iConnect Design Approach - Updates to History and Audit reports for Packages, Products and Sales Agreements

Project Overview

Adding a history/audit report for Forms/Wizard Packages, Products and Sales Agreements will help us manage form updates, Package changes, Product updates, Product changes, Sales agreement updates, Sales Agreement changes and improve the ability for the admin to manage the platform. This will also allow a user to triage Package, Product and Sales Agreement issues such as forms being incorrectly added or removed from the Packages, changes to the Products and Sales Agreement changes that can impact correct workflow.

History/Audit report impacts:

- Admin: Products, Wizard/Forms Packages and Sales Agreements history tab

Requirements / User Stories

Addition of Forms/Wizard Package History

We need to add a tab to the Forms/Wizard Package page to allow the user to view the history of the selected Forms/Wizard Package. This will allow the user to view each change that has been made to the selected package. For this, we will want to add a tab entitled Package History and use the same logic that is applied to the forms and rule set history that is already in place in Fire light.

This example below shows the areas and data we will be collecting in the Package History. The goal is to give the user a full view of all changes that are occurring with the Package selected much like we do now with forms, wizards and rule sets.

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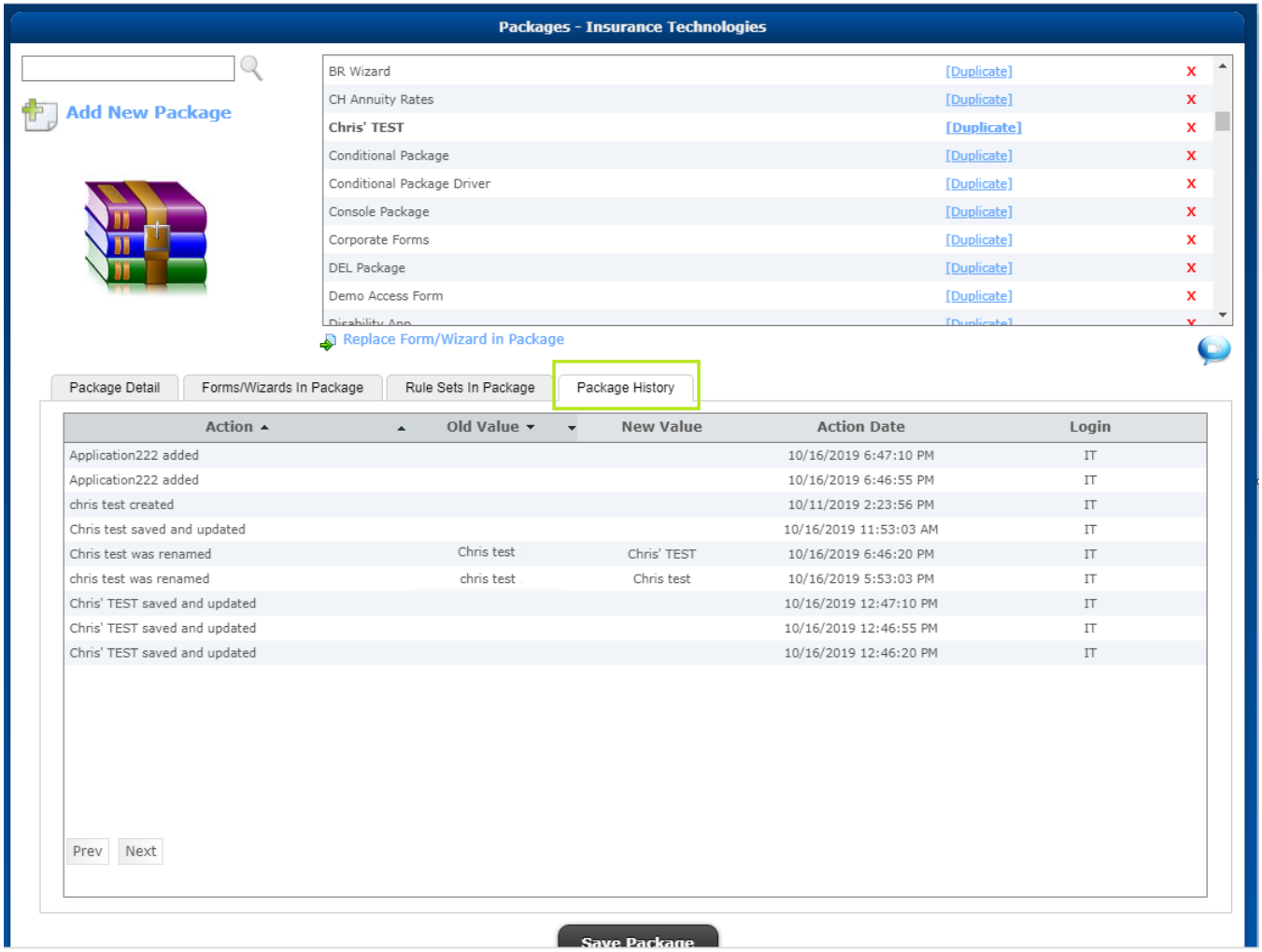

Acceptance Criteria

- Package History tab will be accessible and allow the user to view all changes/updates that have taken place for the selected package
- Package History includes the Action, Old value, New Value, Action date and User Login

Addition of Product History

We need to add a tab to the Product page to allow the user to view the history of the selected Product. This will allow the user to view each change that has been made to the selected Product. For this, we will want to use the same logic that is applied to the forms and rule set history that is already in place in Fire light.

