INSURANCE TECHNOLOGIES

Add History to Activities and Groups

FIRELIGHT BASE

FireLight®

Platform

ADD HISTORY TO ACTIVITIES AND GROUPS

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Insurance Technologies, LLC

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Table of Contents

iConnect Design Approach - Add History to Activities and Groups 4
1 Activities Audit report PDF/CSV 8
2 Addition of Group and Activity Histroy Reports to the Reports page 9
3 Groups Audit report PDF/CSV 5
4 Add History to Activities page 6
5 Add history to Groups page 4

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iConnect Design Approach - Add History to Activities and Groups

Project Overview

Adding a history/audit report for Activities and Groups will help us manage Group updates, Activity changes, and improve the ability for the admin to manage the platform. This will also allow a user to triage Group and Activity issues that can impact correct workflow.

Impacts:

Admin: Groups and Activity history tab

1 Add history to Groups page

We need to add a tab to the Groups page to allow the user to view the history of the selected Groups. This will allow the user to view each change that has been made to the selected Groups. For this, we will want to add a tab entitled Groups History.

This example below shows the areas and data we will be collecting in the Groups History. The goal is to give the user a full view of all changes that are occurring with the Groups selected.

The below screenshot example shows the value shown in the admin and not the actual property name. Include the group name as well. Example: "Admin Test, Optional Client Email was disabled" for option "Optional Client Email" when it's getting disabled.

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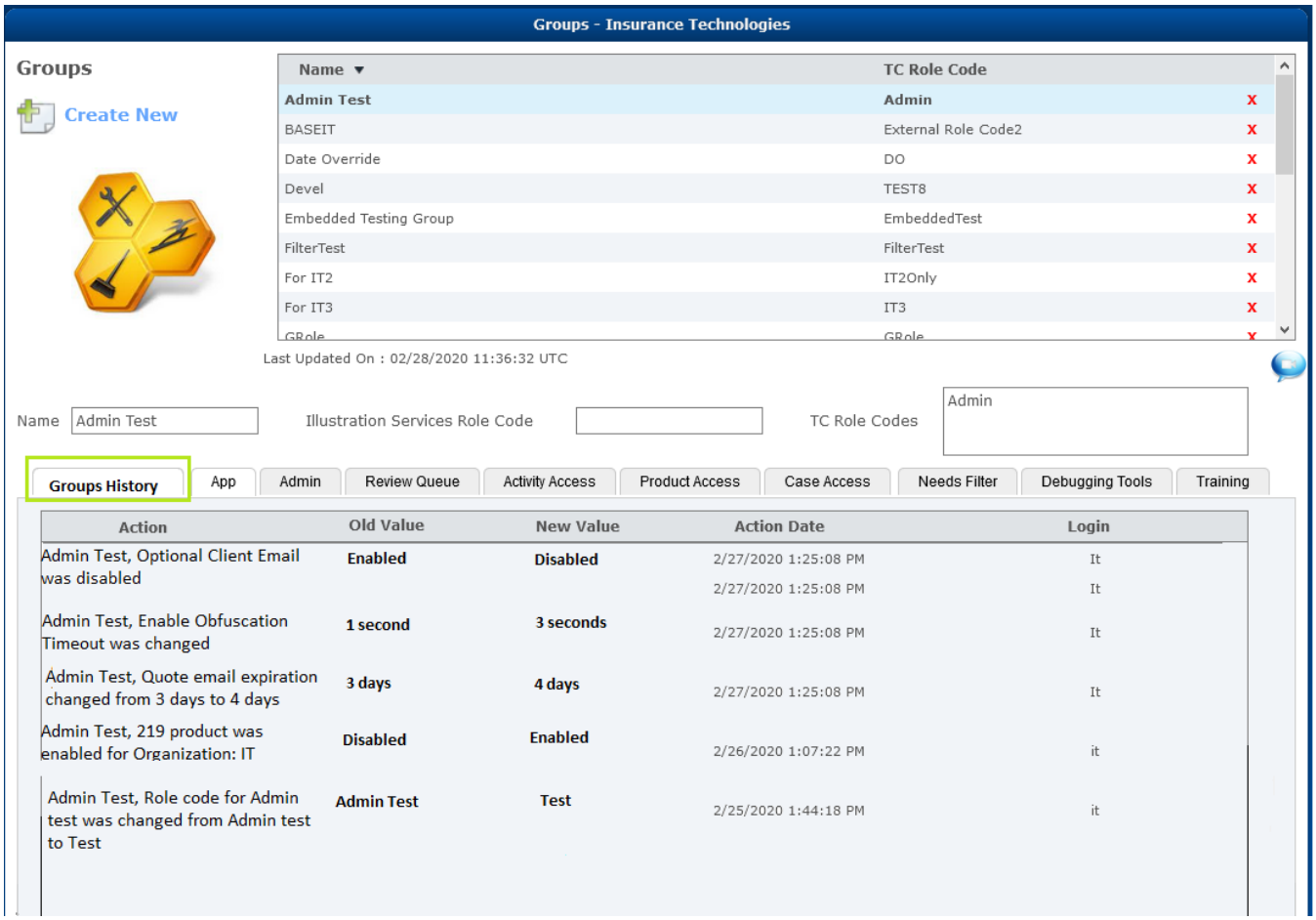

