DataXchange Online
SmartLink for iPipeline
**User Guide**

SmartOffice®

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## Introduction

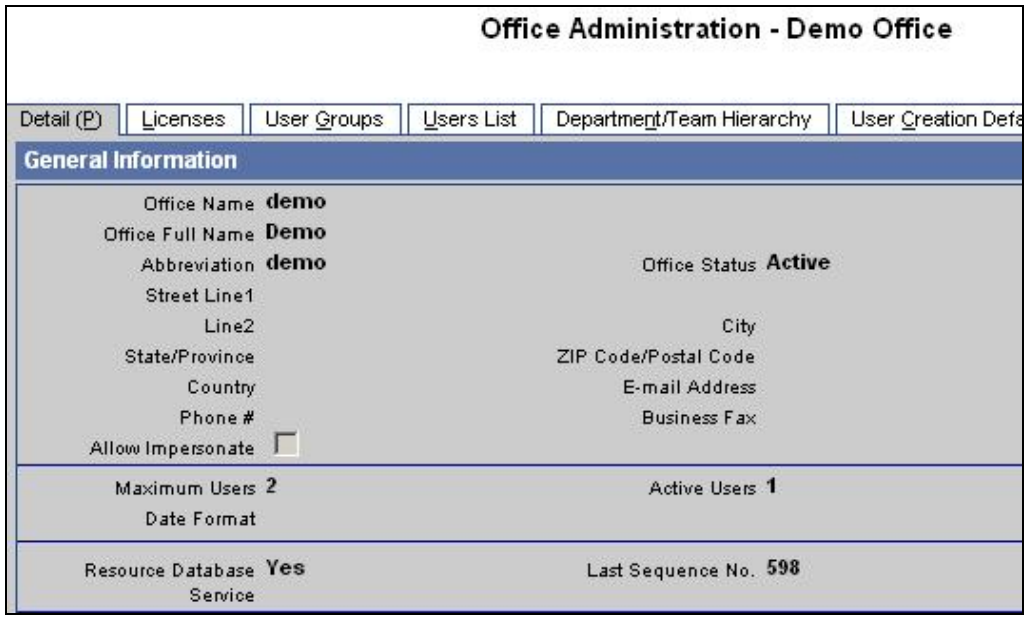
DataXchange Online – SmartLink for iPipeline populates Agency and Advisor/Agent's SmartOffice systems with data coming from iPipeline, a data provider of carrier information that includes related standard plans, forms, underwriting guidelines and vendor requirement information. With iPipeline being a 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.

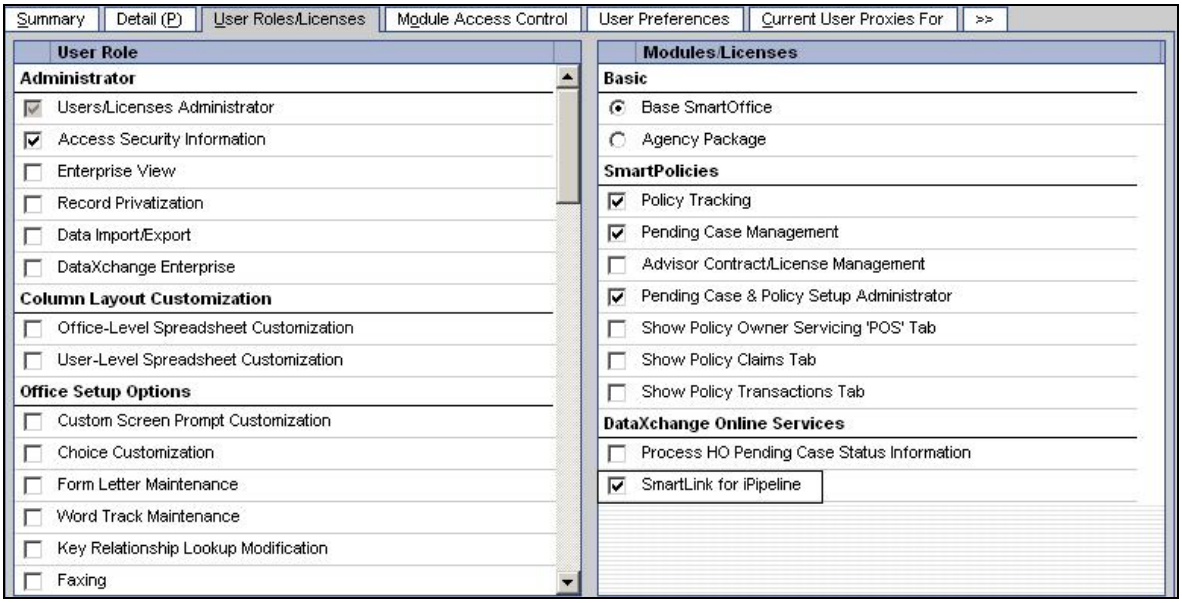
## License and Roles

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.