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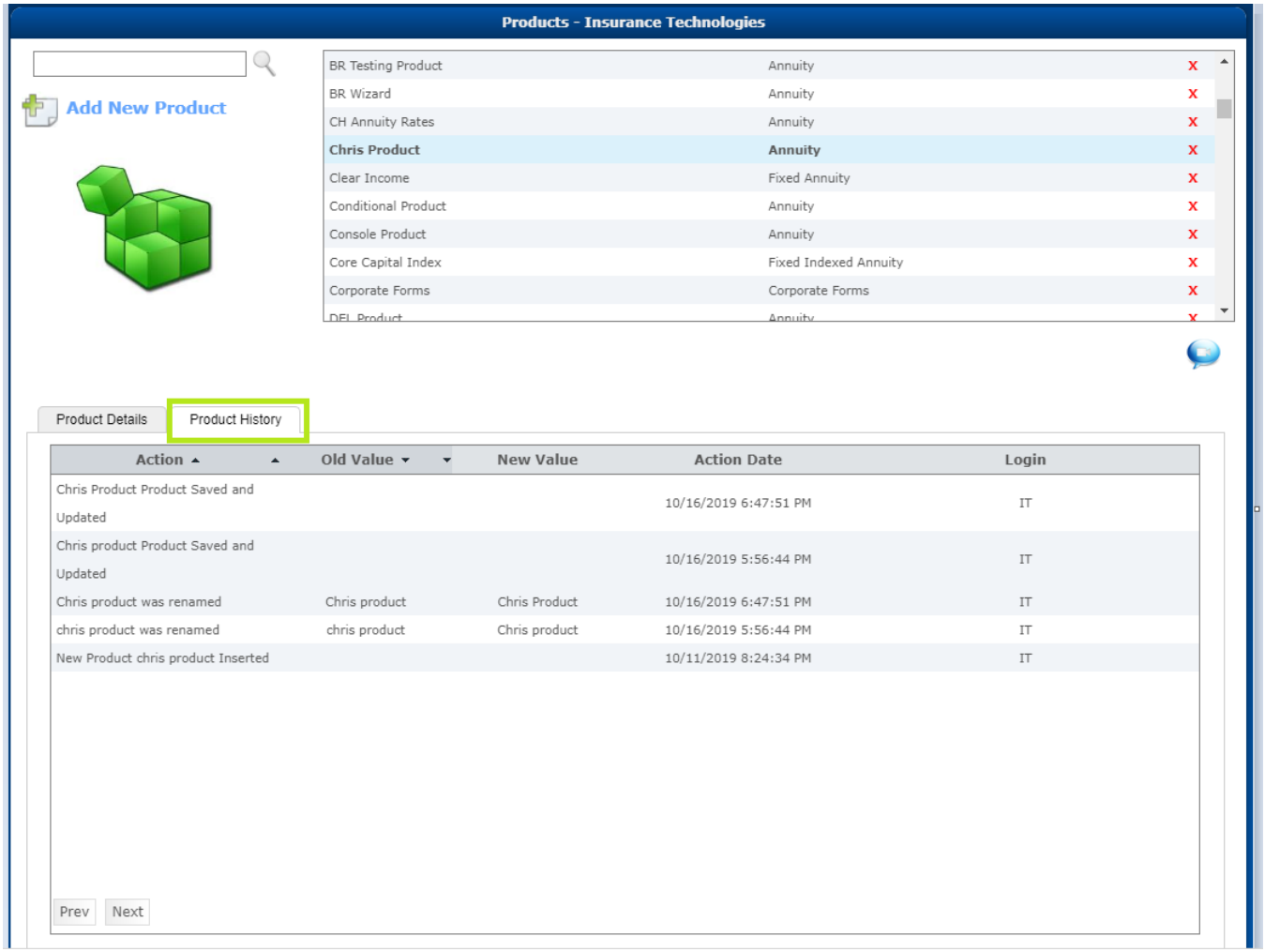
This example below shows the areas and data we will be collecting in the Product History. The goal is to give the user a full view of all changes that are occurring with the Package selected much like we do now with forms, wizards and rule sets.



