DataXchange Online.....	3
Automatic Sequence Updates	4
SmartLink for iPipeline Logs.....	4

Introduction

DataXchange Online – SmartLink for iPipeline populates Agency and Advisor/Agent’s SmartOffice systems with data coming from iPipeline, a data provider of carrier information that includes related standard plans, forms, underwriting guidelines and vendor requirement information. With iPipeline being a leading data provider, information is available for several carriers in the insurance industry.

General information about the carrier that is provided in the feeds includes NAIC ID, Age Calculation and States in which the carrier is approved to do business in. The standard underwriting guidelines available in the feed are carrier and gender specific. The Plan Types supported are Term Life, Permanent Life, Annuity and Long Term Care. Form Types include replacement forms, applications and questionnaires.

The feed saves an enormous amount of time from having to manually enter standard related carrier information required for pending case and policy data.

License and Roles

1. To run the SmartLink for iPipeline Feed, verify if your Office record Resource Database field is set to **Yes**. If not, request the SmartOffice System Administrator to make the change.

Note: For a new user, the Last Sequence No. field data is expected to be blank. The image below displays an existing user of the feed.

Office Administration - Demo Office	
Detail (P)	Licenses
User Groups	Users List
Department/Team Hierarchy	User Creation Defa
General Information	
Office Name demo	
Office Full Name Demo	
Abbreviation demo	Office Status Active
Street Line1	
Line2	City
State/Province	ZIP Code/Postal Code
Country	E-mail Address
Phone #	Business Fax
Allow Impersonate <input type="checkbox"/>	
Maximum Users 2	Active Users 1
Date Format	
Resource Database Yes	Last Sequence No. 598
Service	

2. From the Office **Users List** tab, click the **User Roles/Licenses** tab.

- In the DataXchange Online Services section, select **SmartLink for iPipeline** and then click the **Save** button.

User Role	Modules/Licenses
Administrator	Basic
<input checked="" type="checkbox"/> Users/Licenses Administrator	<input checked="" type="radio"/> Base SmartOffice
<input checked="" type="checkbox"/> Access Security Information	<input type="radio"/> Agency Package
<input type="checkbox"/> Enterprise View	SmartPolicies
<input type="checkbox"/> Record Privatization	<input checked="" type="checkbox"/> Policy Tracking
<input type="checkbox"/> Data Import/Export	<input checked="" type="checkbox"/> Pending Case Management
<input type="checkbox"/> DataXchange Enterprise	<input type="checkbox"/> Advisor Contract/License Management
Column Layout Customization	<input checked="" type="checkbox"/> Pending Case & Policy Setup Administrator
<input type="checkbox"/> Office-Level Spreadsheet Customization	<input type="checkbox"/> Show Policy Owner Servicing 'POS' Tab
<input type="checkbox"/> User-Level Spreadsheet Customization	<input type="checkbox"/> Show Policy Claims Tab
Office Setup Options	<input type="checkbox"/> Show Policy Transactions Tab
<input type="checkbox"/> Custom Screen Prompt Customization	DataXchange Online Services
<input type="checkbox"/> Choice Customization	<input type="checkbox"/> Process HO Pending Case Status Information
<input type="checkbox"/> Form Letter Maintenance	<input checked="" type="checkbox"/> SmartLink for iPipeline
<input type="checkbox"/> Word Track Maintenance	
<input type="checkbox"/> Key Relationship Lookup Modification	
<input type="checkbox"/> Faxing	

- With the licenses properly set, the user is ready to process iPipeline feeds.

Initial Load

Initial Load files are created by E-Z Data from a master repository on a per carrier basis. A user may request for one carrier feed at a time or may request for multiple carriers at one time.

The generated Initial Load file is saved as **rdbinit-*<OfficeName>*.def**. Each record in this file contains the same sequence number (found in the first column of each record in the file). Another important attribute of this file is that each carrier in the file will have a header record containing a 'sectionid' value of "100 INITIAL". The SmartOffice implementation person copies the rdbinit-*<OfficeName>*.def file to the user's SmartOffice application server ...\\WEB-INF\\classes folder.

The *<OfficeName>* is replaced with the name of the office where the initial load will be processed into. **Note:** Enter the Office Name exactly the way it appears in SmartOffice; it is case-sensitive.

To process an Initial Load file:

- Prior to running the Initial Load, from the **Office Setup** side menu, select **Office Settings** and verify that the Last Sequence No field is blank. A blank value means that an Initial Load has not been processed for this carrier.
- From the **Policy/PCM Setup** side menu, select the **SmartLink for iPipeline** sub-menu.
- From the Office Summary spreadsheet, select the office where the initial load files are to be processed.
- Click the **Initial Load** button.

Office Summary	
Office Full Name ↑	OfficeID
<input checked="" type="checkbox"/> Demo	8

- Click **Yes** in the confirmation dialog box to start the initial load.

