

iConnect 187306 Design Approach

Project Overview

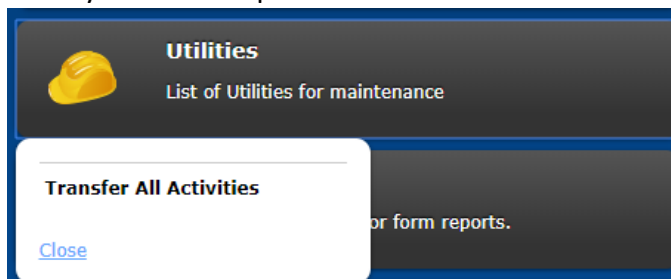
Add the ability to transfer all activities (applications, illustrations, etc.) from one user ID to another. Typically, this is the ExternalMapCode (a. k. a. CompanyProducerID).

Features/Requirements

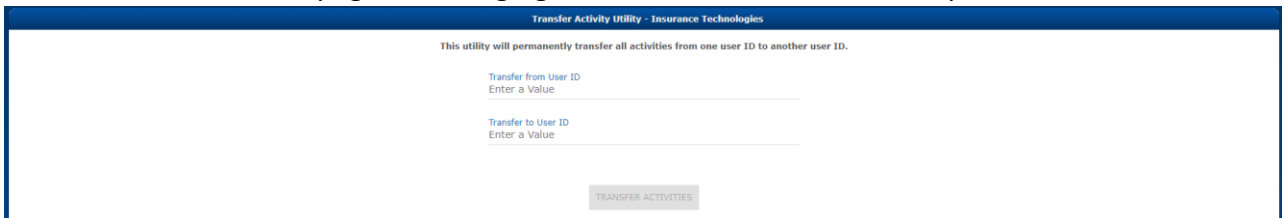
1. Create new Admin Tool page for changing user IDs on all activities for a specific user ID.
2. Create Audit History in the Admin Tool and in each activity.

Admin Changes and Mockups

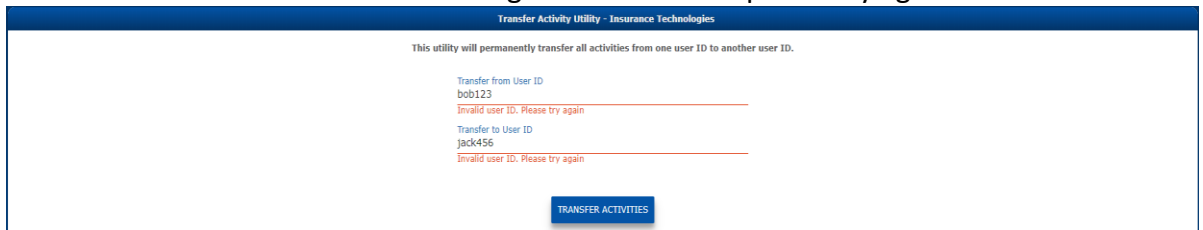
1. Add new Admin Tool option for utilities.
 - a. Add fly out menu option named 'Transfer All Activities'.



2. Create new Admin Tool page for changing user IDs on all activities for a specific user ID.

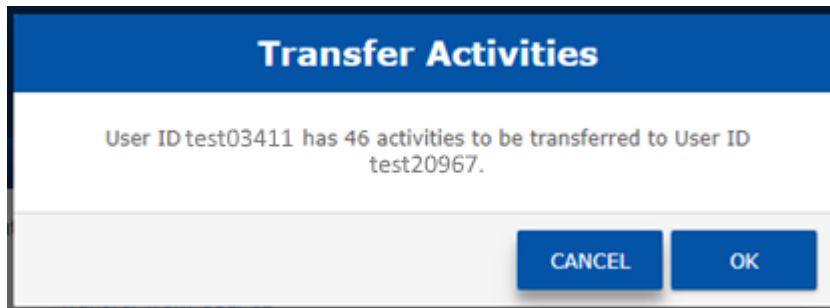

 A screenshot of a web application page titled 'Transfer Activity Utility - Insurance Technologies'. The page has a blue header. Below the header, there's a white box containing the text: 'This utility will permanently transfer all activities from one user ID to another user ID.' Below this text are two input fields. The first is labeled 'Transfer from User ID' with a placeholder 'Enter a Value'. The second is labeled 'Transfer to User ID' with a placeholder 'Enter a Value'. At the bottom of the white box is a grey button labeled 'TRANSFER ACTIVITIES'.