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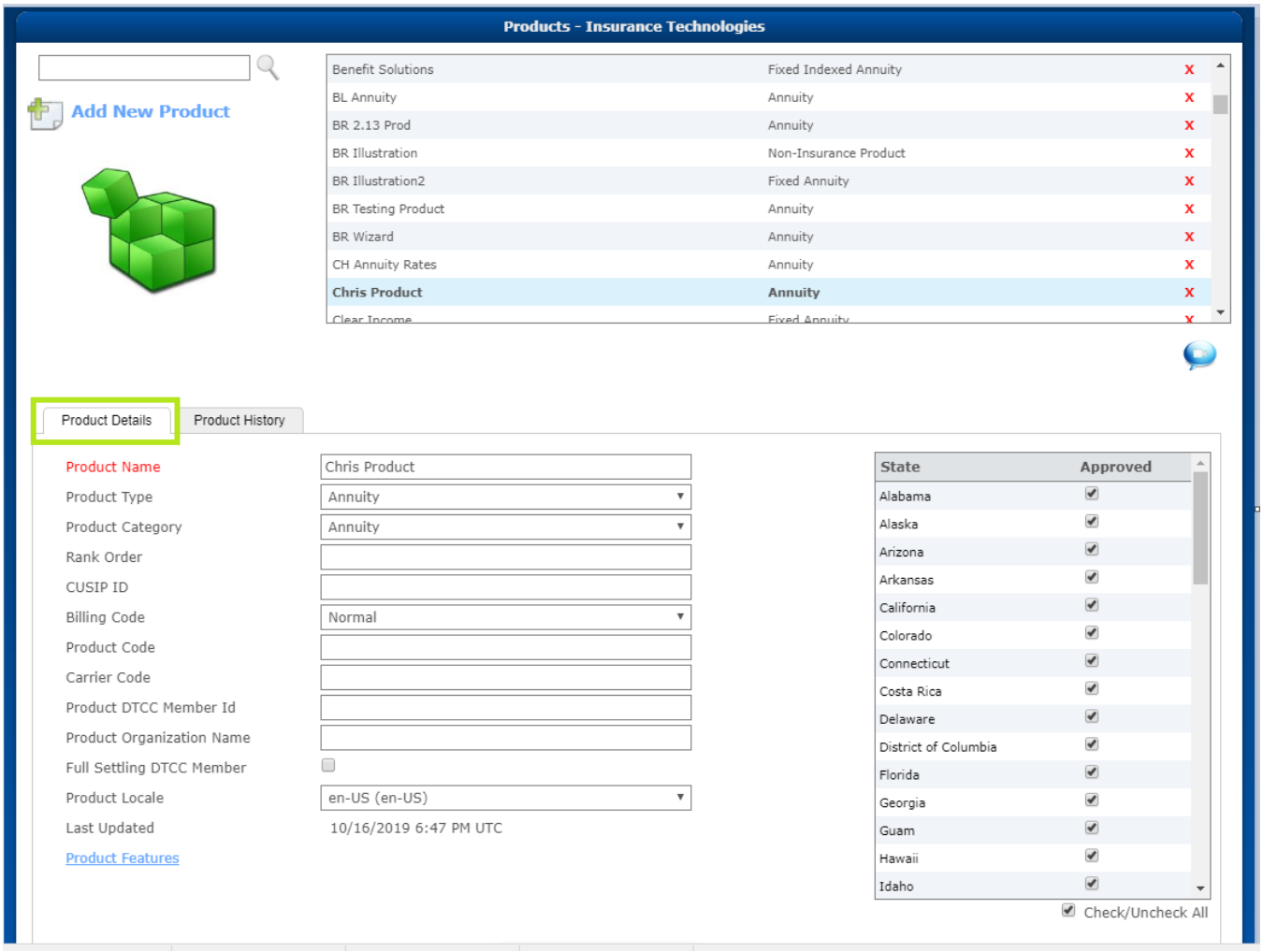
The Product detail tab will outline all the info that is currently in place for the Product screen:



Acceptance Criteria

- Product History tab will be accessible and allow the user to view all changes/updates that have taken place for the selected product
- Product History includes the Action, Old value, New Value, Action date and User Login
- Product Details will show all information that is currently in the Product screen of Fire light today

Addition of Sales Agreement History

We need to add a tab to the Sales Agreement page to allow the user to view the history of the selected Sales Agreement. This will allow the user to view each change that has been made to the selected Sales Agreement. For this, we will want to use the same logic that is applied to the forms and rule set history that is already in place in Fire light.

