

---

Ability to Export Admin Audit History as a Report

## **FIRELIGHT BASE**

---

FireLight®

Platform

**ABILITY TO EXPORT ADMIN AUDIT HISTORY AS A REPORT**

**Document Version: 1.0**

**Published: October 30, 2020**

**Insurance Technologies, LLC**

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

**Insurance Technologies, LLC**

Two South Cascade Avenue  
Colorado Springs, CO 80903  
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: [info@insurancetechnologies.com](mailto:info@insurancetechnologies.com)

Website: <http://www.insurancetechnologies.com>

## Table of Contents

iConnect 223719 Design Approach - Ability to Export Admin Audit History as a Report .....	4
1 Admin History Reports Format Changes-Add Dates and Separation .....	4
2 Admin History Reports: Forms History .....	8
3 Admin History Reports: Rule Set History .....	10
4 Admin History Reports: Wizard History .....	13

# iConnect 223719 Design Approach - Ability to Export Admin Audit History as a Report

## Project Overview

Currently in Firelight the only way to view the audit history for forms, rule sets and wizards is by going into each form/rule set/wizard. This can be cumbersome to track the audit history as you need to review the changes, form by form, rule set by rule set, etc.

We will expand the current list of Admin History Reports to include complete reporting ability for:

Form History

Rule Set History

Wizard History

The existing Admin History Audit Reports will also be enhanced to include Start and End Dates, as well as a format enhancement when a report is run by "All" to easily view each item.

Impacts:

Admin Reports-Edit to existing format, New Admin History Reports available: Forms History, Rule Set History, Wizard History

## 1 Admin History Reports Format Changes-Add Dates and Separation

Currently, the Admin History Reports do not contain a "Start Date" and "End Date" on the report output. All Admin History Reports will be enhanced to display the dates entered in the search criteria on the header of the report. Along with this enhancement, subheadings will be enhanced to easily distinguish reports when there are multiple items searched in the same report ("All" selected in report criteria). The name of the item will be bolded, and an extra space will be inserted as a transition between each item in the report. This will visually separate each report item for a better user experience.

Current:

## Audit History Report

**Organization:** FL Access Carrier

**Report Name:** Package History Report

**Report For:** All Package

Action	Old Value	New Value	Create Date	User Making Changes
----- Package Name :Account Opening -----				
Account Opening role code changed		FL_ApiRoleCode	6/30/2020 7:22:24 AM	del_flademo
Account Opening saved and updated			6/30/2020 7:22:24 AM	del_flademo
Account Opening role code changed	FL_ApiRoleCode		6/30/2020 7:20:37 AM	del_flademo
Account Opening saved and updated			6/30/2020 7:20:37 AM	del_flademo
Account Opening role code changed		FL_ApiRoleCode	5/29/2020 3:46:13 PM	del_flademo
Account Opening saved and updated			5/29/2020 3:46:13 PM	del_flademo
Account Opening status changed	Optional	Required	4/2/2020 10:32:45 AM	Katherine FLADEMO
Account Opening saved and updated			4/2/2020 10:32:45 AM	Katherine FLADEMO
Account Opening form added			4/2/2020 10:32:41 AM	Katherine FLADEMO
Account Opening saved and updated			4/2/2020 10:32:41 AM	Katherine FLADEMO
----- Package Name :Create Transfer Email -----				
Create Transfer Email role code changed	FL_ApiRoleCode		6/30/2020 7:22:27 AM	Julie_FLADEMO

After Enhancement:

