INSURANCE TECHNOLOGIES

Improve All Activities Search with Save and Back Features

FIRELIGHT BASE

FireLight®

Platform

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

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iConnect Design Approach - All Activities - Reconfigure Advanced Search to allow for Saved Searches

Project Overview

Currently within FireLight, a user can select the advanced search in the All Activities and enter the information to narrow their search, but there is not a feature to save this search to go back to at a later date.

In this enhancement, we will be adding in a new button to allow for searches to be saved, as well as adding a dropdown to access those saved searches at a later time. The advanced search functionality will also be reconfigured to make the searching capability more user friendly.

Impacts:

Advanced Search within the All Activities View

List Profile (This is set within the Provider, any of the search items that are set within the List Profile will display in the advanced search)

Saved Searches will only clear when selecting the clear button

1 Reconfigure the UI Layout for Advanced Search in All Activities

When "Advanced Search" is selected on the All Activities page, a separate dialog shows text fields and dropdowns to help the user narrow their search.

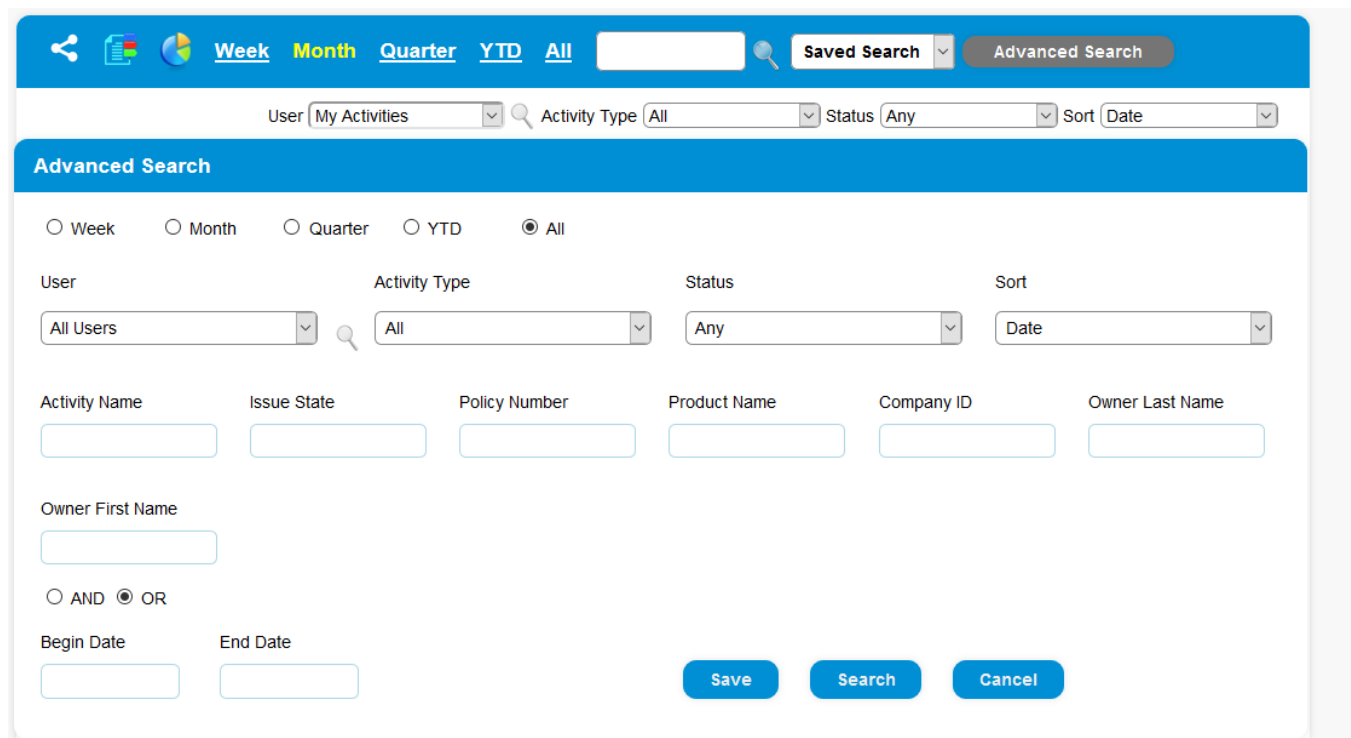We will need to reconfigure the structure of the advanced search feature that is in place today. As today's search in conducted through selecting the parameter, and typing in the search details, this will be changed to the below screenshot to be more consistent with other advanced search functions within FireLight.

The date/time range (shown at the top left hand corner of the mockup) will change from a dropdown to radio buttons.

User, Activity Type, Status, and Sort will stay as dropdowns, but the Activity Name, Policy Number, Company ID, Owner First Name, Owner Last Name, Issue State, and Product Name will now be static text boxes.

The AND and OR buttons will be radio buttons that will allow the user to choose to include all of the search parameters above (User, Activity Type, Status, Sort, Activity Name, Policy Number, Company ID, Owner First Name, Owner Last Name, Issue State, and Product Name) AND the Date range, or all of the parameters OR the date range.