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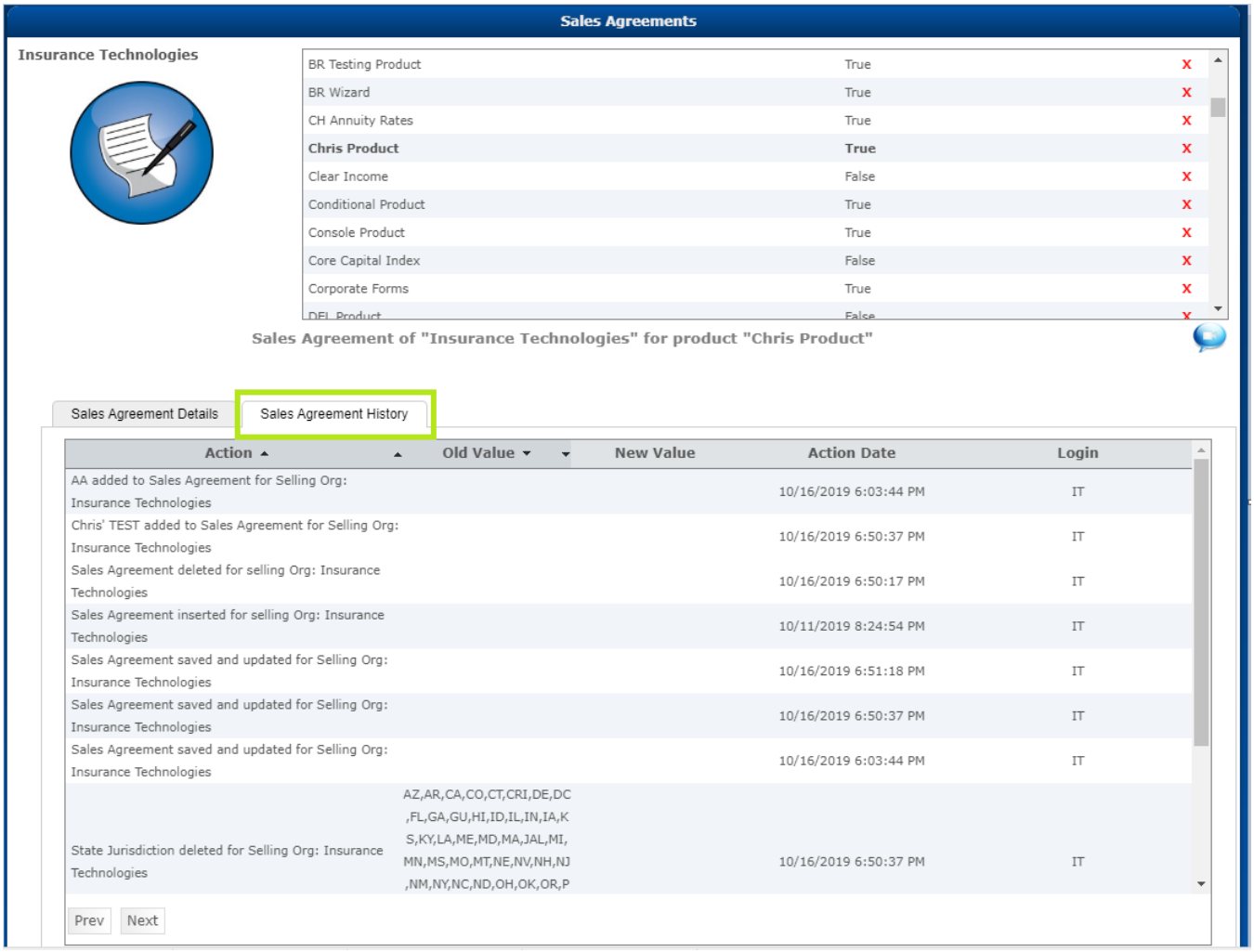
This example below shows the areas and data we will be collecting in the Sales Agreement History. The goal is to give the user a full view of all changes that are occurring with the Package selected much like we do now with forms, wizards and rule sets.



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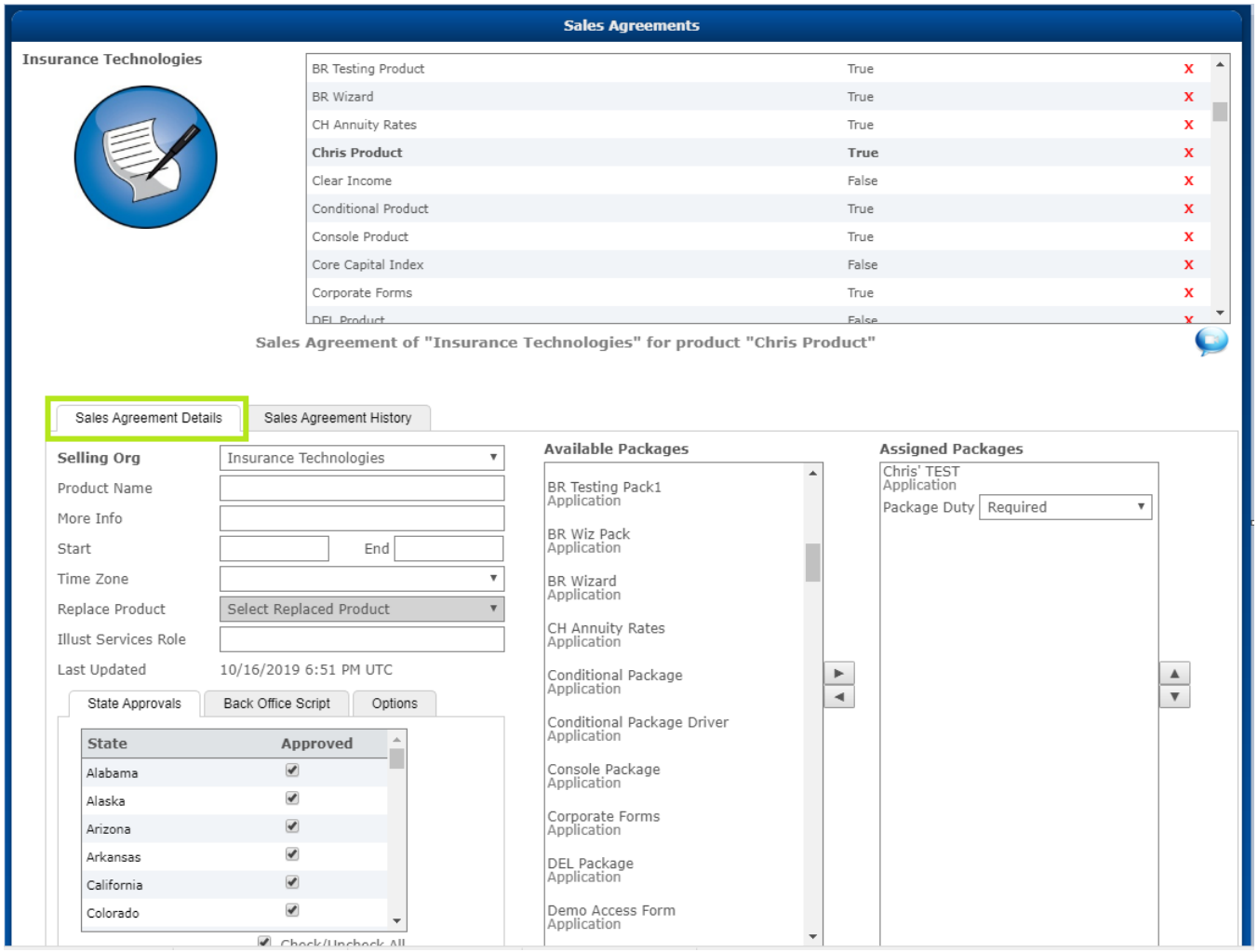
The Sales Agreement Details tab will outline all the info that is currently in place for the Sales Agreement screen:



Acceptance Criteria

- Sales Agreement History tab will be accessible and allow the user to view all changes/updates that have taken place for the selected Sales Agreement
- Sales Agreement History includes the Action, Old value, New Value, Action date and User Login
- Sales Agreement Details will show all information that is currently in the Sales Agreement screen of Fire light today
- (if there are more states added or deleted than will fit in the space, tool tip can display the overflow)

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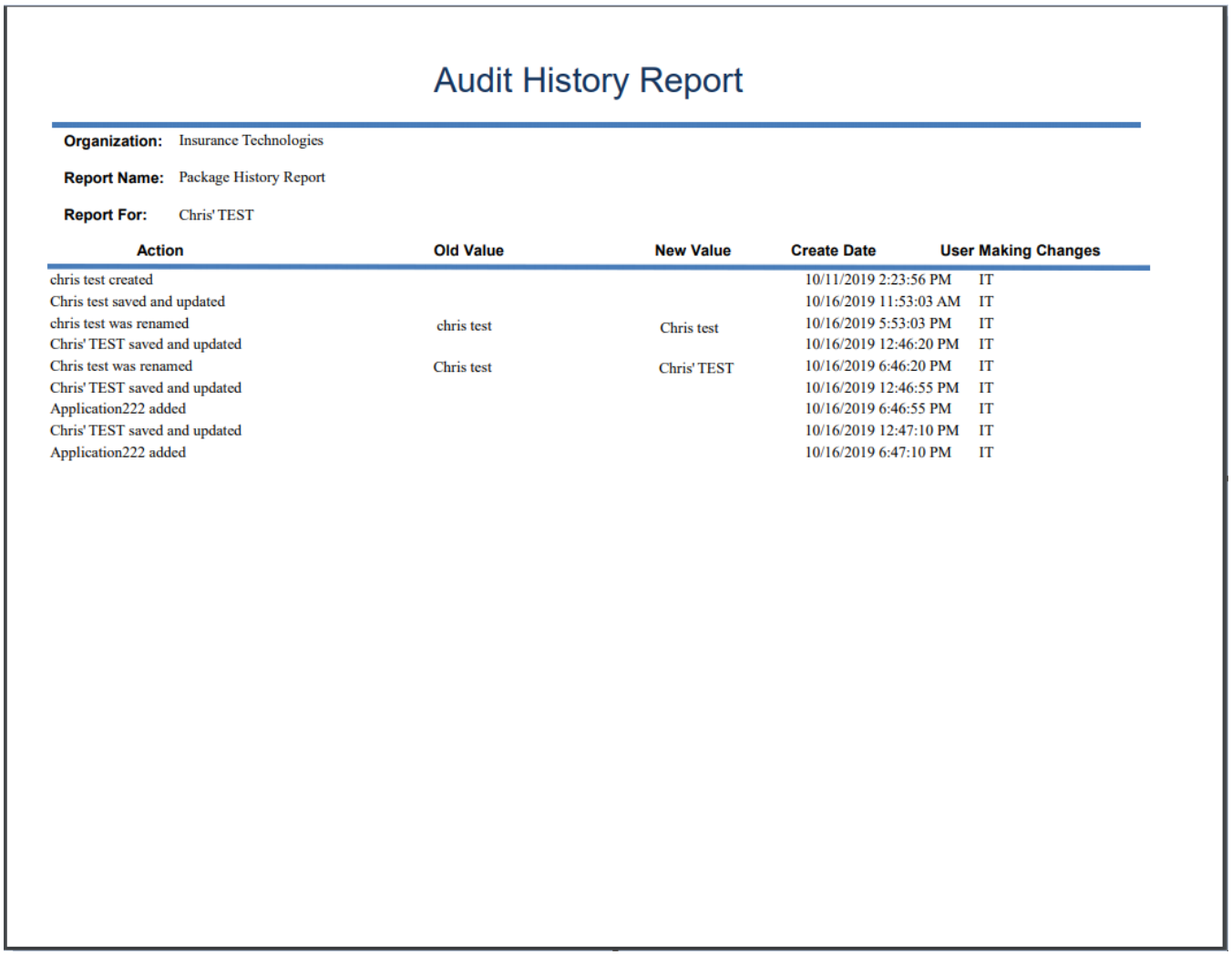
Addition of Forms/Wizard Package Audit Reports

A PDF version of this audit report must be available to the user. This will outline all changes and updates that have taken place for the selected package. We need to capture the same info on this report as we have on the Package History tab.