## Audit History Report

**Organization:** FL Access Carrier

**Report Name:** Package History Report

**Report For:** All Package

**Start Date:** 4/1/2020

**End Date:** 9/17/2020

Action	Old Value	New Value	Create Date	User Making Changes
<b>Package Name: Account Opening</b>				
Account Opening role code changed		FL_ApiRoleCode	6/30/2020 7:22:24 AM	del_flademo
Account Opening saved and updated			6/30/2020 7:22:24 AM	del_flademo
Account Opening role code changed	FL_ApiRoleCode		6/30/2020 7:20:37 AM	del_flademo
Account Opening saved and updated			6/30/2020 7:20:37 AM	del_flademo
Account Opening role code changed		FL_ApiRoleCode	5/29/2020 3:46:13 PM	del_flademo
Account Opening saved and updated			5/29/2020 3:46:13 PM	del_flademo
Account Opening status changed	Optional	Required	4/2/2020 10:32:45 AM	Katherine FLADEMO
Account Opening saved and updated			4/2/2020 10:32:45 AM	Katherine FLADEMO
Account Opening form added			4/2/2020 10:32:41 AM	Katherine FLADEMO
Account Opening saved and updated			4/2/2020 10:32:41 AM	Katherine FLADEMO

### Package Name: Create Transfer Email

Create Transfer Email role code changed	FL_ApiRoleCode		6/30/2020 7:22:27 AM	Julie_FLADEMO
---	----------------	--	----------------------	---------------

### Acceptance Criteria

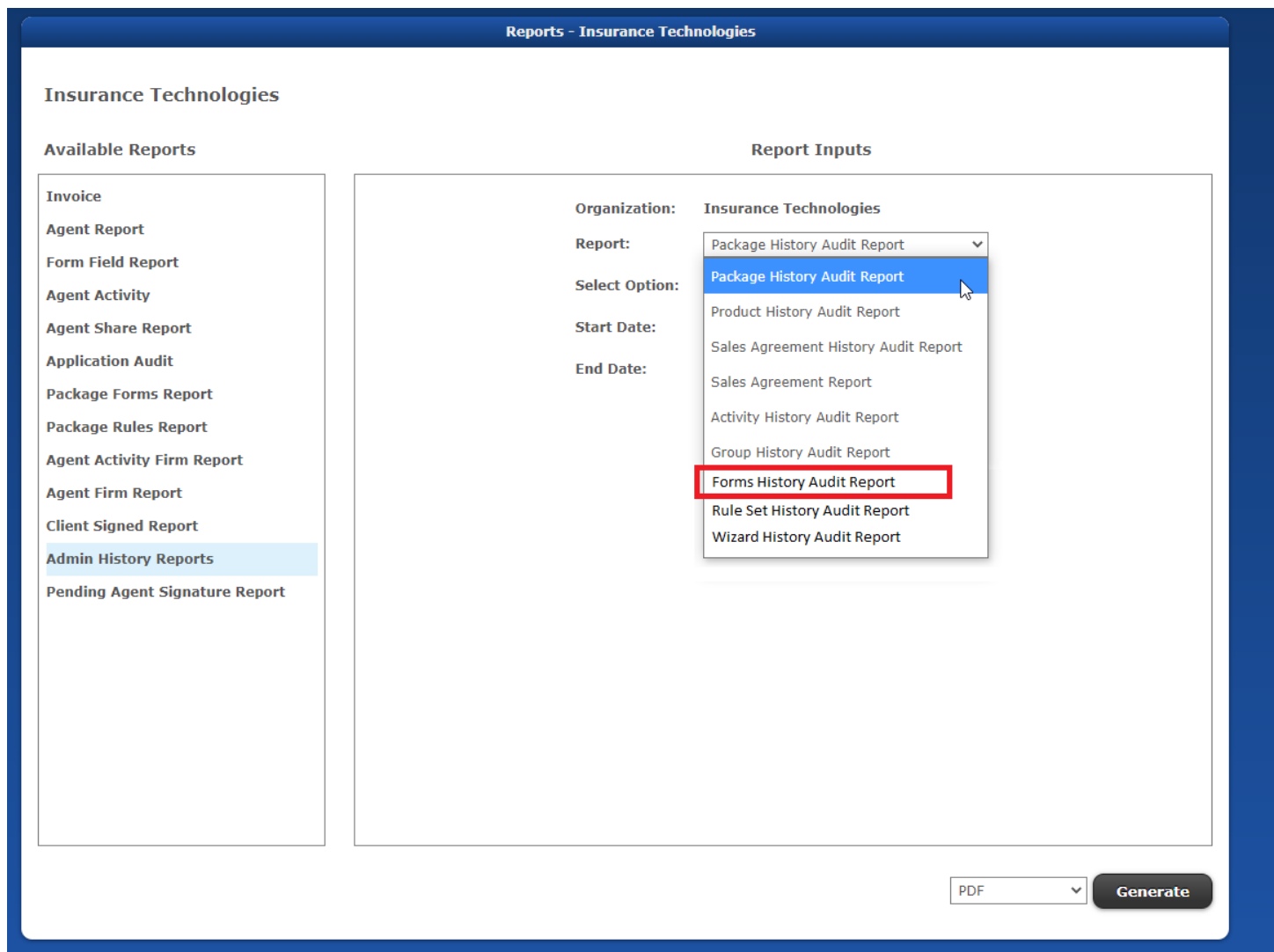
- Admin History Report PDF for Package History Audit Report, (Select Option "All Package") contains dates and enhanced subheadings.
- Admin History Report CSV for Package History Audit Report, (Select Option "All Package") contains dates and enhanced subheadings.
- Admin History Report PDF for Package History Audit Report, (Select Individual Option) contains dates in report header.