Other Notes

- Once the download process completes, the Initial Load file is deleted from the SmartOffice server ...\\WEB-INF\\classes folder. This prevents users from processing the same file twice.
- Carrier records are automatically created by the Initial Load process. If the carrier record has no Cross Reference data, the process will create a new carrier record. If the carrier Cross Reference data is found, a duplicate record will not be created.
- Open the Office Detail record to find the Last Sequence No updated with a numeric value; open the Carrier Detail record to find the Sequence No updated with the same numeric value.
- Once the initial Load process is complete, future feeds from iPipeline for this carrier are downloaded into SmartOffice automatically through a process called Automatic Sequence Updates. In order to download update sequence files, a valid mailbox login is required to authenticate a user's ability to access files from the DataXchange Server.

Registering for DataXchange Online

Users must phone their E-Z Data customer service representative to register for DataXchange Online services. E-Z Data will assign the user a mailbox on the DataXchange (DX) Server. Users already signed up with the DataXchange Online – Pending Case Download service will have a DX Registration login but will not be able to use the SmartLink for iPipeline Feed unless licensed in SmartOffice to do so.

- SmartOffice users who download iPipeline data for carriers that are found in current offices (or non-system offices) will be able to use the same DX Registration for pending case downloads.
- SmartOffice users who download iPipeline data for carriers that are found in the System Office will need another DX Registration login, aside from the DX Registration login used in their Parent or Child Offices for pending case downloads.

To enter DX Registration information, from the **Policy/PCM Setup** side menu, select **Setup** and then from the Master Setup List, select **DataXchange Setup**.

The screenshot shows a web browser window titled "SmartOffice -- Web Page Dialog". The main content area is titled "Registration Information for DataXchange". On the left, there is a "Master Setup List" sidebar with the following items: Requirements, Follow-Up Requirements, Status Setup, PCM Workflows, DataXchange Setup (highlighted), Auto-Update Exceptions, Registration Information, GA ID Validation, NAJLBA/ACORD Codes, SmartView for Advisor, and Privacy. The main form contains two sections, each with a bullet point instruction and input fields. The first section is for a user login, with fields for "User Name" and "Password", and a checkbox for "Allow Child Office Processing". The second section is for a provider login, with fields for "Landing Zone", "Provider Name", and "Target Mailbox". At the bottom of the form, there is a copyright notice: "© 2000-2005 E-Z Data, Inc. All rights reserved." and a "Close" button.

Automatic Sequence Updates

Update sequence files are intended for existing iPipeline users. The files are typically smaller and contain day-to-day incremental updates for ALL carriers supported by iPipeline. It is important to note that not all data in a file will be used by everyone. For example, if customer ABC is not set up to receive day-to-day updates for carrier XYZ, XYZ records in this file will be ignored when it is processed at the customer ABC site. A difference from an Initial Load file would be the absence of a sectionid value of "100 INITIAL" in update sequence files. This file is named sequence_ *nnn*.def by iPipeline, where *nnn* is numeric (for example, sequence_598.def).

The files are no longer stored in the SmartOffice server. Instead, the update files are received directly from iPipeline and are stored on the DataXchange Server. Based on a specified interval, SmartOffice searches the DataXchange Server iPipeline mailbox for updates and electronically updates SmartOffice records through a background service.

Automatic Sequence Update Logic:

- In order to run automatic sequence updates, aside from the license setup completed above, the Carrier Download Status must be set to **Active**.
- After an Initial Load is processed, both the Office and Carrier Detail records display a Sequence No value. The Office Last Sequence No is used to determine what next file sequence number to look for in the DataXchange Server.
- When a request is made for a new sequence_ *nnn*.def file from the DataXchange Server, the process returns a file containing data with a sequence number which is greater by one than the value of the last processed sequence number found in the Office Last Sequence No. For example, if the Office Last Sequence No is 598, the process will search for an update sequence file containing a sequence number 599.
- Whether updates are found or not found for a carrier in the update sequence file 599, once the carrier record is read in SmartOffice, the sequence number will also be updated to 599.
 - If Carrier ABC has changed to a form found for sequence number 599, the Carrier sequence number is updated to 599.
 - If there are no changes for Carrier DEF in sequence number 599, its sequence number will also be updated to 599. This indicates that the file was read and there are no updates for this carrier.
- If a Sequence file is missing on the DataXchange Server, a row is written to iPipeline logs. These logs can be accessed from the SmartLink for iPipeline Office Summary toolbar.

SmartLink for iPipeline Logs

- The SmartLink for iPipeline Log tracks important events that occur through a download for the Log Types:
 - Initial Load.
 - Automatic Update.
 - Manual Update (The Manual Update button function is used for Product Development and Technical Support purposes and will not be available for live servers).
- The Error Log was an enhancement created to provide an easier way for users to find a report of errors occurring on SmartLink for iPipeline Feeds. The error below means that the next sequence_599 could not be found. This allows E-Z Data to easily report to iPipeline that sequence_599 is missing.

<input type="checkbox"/>	Update Type	Log Date	Sequence Ilo	Logged Message
<input type="checkbox"/>	Automatic Update	11/29/2005 05:54AM	0	Failed to retrieve file [B2BExchange/DEFMailbox/Sequence_0599.def] from DataXchange server.