Audit History Report

Organization: Insurance Technologies

Report Name: Package History Report

Report For: Chris' TEST

Action	Old Value	New Value	Create Date	User Making Changes
chris test created			10/11/2019 2:23:56 PM	IT
Chris test saved and updated			10/16/2019 11:53:03 AM	IT
chris test was renamed	chris test	Chris test	10/16/2019 5:53:03 PM	IT
Chris' TEST saved and updated			10/16/2019 12:46:20 PM	IT
Chris test was renamed	Chris test	Chris' TEST	10/16/2019 6:46:20 PM	IT
Chris' TEST saved and updated			10/16/2019 12:46:55 PM	IT
Application222 added			10/16/2019 6:46:55 PM	IT
Chris' TEST saved and updated			10/16/2019 12:47:10 PM	IT
Application222 added			10/16/2019 6:47:10 PM	IT

We will also need to capture the history and changes to the Package selected in CSV form as well. The CSV will show the same info as the PDF.

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1	Key	Value			
2	OrgName	Insurance Technologies			
3	ReportName	Package History Report			
4	ReportItem	Chris' TEST			
5					
6	Action	OldValue	NewValue	CreateDate	UserName
7	chris test created			10/11/2019 14:23	IT
8	Chris test saved and updated			10/16/2019 11:53	IT
9	chris test was renamed	chris test	Chris test	10/16/2019 17:53	IT
10	Chris' TEST saved and updated			10/16/2019 12:46	IT
11	Chris test was renamed	chris test	Chris' TEST	10/16/2019 18:46	IT
12	Chris' TEST saved and updated			10/16/2019 12:46	IT
13	Application222 added			10/16/2019 18:46	IT
14	Chris' TEST saved and updated			10/16/2019 12:47	IT
15	Application222 added			10/16/2019 18:47	IT
16					

Acceptance Criteria

- PDF report can be downloaded and will include info from the latest changes and saves from the Package History
- CSV report can be downloaded and will include info from the latest changes and saves from the Package History

Addition of Product Audit Reports

A PDF version of this audit report must be available to the user. This will outline all changes and updates that have taken place for the selected package. We need to capture the same info on this report as we have on the Product History tab.

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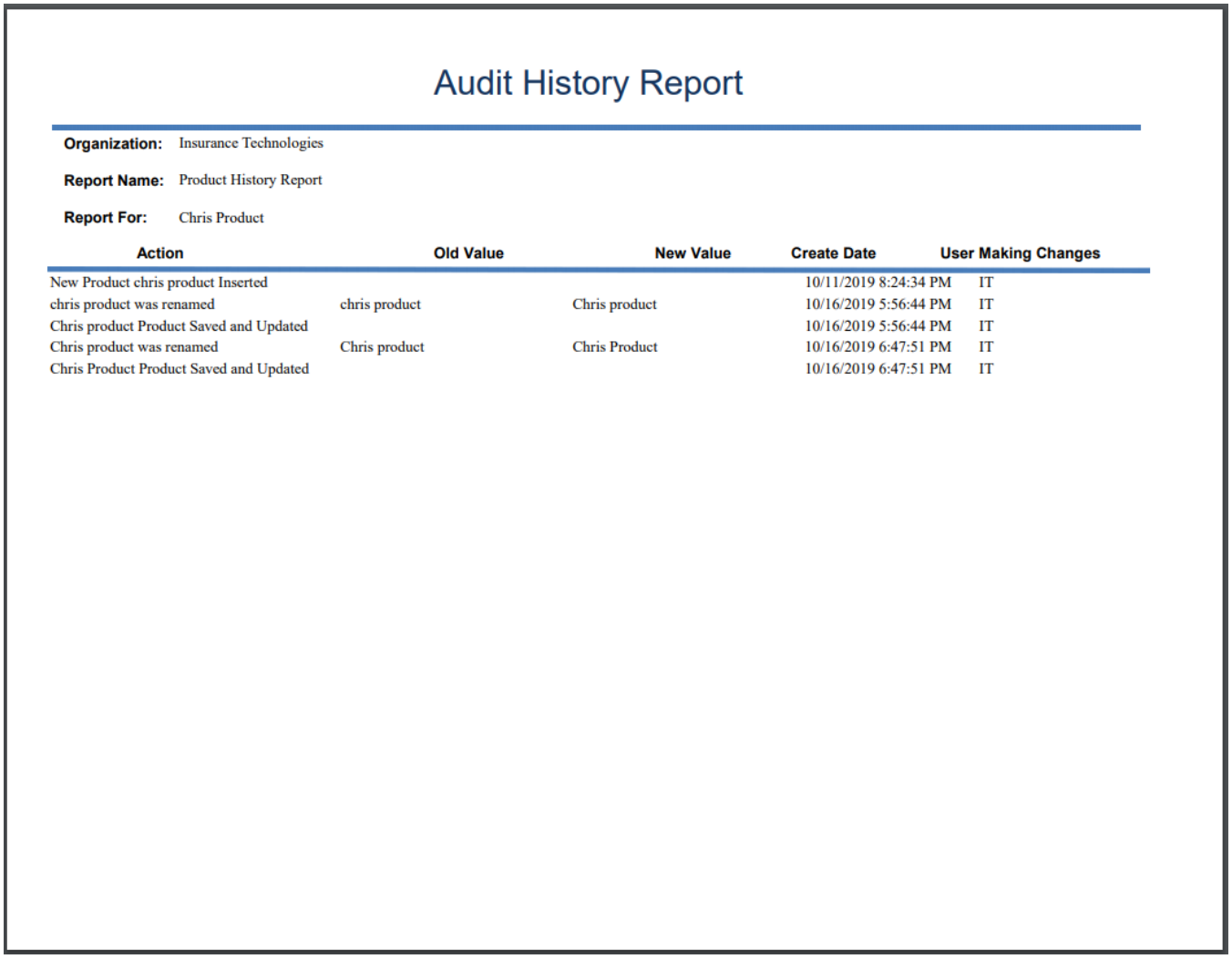