Acceptance Criteria

- Group History tab is available for the user to view the history of each selected group
- Group History will show the Group name along with the action that has occurred in the history tab.

2 Groups Audit report PDF/CSV

The addition of an Audit report for Groups history will need to be implemented. This Audit report will need to show in both CSV and PDF. The Groups audit report will show the history of the Groups page.

PDF Example:

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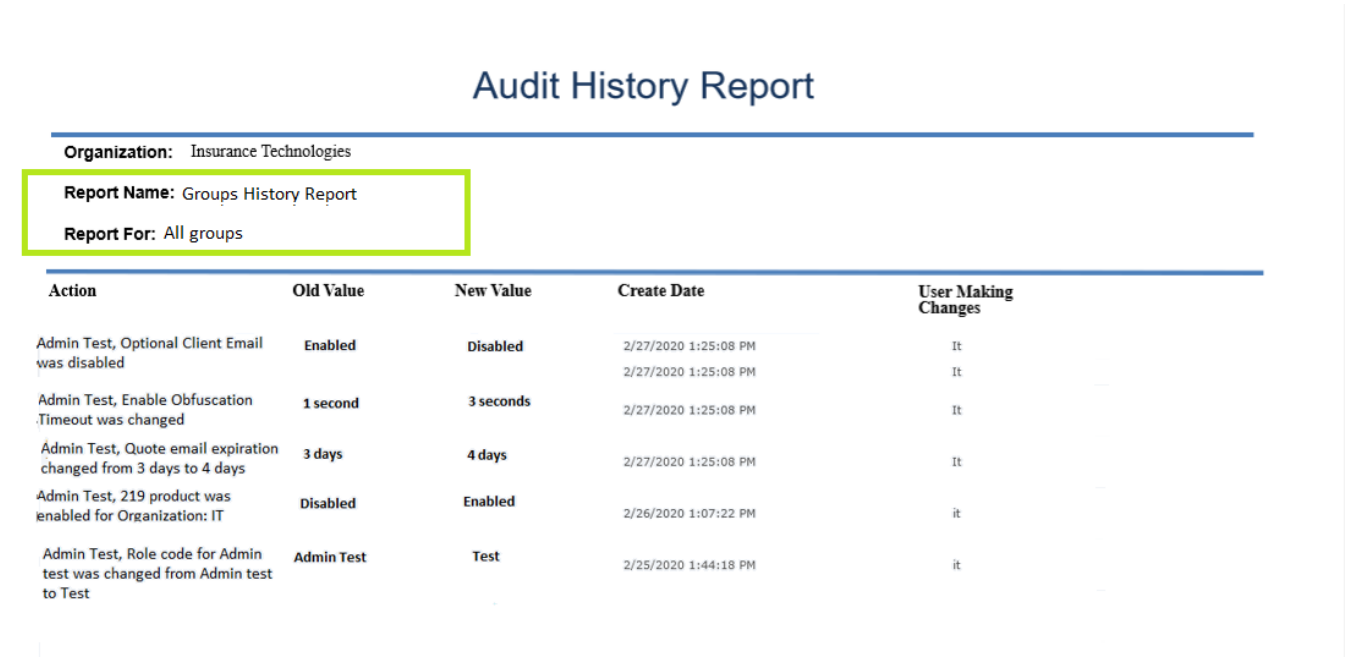


