iConnect 192074 Design Approach

Project Overview

The goal of this project is to provide the ability to share a single activity with one or more users. Currently you have to share all cases/activities with a user regardless of transaction type.

Features/Requirements

- Add user share by activity. This applies to a single activity.
- Applies to all activity transactions, except e-Delivery Child activities.
- Applies to forms and wizards.
- Need ability to enable and disable this feature by role.
- Add share option to Other Actions menu while an activity is in edit mode.
- Leverage existing User Share, Share My Activities dialog to search for a user.
- The user creating the user share, the Share My Activities dialog will only show the active shares for the activity that is open.
- Generate an email when the User Share request is sent to a user.
- To streamline the process, remove the ability to Resend a user share request that has not been accepted.
- Add the Ability to accept the user share activity request.
- Add the ability to remove the user share from an activity.
- Update the three existing user share email template names and text to clarify they are for All Activities, not a single Activity.
- In All Activities, need an indicator on a single activity so the case owner can see it is shared.
- Transfer business rules:
    - The shared to person cannot transfer an activity, only the owner of the activity can transfer it. You can create a copy.
    - *Note*: Transfer gives owner rights to a new user, whereas user share retains the original owner and allows the 'shared with' user to make changes to the activity (Share Full Control) or look at the Activity but not change it (Share Read-Only).
- Only the original activity owner can initiate a share if Groups>Case Access is enabled, not the other users that have case access in the group role.
    - Day 2: If Case Access is enabled for a role, any user with case access should be able to set up a Share by Activity. Global share does not apply.
- Add three new audits and leverage the current user share audits.
- Create a new admin report that shows all the active shares and the initiated date, along with the user IDs. This applies to global shares and at the single activity level.

Use Cases / Workflow Changes

Agent creates an illustration and cannot figure out how to complete the inputs. Agent shares illustration case with Sales Desk so he/she can finish the inputs.

Agent creates an application. The assistant is going to meet with the client, finish the data entry phase and collect the client signatures. Agent shares application with assistant to complete.

Admin Changes and UI Mockups

1. Add a Group option (similar to ‘Allow Transfer Activity’) named Allow Share Activity on the App Only tab. Default is unchecked.
2. Relabel Group option ‘Enable User Share’ to ‘Enable All Activities User Share’.
3. Add new Activity User Share email templates. Create new templates leveraging the existing email templates. Note: Highlighted data items do not exist in the existing global user share email.
   Email Template Name: User Share Request – Single Activity
   Email Subject: Share Request: <USERSHARE_NAME> - <TRANSACTION_TYPE>
   Email text:
   Dear <USERSHARE_NAME>,

   I would like to grant you (<SHARETYPE>) access to view the <TRANSACTION_TYPE> named <CASE_NAME>.

   To find the <TRANSACTION_TYPE>, log into FireLight and open All Activities. Click on the User search icon next to the User list to display a list of users. In the User List, click on my user name <USER_NAME> to switch the view so you can see the <TRANSACTION_TYPE> named <CASE_NAME>.

   Click on this link to accept the share request.

   <URL_LINK>

   Sincerely,

   <AGENT_NAME>

   Email Template Name: Accept User Share – Single Activity
   Email Subject: <USERSHARE_NAME> Accept Single Activity Share Request
   Email text:
   <USERSHARE_NAME> accepted your <TRANSACTION_TYPE> share request for the activity named <CASE_NAME>.

   Email Template Name: Revoke User Share – Single Activity
   Email Subject: <AGENT_NAME> Revoked the <TRANSACTION_TYPE> (<SHARETYPE>) share request
   <AGENT_NAME> has revoked your (<SHARETYPE>) access on the <TRANSACTION_TYPE> named <CASE_NAME> for the user share request originally sent on <SHAREDATE>.
4. Update the names in the three existing user share email templates to clarify they are for All Activities, not a single Activity.
   a. Change User Share Request to User Share Request – All Activities
   b. Change Accept User Share Request to Accept User Share Request – All Activities
   c. Change Revoke User Share to Revoke User Share – All Activities

5. Update the text in the three existing user share email templates to clarify they are for All Activities, not a Single Activity. Also, update text where it applies.

   Email Template Name: User Share Request – All Activities
   Email Subject: All Activities Share Request: <USERSHARE_NAME>
   Email text:
   Dear <USERSHARE_NAME>,

   I would like to grant you (<SHARETYPE>) access to view all my activities.

   To view my activities, log into FireLight and open All Activities. Click on the User search icon next to the User list to display a list of users. In the User List, click on my user name <USER_NAME> to switch the view so you can see the list of all my activities.

   Click on this link to accept the share request.

