iConnect 196381 Design Approach – Configurable Activity

Project Overview

Create a new Admin/Profiles/Activity. This Admin/Profiles/Activity has many current and future use cases. For this release, we will focus on the Pre-Sale. There are many use cases for a Pre-Sale activity that sits in front of another activity. Sales and clients need the ability to dynamically create new Pre-Sale activities that have different names, different home icons, different prefill codes, potentially different next steps, different locking rules, deleting rules, and different reporting.
This project will create a new Admin Profile section called Activity. The layout will mirror the existing Product Profile. The top section will contain the existing activities that are supported in FireLight (Account Opening, Needs Determination, Illustration, Guided Illustration, Application, Sub-Pay, Post Issue, e-Delivery). Selecting any of these activities will display the activity details below. The details to display to the distribution to define are Name, TypeCode for prefill, supported next steps (Illustration, eApp, Post Issue, Sub-Pay, Needs, Account Opening, etc), checkbox indication activity is locked once next activity is submitted (only applies for Pre-Sale activities), checkbox for inclusion in the filter (only applies for Pre-Sale activities), branding, purge policy, and billing code.

The activity section does not deploy to other organizations. Carriers or Distributors can both use this admin section but only for their organization. With that said, Carriers can create a product and package with activity type that will be deployed to the distributor via the selling agreement. Distributors will then link the product to the activity. The distribution will define the activity settings in the Admin/Activity section. Again, Carriers can use this for their organization too but the Profile/Activity does not deploy. Only the product, packages with activity type, and selling agreements deploy.

Acceptance Criteria

- Dynamically create a new activity and associate it with an Activity Type.
- Define activity settings
- Link activity to Product
- Link product to package with activity type (Support wizard and forms.)
- Link product to selling agreement where carriers can deploy
- Distribution can link product to the activity.
- If the product is active in groups, then the icon will appear on the home screen with the assigned product.
- If the product is active in groups and the activity has the TypeCode defined for prefill, then when the SSO has that transaction type defined, launch the user into the activity in the SSO.
- If only 1 product, 1 carrier, and all state, then hide the product, carrier, and state selection.
- Complete the activity and dynamically show the continue options based on the activity settings.

- Esign and Presubmit review will be triggered based on the settings and if there are signature tags and the script for review.
- Upon continue to next steps, prefill data and lock down into next activity base on the activity settings.
- Linked activities will follow the activity settings for locking the initial Pre-Sale activity which will control deletes of the initial activity if there are linked activities.
- Upon continue, the pdf from the initial activity will be in the documents of the next activity. The Pre-Sale activity name will be the document type name. This can be used for the templates.
- Audit from the Pre-Sale will be included in the next activity.
- The audits on both the Pre-Sale and the next activity will include an audit record of the linkage.
- View All Activities will have this new activity in the drop down.
- Reports will be able to be run based on the billing code.
- Reports will have this new activity.

Requirements / User Stories

Admin Changes

The All Activities view must contain the list of the activities active for that user

Admin: Create a new Admin section in profiles called Activity

Sales and clients need the ability to dynamically create new Pre-Sale activities that have different names, different home icons, different prefill codes, potentially different next steps, different locking rules, deleting rules, and different reporting. There are many use cases for a Pre-Sale activity that sits in front of another activity. For this release, we will focus on the Pre-Sale.

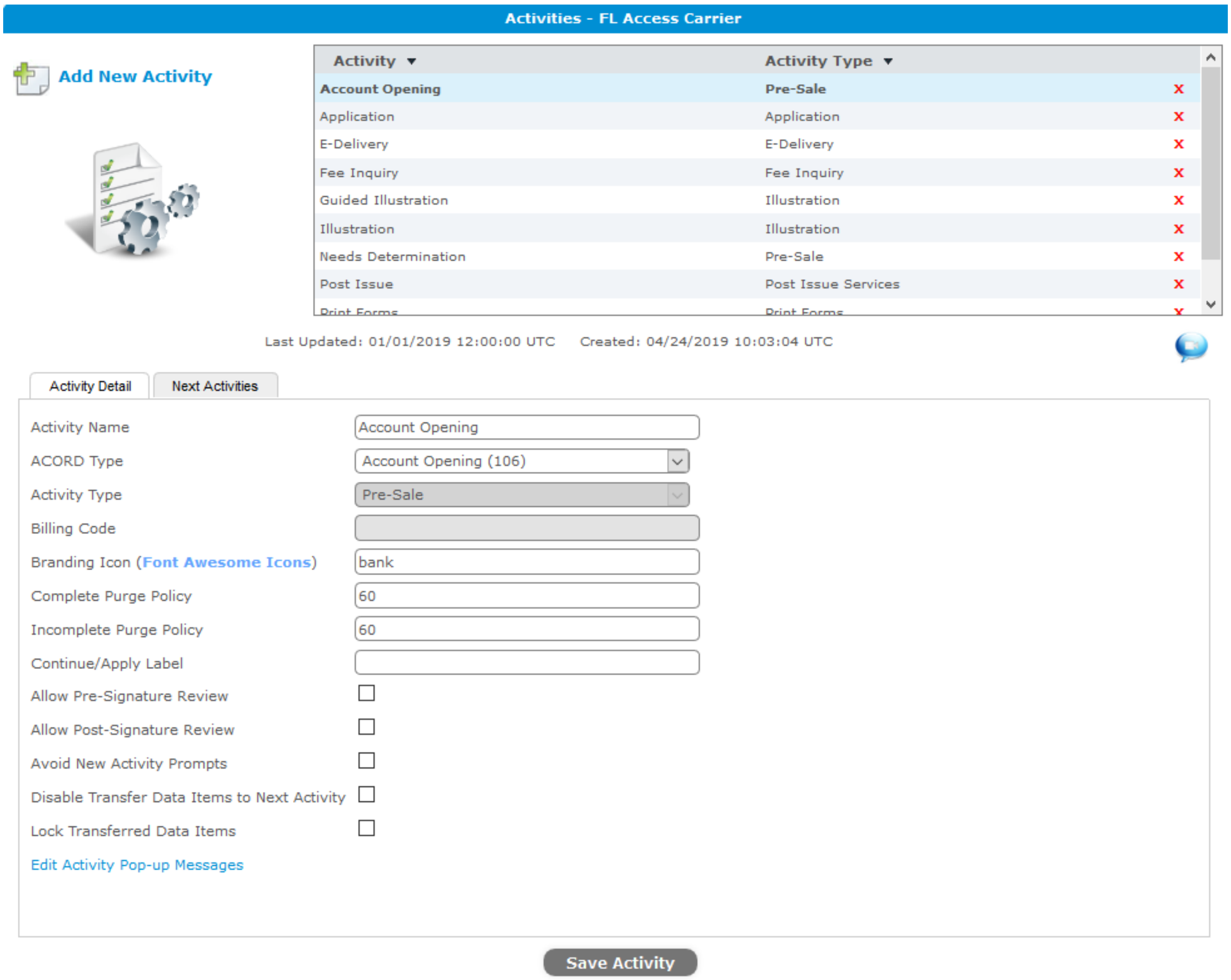
This project will create a new Admin Profile section called Activity. The layout will mirror the existing Product Profile. The top section will contain the existing activities that are supported in FireLight (Account Opening, Needs Determination, Illustration, Guided Illustration, Application, Sub-Pay, Post Issue, e-Delivery). Selecting any of these activities will display the activity details below. The details to display to the distribution to define are Name, TypeCode for prefill, supported next steps (Illustration, eApp, Post Issue, Sub-Pay, Needs, Account Opening, etc), checkbox indication activity is locked once next activity is submitted (only applies for Pre-Sale activities), checkbox for inclusion in the filter (only applies for Pre-Sale activities), branding, purge
policy, and billing code

* This will create a new admin profile called Activity

*The screen layout for Activity will be very similar to Profiles/Product such that the product name once saved is at the top and the details are in the bottom section.

