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Base Code Change Default Activity Name

**FIRELIGHT BASE**

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Platform

**BASE CODE CHANGE DEFAULT ACTIVITY NAME**

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**Insurance Technologies, LLC**

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# iConnect 249258 Design Approach - Base Code Change

## Default Activity Name

### Project Overview

*Base will support an activity level naming convention with a few key data items to allow clients to define how they want their default activities named when accessing through SSO. Insured name and Policy (application) number are the data items that will be used within the activity name that is created through SSO. Both these data items will be supplied via the XML used for SSO.*

*This is an optional enhancement for clients using SSO. Clients will need to reach out to their Project Manager to request changes in the provider for their naming convention to be updated.*

### Impacts:

SSO clients can update default activity naming convention in their provider file to below format:

- Default naming convention for an activity created via SSO will be changed to "<Insured First Name> <Insured Last Name> – <Policy #> – <Activity Name> – <Product Name>".
- Default naming convention for an application created for a pre-sale activity created via SSO will be: "<Insured First Name> <Insured Last Name> – <Policy #> – "New" <Activity Name> – <Product Name>". This change in application naming convention will be done only for "LIFE" type of product category (product type category = "Life"). There will be no change in the naming convention of other type of application product categories

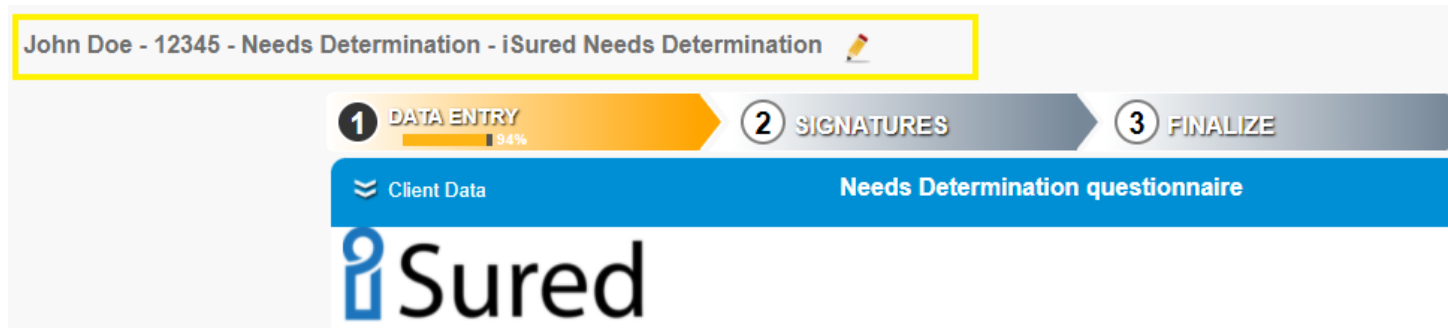
## 1 Change default activity name when created via SSO

When creating an activity via SSO, the default naming convention for the activity needs to change to "<Insured First Name> <Insured Last Name> – <Policy #> – <Activity Name> – <Product Name>". This change in naming convention will apply to activities created via SSO. To implement this default naming convention, client will have to update their provider files and set the format.

If the user wants to edit the activity name further, they can click the edit icon or navigate to "Rename/Summary" in the "Other Actions" menu. Below group settings (if checked) may prohibit the ability to rename.

- Organization Config -> Groups -> App (tab) -> Other Actions -> Disable View Activities Summary (check box)
- Organization Config -> Groups -> App (tab) -> User Rights Home/All Activities -> Disable Save Activities (check box)

There will be no change in the activity naming convention when a new activity is created from product page within FireLight.



Currently when an activity is created via SSO that has no Insured Last Name, naming convention of such application is ""New" <Activity Name> <Case Name>". This condition will still be valid for the activity created via SSO.

### ***Acceptance Criteria***

- After making changes to the client provide file, activity created through SSO, default name for that activity appears in the format "<Insured First Name> <Insured Last Name> – <Policy #> – <Activity Name> – <Product Name>".
- User can edit the default activity name if desired by clicking the edit icon or "Rename/Summary" in "Other Actions".
- Activity created from FireLight app has no change in its naming convention.
- There will be no change in naming convention for pre-sale activities "Enrollment" or "Multiple Activities" created via SSO.

- When there is no Insured Last Name supplied for an activity, the default activity naming convention appears in format - ""New" <Activity Name> <Case Name>".

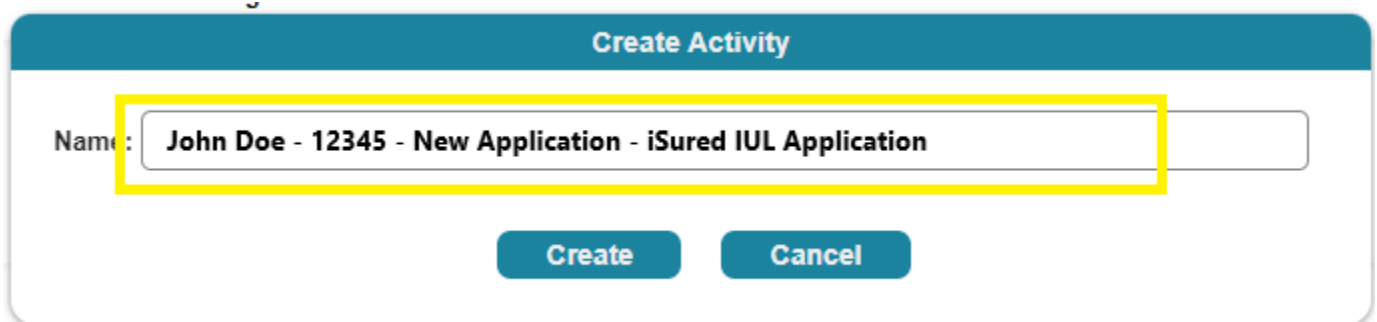
## 2 Change default application name created from a pre-sale activity via SSO

Clients should be able to make changes to their provider file to change the default activity naming convention. When an application is created from a pre-sale activity created via SSO, default naming convention should be changed to "<Insured First Name> <Insured Last Name> – <Policy #> – "New" <Activity Name> – <Product Name>". Insured name and policy number will be available from the pre-sale activity created via SSO.

User will be able to change activity name by clicking the edit icon or navigate to "Rename/Summary" in the "Other Actions" menu if they want to rename it. Below group settings (if checked) may prohibit the ability to rename.

- Organization Config -> Groups -> App (tab) -> Other Actions -> Disable View Activities Summary (check box)
- Organization Config -> Groups -> App (tab) -> User Rights Home/All Activities -> Disable Save Activities (check box)

There will be no change in the activity naming convention when a new activity is created from product page within FireLight. Also, there will be no change for activity naming when it is created from a pre-sale activity created within FireLight.



**Create Activity**

Name:

**Create** **Cancel**

***Acceptance Criteria***

- After making changes to the client provider file, applications created from a pre-sale activity created via SSO, the default name appears in the format "<Insured First Name> <Insured Last Name> – <Policy #> – "New" <Activity Name> – <Product Name>".
- User can edit the default activity name.
- If the activity is created from new product page, there is no impact in the activity naming convention.
- Child application created from a parent pre-sale activity created within FireLight has no change in its naming convention.