INSURANCE TECHNOLOGIES

Activity Share Enhancements

FIRELIGHT BASE

FireLight®

Platform

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iConnect 243108 Design Approach - Activity Share Enhancements

Project Overview

The feature to Share activities in FireLight with another user is confusing to the user base. Once an activity is shared with another user, the user is required to search in "All Activities" for the shared case by the originator's username each time they want to access it. Many of our distribution partners have created an internal user guide to help their users navigate to a shared activity, but many users still have questions.

FireLight users are requesting ease of use and greater visibility for shared activities. Adding greater visibility of shared activities will provide clients with the ability to view shared cases in a way that does not require them to search for the activity. Users would like to easily see when an activity is shared with them and access the shared activity easily from their dashboard

1   Add "Shared Activity" Tab View to FireLight Home Page

A new tab will be placed on the FireLight home page for users to easily identify and access shared activities. This tab will be placed next to the "Recent Activity" tab called "Shared Activity". The user will be defaulted to the "Recent Activity" tab view upon entering the dashboard/home page. A slight variation of the tab colors will provide the user easy insight as to which tab they are viewing.

"Recent Activity" tab default/selected:

"Shared Activity" tab selected:

When there is no Shared Activity to display, the user will see "No shared activity"
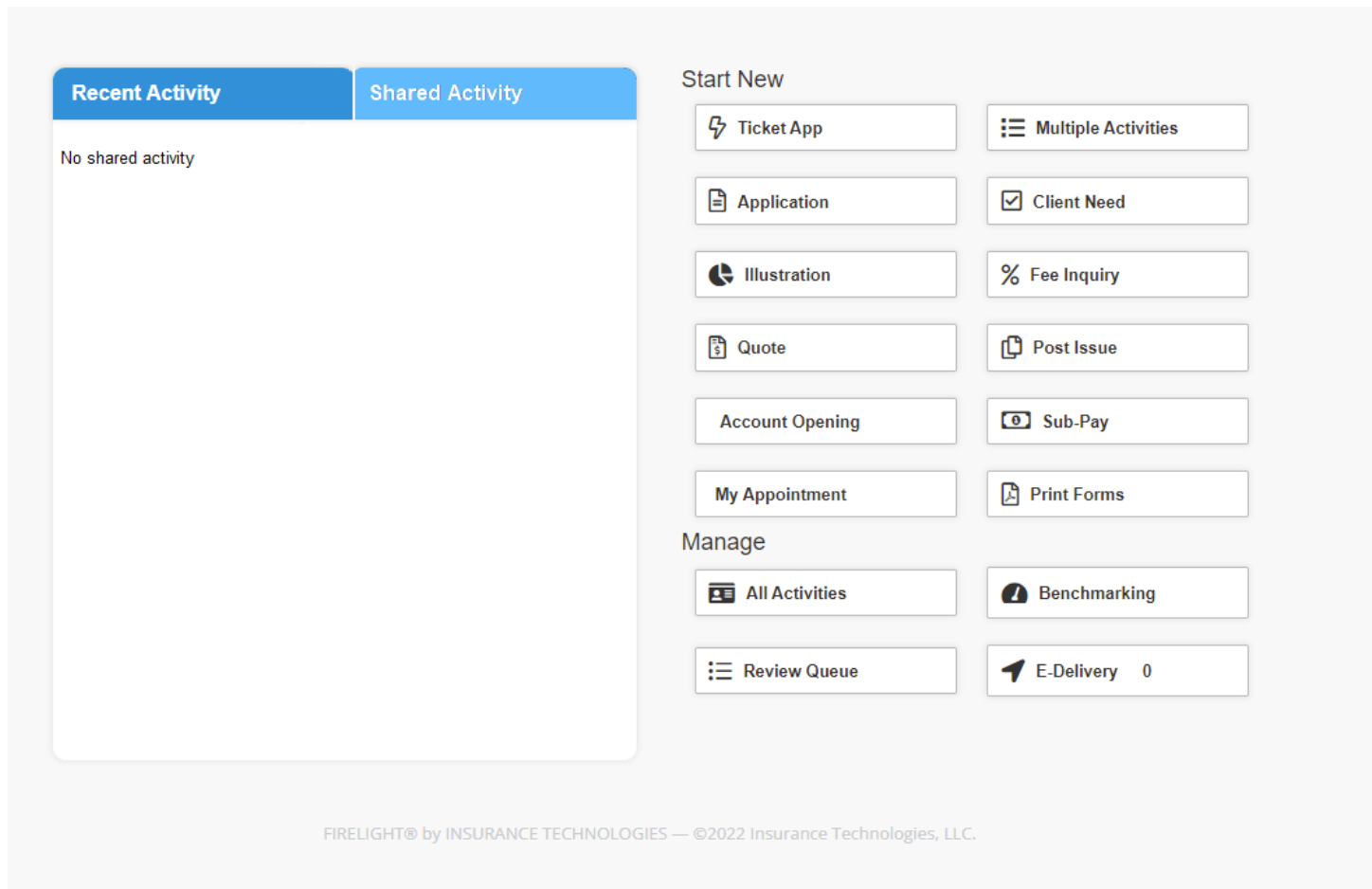
Acceptance Criteria

- New tab, "Shared Activity" is created.
- User home page/dashboard view defaults to Recent Activity tab.
- "Shared Activity" tab will always display.
- View is distinguishable to the user which tab they are currently on by a slight color variation.
- "Shared Activity" tab is localized.
- When no "Recent Activity" is available to display, the "Shared Activity" tab will still display.
- When no "Shared Activity" is available to display, the user will see "No shared activity".