Acceptance Criteria

- New admin profile called Activity
- Menu option on Home view to Open Activities view.
- Navigate to the Activities View
- The General Control Layout should be consistent with Products/Packages/Sales Agreements



Admin: Activity define the Activity settings

The organization that will own the activity will define the activity settings. Carriers create a product and package with activity type that will be deployed to the distributor via the selling agreement. Distributors will then link the product to an activity defined in their environment. The distribution will define the activity settings in the Admin/Activity section (see other stories). Carriers can manage the entire process for their own organizations.

*This will create the table and data for Activities.

* There will be an activity for each Activity Type (this is transaction type in the database).

*Activity Type (Transaction type in database) options are controlled by base. (Pre-Sale, Application, Illustration, Post Issue, Sub-Pay, e-Delivery)

* Options per activity are defined by base.

* The base Activity Types will be the base defined options. (Pre-Sale, Application, Illustration, Post Issue, Sub-Pay, e-Delivery)

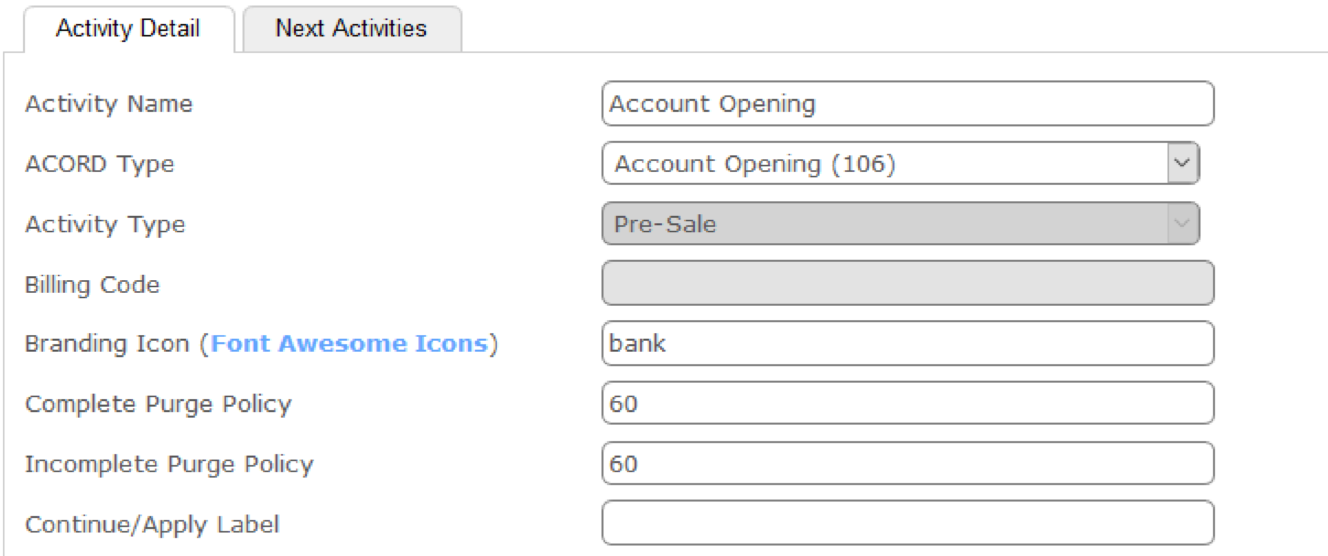
* For V1 Pre-Sale activities are the only Activities that will be editable.

* Illustration, Application etc. Activities will be defaulted based on current settings.

* The activity name is configurable but each activity name will be associated with a base defined Activity Type (Transaction Type).

Acceptance Criteria

- The activity settings/options will be below the activity name list
- Only Pre-Sale activities are editable (V1 only)
- The user can Save and Update the following settings/options
- Activity Name
- Select Activity Type from a base defined list. (V1, only activity type to select is Pre-Sale)
- TypeCode for prefill defined by base- read only associated with Activity Type (Pre-Sale will default to 116; Applications 103; Illustrations 111; Account Opening 106; Sub-Pay 508)
- Sub Type for prefill (This is where we can define a specific code to use for prefill into this specific Pre-Sale activity.
- Purge Policy
- Billing Code
- Branding Icon
- Product selection in the Pre-Sale will be controlled by the existence of multiple products available (see story below)
- Supported Next Activities
- Hide Jurisdiction selection (only works if product has all states supported)
- Prefill
- Prefill content to child activities
- Lock prefill content in child activities
- Review (Presubmit review)- use OSJ logic
- Activity Locked on Continue (i.e. Pre-Sale locked on continue, Illustrations not locked)
- Supported Next Activity: (On continue) eApplication, Illustration, Pre-Sale activity name xx, Sub-Pay, Post Issue



Admin & App: Move Manual Review (Allow Pre-Signature Review) from Org setting to Activity

Acceptance Criteria

- Duplicate Manual Review (Allow Pre-Signature Review) from Org setting to Activity
- Should be selected on Application activity if previously selected on Org Setting

Migrate Needs Determination to Pre-Sale Activity Type

The existing Pre-Sale activities of Needs Determination and Account Opening that base defined need to be converted to a Pre-Sale activity type with a customized name of Needs Determination and Account Opening. The specific activity definitions need to be preset as well.

* Name: Needs Determination
* Activity Type: Pre-Sale
*TypeCode for prefill: 116
* subtype: blank
*Include in Filter: Yes
* Purge Policy:
* Billing Code :
* Branding Icon:
* Supported Next Activities
* Activity content locked in supported activities: Yes
* Manual Review
* OSJ Review - if checked, look at script
* Submission
*Activity Locked once submitted (no deletes, no changes): Yes
*Product selection will be defined by the existence of multiple products. (see story above)
*Next Steps: eApplication

Acceptance Criteria

- Activities that were in flight will now show Pre-Sale with the name of Needs Determination and the activities will remain linked.

Activity Detail | Next Activities

Activity Name	Needs Determination
ACORD Type	Needs Determination (116-11600)
Activity Type	Pre-Sale

Admin deployment for activities to subsequent environments within Product Scope (Staging and Prod)

The activity section does not deploy to other organizations. Carriers can create a product and package with activity type that will be deployed to the distributor via the selling agreement. Distributors will then link the product to the activity. The distribution will define the activity settings in the Admin/Activity section (see other stories). Again, Carriers can use this for their organization too but the Profile/Activity does not deploy. Only the product, packages with activity type, and selling agreements deploy***.***

Acceptance Criteria

- Deploy Profile/Activity to Staging and Prod environments but not to distributor. Activity deployments must stay within the same organization.

Admin: Product Transaction Type approval is changed to Activity Type

Acceptance Criteria

- With this change the section in the Product for Transaction Type will be renamed to Activity type.

Package/Package type is removed

We need to replace package type with these new values of Transaction Type => AcordType/Area.

