

iConnect 170244 Design Approach

Project Overview

This project will enhance the reporting by adding a new report for abandoned activity. This will be a list of applications that are not submitted and the last updated date is X days. We will add a filter in the Admin reports to capture the timeframe to run the report (Today, week, month, YTD). For activity reports, we will allow clients to define/set the timeframe for monthly reports.

Features/Requirements

- Once an application is created, it has a last updated date. If the application is not submitted, the last updated date will indicate that the application is abandoned. This will apply to all statuses that are not complete.
- Report format layout: Application name, Policy Number, Created Date, Carrier, Product, Product type, agent ID, current status, Last Updated, and Count from today to last updated date.

Sample:

(repeat for each application)										
Application Name	Policy Number	App Created Date	Carrier	Product	Product Type	Agent ID	Agent Role code	Current Status of App	Last Updated Date	Time passed since last updated (days)
Katherine Dease Annuity	33r4545r	12/5/2017	Voya	Annuity for Life	Variable Annuity	Katherine_FLADEMC FLA10		Pending Signatures	12/5/2017	13
name	3443erer	12/5/2017	Voya	Annuity for Life	Variable Annuity	Katherine_FLADEMC FLA10		Pending Signatures	12/6/2017	12
name	33r45465	11/1/2017	Transamerica	xxxy	Variable Annuity	Katherine_FLADEMC FLA10		Pending Signatures	11/1/2017	48
name	33r45466	11/1/2017	Transamerica	xxxy	Variable Annuity	Katherine_FLADEMC FLA10		Pending Review	11/1/2017	48
name	33r45467	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMC FLA10		Form Entry	11/1/2017	48
name	33r45478	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMC FLA10		Form Entry	11/1/2017	48
name	33r45456	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMC FLA10		Form Entry	11/1/2017	48

Sample report is in folder with Design Doc.

Use Cases / Workflow Changes

No changes in existing workflow.

Admin Changes

Add new report template for "Abandoned Activity Report" and add new class to define the functionality.

App Changes

No App Changes required. (Changes may be required to track what page they last viewed)

Integration Changes

None

UI Mock Ups

In report section user can see new report type called “Abandoned Activity Report” and generate report for specified input details.

Reports - Insurance Technologies

Insurance Technologies

Available Reports

- Invoice
- Agent Report
- Form Field Report
- Agent Activity
- Agent Share Report
- Application Audit
- Package Forms Report
- Package Rules Report
- Agent Activity Firm Report
- Agent Firm Report
- Abandoned Activity Report

Report Inputs

Organization:

Insurance Technologies

Start Date:

End Date:

Abandoned Activity Report

Organization: Insurance Technologies

Start Date: 2/1/2018

End Date: 3/9/2018

Number Of days Since Last Updated: 36.

Application Name	Policy Number	App Create Date	Carrier	Product	Product Type	Agent ID	Agent Role Code	Current Status	Last Updated Date	Days Since Last Updated
New Account Opening - BR Prod		3/9/2018	Insurance Technologies	BR Prod	Annuity			ActiveApplication	3/9/2018	0
Signing- BR Prod		3/9/2018	Insurance Technologies	BR Prod	Annuity			PendingSignature	3/9/2018	0

How to Enable and Use This Feature

To enable this report we need to update the database as per request from client/user.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports	Yes	New report template and class will be added
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		