- Admin History Report CSV for Package History Audit Report, (Select Individual Option) contains dates in report header.
- Admin History Report PDF for Product History Audit Report, (Select Option "All Product") contains dates and enhanced subheadings.
- Admin History Report CSV for Product History Audit Report, (Select Option "All Product") contains dates and enhanced subheadings.
- Admin History Report PDF for Product History Audit Report, (Select Individual Option) contains dates in report header.
- Admin History Report CSV for Product History Audit Report, (Select Individual Option) contains dates in report header.
- Admin History Report PDF for Sales Agreement History Audit Report, (Select Option "All Sales Agreement") contains dates and enhanced subheadings.
- Admin History Report CSV for Sales Agreement History Audit Report, (Select Option "All Sales Agreement") contains dates and enhanced subheadings.
- Admin History Report PDF for Sales Agreement History Audit Report, (Select Individual Option) contains dates in report header.
- Admin History Report CSV for Sales Agreement History Audit Report, (Select Individual Option) contains dates in report header.
- Admin History Report PDF for Sales Agreement Report, (Select Option "All Sales Agreement") contains dates and enhanced subheadings.
- Admin History Report CSV for Sales Agreement Report, (Select Option "All Sales Agreement") contains dates and enhanced subheadings.
- Admin History Report PDF for Sales Agreement Report, (Select Individual Option) contains dates in report header.
- Admin History Report CSV for Sales Agreement Report, (Select Individual Option) contains dates in report header.
- Admin History Report PDF for Activity History Audit Report, (Select Option "All Activity") contains dates and enhanced subheadings.
- Admin History Report CSV for Activity History Audit Report, (Select Option "All Activity") contains dates and enhanced subheadings.
- Admin History Report PDF for Activity History Audit Report, (Select Individual Activity) contains dates in report header.
- Admin History Report CSV for Activity History Audit Report, (Select Individual Activity) contains dates in report header.
- Admin History Report PDF for Group History Audit Report, (Select Option "All User Groups") contains dates and enhanced subheadings.
- Admin History Report CSV for Group History Audit Report, (Select Option "All User Groups") contains dates and enhanced subheadings.

- Admin History Report PDF for Group History Audit Report, (Select Individual Group) contains dates in report header.
- Admin History Report CSV for Group History Audit Report, (Select Individual Group) contains dates in report header.

## 2 Admin History Reports: Forms History

A new Forms History Audit Report will be added to the Admin History Reports option in the Admin tool.