Package Name	Account Opening
ACORD Type	Account Opening (106)
Area Type	Activity

* Area - This will define the area of the system being used. Currently there are two areas: Activity and Review Queue.

* ACORD Trans Type - This value comes from a list of supported Acord Trans Type codes. It allows us to loosely couple the Package to an Activity since a package can be deployed into another organization but the Activity cannot be deployed to another org.

Between these two values we can determine what packages should be loaded based on the area of the system and the Activity being loaded. This logic is needed for App and will be in another story.

A SQL script will need to modify the table schema and convert existing PackageType values to Area & Acord Trans Type. I think the script should not initially remove the original PackageType field so App continues to work until the business layer logic is updated to use the new properties.

Below are the Package Types that exist today and what they will convert to with this enhancement:

Application -> Activity & 103

Broker App -> Activity & 103

Sub-Pay -> Activity & 508

Post-Issue -> Activity & 113

Needs Determination -> Activity & 116-11600

Pre-Suitability--> 116-11602

Appointments -->410

Fee Inquiry -> Activity & 1241

Illustration -> Activity & 111

Guided Illustration -> Activity & 111-11101

Account Opening -> Activity & 106

E-Delivery -> Activity & 121

Reviewer -> Review Queue & 103

Reviewer Optional -> Review Queue & 103

Print Forms - > Activity & 310

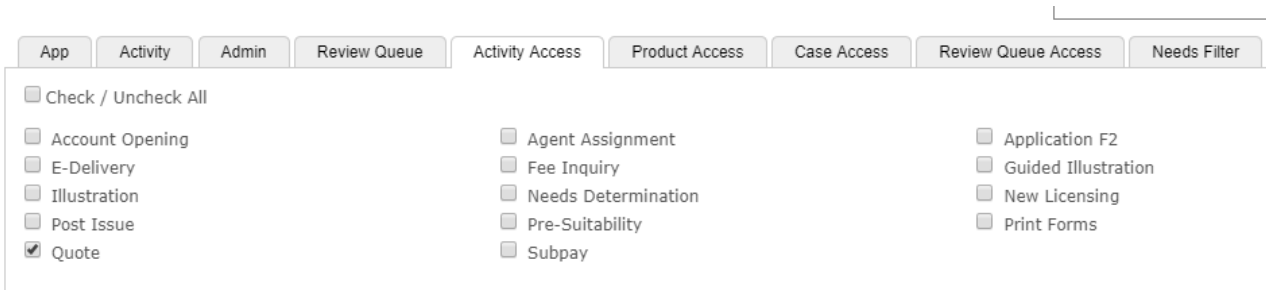
Acceptance Criteria

- Package type is replaced with Area and Acord Trans Type
- Area is a Drop Down list that is the same across all organizations
- Acord Trans Type is a Drop Down list that is the same across all orgs

- All existing packages will have a valid Area and Acord Trans Type value set.
- Both Area and Acord Trans Type are required fields.
- Area and Activity Type can be updated and saved in the Package view

Admin: Enable activity within Group Settings instead of current group options (i.e. Enable Illustration)

In the admin tool, we need to move the App Only settings that enable the transaction types to the Activity section. This will allow us to list the activities as they are added in the Admin/Profile/Activity section.



Acceptance Criteria

- Each activity in the environment should be listed for selection. Similar to Product Access.
- Group by Activity Type (Transaction Type) i.e. Needs Determination and Account Opening will be Pre-Sale Activity Type.

Migrate "Create new transaction" group options to Activity group settings

Acceptance Criteria

- Using the new Admin/Groups/Activity settings, migrate existing groups that have the "Enable xxx" checked to the new Admin/Groups/Activity.
- The “xx” activity will have access to the same group option functionality as the original group access. For example, case access that is applied to the role code will apply across all activity types enabled for that role code.

* Add new Activity field to link Application to Activity record

We need to create a new database field to link an Activity to the Application. This should use the Acord Type value used elsewhere to link other objects like Package.

We also need a script to manage the schema changes.

We also need a script to set the initial Acord Type values.

App Entity need to be changed.

Business Layer needs to be changed to Query and Load Entity.

Acceptance Criteria

- Dev: Database will have Transaction Type which will be the Activity Type and will now have an additional new Acord Type to assign to the application.
- Dev: Verify AcordType is saved correctly.
- UI: Verify all Activities are created correctly and will open correctly after creation.

Admin: Add new Activity Type category drop down to email templates

This functionality makes our very long list of emails more manageable. By adding an Activity Type (Transaction Type) selection to this view it will filter the list of email templates to only emails specific to those Activities. This will make it easier to see all emails that are used within a specific activity as well as make it easier to manage emails.

Need a DB field to identify the Activity Type or Category each email belongs to.

This will require a new property on our Templates so that they can be tied to an activity type if needed.

Acceptance Criteria

- A new drop down is shown in the Email view listing activity types.
- The list should also include an option to view All email templates.
- Selecting an activity type will filter the email template list to only emails related to that activity type (Category).

Email Category	Pre-Sale
Email Template Type	Pending Signature Request - Pre-Sale

Emails for Pre-Sale

Must have the following values for each Pre-Sale email

Subject: <CASE_NAME> - Please complete your signature

Content:

Dear <CLIENT_NAME>,

Thank you for providing your client information.

Use the link included at the bottom of the email to start the signing process. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.

Please use your birth date and the last 4 digits of your SSN to login.

If you have any questions please feel free to contact me.

If you need help signing, please watch this short guide:

Sincerely,

<AGENT_NAME>

To sign your client information, click on <URL_LINK>, enter the last 4 digits of your SSN, and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Subject: <CASE_NAME> - Please complete your <ACTIVITY_NAME>

Dear <CLIENT_NAME>,

Thank you for providing your client information.

In order to complete your electronic application, please click on the link at the bottom of the email. You will be asked to acknowledge your acceptance of the disclosure terms and consents.

Please use your birth date and the last 4 digits of your SSN to login.

If you have questions please feel free to contact me.

Sincerely,

<AGENT_NAME>

To view and complete your <CASE_NAME>, click on <URL_LINK>, enter the last 4 digits of your SSN, and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Subject: Print or download your <ACTIVITY_NAME>.

Content:

Dear <CLIENT_NAME>,

Thank you for providing your client information.

To download or print this information, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number.

If you have questions please feel free to contact me.

Sincerely,

<AGENT_NAME>

To download or print your client information click on <URL_LINK>, Enter the last 4 digits of your SSN, and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.

Acceptance Criteria

- The following are the emails needed for Pre-Sale
- Signature Request on [Pre-Sale]
- Download Completed [Pre-Sale]
- Thank you for submit
- Need a replacement variable for the activity name. (May already be Transaction Type)
- Using the replacement variable, there are no changes needed to these emails but the Pre-Sale should send them when they apply.
- Declined eSignature
- Agent /Client Request Expiration Warning
- Agent /Client Request Expired
- Template Upload
- Submit reminder

Create Default Activity Data

The table for Activity needs to be created and populated with the default Activities

Needs Determination,

Illustration

Application

etc

Each record should initially be the same in each environment.

