iConnect 182779 Design Approach

Project Overview

The goal of this project is to integrate training videos into FireLight.

Features/Requirements

- The user can click the "Training" button on the top toolbar to display the training dialog.
- The list of videos on the training dialog will be specific to the current system context. For example, if the user is on the home page, only videos specific to the home page will be visible.
- The user can click the "View All Videos" link on the training dialog, which will show all videos available in the system, regardless of context.
- Training video availability can be controlled by role code.

Admin Changes

Added "Enable Training" checkbox on the "App Only" tab within Group profile administration. Also added new "Training" tab with the list of videos that can be selected for display to users.

App Changes

Added Training tab to toolbar, along with the new training video dialog.
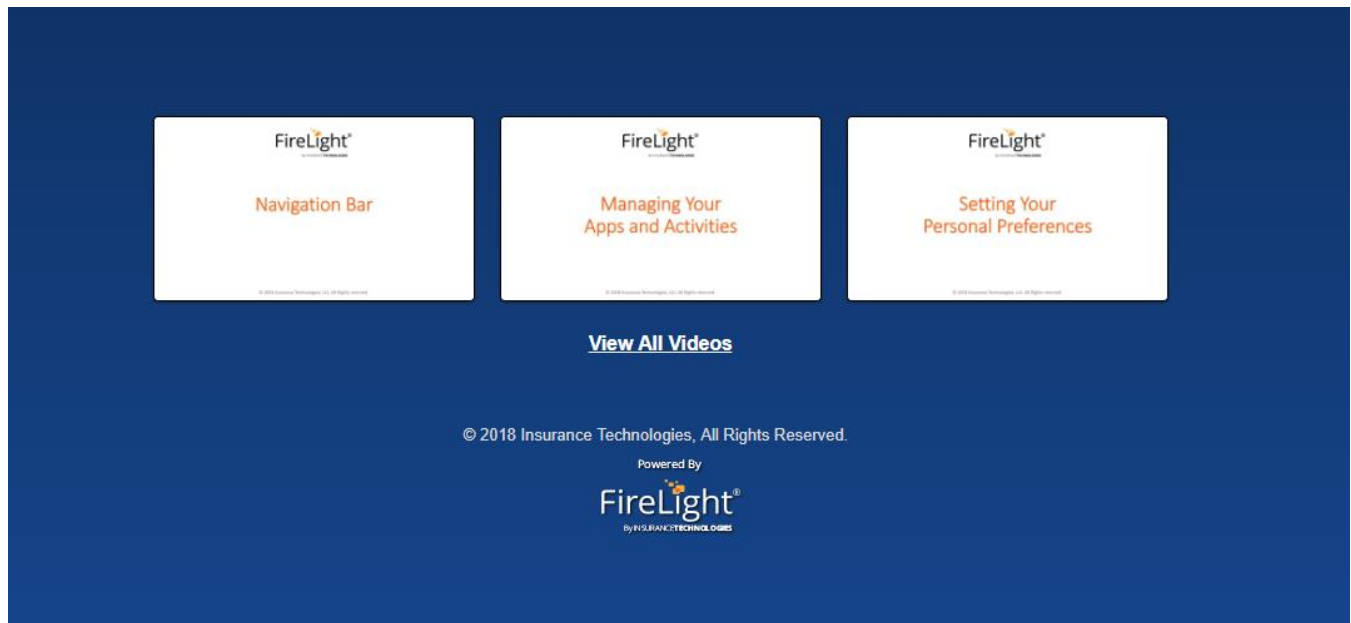
Integration Changes

No changes to the application. If custom videos are needed for a client, they will need to be uploaded to the FireLight Vimeo account and tagged appropriately. This will be handled through the marketing team at Insurance Technologies. There may be a 20-minute delay between videos being added and tagged in Vimeo and those videos being available within FireLight.

UI Mock Ups

Training Tab (Admin):

Training Dialog (Application):

How to Enable and Use This Feature

To enable this feature within FireLight Admin:

- From the home page within FireLight Admin, select "Profile Administration" and then select "Groups."
- For a given group, check the "Enable Training" checkbox on the "App Only" tab and select "Save."
- The "Training" tab will now appear. Select it.
- A list of training videos will appear. Check the checkboxes next to all training videos that should be available for the current group and select "Save."

To use this feature within the FireLight application:

- Select the "Training" button on the top toolbar within the FireLight application. The button will be visible whenever training videos are enabled in FireLight Admin.
- A new browser tab will open with the list of available training videos. If any videos are available that are specific to the current system context, only those videos will be visible; otherwise, all videos will be visible.

Tags used to enable a video for selection within FireLight Admin (for Insurance Technologies marketing team):

- "Production" – The video is ready to be enabled within the FireLight UI.
- Client abbreviation – The video is only available for a specific client.
- "BaseFireLight" – The video is available for all clients.
- "GeneralSystem" – The video is available throughout the system.
- "Home" – The video is available when the user is on the home screen.
- "Preferences" – The video is available when the user is on the preferences screen.
- "AllActivities" – The video is available when the user is on the All Activities screen.
- "NewActivity" – The video is available when the user is creating a new activity.
- "EditActivity" – The video is available when the user is editing an existing activity.
- "eSignature" – The video is available when the user is in eSignature, regardless of activity type.
- Activity Transaction Type (e.g. "Application", "SubPay", "NeedsDetermination", "PostIssue", "FeeInquiry", "Illustration", "GuidedIllustration", "AccountOpening", or "eDelivery") – The video is available for a specific activity. Videos tagged with an activity transaction type will also need the "NewActivity" and/or "EditActivity" tags to indicate where they should be displayed. A video tagged only with the activity transaction type will not be displayed.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	On the "App Only" tab, the "Enable Training" checkbox is available. When "Enable Training" is checked and settings are saved, a "Training" tab will be visible, which will contain a list of all videos available to the current organization.
- Reports		
- 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		