

iConnect 127640 Design Approach

Project Overview

The purpose of this project is to add reports detailing FireLight product configuration information that has been deployed.

Features/Requirements

- Reports that show sales agreement, product, package, and form information within a given environment so that organizations can identify which version or timestamp of data is in that organization's database and compare to what has been deployed to all destination organizations and to different environments.

Use Cases / Workflow Changes

This feature will allow users to determine the current version of forms, packages, and products that have or have not been deployed to distributor organizations and other environments.

Admin Changes

Create 4 new reports that will show configuration information for all organizations within the current environment. The reports will not have any required inputs and will always include all available data. Each report will contain a header with the following information:

Organization: [Carrier Name]

Environment: [QE / UAT / Staging / Production]

Report Date: [Current Date]

The reports will include the following information for the current organization any distributor organizations this organization has sales agreements with:

Sales Agreement Deployment Report

<u>Organization</u>	<u>Product Name</u>	<u>Last Updated</u>	<u>Start</u>	<u>End</u>
Carrier Name	Product 1	timestamp	timestamp	timestamp
Carrier Name	Product 2	timestamp	timestamp	timestamp
....				
Distributor 1 Name	Product 1	timestamp	timestamp	timestamp
Distributor 1 Name	Product 2	timestamp	timestamp	timestamp
...				
Distributor 1 Name	Product 1	timestamp	timestamp	timestamp

...

Product Deployment Report

<u>Organization</u>	<u>Product Name</u>	<u>Last Updated</u>	<u>Product Type</u>	<u>CUSIP ID</u>
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Package Deployment Report

<u>Organization</u>	<u>Package Name</u>	<u>Last Updated</u>	<u>Package Type</u>
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Form Deployment Report

<u>Organization</u>	<u>Form Number</u>	<u>Form Name</u>	<u>Last Updated</u>	<u>Edition</u>	<u>Label</u>
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App Changes

None

Integration Changes

None

UI Mock Ups

[Provide cropped screen shots with IT branding focusing on the new feature]

How to Enable and Use This Feature

The new reports will be available within the Report profile of Admin.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports	X	
- 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		
- Scheduler		