A script can be used to create each Activity record

Acceptance Criteria

- Data for all existing activities should exist in each environment and be the same in each environment.
- Needs Determination Activity Name with the Activity type of Pre-Sale.
- Name: Needs Determination
- Activity Type: Pre-Sale

- TypeCode for prefill: 116
- subtype: blank
- Include Jurisdiction, Carrier Selection, and Product selection: Dynamic
- Include in Filter: Yes
- Prefill and Lock data: Yes
- Lock activity after submit (No delete or edits post submit): Yes NOTE: this should this be all the time. It gets very complicated if we submit and allow edits after submit.)
- Next Steps: eApplication

Convert Product Transaction Types

Once the Sales Agreements are assigned activities some of the Transaction Types assigned to the product need to be converted. i.e. Needs Determination convert to Pre-Sale.

Acceptance Criteria

- Needs Determination Transaction Type in Products should be Pre-Sale
- Guided Illustration Transaction Type in Products should be Illustration

Admin: Deploy new GroupActivityAccess settings

Need to deploy the new GroupActivityAccess data within in the Group Scope.

Acceptance Criteria

- Verify GroupActivityAccess deployment successfully is moved to Staging and Prod

Admin: Create base List for all supported Acord Transaction Types.

Due to a change in design an Activity will require an Acord Trans Type. FireLight will maintain a list of supported Acord Trans Types that can be used for Activities and Packages. Initially the list will have all the Acord Trans Types FireLight currently supports. The value of each item in the list must contain the Acord Trans Type tc code value and optionally an Acord Trans Sub Type tc code value. The display text for each item should contain both a readable description and the value. The list could look something like this...

Application (103)

Illustration (108)

Needs Determination (116-11600)

E-Delivery (121)

NOTE: Some activities do not use an Acord Trans Type. They must be assigned one. (i.e. Illustration)

Acceptance Criteria

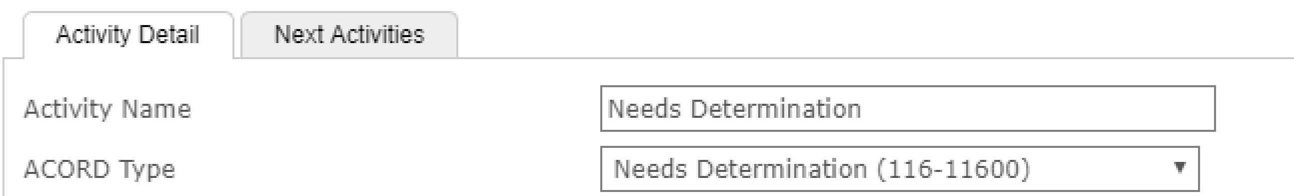
- This story is technical so the criteria below should be verified by a developer.
- The list is the same across all organizations
- The list is accessible across all organizations
- The list covers all currently supported Transaction Types (Activity Types)
- TFS has a functional script to load the list in Master DB

Admin: Activity view uses new Acord Trans list instead of Trans Type and Sub Type

The activity view currently has two values for Trans Type and Trans Sub Type. These need to be replaced with the drop down containing the list defined in story 2460.

In addition the DB schema will need to change to accommodate the new field.

Finally the scripts will need to change to accommodate the new fields.



Acceptance Criteria

- The Activity view no longer shows Type Code field.
- The Activity view no longer shows Sub Type Code field.
- The Activity view displays the Acord Type dropdown
- The user can select and save an Acord Trans Type value in Activity.
- The Acord Trans Type field is required. If nothing is selected there will be a validation message.
- The Acord Trans Type field should be defaulted for all existing Activities.

Admin: Improve use ability in Activities view

Need an Improved image selection for choosing the Branding image. The user does not know the name of the Font Awesome images we use. Provide a link to the Font Awesome library so user can choose an image. The user will need to know how to determine the correct text to put in the image name so provide a link to help that provides directions.

Finally, the image should be displayed somewhere so the user know they have typed the correct image name.

Acceptance Criteria

- The UI selection for branding image will be a textbox
- Link which opens new browser window to FontAwesome Library (https://fontawesome.com/icons?d=gallery&m=free)
- Link which opens a new browser window to Help with directions
- Image should be displayed for user to view and verify.

Admin: Product is associated with Activity instead of TxType

Currently a Product in FireLight is associated with one or more Transaction Types. This no longer applies and products should be tied to one or more Activities. Note, that since each Activity is unique to an organization the agreed upon identifier used will be AcordType, which is an aggregate of Acord Transaction Type + Acord Transaction SubType. ***Acceptance Criteria***

- DbManager.GetAvailableProducts() should use AcordType
- DbManager.GetProductList() should use AcordType - the query used inside should get all packages with the given AcordType, and join that on SalesAgreementPackage (table contains a ProductID & PackageID) - should only care about Products where product's orgID matches Package's OrgID (for BD scenarios)
- Anywhere in code where you see AvailableTransactions being used, try instead to use AcordType
- Change Product page "Activity Type" grid to use AcordType instead, and display Activity names (instead of TransactionType names) - also make this grid read-only
- Looks like there's a couple of other queries we need to mess with in the DbManager too

Admin: Convert TransactionType in email templates to ActivityName

Currently, emails and email templates use a replacement variable for Transaction Type. These need to be replaced with a new Activity Name variable.

Rework UserGroup flags and Activity Boolean properties to be one and the same.

To ease future development and increase flexibility for clients: the usergroup flags should be expanded to have all the options that are contained in the activity list of options. The options in the activity should be reworked to be stored in a usergroup flag container in the database. On the app side of the system the merged usergroup flags would be available to the developer as part of the session state and be context aware IE knowing it's in the specific activity or not. This would allow the client to deny an activity feature in the groups pane based on a role code.

Acceptance Criteria

- Store all activity options as a user group flag
- Add a context aware user group flags to the session in app

- Add all activity options to the admin group page
- Rework code to use the new session user group flag

Exclude the Carrier, Product, and State selection and go straight to Create Activity if there is only 1 carrier, 1 product setup and all states are supported

For the Activity, we need to be able to look at the system definitions to determine if we include Jurisdiction selection, Carrier selection, and Product selection. For example: exclude the entire set of selections and go right to create activity if there is only 1 carrier, 1 product setup and all states are supported.
In order to exclude all options, including jurisdiction, we need a new "All states" option that will be set when all states are supported for the product.

Acceptance Criteria

- In Admin: Add new option for Activity - Jurisdiction not applicable
- In App: If Activity has "Jurisdiction not applicable" checked AND only 1 Carrier, 1 Product and All Jurisdictions are allowed for that product then default the Carrier, Product, and State selection and go straight to Create Activity.
- If all above conditions aren't met then use the existing logic for the selection.
- Allow the client to specify the jurisdiction (FLI_NEXT_ACTIVITY_JURISDICTION) inside the activity. This Jurisdiction would persist to the next activity (i.e. Needs -> Application).
- FL needs to recognize the FLI_JURISDICTION change and update the database to reflect the change. (Similar to what we support for FLI_FIRMID) The DB field Application. Jurisdiction should be updated when this field is updated. Base should only allow this update if "Jurisdiction not applicable" is selected and Product allows all states.

SSO into the specified Activity

In order to support subtype codes to direct the user into an activity, we need to start looking at Subtype codes in a validation step when processing TXLifeRequest in New Business. The TxLifeRequest has a TypeCode, SubTypeCode (ACORD Type) and a Product identifier (CUSIP). The Activity can be determined by matching the TypeCode and SubTypeCode in TxLife to the Activities AcordType value. The product being used must support the Activity configured with the specified TypeCode and SubTypeCode.