Begin Date and End Date will be calendar boxes, but can also have dates entered if the user prefers to type them in.

This new layout will also allow for the saved searches capability (covered in Story 12518). This would include the Existing Search dropdown, Save as a new Search checkbox, and Enter a new Search Name fields.

Acceptance Criteria

- When Advanced Search is selected, a new layout of the feature will be displayed (that is shown in the attached mock-up) within a dialog box.
- The date/time range (on the upper left corner) will display as radio buttons.
- User, Activity Type, Status, and Sort are existing dropdowns and will continue to function as they do today.
- Activity Name, Policy Number, Company ID, Owner First Name, Owner Last Name, Issue State, and Product Name are static text fields that are alpha-numeric. (Note that these text boxes are controlled by list profile for each client, so they could be different than what is listed above)
- The And and OR buttons will either allow all of the search fields ((User, Activity Type, Status, Sort, Activity Name, Policy Number, Company ID, Owner First Name, Owner Last Name, Issue State, and Product Name) to be added to the Date search or the date searches can be used in place of those search fields.
- The Begin Date and End Date are calendar boxes that can also allow the user to enter the dates via text.
- The Saved search capability will be covered through story 12518. This includes the Existing Search, Save As New Search checkbox, and Enter New Search Name text field.

2 Add Saved Search Capability to All Activities

We will need to add the ability to save a search within the advanced search functionality.

When a user selects the Advanced Search button, a new dialog box will display and the user can enter in their information for the search. If the user would like to save this information, they can select the "Save" button at the bottom of the search.

When they do, a pop-up will appear that will allow the user to name this search, which then they can select "OK" to save, and "Cancel" to cancel the save.
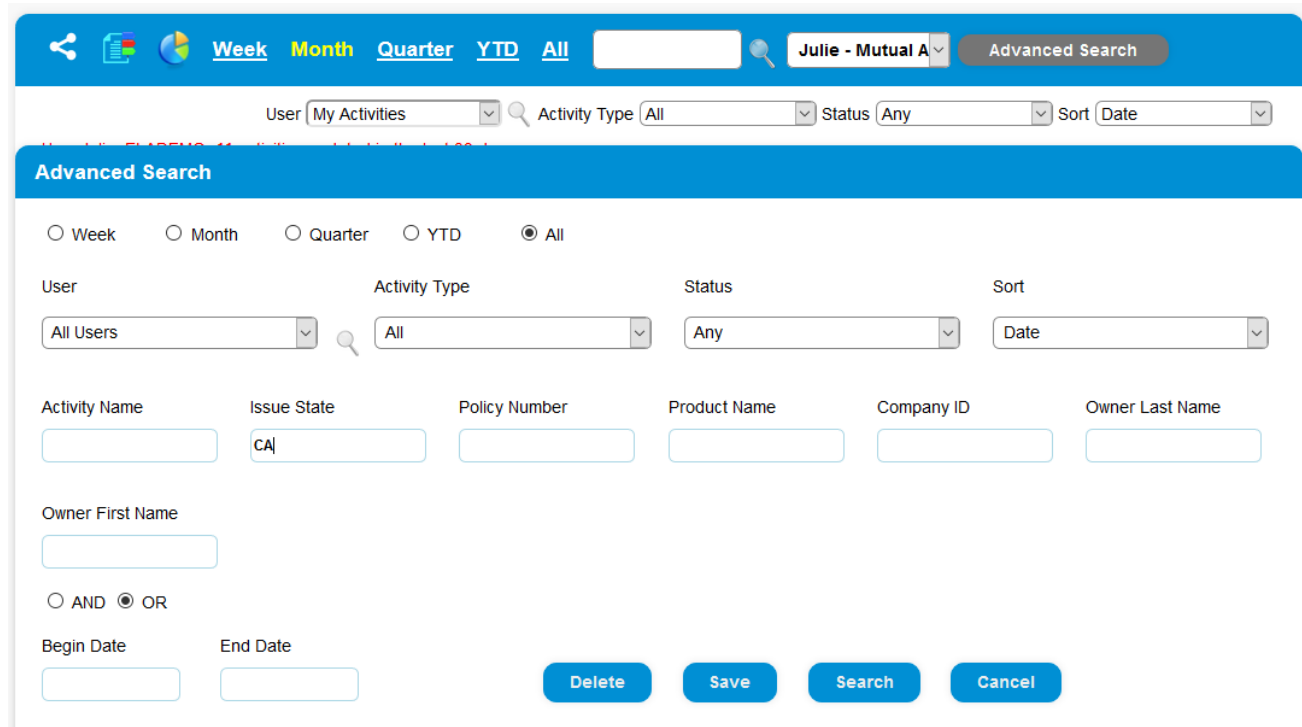
Once the search has been saved, the user can then proceed with the search by selecting the "Search" button.