Audit History Report

Organization: Insurance Technologies

Report Name: Product History Report

Report For: Chris Product

Action	Old Value	New Value	Create Date	User Making Changes
New Product chris product Inserted			10/11/2019 8:24:34 PM	IT
chris product was renamed	chris product	Chris product	10/16/2019 5:56:44 PM	IT
Chris product Product Saved and Updated			10/16/2019 5:56:44 PM	IT
Chris product was renamed	Chris product	Chris Product	10/16/2019 6:47:51 PM	IT
Chris Product Product Saved and Updated			10/16/2019 6:47:51 PM	IT

We will also need to capture the history and changes to the Product selected in CSV form as well. The CSV will show the same info as the PDF.

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	A	B	C	D	E
1	Key	Value			
2	OrgName	Insurance Technologies			
3	ReportName	Product History Report			
4	ReportItem	Chris Product			
5					
6	Action	OldValue	NewValue	CreateDate	UserName
7	New Product chris product Inserted			10/11/2019 20:24	IT
8	chris product was renamed	chris product	Chris product	10/16/2019 17:56	IT
9	Chris product Product Saved and Updated			10/16/2019 17:56	IT
10	Chris product was renamed	Chris product	Chris Product	10/16/2019 18:47	IT
11	Chris Product Product Saved and Updated			10/16/2019 18:47	IT
12					
13					
14					
15					

Acceptance Criteria

- PDF report can be downloaded and will include info from the latest changes and saves from the Product History
- CSV report can be downloaded and will include info from the latest changes and saves from the Product History

Addition of Sales Agreement Audit Reports

A PDF version of this audit report must be available to the user. This will outline all changes and updates that have taken place for the selected package. We need to capture the same info on this report as we have on the Sales Agreement History tab.

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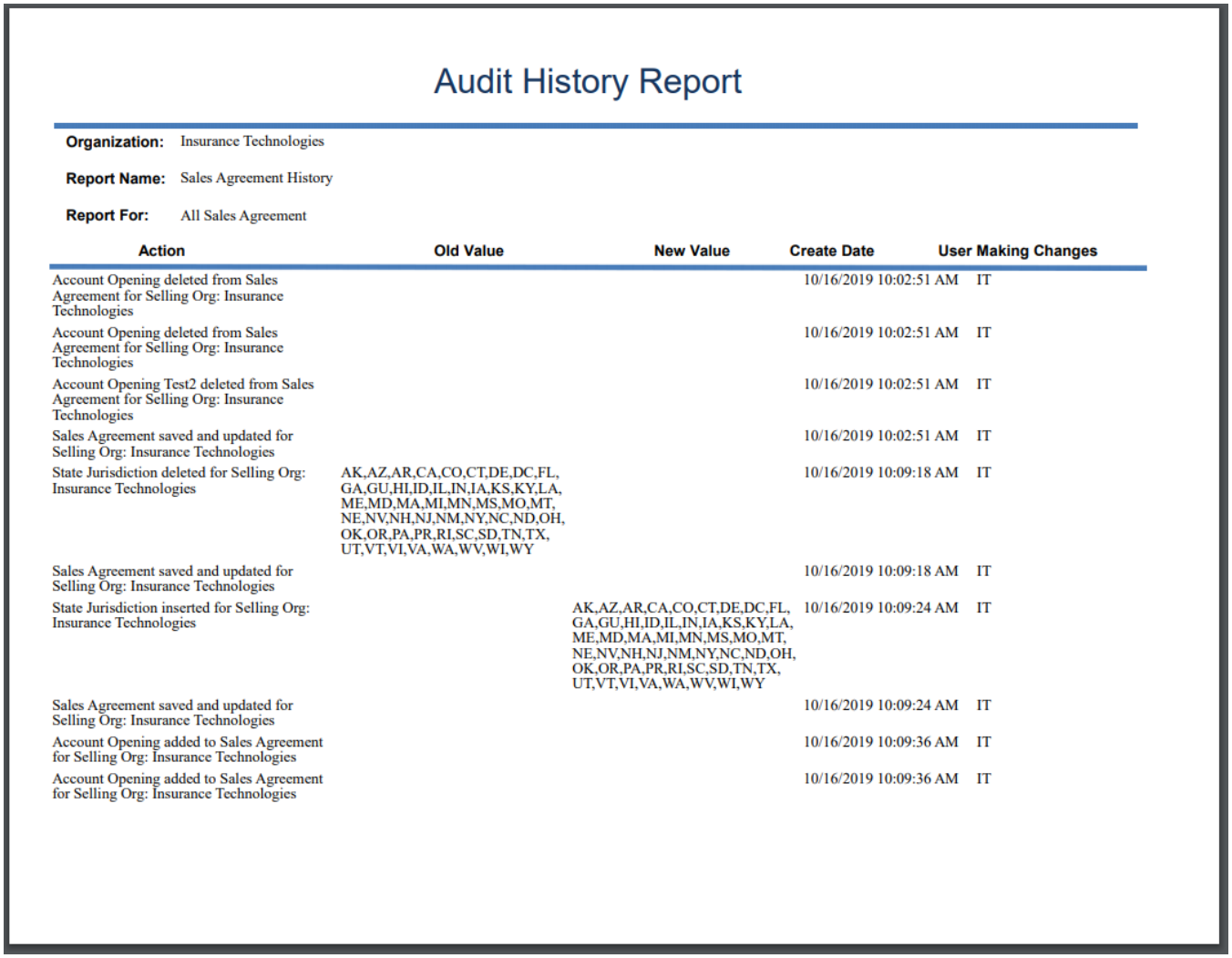