Audit History Report

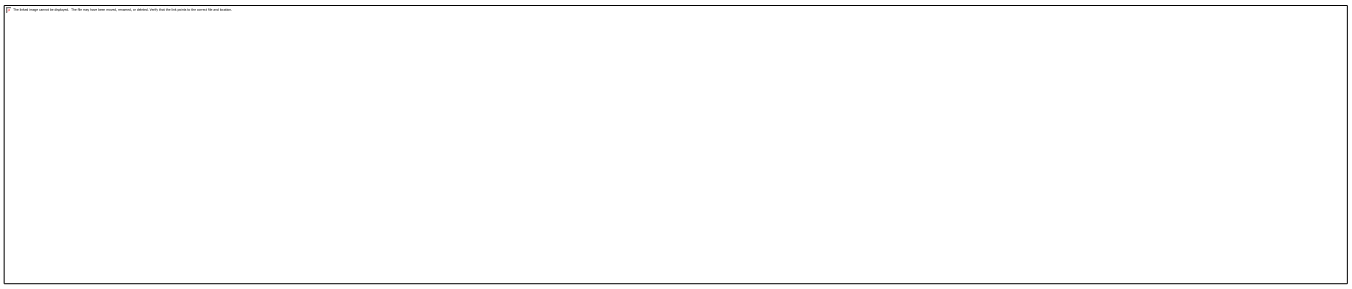
Organization: Insurance Technologies

Report Name: Groups History Report

Report For: All groups

Action	Old Value	New Value	Create Date	User Making Changes
Admin Test, Optional Client Email was disabled	Enabled	Disabled	2/27/2020 1:25:08 PM	It
			2/27/2020 1:25:08 PM	It
Admin Test, Enable Obfuscation Timeout was changed	1 second	3 seconds	2/27/2020 1:25:08 PM	It
Admin Test, Quote email expiration changed from 3 days to 4 days	3 days	4 days	2/27/2020 1:25:08 PM	It
Admin Test, 219 product was enabled for Organization: IT	Disabled	Enabled	2/26/2020 1:07:22 PM	it
Admin Test, Role code for Admin test was changed from Admin test to Test	Admin Test	Test	2/25/2020 1:44:18 PM	it

CSV Example:



Acceptance Criteria

- Groups History Audit report is available in PDF.
- Groups History Audit report is available in CSV.

3 Add History to Activities page

We need to add a tab to the Activities page to allow the user to view the history of the selected Activity. This will allow the user to view each change that has been made to the selected Activity. For this, we will want to add a tab entitled Activity History.

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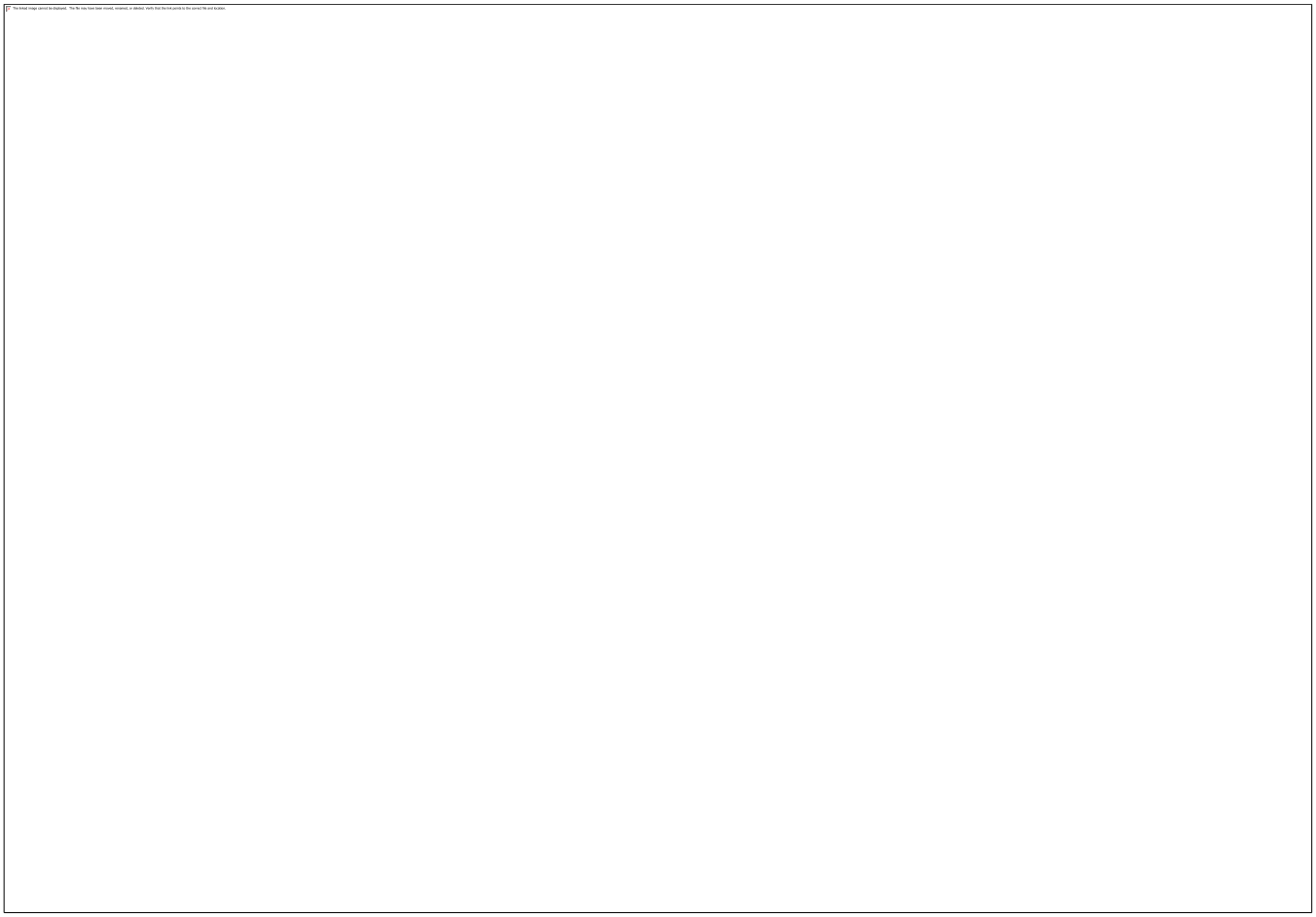
This example below shows the areas and data we will be collecting in the Activity History. The goal is to give the user a full view of all changes that are occurring with the Activity selected.