Additionally, when the user wants to access their saved searches, they will be able to do so by selecting the "Saved Searches" button at the top of the review queue next to the "Advanced Search"

button. When this is selected, a dropdown will list all of the users saved searches. This search box has no maximum limits, and is scrollable to allow for as many searches as the user has.
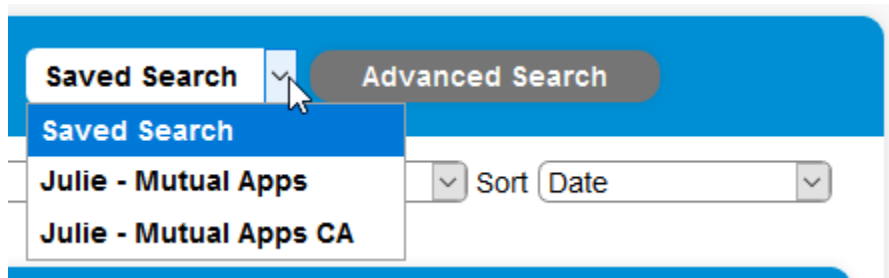
When a saved search from the dropdown is selected, then the advanced search dialog box appears with all of the saved information listed within the texts, dropdowns, and calendar boxes. Any of the text boxes, dropdowns, and calendar boxes can be left blank, not all of the fields have to be filled out

If the user changes any of the information in an existing saved search, it can be re-saved under the same name by selecting the "Save" button, and the name in the pop-up will default to the original name.

If the user wants to delete a search, they can select the search in the saved searches dropdown, and select the "Delete" button, which will appear only when a user is in a saved search.

A pop-up will appear asking "Are you sure you want to delete this search?" which the user can select "Yes" to delete, or "Cancel" to cancel.

If the user wants to resume the default search in review queue, they can select the "Clear" button located next to the Advanced Search on the header, which will clear the search and show the default list of activities within the review queue. The Clear button is the only way to clear out a search, even if other actions are taken on an app within the queue.
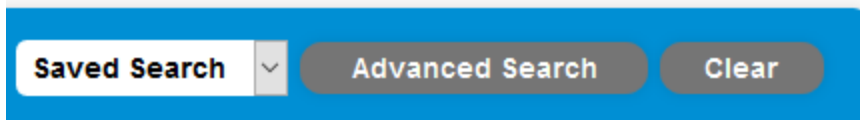
Acceptance Criteria

- A search can be saved when entering at least the user information and selecting the "save" button.
- The "Save" button will prompt a pop-up where the user can enter the name of their search. If they select "Ok" it saves, but if they select "Cancel" it will cancel.
- When a user wants to access their saved search, they select the "Saved Searches" button. A dropdown will display listing all of the searches that have been saved
- Saved searches have no limit, and the dropdown that is displayed in alphabetical order will be scrollable.
- When a saved search is selected within the dropdown, the advanced search dialog appears with the saved search information listed within the textboxes, dropdowns, or calendar boxes. Not every field has to be populated.
- A user can edit their saved search by changing the information within the dialog and selecting the "Save' button. The pop-up that appears will default to the last name.
- A user can delete a saved search by selecting it in the saved search dropdown, and selecting "Delete Search" button at the top right. This will prompt a pop-up asking "Are you sure you want to delete this search?" A "yes" will delete, and "Cancel" will cancel the delete.
- If the user wants to resume a default search, they can select the "clear" button next to the advanced search button on the header. The Clear will be the only way to clear the search.

3 Advanced Search dialog does not reflect filtering in drop-downs on All Activities view

In the All Activities view, the date search, user, Activity Type, Status, Sort, etc. Are displayed before entering the Advanced Search. These dropdowns are also listed within the Advanced Search, however currently the values within the dropdowns are not matching. For instance, if status of data entry is selected, it remains in "All" in Advanced Search Dialog. If Values are selected outside of the Advanced Search, they need to be reflected in the Advanced Search as well.

Acceptance Criteria

- All Values within the dropdowns listed in the All Activities tab will reflect the same values within the drop downs of the Advanced Search.
- Ex. If Data Entry is selected in Status, then Data Entry will be displayed within the Advanced Search Status Dropdown
- If Application is selected in Activity Type, then Application will be displayed within the Advanced Search Status Dropdown
- If Activity Name is selected in Sort, then Activity Name will be displayed within the Advanced Search Status Dropdown

4   Locale dropdown needs to be listed in Advanced Search

The Locale Dropdown that is listed in the All Activities page needs to be listed in the Advanced Search category. This dropdown will use existing functionality. This should be listed between the "User" and "Activity Type" dropdowns

Advanced Search

○ Week ○ Month ○ Quarter ○ YTD ● All

User
All Users ▾ 🔍

Locale
Locale ▾

Activity Type
All Activities ▾

Status
Any ▾

Sort
Date ▾

Activity Name
[   ]

Issue State
[   ]

Policy Number
[   ]

Product Name
[   ]

○ AND ● OR

Begin Date
[   ]

End Date
[   ]

[Save] [Search] [Cancel]

Acceptance Criteria

- Locale will be listed within the Advanced Search settings
- Locale in Advanced search will match what is listed in the Locale Dropdown within the All Activities
- Locale dropdown will use existing filter functionality