   <URL_LINK>

   Sincerely,

   <AGENT_NAME>

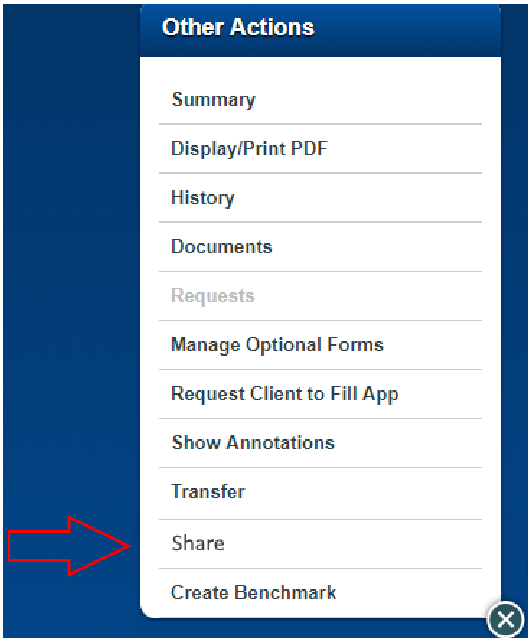
   Email Template Name: Accept User Share – All Activities
   Email Subject: <USERSHARE_NAME> Accept All Activities Share Request
   Email text:
   <USERSHARE_NAME> accepted your All Activities share request.

   Email Template Name: Revoke User Share – All Activities
   Email Subject: <AGENT_NAME> Revoked All Activities Share Request
   Email text:
   <AGENT_NAME> revoked your (<SHARETYPE>) access for all activities originally sent on <SHAREDATE>.

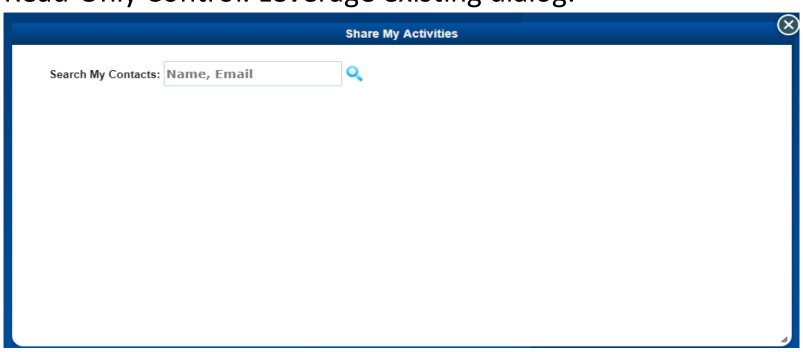
6. Create a new admin report that shows all the 'active' shares and the activated date along with the user IDs. This applies to global all activities shares and to single activity shares.
   Admin Report Name: User Share
   Report Inputs: State Date and End Date
   Report:
   Title: User Share Report
   Show the from and through dates above the report (see Agent Activity report for a sample)
   Columns: User Name, User Share Name, Date Share Initiated, Share Type, Share Control, Activity Name
   Where Share Type = Full Control, Read-Only Control
   Where Share Control = All Activities, Single Activity
   Where Activity Name will only appear for the Single Activity shares.

App Changes and UI Mock Ups

1. Add Share option to Other Actions menu in activity edit mode.

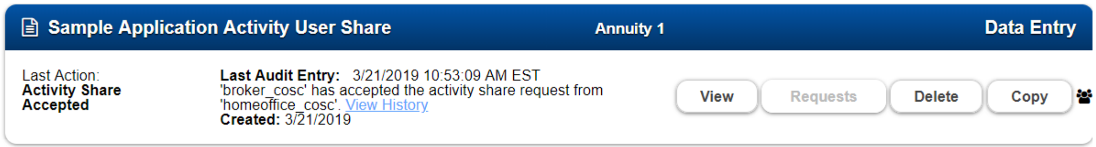


   a. Only the original activity owner can manage the shares, including users with Case Access.
   b. Add ability to select a user name in the User Share dialog and to set the share to Full Control or Read-Only Control. Leverage existing dialog.