- a. Section title: Transfer Activity Utility
- b. Add text at top of the page: This utility will permanently transfer all activities from one user ID to another user ID.
- c. Field (textbox) and label: Transfer from User ID
- d. Field (textbox) and label: Transfer to User ID
- e. Button at bottom of page: [Transfer Activities]
- f. When button clicked, if either user ID is not valid, show validation message by one or both that are invalid. Validation message: Invalid user ID please try again.


 A screenshot of the same web application page as before, but now showing validation messages. The 'Transfer from User ID' field contains the text 'bob123' and has a red error message below it: 'Invalid user ID. Please try again'. The 'Transfer to User ID' field contains the text 'jack456' and also has a red error message below it: 'Invalid user ID. Please try again'. The 'TRANSFER ACTIVITIES' button is now blue.

- g. If a user ID is a duplicate of another, show validation message by one or both that are invalid. Validation message: Duplicate user ID, contact support for assistance.

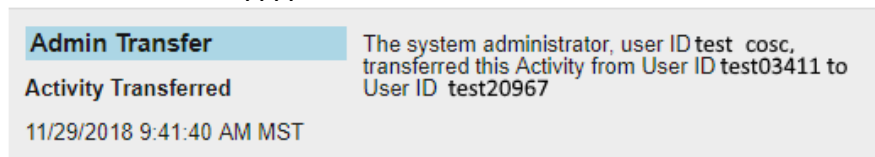
- h. If both user IDs are valid show a confirmation dialog old user ID and the number of activities to be transferred to the new user.



3. Add a new Group option 'Enable View Transfer All Activities' on the Admin Only tab. The default will be 'unchecked'.
4. Create audit in the Admin Tool showing the number of activities moved by user ID xxxx from user ID xxxx to user ID yyyy.

UI Changes and Mock Ups

1. Create Audit History entry in each transferred activity.
 - a. Display Status: Admin Transfer
 - b. Audit Message: The system administrator, user ID xxxx, transferred this Activity from User ID xxxx to User ID yyyy.



Use Cases / Workflow

1. A user gets married and is issued a new user ID. She wants to be able to transfer all activities to the new user ID.
2. An advisor leaves a company. The firm needs to be able to transfer all their applications to their replacement.
3. A sales desk person changes jobs and needs all their activities transferred to another sales desk person.

Testing Acceptance Criteria

1. Test moving activities to a new user with no saved activities.
 - a. Make sure audit history appears for the Admin Transfer along with the prior audit history.
 - b. Make sure all activity (transactions) are moved for the old user to the new user ID.
 - c. Make sure Recent page shows same cases from old user ID on the new user ID.
 - d. Make sure the activities appear in All Activities for the new user, can be opened, etc.
 - e. Test an activity with a pending request:
 - i. Remote sign
 - ii. Client fill / client fill and sign
 - iii. Manual review queue
 - iv. Open Requests dialog, make sure it is accurate.
 - f. Test an activity In Signatures, make sure new user can complete.
 - g. Test an activity In Review status. Make sure the reviewer can send More Info request to new user ID, Approve and Reject it and that the emails go to the new user ID.
 - h. Make sure attached documents are still attached after transfer. Also attach a document in the new user ID.
 - i. Test client fill / client fill and sign on one of the transferred activities.
 - j. Test transferring one of the transferred activities.
 - k. Test locking an activity and taking it through signatures to submit/completion.
 - l. Verify message center information appears from the old user ID under the new user ID.
 - m. Make sure any user shares are still active.
 - n. Test an activity linked to another activity, make sure you can see link dialog, open the linked activities (e.g. open Illustration with a linked application, make changes and Update the application).
 - o. Make sure active and purged activities are moved to new user ID.
 - p. Make sure all activities are gone from the old user ID (All Activities, Recent, pending requests, etc.).
 - q. Make sure an existing benchmark still runs after transferred.
2. Test moving activities to an existing user ID.
 - a. On the Recent activity entries, make sure they are combined for the old and new user IDs in date order.
 - b. Make sure all activity (transactions) are moved for the old user to the new user ID. In All Activities under filters verify the case count – for example, under All filter there are 525 cases before the transfer, 300 cases are being transferred, should see 825 cases after the transfer.
3. Test entering old user ID (moved from) that does not exist. Verify validation appears.
4. Test entering new user ID (moved to) that does not exist. Verify validation appears.

Areas Impacted

System Area	Yes	Comment
Admin Tool	Y	New Tools Section.
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
FireLight App	N	
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console	N	
- Windows		
- iOS		
Other Systems	N	
- DTCC Integration		
- Commission Netting		
- Activity Reporting		