iConnect Design Approach - Request for Additional Details for Admin Deployments

Project Overview

Clients have requested that more details are to be given whenever a deployment has been done. To help maximize the amount of details given to the user during any deployment, more options in both the current and history of each deployment need to be updated. The addition of log views for not only form/wizard changes, but rule set, product, sales agreement and activity changes etc. will give more detailed info on what exactly was included with a deployment. Also, links for forms/wizards, products, rule sets, activities and sales agreements etc. will allow the user to view a detailed history of past deployments as well
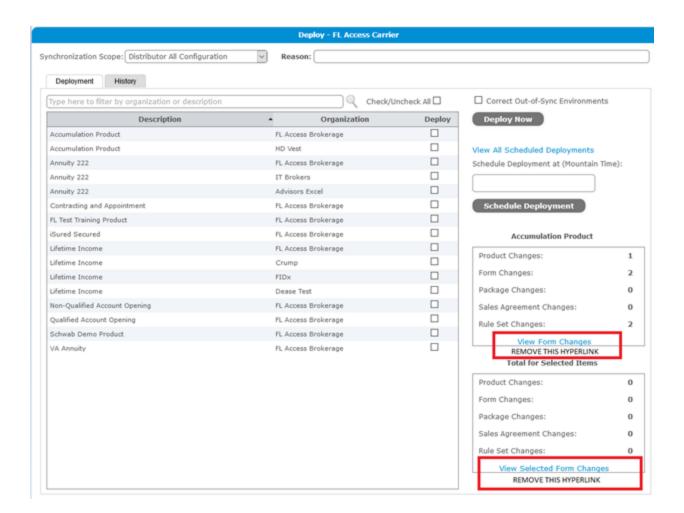
Requirements / User Stories

Removal of View Form Changes Hyperlink

Currently the user can only view form changes. We need to remove this Hyperlink under the deployment tab in the deployment screen. This Hyperlink will be replaced and represented in all applicable changes for each deployment. (Refer to story 7017)

Acceptance Criteria

- View form changes hyperlink is no longer in place in the deployment tab.

Addition of Hyperlink to all applicable areas of deployment

Fire Light has been limited to only allow the user to view form changes in each deployment. We will need to change this to allow the user to have a better detailed description of what has transpired in each deployment. Therefor we will add hyperlinks to all areas of the deployment, Description items and Total selected items. The hyperlink will only be available if a change in the deployment is found. For example, if the selected item has 2 forms changes a hyperlink will be available. If Product changes has 0, then no hyperlink is needed.

Deploy – FL Access Carrier

Synchronization Scope: Distributor All Configuration   Reason:

Tabs: Deployment | History

Description	Organization	Deploy
Accumulation Product	FL Access Brokerage	☐
Accumulation Product	HD Vest	☐
Annuity 222	FL Access Brokerage	☑
Annuity 222	IT Brokers	☐
Annuity 222	Advisors Excel	☐
Contracting and Appointment	FL Access Brokerage	☐
FL Test Training Product	FL Access Brokerage	☐
iSured Secured	FL Access Brokerage	☐
Lifetime Income	FL Access Brokerage	☐
Lifetime Income	Crump	☐
Lifetime Income	FIDx	☐
Lifetime Income	Dease Test	☐
Non-Qualified Account Opening	FL Access Brokerage	☐
Qualified Account Opening	FL Access Brokerage	☐
Schwab Demo Product	FL Access Brokerage	☐
VA Annuity	FL Access Brokerage	☐

Check/Uncheck All ☐
☐ Correct Out-of-Sync Environments
Deploy Now
View All Scheduled Deployments
Schedule Deployment at (Mountain Time):
Schedule Deployment

Annuity 222 — *Description Box*

Product Changes:	0
Form Changes:	3
Package Changes:	1
Sales Agreement Changes:	0
Ruleset Changes:	3

Total for Selected Items — *Total for Selected Items Box*

Product Changes:	0
Form Changes:	3
Package Changes:	1
Sales Agreement Changes:	0
Ruleset Changes:	3

Acceptance Criteria

- Hyperlinks are available for all applicable deployment changes in the Description and Total for Selected items boxes.

Forms/Wizard, Product, Package, Sales Agreement, Ruleset and Activity Logs

The addition of the hyperlink will now allow the user to view a History log of each applicable change. Once the hyperlink is selected, the history log will enable for the user to view. This will apply to both the Description and Total Selected Items boxes. Below are a few examples of each History log:

Total Items Selected for Form changes Example:

Form Number	Date/Time	Action	Old Value	New Value
Application222	6/13/2019 8:00:37 AM	Form Saved and Updated		
Application222	6/13/2019 8:00:37 AM	Field 'Client_LastName' - Is ReadOnly was updated	True	False
Application222	10/15/2018 10:04:08 AM	Form Saved and Updated		
Application222	10/15/2018 10:04:08 AM	Field 'Agent_Signature' was resized	Width:346	Width:345
Application222	10/15/2018 9:36:58 AM	Form Saved and Updated		
Application222	10/15/2018 9:36:58 AM	Field 'Client_ResidentialAddress1' - Office Use Only was updated	True	False
Application222	10/15/2018 9:36:58 AM	Field 'Client_ResidentialAddress1' was resized	Width:456	Width:455
Application222	10/15/2018 9:36:58 AM	Field 'Client_LastName' was resized	Width:222	Width:221
Application222	10/15/2018 9:36:58 AM	Field 'Client_LastName' was resized	Width:221	Width:220
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' - Office Use Only was updated	True	False
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' was resized	Width:182	Width:183
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' was resized	Width:183	Width:184
Application222	10/15/2018 9:35:56 AM	Form Saved and Updated		
Application222	10/15/2018 9:35:56 AM	Field 'Agent_Commission' was resized	Width:92	Width:91
Application222	10/15/2018 9:35:56 AM	Field 'Agent_FLIDNumber' was resized	Width:122	Width:121
Application222	10/15/2018 9:35:56 AM	Field 'Agent_FLIDNumber' was resized	Width:121	Width:120

Form Changes Example:

Form Changes

Form Number ▲	Date/Time ▼	Action	Old Value	New Value
Application222	6/13/2019 8:00:37 AM	Form Saved and Updated		
Application222	6/13/2019 8:00:37 AM	Field 'Client_LastName' - Is ReadOnly was updated	True	False
Application222	10/15/2018 10:04:08 AM	Form Saved and Updated		
Application222	10/15/2018 10:04:08 AM	Field 'Agent_Signature' was resized	Width:346	Width:345
Application222	10/15/2018 9:36:58 AM	Form Saved and Updated		
Application222	10/15/2018 9:36:58 AM	Field 'Client_ResidentialAddress1' - Office Use Only was updated	True	False
Application222	10/15/2018 9:36:58 AM	Field 'Client_ResidentialAddress1' was resized	Width:456	Width:455
Application222	10/15/2018 9:36:58 AM	Field 'Client_LastName' was resized	Width:221	Width:220
Application222	10/15/2018 9:36:58 AM	Field 'Client_LastName' was resized	Width:222	Width:221
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' - Office Use Only was updated	True	False
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' was resized	Width:183	Width:184
Application222	10/15/2018 9:36:58 AM	Field 'Client_FirstName' was resized	Width:182	Width:183
Application222	10/15/2018 9:35:56 AM	Form Saved and Updated		
Application222	10/15/2018 9:35:56 AM	Field 'Agent_Commission' was resized	Width:92	Width:91
Application222	10/15/2018 9:35:56 AM	Field 'Agent_FLIDNumber' was resized	Width:121	Width:120
Application222	10/15/2018 9:35:56 AM	Field 'Agent_FLIDNumber' was resized	Width:122	Width:121

Sales Agreement Changes Example:

Sales Agreement Changes

Product/Selling Org ▲	Date/Time ▼	Action	Old Value	New Value
Chris Product/Insurance Technologies	10/16/2019 12:51:18 PM	State Jurisdiction inserted for Selling Org: Insurance Technologies		AZ,AR,CA,CO,CT,CRI,DE,DC,FL,GA,GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,JAL,MI,MN,MS,MO,MT,NE,NV,NH,NJ,NM,NY,NC,ND,OH,OK,OR,PAN,PA,PR,RI,SC,SD,TN,TX,UT,VT,VI,VA,WA,WV,WI,WY
Chris Product/Insurance Technologies	10/16/2019 12:51:18 PM	Sales Agreement saved and updated for Selling Org: Insurance Technologies		
Chris Product/Insurance Technologies	10/16/2019 12:50:37 PM	State Jurisdiction deleted for Selling Org: Insurance Technologies	AZ,AR,CA,CO,CT,CRI,DE,DC,FL,GA,GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,JAL,MI,MN,MS,MO,MT,NE,NV,NH,NJ,NM,NY,NC,ND,OH,OK,OR,PAN,PA,PR,RI,SC,SD,TN,TX,UT,VT,VI,VA	

Prev | Next

Product Changes Example:

Product ▲	▲	Date/Time ▼	▼	Action	Old Value	New Value	clo
Chris Product		10/16/2019 12:47:51 PM		Chris product was renamed	Chris product	Chris Product	
Chris Product		10/16/2019 12:47:51 PM		Chris Product Product Saved and Updated			
Chris Product		10/16/2019 11:56:44 AM		Chris product Product Saved and Updated			
Chris Product		10/16/2019 11:56:44 AM		chris product was renamed	chris product	Chris product	
Chris Product		10/11/2019 2:24:34 PM		New Product chris product Inserted			

Prev Next

Package changes Example:

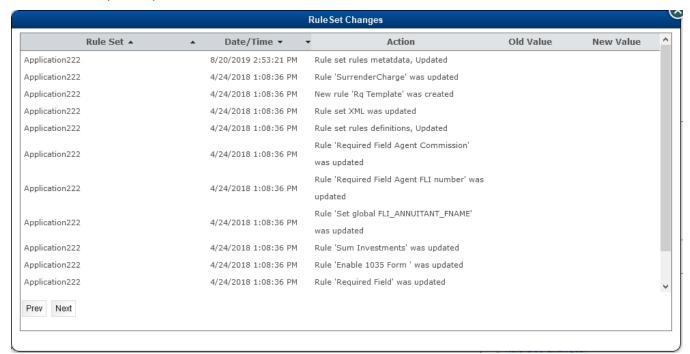| Package ▲	▲	Date/Time ▼	▼	Action	Old Value	New Value	clo
CSH test		10/17/2019 1:20:30 PM		Chris' TEST was renamed	Chris' TEST	CSH test	
CSH test		10/17/2019 7:20:30 AM		CSH test saved and updated			
CSH test		10/16/2019 12:47:10 PM		Application222 added			
CSH test		10/16/2019 12:46:55 PM		Application222 added			
CSH test		10/16/2019 12:46:20 PM		Chris test was renamed	Chris test	Chris' TEST	
CSH test		10/16/2019 11:53:03 AM		chris test was renamed	chris test	Chris test	
CSH test		10/16/2019 6:47:10 AM		Chris' TEST saved and updated			
CSH test		10/16/2019 6:46:55 AM		Chris' TEST saved and updated			
CSH test		10/16/2019 6:46:20 AM		Chris' TEST saved and updated			
CSH test		10/16/2019 5:53:03 AM		Chris test saved and updated			

Prev Next

Ruleset History Example:

Acceptance Criteria

- Once selected, the hyperlink will enable a History log of the specific change. (Example: Product Change hyperlink enables Product History)
- Any hyperlink that is selected in the Total items Selected box will show the totals of that change based on the selections the user has made. (Example: User selects Annuity 222 and Application, the Form change hyperlink will show all from changes for both once clicked).

Addition of Deployment Totals on History tab

The addition of Totals for Deployment on the History tab of the deployments screen will now allow the user to track past deployments in a more detailed fashion. This addition will allow the user to see the specifics of past deployments in multiple areas. Hyperlinks will be available in each category if a change or update is found. If no change or update occurred in the deployment, a hyperlink will not be available. As with Story 7018, each Hyperlink will enable a History log for the selected change. This will
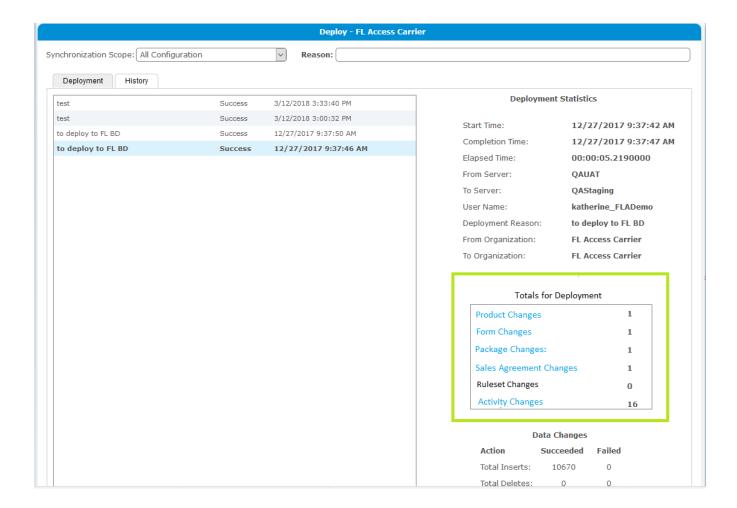
ensure that the user has the capability to view past deployments in greater detail. We will need to have all History logs, except for the forms log, show the History going forward.

NOTE: All information that is collected in each log will need to be stored for the user to view the history of each change that occurred in the deployment.

Deploy - FL Access Carrier

Synchronization Scope: All Configuration ▾   **Reason:** [   ]

Deployment	History

test		Success	3/12/2018 3:33:40 PM
test		Success	3/12/2018 3:00:32 PM
to deploy to FL BD		Success	12/27/2017 9:37:50 AM
to deploy to FL BD		**Success**	**12/27/2017 9:37:46 AM**

Deployment Statistics

Start Time:	12/27/2017 9:37:42 AM
Completion Time:	12/27/2017 9:37:47 AM
Elapsed Time:	00:00:05.2190000
From Server:	QAUAT
To Server:	QAStaging
User Name:	katherine_FLADemo
Deployment Reason:	to deploy to FL BD
From Organization:	FL Access Carrier
To Organization:	FL Access Carrier

Totals for Deployment

Product Changes	1
Form Changes	1
Package Changes:	1
Sales Agreement Changes	1
Ruleset Changes	0
Activity Changes	16

Data Changes

Action	Succeeded	Failed
Total Inserts:	10670	0
Total Deletes:	0	0

Acceptance Criteria

- Hyperlinks are available for all applicable deployment changes in the Deployment History tab
- Each Hyperlink will enable a History view for the selected change.
- History logs will show details going forward. We do not have the capability to draw previous history info in any of these logs.
- The Details: Open link will be removed.