

DataXchange Online -  
Pending Case Export  
User Guide

# SmartOffice®



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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

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## Introduction

DataXchange Pending Case Export provides the ability within SmartOffice to export pending case status to the member agencies through DataXchange. This export service has the ability to “push” a case that was entered into SmartOffice at the CPU office out to the affiliate offices that are using different Agency Management Systems (AMS).

The DataXchange Pending Case Export Adapter service creates an export file. E-Z Data creates mailboxes for member agencies that sign up for the service who do not yet have a mailbox at the DataXchange server. The Adapter service will distribute the exported file(s) to mailboxes and it is then the responsibility of the various Agency Management Systems to retrieve the file(s) from those mailboxes.

The scope includes:

1. Exporting pending case changed data in ACORD XML format.
2. Providing the ability to transport data to a DataXchange Server landing zone.
3. From this location, the CPU outer-offices will download the exported "XML Pending Case Status File (ACORD XML)" into their AMS system. The CPU outer-offices may use different Agency Management Systems such as IIT, Commerce Agency, Agency Works, or SmartOffice.

## Requirement

DataXchange Pending Case Export is available for SmartOffice v5.0.2 Build # 4311 and subsequent releases.

## Signing Up for DataXchange Pending Case Export

To sign up for the DataXchange Pending Case Export, phone E-Z Data’s Sales Department at (800) 777-9188.

## Data Provider

Once the data provider has completed signing up for the DataXchange Pending Case Export, E-Z Data’s Implementation personnel will arrange to have the DataXchange Pending Case Adapter deployed on the user’s SmartOffice server. The next step is the installation of the Adapter Plug-in in SmartOffice. Once the installation is complete, a DataXchange Pending Case Export license can be assigned for a specific site (URL), office, or user.

## Data Consumer

SmartOffice users who are signed up with the DataXchange Pending Case Download and/or the DataXchange XML Commission Download will already have a mailbox on the DataXchange Server. The same mailbox is used by the Data Provider to send pending case status information to the Data Consumer.

## SmartOffice Setup

The DataXchange Pending Case Export adapter exports data to the following:

- The offices with a license to the DataXchange Pending Case Export. Licenses are assigned by authorized personnel, one with rights to log into the System Office as an Admin user.
- The offices with valid entries in the Pending Case Export section of the DataXchange Registration Information window. The authorized person with rights to Policy/PCM Setup is able to add the Registration Information.

## DataXchange Registration Information

The image below provides an example of the Registration Information window that the MAIN CPU Office Admin person added for one of the SmartOffice Child Offices. The actual values that a particular customer should use are provided by E-Z Data support. In the example provided, the BPC Child Office of the MAIN CPU Parent Office is the Data Provider of pending case changes in ACORD XML format to one of its member agencies.

- The Landing Zone tells the adapter which folder path on the DataXchange Server the routing file and exported XML pending case file(s) are to be uploaded. In the example below, **maincpu** (all in lowercase) is the landing zone. (A routing file is a component of the DataXchange delivery system. It uses the DataXchange Registration Information to identify the mailboxes into which the individual XML pending case update files will be delivered.)
- The Consumer Name defines the name of the member agency who will be the recipient or consumer of an exported XML pending case file.
- The Consumer Mailbox defines the DataXchange Server mailbox where the exported XML files are to be delivered.

SmartOffice

Master Setup List

Requirements  
Follow-Up Requirements  
Status Setup  
Agency Manager Setup  
PCM Workflows  
DataXchange Setup  
    Auto-Update Exceptions  
    Registration Information  
    GA ID Validation  
NAILBA/ACORD Codes  
SmartView for Advisor  
Privacy

### Registration Information for DataXchange

• Please enter a valid DataXchange User Name and Password. This login validates that you are a licensed user of DataXchange and will allow the retrieval of Pending Case information from the DataXchange Server.

User Name

Password

Allow Child Office Processing

• Please enter a valid DataXchange Landing Zone, Consumer Name and Consumer Mailbox. This login validates that you are a licensed user of DataXchange and will allow the export of Pending Case information from the DataXchange Server.