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

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




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

## Initial Load

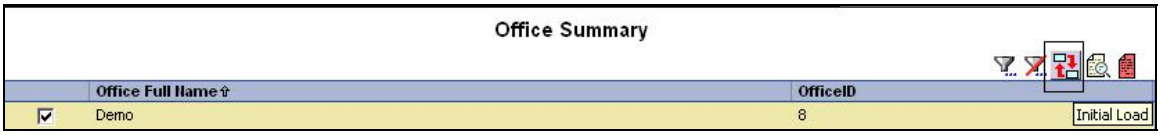
Initial Load files are created by E-Z Data from a master repository on a per carrier basis. A user may request for one carrier feed at a time or may request for multiple carriers at one time.

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:**

1. 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.
2. From the **Policy/PCM Setup** side menu, select the **SmartLink for iPipeline** sub-menu.
3. From the Office Summary spreadsheet, select the office where the initial load files are to be processed.
4. Click the **Initial Load** button.




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

### Other Notes

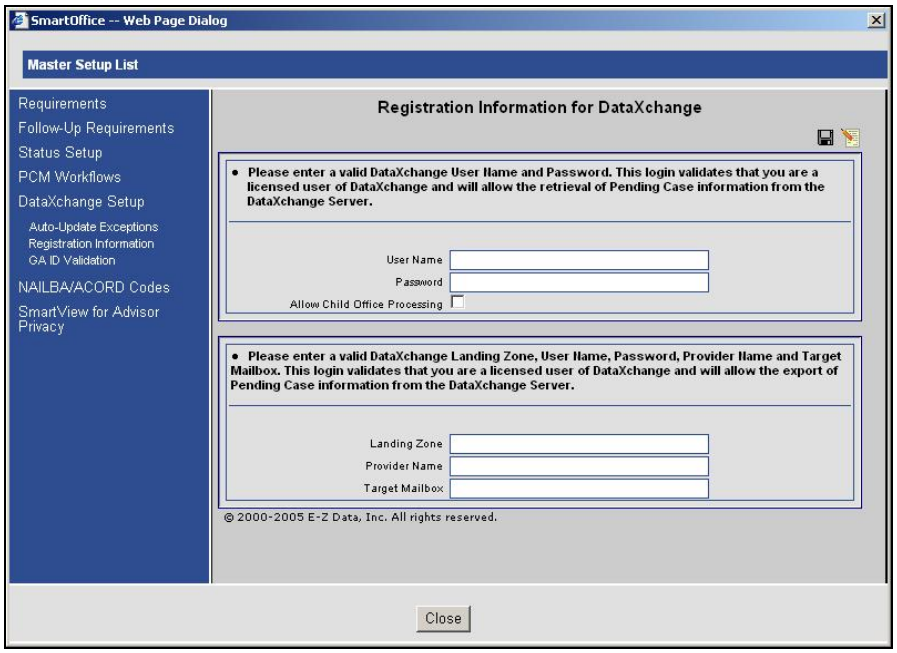
- Once the download process completes, the Initial Load file is deleted from the SmartOffice server …\WEB-INF\classes folder. This prevents users from processing the same file twice.
- Carrier records are automatically created by the Initial Load process. If the carrier record has no Cross Reference 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**.



## Automatic Sequence Updates

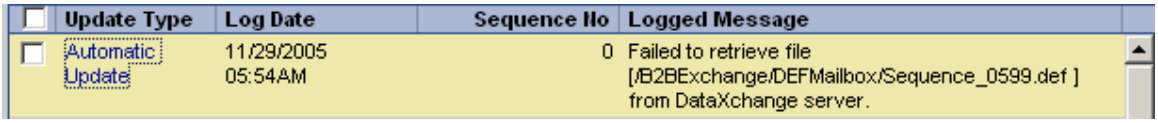
Update sequence files are intended for existing iPipeline users. The files are typically smaller and contain day-to-day incremental updates for ALL carriers supported by iPipeline. It is important to note that not all data in a file will be used by everyone. For example, if customer ABC is not set up 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.



| Update Type | Log Date | Sequence No | Logged Message |
|---|---|---|---|
| Automatic Update | 11/29/2005 05:54AM | 0 | Failed to retrieve file [/B2BExchange/DEFMailbox/Sequence_0599.def ] from DataXchange server. |