The screenshot displays the 'Reports - Insurance Technologies' interface. On the left, under 'Insurance Technologies', there is a list of 'Available Reports'. The 'Admin History Reports' option is highlighted. On the right, the 'Report Inputs' section shows the 'Organization' as 'Insurance Technologies'. A dropdown menu for 'Report:' is open, showing a list of report options. The 'Forms History Audit Report' is highlighted with a red box. Below the dropdown, there are fields for 'Select Option:', 'Start Date:', and 'End Date:'. At the bottom right, there is a 'PDF' dropdown and a 'Generate' button.

Available Reports	Report Inputs
Invoice	Organization: Insurance Technologies
Agent Report	Report: Package History Audit Report
Form Field Report	Select Option: Package History Audit Report
Agent Activity	Start Date:
Agent Share Report	End Date:
Application Audit	
Package Forms Report	
Package Rules Report	
Agent Activity Firm Report	
Agent Firm Report	
Client Signed Report	
Admin History Reports	
Pending Agent Signature Report	

PDF ▼ **Generate**



The new Forms History Audit Report will allow users to search for history by All Forms or individual forms listed in the "Select Option:" drop down. A selection for a start and end date for the search will be provided, allowing the user to leave the default previous month search, or search a custom date range for Forms History.

**Insurance Technologies**

**Available Reports**

- Invoice
- Agent Report
- Form Field Report
- Agent Activity
- Agent Share Report
- Application Audit
- Package Forms Report
- Package Rules Report
- Agent Activity Firm Report
- Agent Firm Report
- Client Signed Report
- Admin History Reports**
- Pending Agent Signature Report

**Report Inputs**

Organization: Insurance Technologies

Report: Forms History Audit Report

Select Option: All Forms

Start Date: 8/2/2020

End Date: 9/2/2020

PDF
Generate

The output will feature the same information that can be seen within the Forms Library History, but using the format established for the Audit History Reports currently today. The Form History will be available to download in PDF or CSV format.

## Audit History Report

**Organization:** FL Access Carrier

**Report Name:** Forms History Report

**Report For:** All Forms

**Start Date:** 4/1/2020

**End Date:** 9/17/2020

Action	Old Value	New Value	Create Date	User Making Changes
--------	-----------	-----------	-------------	---------------------

### **Acceptance Criteria**

- Forms History Audit Report is listed as a new report in Admin History Reports dropdown.
- Report can be run by "All Forms"
- Report can be run by specific/individual form.
- Start and End Dates default to the last month as expected, like other Admin History Reports currently do.
- Start and End Dates can be adjusted as desired.
- Report can be generated in PDF format.
- Report can be generated in CSV format.
- Report output contains valid information in the correct format.

## **3 Admin History Reports: Rule Set History**

A new Rule Set History Audit Report will be added to the Admin History Reports option in the Admin tool.

Reports - Insurance Technologies

### Insurance Technologies

#### Available Reports

- Invoice
- Agent Report
- Form Field Report
- Agent Activity
- Agent Share Report
- Application Audit
- Package Forms Report
- Package Rules Report
- Agent Activity Firm Report
- Agent Firm Report
- Client Signed Report
- Admin History Reports
- Pending Agent Signature Report

#### Report Inputs

Organization: Insurance Technologies

Report:

Select Option:

Start Date:

End Date:

Package History Audit Report

Package History Audit Report

Product History Audit Report
Sales Agreement History Audit Report
Sales Agreement Report
Activity History Audit Report
Group History Audit Report
Forms History Audit Report

Rule Set History Audit Report

Wizard History Audit Report

PDF

Generate

The new Rule Set History Audit Report will allow users to search for history by All Rule Sets or individual rule sets listed in the "Select Option:" drop down. A selection for a start and end date for the search will be provided, allowing the user to leave the default previous month search, or search a custom date range for Rule Set History.

CONFIDENTIAL ©2020 Insurance Technologies, LLC. All rights reserved.