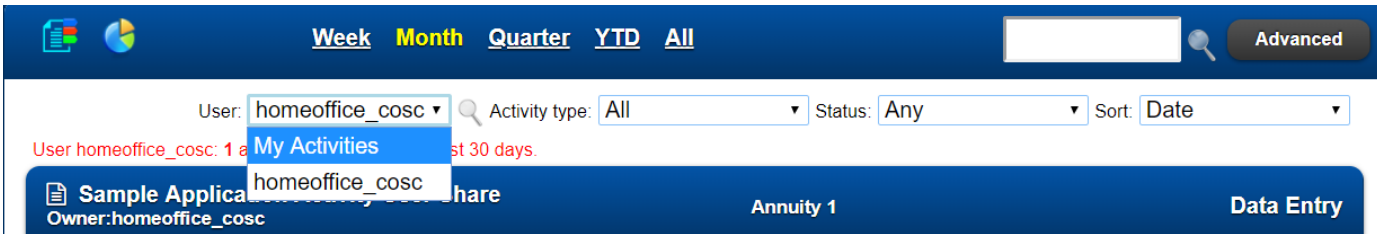


   c. Disable in Other Actions menu following the logic in place for Transfer. Business rules are:
      i. Activities other than Illustration and e-Delivery: Disable if the display status is past signatures complete (Review Queue, Submitted, Complete).
      ii. Illustration Activity: Disable if the illustration is locked because it is linked to an application that has been locked and in signatures and any proceeding display status.
      iii. e-Delivery Parent Activity: Disable if the parent activity is in a terminal status (Change Requested by Agent, Change Requested by Client, Policy Canceled, Expired, Complete).
   d. Hide the Share option in Other Actions for the following business rules:
      i. The ‘shared to’ user cannot share a shared activity, only the owner of the activity can share it.
      ii. An unsaved illustration cannot be shared (new logic being added to 2.14).
   e. Add ability to remove the activity user share.
      i. Leverage existing confirmation dialog.
   f. Remove ability to Resend global user share, no longer needed.

2. All Activities:
    a. Add a non-functional share indicator for the activity owner on a single activity.

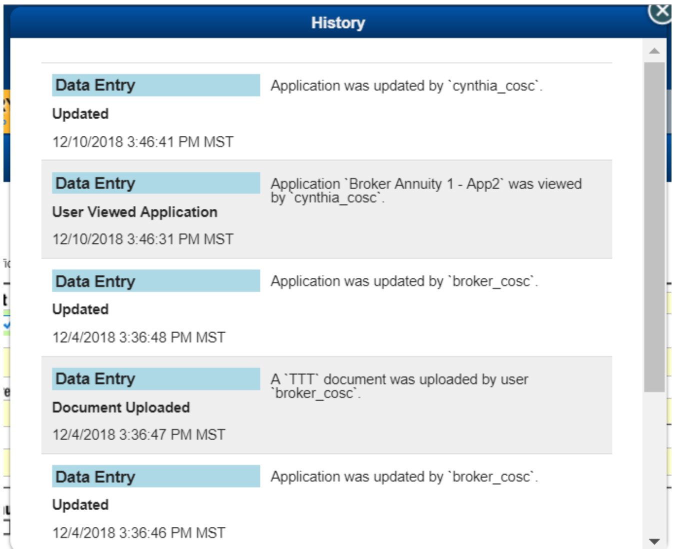


    b. Day 2: When the Share icon is clicked, display information about the share (type, user, date).
3. All Activities, User List:



    a. Update the User List to include the active activity user share usernames.
    b. Update the User List – change the icon to a drop-down list named User.
    c. Add logic for new User drop-down. Default to 'My Activities' for the active user. Add up to a maximum of five additional users in the drop-down list (applies to all user shares and case access).
    d. Username in the 'User' drop-down should be just the username.
    e. When a user is selected from the User drop-down list, refresh the list of activities that are shown.
    f. Remove the username from the drop-down list and the User List dialog in the following scenarios:
        i. If an Activity User Share is revoked, unless already there due to global sharing, case access, etc.
        ii. If a global All Activities User Share is revoked, unless already there due to activity sharing, case access, etc.
        iii. If the Activity is deleted or purged that has an Activity User Share, unless already there due to global sharing, case access, etc.
        iv. If Case Access is removed for a group role, unless already there due to activity sharing, global sharing, etc.

4. Add new audits (leverage the current user share audits).
   a. Leverage the existing logic in the audits with a user share where the user name is added to the audit.



Example: Created by Broker_COSC, edited by Cynthia_COSC via share

   b. Add new audits to state an individual activity is shared with user xxxx and also when it is revoked.
      i. Audit 1 Text: <USER_NAME> has shared this activity with <USERSHARE_NAME>.
      ii. Audit 2 Text: <USERSHARE_NAME> has accepted the activity share request from User_Name>.
      iii. Audit 3 Text: <USER_NAME> has revoked sharing this activity with <USERSHARE_NAME>.
5. When the purge process runs, remove any share data related to the activity.

How to Enable and Use This Feature

In the Admin Tool, select the new Group option named Allow Share Activity on a specific role.

In the App, select the Share option in the Other Actions menu while in edit mode of an activity. Complete the user share request. Log into the user you shared with and verify you can find the user in All Activities and open and edit the activity.

If desired, modify the new email templates with any desired changes for your organization.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form, Wizard Library		
- Design Forms, Wizards		
- Profile Administration	X	
- Emails	X	
- Reports	X	
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- All Activities	X	
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
- Audits	X	
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		