Acceptance Criteria

- Activity History tab is available to allow the user to view the history of each activity

4 Activities Audit report PDF/CSV

The addition of an Audit report for Activities will need to be implemented. This Audit report will need to show in both CSV and PDF. The Activities audit report will show the history of the Activity page.

PDF Example:

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Audit History Report

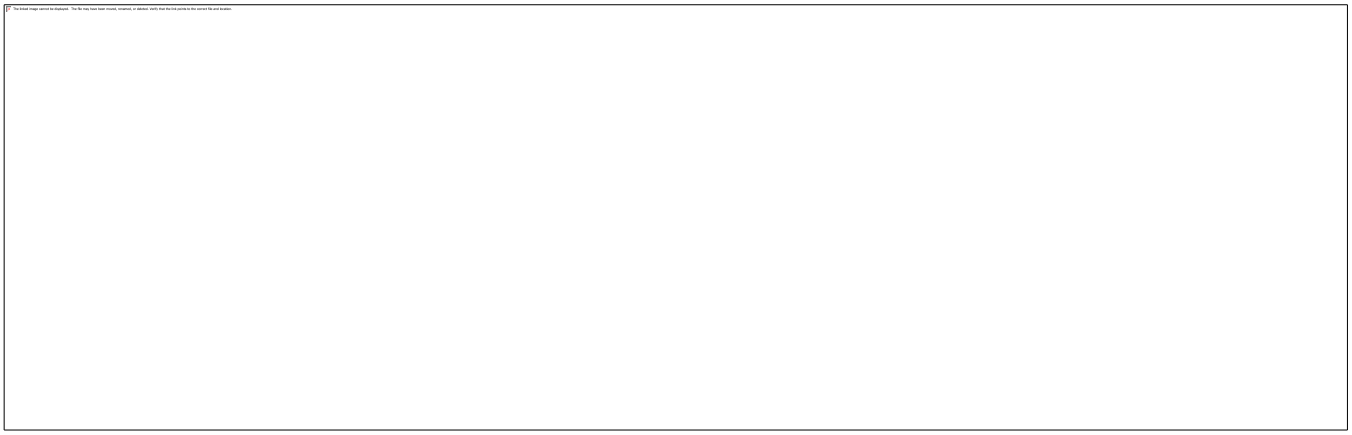
Organization: Insurance Technologies

Report Name: Activity History Report

Report For: All Activities

Action	Old Value	New Value	Create Date	User Making Changes
Activity Name was Updated	Account	Account Opening	2/27/2020 1:25:08 PM	It
Acord Type was Updated	ACORD Opening	Application	2/27/2020 1:25:08 PM	It
Billing code was updated	123	321	2/27/2020 1:25:08 PM	It
Branding Icon was updated	file-text-o	location-arrow	2/27/2020 1:25:08 PM	It
Complete Purge Policy was updated	10	15	2/26/2020 1:07:22 PM	it
Incomplete Purge Policy was updated	10	20	2/25/2020 1:44:18 PM	it
Continue/Apply Label was updated	Quote	edelivery	2/25/2020 1:43:53 PM	it
Allow Pre-Signature Review was enabled	Disabled	Enabled	1/6/2020 9:46:43 AM	IT

CSV Example:



Acceptance Criteria

- Activity History Audit report is available in PDF.
- Activity History Audit report is available in CSV.