Page 11 of 16

Reports - Insurance Technologies

### Insurance Technologies

#### Available Reports

Invoice

Agent Report

Form Field Report

Agent Activity

Agent Share Report

Application Audit

Package Forms Report

Package Rules Report

Agent Activity Firm Report

Agent Firm Report

Client Signed Report

Admin History Reports

Pending Agent Signature Report

#### Report Inputs

Organization:

Insurance Technologies

Report:

Rule Set History Audit Report ▼

Select Option:

All Rule Sets ▼

Start Date:

8/2/2020

End Date:

9/2/2020

PDF ▼

Generate

The output will feature the same information that can be seen within the Rule Set History, but using the format established for the Audit History Reports currently today. The Rule Set History will be available to download in PDF or CSV format.

## Audit History Report

---

**Organization:** FL Access Carrier  
**Report Name:** Rule Set History Report  
**Report For:** All Rule Sets  
**Start Date:** 4/1/2020  
**End Date:** 9/17/2020

---

Action	Old Value	New Value	Create Date	User Making Changes
--------	-----------	-----------	-------------	---------------------

---

### ***Acceptance Criteria***

- Rule Set History Audit Report is listed as a new report in Admin History Reports dropdown.
- Report can be run by "All Rule Sets"
- Report can be run by specific/individual rule sets.
- Start and End Dates default to the last month as expected, like other Admin History Reports currently do.
- Start and End Dates can be adjusted as desired.
- Report can be generated in PDF format.
- Report can be generated in CSV format.
- Report output contains valid information in the correct format.

## **4 Admin History Reports: Wizard History**

A new Wizard History Audit Report will be added to the Admin History Reports option in the Admin tool.

Reports - Insurance Technologies

### Insurance Technologies

#### Available Reports

- Invoice
- Agent Report
- Form Field Report
- Agent Activity
- Agent Share Report
- Application Audit
- Package Forms Report
- Package Rules Report
- Agent Activity Firm Report
- Agent Firm Report
- Client Signed Report
- Admin History Reports
- Pending Agent Signature Report

#### Report Inputs

**Organization:** Insurance Technologies

**Report:**

**Select Option:**

**Start Date:**

**End Date:**

Package History Audit Report ▼

Package History Audit Report

Product History Audit Report

Sales Agreement History Audit Report

Sales Agreement Report

Activity History Audit Report

Group History Audit Report

Forms History Audit Report

Rule Set History Audit Report

Wizard History Audit Report

PDF ▼

Generate

The new Wizard History Audit Report will allow users to search for history by All Wizards or individual wizards listed in the "Select Option:" drop down. A selection for a start and end date for the search will be provided, allowing the user to leave the default previous month search, or search a custom date range for Wizard History.

CONFIDENTIAL ©2020 Insurance Technologies, LLC. All rights reserved.

Page 14 of 16

Reports - Insurance Technologies

### Insurance Technologies

#### Available Reports

Invoice

Agent Report

Form Field Report

Agent Activity

Agent Share Report

Application Audit

Package Forms Report

Package Rules Report

Agent Activity Firm Report

Agent Firm Report

Client Signed Report

Admin History Reports

Pending Agent Signature Report

#### Report Inputs

Organization:

Insurance Technologies

Report:

Select Option:

Start Date:

End Date:

PDF

Generate

The output will feature the same information that can be seen within the Wizard Library History, but using the format established for the Audit History Reports currently today. The Wizard History will be available to download in PDF or CSV format.

## Audit History Report

**Organization:** FL Access Carrier

**Report Name:** Wizard History Report

**Report For:** All Wizards

**Start Date:** 4/1/2020

**End Date:** 9/17/2020

Action	Old Value	New Value	Create Date	User Making Changes
--------	-----------	-----------	-------------	---------------------

### ***Acceptance Criteria***

- Wizard History Audit Report is listed as a new report in Admin History Reports dropdown.
- Report can be run by "All Wizards"
- Report can be run by specific/individual wizards.
- Start and End Dates default to the last month as expected, like other Admin History Reports currently do.
- Start and End Dates can be adjusted as desired.
- Report can be generated in PDF format.
- Report can be generated in CSV format.
- Report output contains valid information in the correct format.