ACORD Type = (TypeCode + "-" + SubTypeCode)

Acceptance Criteria

- SSO & New Business: Begin looking at workflow to determine the TypeCode and SubTypeCode.
- Define a Pre-Sale activity XX with a typecode of 106 and a subtype code of xx.

- Then define another Pre-Sale activity YY with a typecode of 106 and a subtype code of yy.
- In the New Business TX send in the TypeCode and subtype code for the XX activity. FL will direct the user to the correct activity.
- In the New Business TX send in the typecode and subtype code for the YY activity. FL will direct the user to the correct activity.
- Determine the availability of products based off of the Subtype code. This would be a validation step in the SSO.

* All Activities view for Configurable Activity

The All Activities view will contain a list of all distinct Applications that the user has created.

The Transaction list should not be managed by Transaction Type. Instead Acord Type and Activity should be used. The list should contain only activities the user has created.

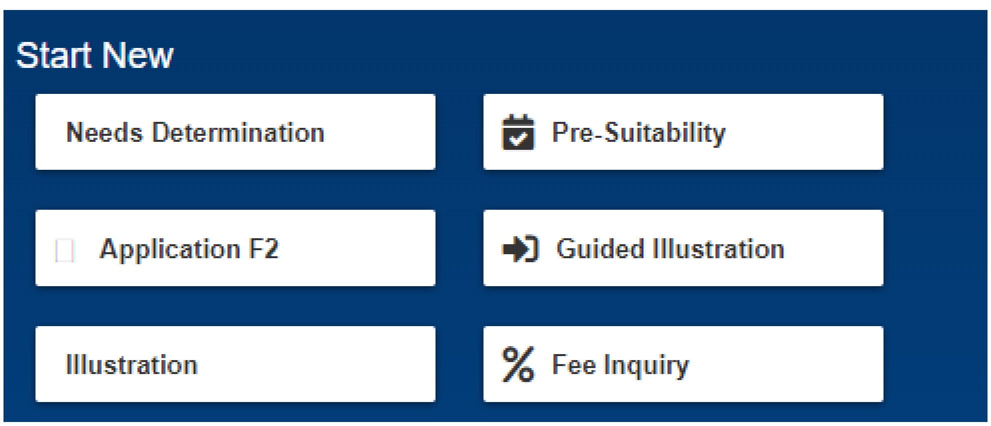
If an Activity that the user no longer has access to is removed, we still need to still access it.

Acceptance Criteria

- Activity Type filter list should use Activity Name set in Admin
- Filter should have configurable names activity in filter drop down
- Activity filter will filter cases by Activity instead of Transaction Type

Home screen for Configurable Activity

The activities created in the new Activity section will have their own icon. That should be seen on the home screen when it is correctly linked to a product, package, and selling agreement.



Acceptance Criteria

- This activity will use the Activity defined icon for the home screen.
- New icon on home screen to launch the XX

- Agent will select the XX activity from Home screen

Reporting for Configurable Activity

Transaction specific reports need to be changed to group by Activity Type, Activity, Billing code.

Acceptance Criteria

- Transaction specific reports need to be changed to group by Activity Type, Activity, Billing code.

Home/New Activity and All Activities/New Activity button includes configurable activity

The New Activity menu button on the Home screen (Home/New Activity) and All Activities/New Activity button will list all available configurable activities

Acceptance Criteria

- The New Activity menu from Home and All Activities will list all available activities for the user
- Selecting the XX transaction from the New Activity menu from Home and All Activities takes use to new Activity view

Use Package Area & Acord Type in App

After 2122 is complete the App and Business layers need to be modified to use the new values.

Acceptance Criteria

- Activities in EGApp should load the same packages as prior to changes.

EGApp should recognize Allow pre-Signature Review setting in activity, not from org

Note: Try not to pass down activity settings to lower level functions. Instead pass down a way to get to Activity (App ID, or ActivityID)

Acceptance Criteria

- Should function the same but enabling this feature should be controlled from Activity Setting instead of Org Setting.
- EGApp should recognize Allow eApproval setting in activity, not from org

Once App Side of Pre-Sale is done - clean up groups

In the admin tool, we need to move the App Only settings that enable the transaction types to the Activity Access section and remove the settings from the app side. We moved the settings to a new locations in Activity Settings but the settings are still in the App tab.

We could not remove App options until implemented in App. Now that those tasks are done, we need to finish cleaning up the group settings and ensure the data correctly migrated to the new Activity settings.

Acceptance Criteria

- 1. These check boxes will no longer appear in the App tab.
- Disable Create Application
- Enable Create Needs Determination
- Enable Create Subsequent Payment
- Enable Create Post Issue
- Enable Create Fee Inquiry
- Enable Create Illustration
- Enable Create Guided Illustration
- Enable Create Account Opening
- Enable E-Delivery
- Enable Print Forms

  All of the enable/disable functionality will be controlled from the Activity Access tab. Meaning, I can check or uncheck an activity from the Activity Access and it will correctly, make the products assigned available to that role code.

Activity Summary dialog should show Activity Name instead of Activity Type

Acceptance Criteria

- Activity Summary dialog show Activity Name

New Application Workflow needs to use Activity instead of TxType

The New Application workflow (NewApplicationController and all locations that call into NewApplication controller).

Currently the workflow includes sending a TxType into New Application to determine the type of activity to create. Instead the AcordType of the Activity needs to be sent in and the models and workflow should use AcordType instead of TxType

New Activity Process should be driven by AcordType vs Transaction Type

The New Activity process is currently heavily controlled by the Transaction Type. This process needs to be driven by the new AcordType used in Activities going forward.

Acceptance Criteria

- All valid activities should be created without issues.

Admin: Combine Activity & Activity Access tabs

Remove Activity Tab and place options in Activity Access tab.

Sort the list of Activities.

List Activity options below Activity Access options.

Acceptance Criteria

- - Activity items are listed at top and sorted.
- - Activity specific options are below and shown only if Activity is selected. If more than one make sure they are sorted as well.

App: Side Agents complete a Configurable Activity

Next Steps when completing the Configurable activity

When 100% is reached, Continue will kick-off the next step defined in the activity settings. That could be signing if there are active signature tags, manual review if it was checked in the Activity Setting review, presubmit review if checked in Activity settings and set in script, or kick-off the submit to send the output file to the endpoints and initiate the next activity workflow

FLI_NEXT_ACTIVITY_ACORDTYPE

The ACORD type for the new activity that needs to be specified is FLI_NEXT_ACTIVITY_ACORDTYPE. This data item will be used to set the ACORD type of the related activity.

Acceptance Criteria

- When 100% is reached, the user will be presented: You have entered all of the require data. Do you want to enter more data or continue to the next step? (Customization of message is in “Configurable Continue pop-up/Toast from Data Entry to Signatures” Story)
- Continue will kick-off the next step which could be signing if there are signature tags that are active, manual review if it was checked in the Activity Setting review, Presubmit review if checked in Activity settings and set in script, or kick-off the submit to send the output file to the endpoints and initiate the next activity workflow

- Look at the activity settings to determine next steps
- Using the new FLI_NEXT_ACTIVITY_ACORDTYPE Clients can specify the next activity found in the admin during next steps
- When FLI_NEXT_ACTIVITY_PRODUCT_CUSIP is listed, the following action occurs with each ACORD type:
- ACORD type is not valid, then show complete list
- If 1 ACORD type is listed: Automatically redirect to that specified activity
- If 1 or more ACORD types are listed: Present drop down, and when chosen, redirect to that specified activity
- If no CUSIP and ACORD are shown, the user will go through the standard FireLight new activity workflow
- Can be controlled by role code, ACORD type, and pre-selection of the Activity types.