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5 Addition of Group and Activity History Reports to the Reports page

With the addition of both the Groups and Activity reports, we will need to add these reports to the admin history reports section in the reports page of the admin. Both Groups and Activity be included in the Report dropdown.

The Activity and Groups audit reports will also be available to be downloaded by both CSV and PDF versions.

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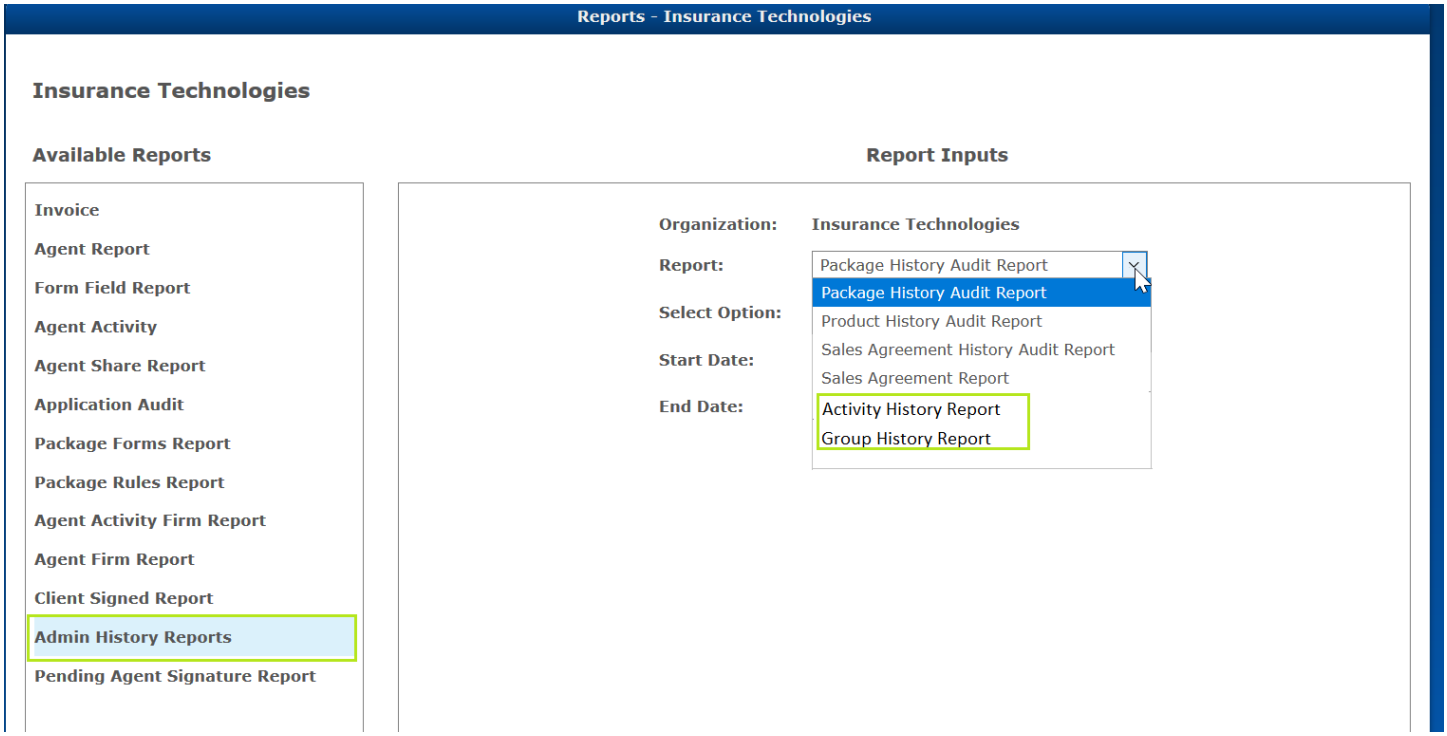

Acceptance Criteria

- Activity History audit report is available within the Admin History reports under the report dropdown
- Group History audit report is available within the Admin History reports under the report dropdown

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