
LexisNexis Admin Reports

FIRELIGHT BASE



LEXISNEXIS ADMIN REPORTS

Document Version: 1.1

Published: June 04, 2021

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iConnect 241245 Design Approach - LexisNexis Admin Reports

Project Overview

We need to add 2 new canned admin report to the Admin tool that will show the current information for any application who has utilized the LexisNexis InstantID or Risk Classifier service. These reports will be available for any admin user to review applications who use these services, and will see the values associated with each service. One report for the Instant ID service: this will show the Ref ID, Lex ID, CVI Score, NAS Score, NAP Score, Risk Indicators, and Pass/Fail Scores.

The other report will be for the Risk Classifier Service: This will show the Ref ID, Quoteback ID, Result Codes, Risk Score, Reason Codes.

Impacts:

Admin Reports - LexisNexis InstantID and LexisNexis Risk Classifier reports are added to the Admin Report tab to review at any time.

1 Add a new Admin Report that will encompass the LexisNexis Instant ID service

We want to add a report to the admin tool that will allow the user to view any applications that have called the LexisNexis InstantID service. This report will be displayed in alphabetical order along with the other admin reports, and once clicked, will allow the user to choose the start and end dates, the activity type, and the user.

Reports - FL Access Carrier - Test

FL Access Carrier - Test

Available Reports

- Abandoned Activity Report
- Admin History Reports
- Agent Activity
- Agent Activity Firm Report
- Agent Firm Report
- Agent Report
- Agent Share Report
- Application Audit
- Client Signed Report
- Form Field Report
- Invoice
- LexisNexis InstantID Report
- LexisNexis Risk Classifier Report
- Package Forms Report
- Package Rules Report
- Pending Agent Signature Report
- Unused Data Report
- User Detail Report
- User Share Report
- Wizard Field Report

Report Inputs

Organization:

FL Access Carrier - Test

Start Date:

End Date:

Activity Type:

User:

This report will also be available in a CSV format or a PDF format (samples are attached).

The PDF report will have a header that will display the organization, and the From date and through date. The report will show the following columns: Ref ID, LexID/Order Number, CVI Score, NAP Score, NAS Score, IID Risk Indicator(s), and Pass/Fail Score

Acceptance Criteria

- The Reports section in the admin tool will show the "LexisNexis Instant ID Report" in the available reports section.
- This report will be able to be generated instantly upon the generate button being clicked.
- When "LexisNexis InstantID Report" is clicked in the available reports section, the report inputs will show organization, start date, and end date textboxes; and Activity Type, and User dropdowns

- The report is available to be seen in a PDF or CSV format
- When CSV is chosen as the format, and the generate button is clicked, a CSV file will open showing a Key, OrgName, and Date Range Rows. It will also show the RefID, LexID/Order Number, CVI Score, NAP Score, NAS Score, IID Risk Indicator(s), and Pass/Fail Score columns
- When PDF is chosen as the format, the generate button is clicked, a Word document will open showing the header name of the report, organization, and the From date and through date. The report will show the following columns: RefID, LexID/Order Number, QuoteBack ID, Result Codes, Risk Score, and Reason Codes
- Add sample report to task for PO Review

2 Add a new Admin report that will encompass the LexisNexis Risk Classifier service

We want to add a report to the admin tool that will allow the user to view any applications that have called the LexisNexis Risk Classifier service. This report will be displayed in alphabetical order along with the other admin reports, and once clicked, will allow the user to choose the start and end dates, the activity type, and the user.

FL Access Carrier - Test

Available Reports

Abandoned Activity Report
 Admin History Reports
 Agent Activity
 Agent Activity Firm Report
 Agent Firm Report
 Agent Report
 Agent Share Report
 Application Audit
 Client Signed Report
 Form Field Report
 Invoice
 LexisNexis InstantID Report
LexisNexis Risk Classifier Report
 Package Forms Report
 Package Rules Report
 Pending Agent Signature Report
 Unused Data Report
 User Detail Report
 User Share Report
 Wizard Field Report

Report Inputs

Organization: FL Access Carrier - Test
 Start Date: 3/4/2021
 End Date: 3/18/2021
 Activity Type: All
 User: All

PDF

This report will also be available in a CSV format or a PDF format (samples are attached).

The PDF report will have a header that will display the Report Name, organization, and the From date and through date. The report will show the following columns: RefID, QuoteBack ID, Result Codes, Risk Score, and Reason Codes

Acceptance Criteria

- The Reports section in the admin tool will show the "LexisNexis Risk Classifier Report" in the available reports section.
- This report will be able to be generated instantly upon the generate button being clicked.

- When "LexisNexis Risk Classifier Report" is clicked in the available reports section, the report inputs will show organization, start date, and end date textboxes; and Activity Type, and User dropdowns
- The report is available to be seen in a PDF or CSV format
- When CSV is chosen as the format, and the generate button is clicked, a CSV file will open showing a Key, OrgName, and Date Range Rows. It will also show the RefID QuoteBack ID, Result Codes, Risk Score, and Reason Codes
- When PDF is chosen as the format, the generate button is clicked, a Word document will open showing the header name of the report, organization, and the From date and through date. The report will show the following columns: RefID, QuoteBack ID, Result Codes, Risk Score, and Reason Codes
- Add sample report to task for PO Review