Configurable Continue pop-up/Toast from Data Entry to Signatures

Because these activities are created by clients, there could be many names and use cases. Clients need to be able to define the continue pop-ups and toasts.

Acceptance Criteria

- This new activity will need to support a separate customizable pop-up/Toast message for the continue prompt from Data Entry to Signatures.
- Use the Branding (LocalizeUILabel) to support customizing the pop-up message.
- Default Pre-Sale message is: Data Entry has met the requirements. You may enter more data or CONTINUE to proceed to the next step. [close]

Configurable Continue pop-up/Toast from signatures to Review

Because these activities are created by clients, there could be many names and use cases. Clients need to be able to define the continue pop-ups and toasts.

Acceptance Criteria

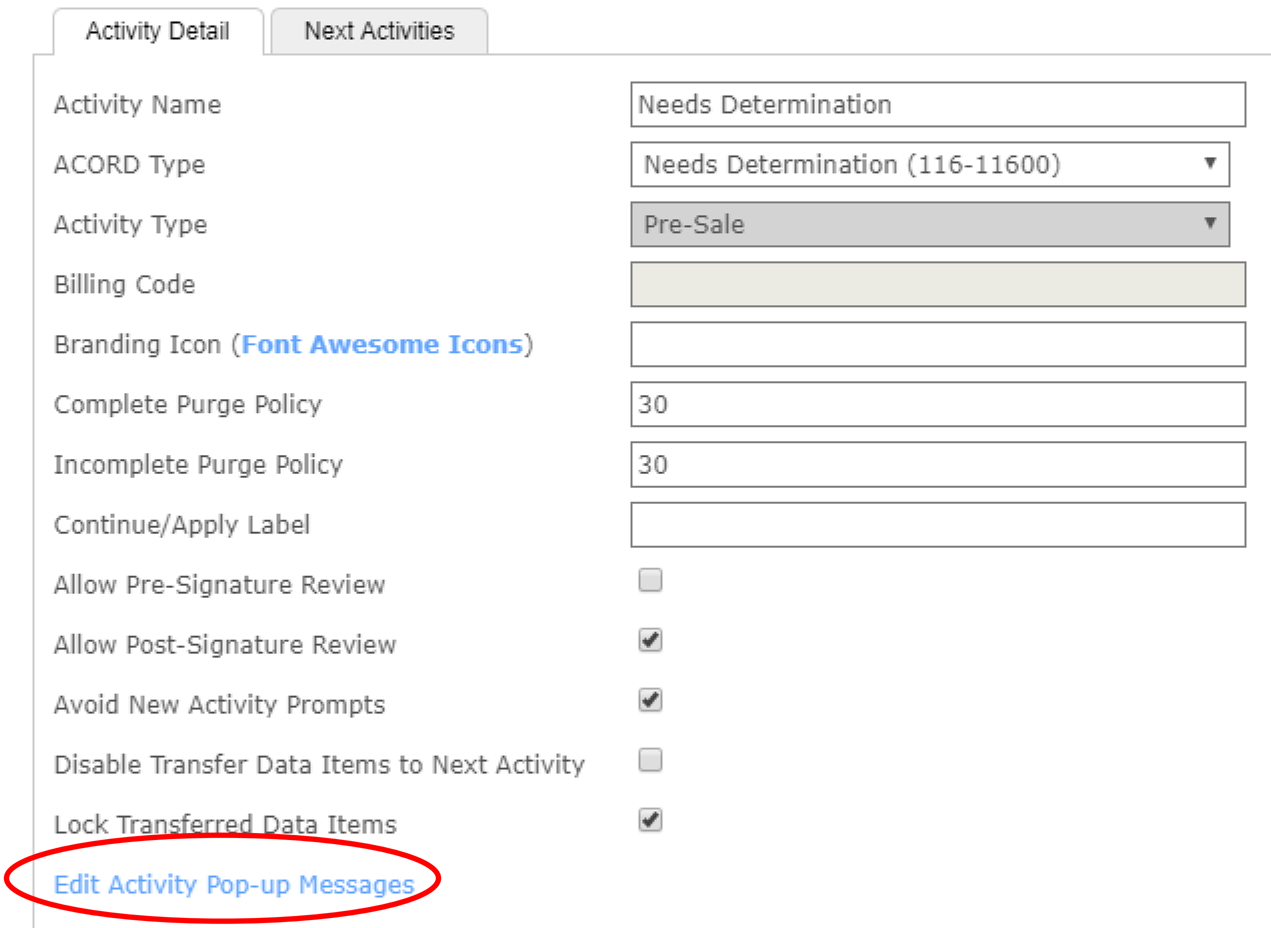
- This new activity will need to support a separate customizable pop-up/Toast message for the continue prompt from signatures to Review
- Use the LocalizeUILabel to support customizing the pop-up message.
- Default Pre-Sale message is: [activity name] is pending review. To print or view the [Activity Name], history or documents, click on Other Actions. [close]

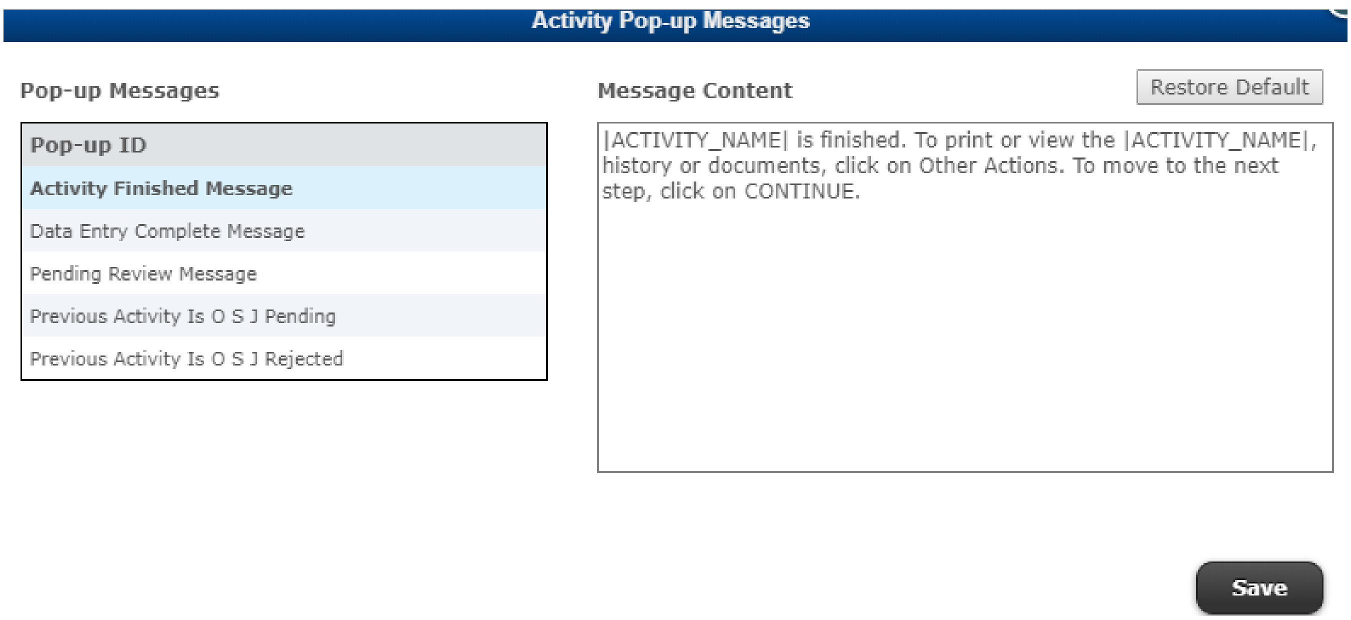
Configurable Continue pop-up/Toast from Review to Next Steps

Because these activities are created by clients, there could be many names and use cases. Clients need to be able to define the continue pop-ups and toasts.

