

Export Results of Searches

FIRELIGHT BASE



EXPORT RESULTS OF SEARCHES

Document Version: 1.0

Published: December 24, 2021



Insurance Technologies, LLC

Copyright © 2021 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 Website: http://www.insurancetechnologies.com



Table of Contents

iCon	nect 233156 Design Approach - Export Results of Searches	4
1	(App) Add Export Results option on Review Queue	4
2	(App) Add Export Results option on All Activities	/





iConnect 233156 Design Approach - Export Results of Searches

Project Overview

With this feature clients will have the ability to export search results from all available views on All Activities and Review Queue screens on the App side into a Comma Separated File (CSV). Clients will then be able to take that data in CSV and use it for further research.

Impacts:

A new icon will be added on both the screens below to allow exporting data visible on the screen, either from the default view or after a search is performed.

FL App -> Manage -> All Activities - "Export" functionality

FL App -> Manage -> Review Queue -> Queues - "Export" functionality

1 (App) Add Export Results option on Review Queue

A new "Export" button will be added on Review Queue page. Clicking on this button will export all pages of current view result set into a CSV file. It will show a prompt to save the CSV file. User can export the default, saved or an advanced search result set.

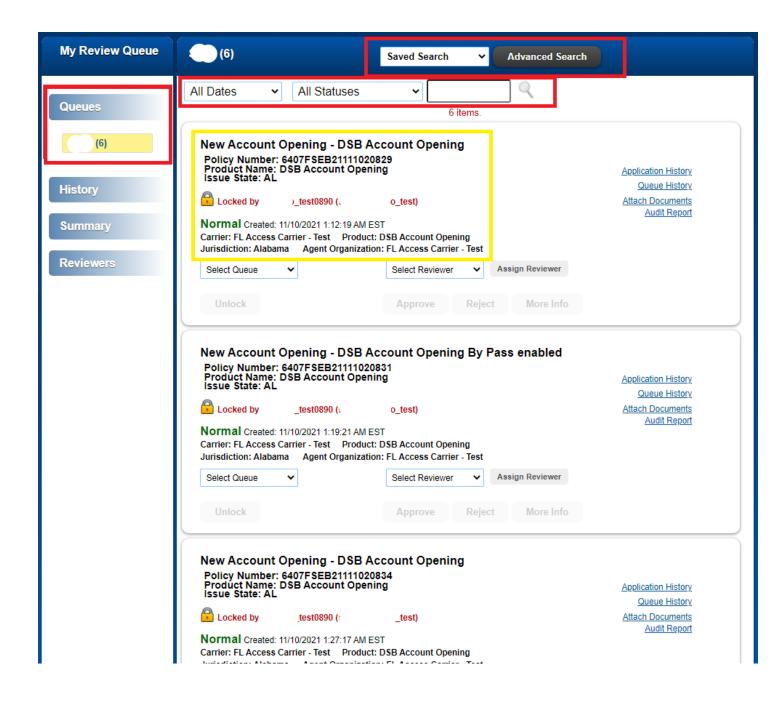
This new button will display for only "Queues" tab on Review Queue screen.

In below screenshot,

- 1. All data listed/searched from fields within the red highlighted box will have export option.
- 2. All fields listed within the yellow highlighted box will be exported to the CSV file.



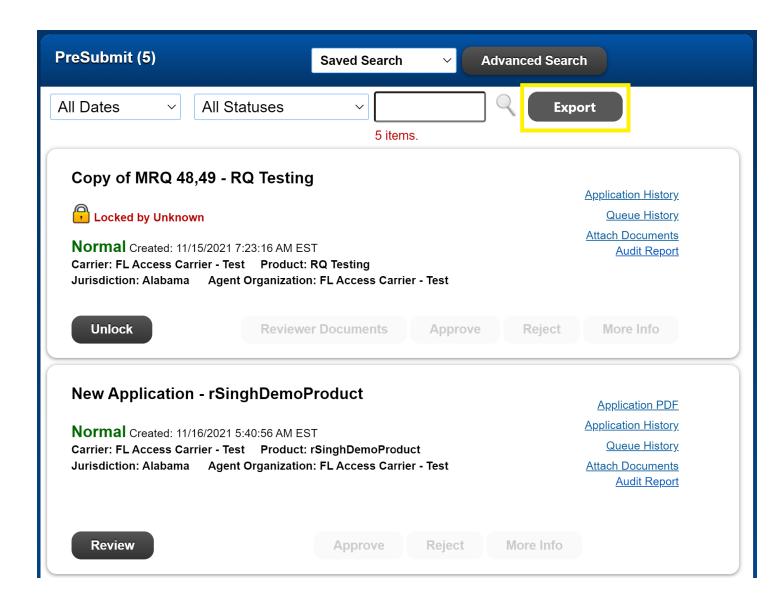




Below Mockup display the "Export" button and placement.