Landing Zone

Consumer Name

Consumer Mailbox

Close

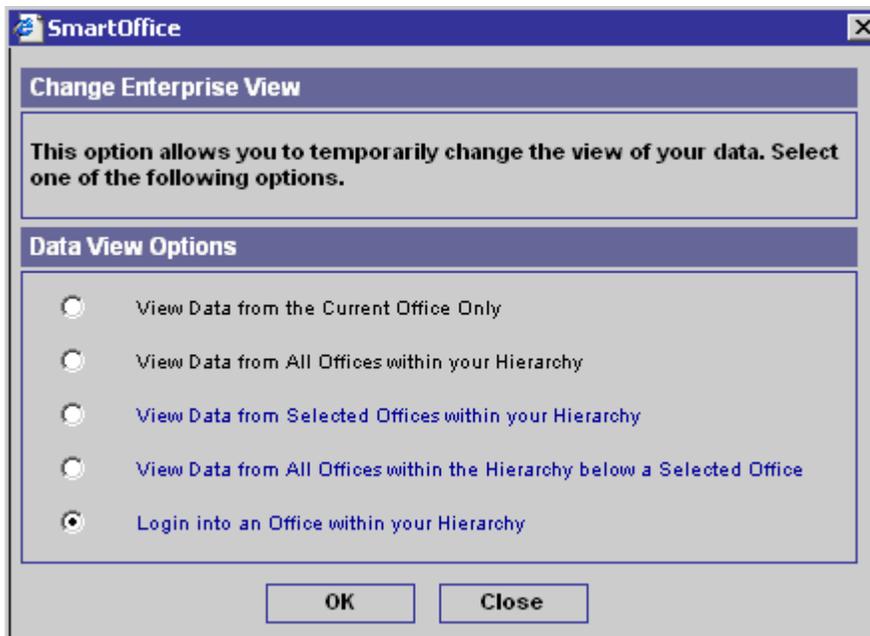
## Relationship from the Data Provider to the Data Consumer

The relationship from the data provider database to the data consumer offices is one to many (i.e., one MAIN CPU office to all of its affiliated offices). The DataXchange Registration Information window DataXchange Pending Case Export section will have to be set up in each MAIN CPU Child Office for each one of the disconnected affiliated member agency offices to which the MAIN CPU wants to provide a feed.

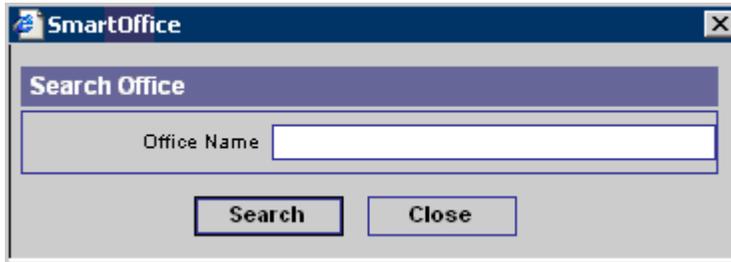
Example: There is a Child Office in the MAIN CPU hierarchy called BPC that corresponds to an external affiliated agency called Bismark Planning Consultants. There is another Child Office in the MAIN CPU hierarchy called EPP that corresponds to an external affiliated agency Estate Planning Partners. A user at the MAIN CPU with Admin login rights to the Child Offices has to go into the BPC Child Office to set up the export registration information to deliver pending case export updates made in the BPC Child Office to Bismark Planning Consultants whose DataXchange mailbox is CL0000000270 and then do the same for the EPP Child Office. This set up will be made for each of the MAIN CPU Child Offices that is to provide a pending case export feed to an external outer office.

The MAIN CPU office with Enterprise View set to ON may access Child Offices without logging out of the MAIN CPU office.

1. Click the **Enterprise View: On** hyperlink on the top right section of the SmartOffice Home Page to open the Change Enterprise View dialog box.
2. Select the **Log into an Office within your Hierarchy** option and then click the **OK** button.



3. From the Search Office dialog box, enter the office name you would like to log into.



4. After the screen refreshes, you are logged into the Child Office in Impersonating Mode.  
**Enterprise View: Im**
5. Select **View Data from All Offices within your Hierarchy** to return to Enterprise View ON mode.
6. Take the same steps above to log into other Child Offices.

## Events That Trigger an Export

The DataXchange Pending Case Export does not just segment a carrier download and push it down to the sub-agency. The export creates a new download based on the current composite information of what has happened to this case including whatever the agency has done in servicing this case. Any manually changed pending case is logged in an Adapter file. When the service activates, it displays an XML pending case export file with those pending case records that have changed since the last export.

Export events that trigger an As of Date change in SmartOffice are any of the following:

1. Receipt and processing of carrier download data.
2. Add or update of a requirement.
3. Add or update of a requirement note.
4. Change of status in SmartOffice.
5. Add or update of any premium related details (i.e., change of premium, change of mode).