Acceptance Criteria

- This new activity will need to support a separate customizable pop-up/Toast message for the continue prompt from Review to Next Steps
- Use the LocalizeUILabel to support customizing the pop-up message.
- Default Pre-Sale message is: [Activity name] is finished.
  To print or view the [Activity Name], history or documents, click on Other Actions.
  To move to the next step, click on CONTINUE.



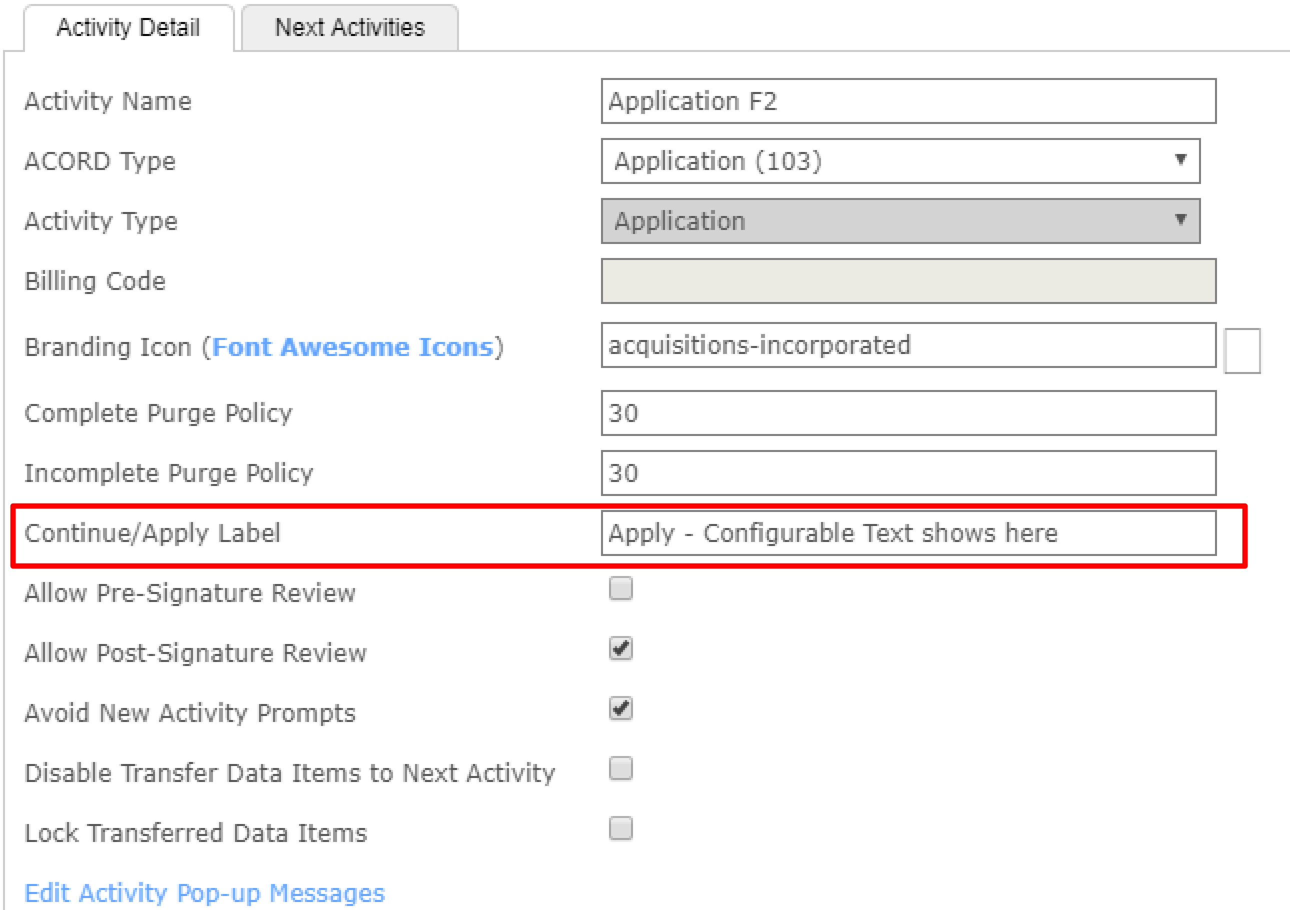


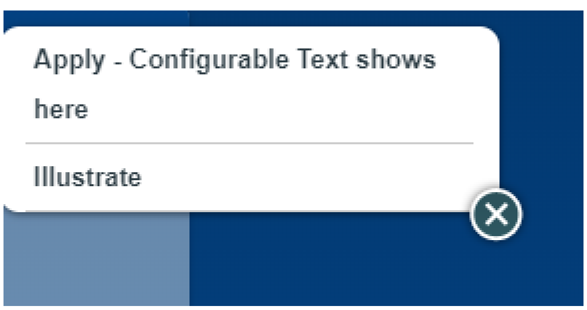
Configurable Continue Button

Because these activities are created by clients, there could be many names and use cases. Clients need to be able to define the continue button.

Each activity will need to support the Continue button and the text for that button. Example an Application activity would use the text "Apply" as the text for continue.

If the activity supports multiple "Next" activities then the button text will be "Continue" and supported "Next" activities will be listed as a drop down menu.





Acceptance Criteria

- Once all steps (esign and review) have been completed, the Continue button will display.
- The text will reflect the text for the Next activity
- If the activity supports multiple "Next" activities then the button text will be "Continue" and supported "Next" activities will be listed in a drop down menu. (See current Account Opening continue)
- The list should only show activities that are supported by the users Group.

Link activities that are related in All Activities and audit

We need to validate that the Pre-Sale activity once linked to the next activity are seen in the link icon on the All Activities, in the audit history that the link is seen in both the Pre-Sale and next activity.

Below is an example of how we handle Needs Determination today:

The audit is seen on both the parent and the child.

If the child is deleted, then create an audit in the parent that removes the link. (Mirror what we are doing in the Needs Determination.)

Data Entry

Activity linked to source activity

12/7/2018 4:40:01 PM EST

Needs Determination linked to Account Opening `Application for Joe Client- Need Determination`.

Data Entry

Activity linked to source activity

12/7/2018 4:37:49 PM EST

Account Opening linked to Needs Determination `Joe Client- Need Determination`.

