
Reporting Changes to Incorporate New Purging Policy

FIRELIGHT BASE



Platform

REPORTING CHANGES TO INCORPORATE NEW PURGING POLICY

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iConnect Design Approach - Reporting Changes to Incorporate New Purging Policy

Project Overview

To comply with the Terms and Agreements for Third Party Service contracting, we will need to expand our purging policy that we are currently using.

Impacts: Reports - any reports utilizing the service request table (LexisNexis, GIACT, and Third Party Configuration

1 Separate link between Service Request table and Application Table

In order to comply with a greater purging length on FireLight activities, we need to house reporting data in one central location. Currently third party configuration report information is stored within the service request table and the application table. We need to separate the hard link between these two tables.

Acceptance Criteria

- The link between the service request table and application table for reports will be removed

2 Create a greater purging policy for third party configuration reports

We need to increase the purging policy that we currently have for the service request table. This will need to be increased to 3 years or 1,095 days.

We need to make changes to the purge manager to add this version.

Acceptance Criteria

- Purging for any report connected to the service request table should be increased to a 3 year timeframe
- This impact will be on any report pointing to this table, which will include the LexisNexis, GIACT, and Third Part Configuration reports.

3 Move current information from Third Party Config Reports to Service Request Table

We will need to move any current information being stored for any third party configuration reports to the service request table. This will include the following:

LexisNexis: Verify if currently storing, and if not, move the following information to the service request table:

- TransRefGuid (Lex ID)
- RefID, Date
- Conversation ID
- Carrier (Product Organization ID)
- Distributor (Org ID)
- Policy Number (DTI Number)
- Case Name
- Agent Name
- Agent ID (External Map Code)
- User ID (the one who initiated the call)
- Status during call (i.e. Data Entry if custom action, Signatures if in e-signature)
- Overall Status (was the app completed, left in signatures, etc)
- Party Name
- Party Type
- NAS, NAP, CVI Scores

GIACT: Verify if currently storing, and if not, move the following information to the service request table:

- ACORD Type (eApp, eDelivery, etc.)

- Agent ID (External Map Code)
- Distributor Transaction ID (AppID)
- Call Date
- Initiating Organization
- Account Response Code (gVerify)
- Customer Response Code (gAuthenticate)

Third Party Config: Verify if currently storing, and if not, move the following information to the service request table:

- Organization
- Product
- Application Name
- Date
- Agent ID (External Map Code)
- Usage Message

Cooperative Technologies 1035 Yellow Pages Usage Report:

- Organization
- Product
- Application Name
- Date
- Agent ID (external Map code)
- Usage Message

Acceptance Criteria

- LexisNexis information that needs to store within the service request table includes TransRefGuid, RefID, Carrier, Distributor, Policy Number (DTI), Case Name, Agent Name, Agent ID, User ID, Status during call, status, Party Name, Party Type, NAS, NAP, CVI Scores

- GIACT information that needs to store within the service request table includes ACORD type, Agent ID, Distributor Transaction ID (App ID), Call Date, Initiating Organization, Account Response Code (gVerify), Customer Response Code (gAuthenticate)
- Third Party configuration information that needs to store within the service request table includes Organization ID, Product Name, Application name, Date, Agent ID, and Usage Message
- Cooperative Technologies 1035 Yellow Pages Usage Report includes Organization, Product, Application Name, Date, Agent ID, and Usage Message

4 Alter Third Party Reports to pull from Service Request Table

The following Reports/services need to pull all values from the Service Request table:

- LexisNexis Usage Report (LexisNexisUsage)
- GIACT
- Cooperative Technologies 1035 Yellow Pages (ThirdPartyServiceUsage_CT1035)

The Third Party Usage All Report will be worked on at a later date.

The services that need to be tested when updating these reports are below:

- 1035/CRM
- Address auto complete
- Address validation
- SMS
- LexisNexis
- GIACT

Acceptance Criteria

- The LexisNexis Usage Report, GIACT Report, and Cooperative Technologies 1035 Yellow Pages Report will be pulling values from the Service Request Table
- Each report needs to be run prior to the change, and then after the change to make sure that no information changes. Each of these reports need to be sent to the PO for review as well.
- Services that need to be validated are: 1035/CRM, Address auto complete Address validation, SMS, LexisNexis, and GIACT.