Sample of fields that will be exported to the CSV file:

User	Review Queue	Activity Name	Policy Number	Product Name	Issue State	Locked By	Status	Created	Carrier	Product	Jurisdiction	Agent Organization
User_Test	Pre-Review	New Needs Determination - Need Determination	6407FSEB21111102829	DSB Account Opening	AL	User_Test	Normal	12/16/21 1:19:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test
User_Test	Pre-Review	New Application - iSured Lifetime Income	6407FSEB21111102830	DSB Account Opening	AL	User_Test	Normal	12/15/21 5:21:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test
User_Test	Pre-Review	New Needs Determination - Need Determination-2	6407FSEB21111102827	DSB Account Opening	AL	User_Test	Normal	12/12/21 1:11:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test





Acceptance Criteria

- When basic search is performed, search results exported are the results in the basic search.
- When "Advanced Search" is performed, search results exported are the results returned in the Advanced Search.
- New "Export" button is available on "Queues" tab of Review Queue screen.
- Clicking on this Export button will export review data listed on the screen into a CSV file.
- Exported CSV file has all fields containing review data as mentioned in the sample CSV format.

2 (App) Add Export Results option on All Activities

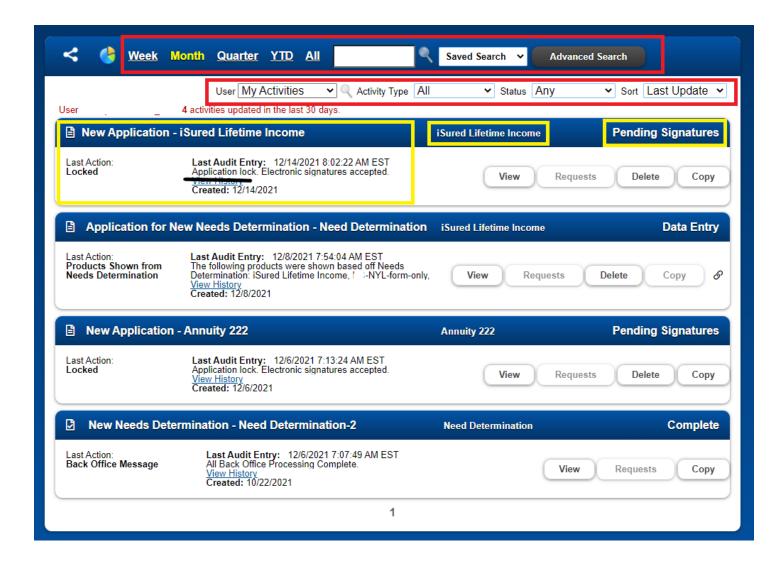
A new "Export" button will be added on All Activities pages. Clicking this button will export all pages of current view results into a CSV file. A prompt will also be displayed to optionally save the CSV file. The user can export the default, saved or advanced search result data.

In below screenshot,

- 1. All data listed/searched from fields within the red highlighted box will have export option.
- 2. All fields listed within the yellow highlighted box will be exported to the CSV file.



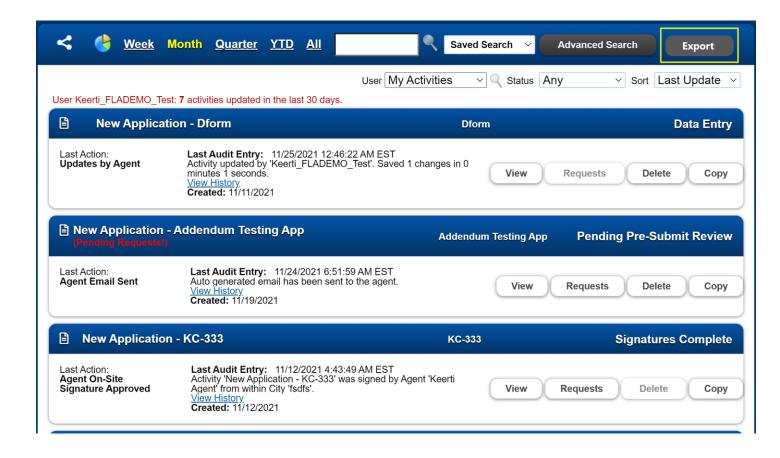




Below Mockup highlights the placement of the "Export" button.







Sample CSV file of fields exported:

+						
User	Activity Name	Activity Type	Status	Last Action	Last Audit Entry	Created
					12/20/2021 7:40:57 AM EST	
					Activity updated by 'User_Test'. Saved 1 changes in 0 minutes 1	
User_Test	New Needs Determination - Need Determination	Need Determination	Data Entry	Updates by Agent	seconds.	12/20/2021
					12/14/2021 8:02:22 AM EST	
User_Test	New Application - iSured Lifetime Income	iSured Lifetime Income	Pending Signatures	Locked	Application lock. Electronic signatures accepted.	12/16/2021
					12/6/2021 7:07:49 AM EST	
User_Test	New Needs Determination - Need Determination-2	Need Determination	Complete	Back Office Message	All Back Office Processing Complete.	12/15/2021

Acceptance Criteria

- When basic search is performed, search results exported are the results in the basic search.
- When "Advanced Search" is performed, search results exported are the results returned in the Advanced Search.
- New "Export" button is available on All Activities screen.





- Clicking on this Export button will export app data listed on the screen into a CSV file.
- Exported CSV file has all fields containing app data as mentioned in the sample CSV format.