Acceptance Criteria

- Verify link icon on All Activities is displayed if the activity has a parent or child (mirror how we are doing that in Needs Determination)
- Clicking on the linkage icon will show the linked activity.
- The linked activities details will display in in the history.
- The audit will be linked (mirror how we are doing that in Needs Determination
- Child activity audit shows the link to parent activity
- But the parent's audit does not include the link info for the child

Admin: Default Illustration & Quote to only Apply

Illustration & Quote can only use Application as Next Activity so they cannot be configured any differently in Admin.

Print forms is similar in that Next Activities is not allowed at all

Acceptance Criteria

- For Illustration & Quote Next Activity Tab is visible but a message is displayed notifying user they cannot configure Next Activity. Application is only allowed.
- Next Activities tab is disabled for Print Forms

Admin: Manage Acord Type list by Org

Currently the Acord Type list is shared by all orgs. Instead each org should only have the Acord Types they are licensed to use. This will be managed manually via a listProfile.

Acceptance Criteria

- Each org should only see the Acord Types they are licensed to use.
- list of each client's licensed activities will be attached before Production]

Ensure not using TransactionType in EGApp

Acceptance Criteria

- - No Errors

Run Reports for configurable activity

Clients need to be able to run reports for the activities they created and billing needs to be able to associate it with a billing code

Requirements / User Stories

Admin: Run Admin and Activity Reports for the configurable activity

Clients need to be able to run reports for the activities they created and billing needs to be able to associate it with a billing code.

Acceptance Criteria

- Run activity Reports for a configurable activity
- Dynamically enumerate the Pre-Sale activity name
- Add the configurable activity to the Trn filter
- Run reports by billing code
- Run reports by distribution and by groups within the distribution

Add billing code to Admin and Activity Reports

Clients need to be able to run reports for the activities they created and billing needs to be able to associate it with a billing code.

Acceptance Criteria

- modify application transaction records
- modify logic for invoicing activity to include the billing code

Continue to another activity

Agent: continue to another activity look at Pre-Sale activity settings to define locking rules

Default for Pre-Sale is to lock Pre-Sale activity from edits.

Adding Lock option when child is created.

Acceptance Criteria

- Upon continue, the configurable activity will now be linked to the other activity and the configurable activity will be locked
- If linked to another activity, the link icon will display with the linked activity type. (From another Story)
- If an activity is linked, the parent activity cannot be deleted or unlocked until the linked activity is deleted. (Please note that since the configurable activity and it is a submitted transaction, the agent can delete it once there is not associated linked transactions but it will only be hidden from the view until the purge policy actually removes it.) Theses cases are not being deleted from the database. It will only appear to be gone from the agents view.
- If "Activity Locked on Continue" is set in Activity settings then lock activity when Creating Next activity. Activity cannot be edited or deleted while activity has a linked child activity. If linked child activity is deleted the parent activity is unlocked.

Agent: Continue to next activity will prefill into next activity

Default for Pre-Sale is to prefill data items into child activity.

Also the setting to lock prefilled data should also be respected.

Acceptance Criteria

- Admin option in Activity to determine whether to push Data to next Activity
- Admin option in Activity to determine whether to lock pushed data

- By default, dataitems will be prefilled and unlocked, and exceptions will be handled via the provider.
- Need new dataitems to specify the previous activities

Disable Delete in All Activities based on Activity Setting

This is an option on the Activity but the default for Pre-Sale is to lock Pre-Sale activity from edits, no deletes**.**

Acceptance Criteria

- The XX cannot be deleted once it is associated with another activity. To delete an XX, you must first delete the associated activity.
- A draft (not submitted) application can be deleted but the completed activity cannot be deleted.
- Deleting the app will only delete the application.
- Deleting the app will remove the associated application from the XX.
- The XX activity can be deleted once the application association is removed only if it was not transmitted externally.
- The audits on both the Pre-Sale and the next activity will include an audit record of the deletion of the linkage.

Agent: retain Pre-Sale product and state selection and drop user into application for that product and jurisdiction

When the actual product and jurisdiction are selected upfront prior to entering the Pre-Sale, then we should retain those values and drop the user directly into the application for that jurisdiction and that product.

Please note that if the Pre-Sale is a generic non-insurance product, the user must still select the real product in the application. This workflow will be addressed with an enhancement as requested by a client.

Acceptance Criteria

- Pre-Sale must be associated with a real product not a generic non-insurance product.
- Upon entering the Pre-Sale, the user will select the state and product for the Pre-Sale activity.
- Upon reaching 100% and progressing to the next step, FL will retain the FLI_PRODUCT and FLI_JURISDICTION and drop the user directly into the application with the create activity dialogue.

Generate PDF for Next Activity

If activity has Forms generate a PDF and name it based on Activity name. The PDF should be passed to the next activity.

PDF Document Type will need to also be set. This will be set by a value in the Activity config.

Acceptance Criteria

- Option in Activity which determines whether or not to provide PDF to Next activity
- Respect readonly option when passing data to next activity
- Document Type will be named the Activity name
- App Side: PDF is created if there are Forms in package. PDF is passed to new application
- Doc type will be associated with any templates using the same Activity name

Review Queue (Presubmit)

Enhance review to support automatically sending to OSJ queue

Configurable Activities will support both Manual and Standard Review Queue using existing functionality in the current needs determination. Along with the configurable activity going to review queue, the agent will still be able to move forward to the next activity. When the next activity is ready to be submitted, this and the linked activity (configurable activity) will be verified to be in the status of 6. If it still is in 5 or rejected, they will not be able to proceed. A pop-up will display for the agent notifying them that the configurable activity hasn't completed.

This workflow will work for all linked activity.

Acceptance Criteria

- Continue with the next activity and when ready to lock, verify if previous Activity is approved
- Cannot submit until previous activity is complete
- A pop-up will show if the linked activity is set to Pending Review or Pending Transmission (5) and the user will not be able to continue to submission. Pop up will display the following message: The |ACTIVITY_NAME| is still being reviewed. Please wait while it's being processed, an email will be sent once it has been approved.
- FLI_ACORD_TYPE data item (Verify)

If previous activity is rejected, please display the following message: The |ACTIVITY_NAME| has been rejected from review. Please contact the help desk to learn the next steps for this activity.

Generate an output file at the completion of the XX Transaction

The provider will generate the output file but we need a branch to look at the Activity type and Acord tc and subtype code

System: generate standard FL Data Item pair XML Output file at the completion of the configurable activity

Because these activities are not for ACORD clients, we will generate an output file in a format that meets the needs of the client so XML data item pairs or a custom format defined in a WO.

This is not base work. The provider will generate the output file but we need a branch to look at the Activity type and Acord tc and subtype code*.*

Acceptance Criteria

- Generate a standard FL Data Item pair XML Output file, at the completion of the XX activity

Rework Workflow Logic

Right now logic for the workflow and what is displayed, what are the next actions, etc. are sprinkled throughout the system. Making changes to this logic difficult and time consuming as every change needs to be done in multiple places. The proposed plan is to consolidate all this logic into a single location (method or class) so that the code that consumes this logic has a unified place to call. This was the Command managers original purpose but no longer accomplishes this. I propose a simplified methodology where this code for most interactions returns a simple enumeration for the current state of the system and a bitwise flag for the steps to display. There is more complexity that will have to be thought out but this will handle 99% of the workflow logic and dumbing down the UI to no longer need access to the large number of flags and statuses

Pre-Sale Audit included in next activity

The Pre-Sale audit should be included in the next activity. This should mirror how we are doing this with Needs Determination