2 "Shared Activity" Tab Features

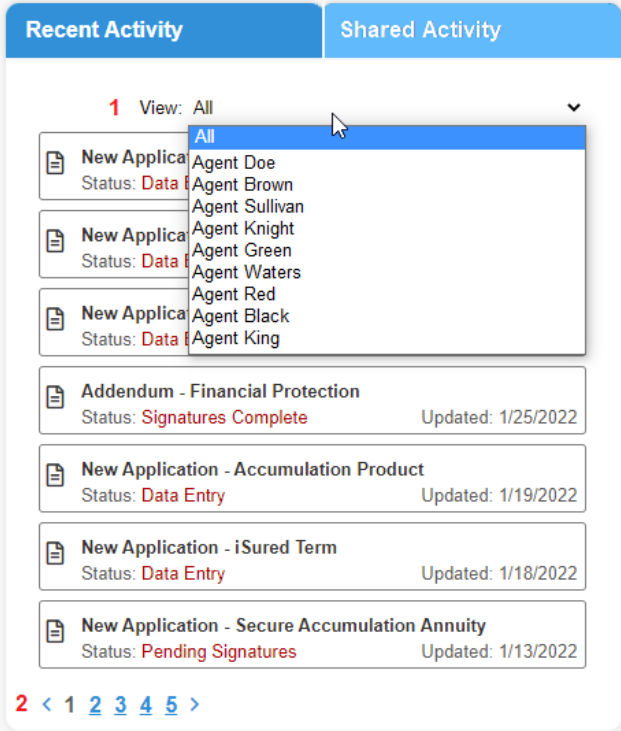The "Shared Activity" tab will contain the ability to filter by the shared user (owner) of the activity. The navigation options for multi-pages (if applicable) will remain the same as the "Recent Activity" tab for the shared user once a share request has been accepted via email link.

1. Ability to filter by "All" shared users (owner of the activity) or by individual users.

If filtered by "All", the activities will display in order of last updated date in descending order.

2. Navigation for multiple pages of shared activities (if applicable).

3. If Groups, App, User Rights Home/All Activities is set to "Disable View Activities", the activities listed in the "Shared Activity" tab will only provide a status and date of shared activities in a read-only view. Clicking an activity in the list will not open the activity.
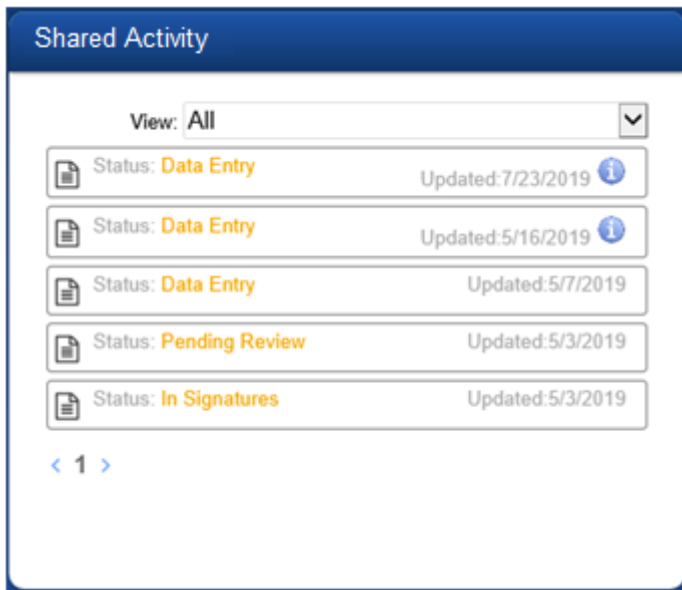
Acceptance Criteria

- Shared activities are displayed in the "Shared Activity" tab once the share request has been accepted via email link.
- Shared requests not accepted are not displayed in "Shared Activity" tab view.
- Shared requests cancelled/removed by the originator no longer display in "Shared Activity" tab view.
- Expired share requests are not displayed in the "Shared Activity" tab view.
- The user who originated the share request will continue to see the activity under their "Recent Activity" list; no changes will be implemented for how the original user views the activity.
- "Shared Activity" has ability to filter view by all shared activities or by user who shared the activity (owner of the activity).
- When using the "All" filter for "Shared Activity", the activities will display in order of last updated date in descending order.
- "Shared Activity" features navigation for multiple pages of shared activities (if applicable).
- When "Disable View Activities" group option is selected, a read-only view is provided of the shared activity(ies) with the status and date. Clicking the activity in the list does not open the activity.
- Individually shared activities will be displayed in the "Shared Activity" tab view.
- All activity share will continue to be accessed only from the "All Activities".