Audit History Report

Organization: Insurance Technologies

Report Name: Sales Agreement History

Report For: All Sales Agreement

Action	Old Value	New Value	Create Date	User Making Changes
Account Opening deleted from Sales Agreement for Selling Org: Insurance Technologies			10/16/2019 10:02:51 AM	IT
Account Opening deleted from Sales Agreement for Selling Org: Insurance Technologies			10/16/2019 10:02:51 AM	IT
Account Opening Test2 deleted from Sales Agreement for Selling Org: Insurance Technologies			10/16/2019 10:02:51 AM	IT
Sales Agreement saved and updated for Selling Org: Insurance Technologies			10/16/2019 10:02:51 AM	IT
State Jurisdiction deleted for Selling Org: Insurance Technologies	AK,AZ,AR,CA,CO,CT,DE,DC,FL, GA,GU,HI,ID,IL,IN,IA,KS,KY,LA, ME,MD,MA,MI,MN,MS,MO,MT, NE,NV,NH,NJ,NM,NY,NC,ND,OH, OK,OR,PA,PR,RI,SC,SD,TN,TX, UT,VT,VI,VA,WA,WV,WI,WY		10/16/2019 10:09:18 AM	IT
Sales Agreement saved and updated for Selling Org: Insurance Technologies			10/16/2019 10:09:18 AM	IT
State Jurisdiction inserted for Selling Org: Insurance Technologies		AK,AZ,AR,CA,CO,CT,DE,DC,FL, GA,GU,HI,ID,IL,IN,IA,KS,KY,LA, ME,MD,MA,MI,MN,MS,MO,MT, NE,NV,NH,NJ,NM,NY,NC,ND,OH, OK,OR,PA,PR,RI,SC,SD,TN,TX, UT,VT,VI,VA,WA,WV,WI,WY	10/16/2019 10:09:24 AM	IT
Sales Agreement saved and updated for Selling Org: Insurance Technologies			10/16/2019 10:09:24 AM	IT
Account Opening added to Sales Agreement for Selling Org: Insurance Technologies			10/16/2019 10:09:36 AM	IT
Account Opening added to Sales Agreement for Selling Org: Insurance Technologies			10/16/2019 10:09:36 AM	IT

We will also need to capture the history and changes to the Sales Agreement selected in CSV form as well. The CSV will show the same info as the PDF.

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1	Key	Value				
2	OrgName	Insurance Technologies				
3	ReportName	Sales Agreement History Report				
4	ReportItem	All Sales Agreement				
5						
6	Action	OldValue	NewValue	CreateDat	UserName	
7	Sales Agreement saved and updated for Selling Org: Insurance Technologies			########	IT	
8						
9		AK AZ AR CA CO CT DE				
10		DC FL GA GU HI ID IL IN				
11		IA KS KY LA ME MD MA				
12		MI MN MS MO MT NE				
13		NV NH NJ NM NY NC				
14		ND OH OK OR PA PR RI				
15		SC SD TN TX UT VT VI				
16	State Jurisdiction deleted for Selling Org: Insurance Technologies	VA WA WV WI WY		########	IT	
17	Sales Agreement saved and updated for Selling Org: Insurance Technologies			########	IT	
18						
19			AK AZ AR CA CO CT DE			
20			DC FL GA GU HI ID IL IN			
21			IA KS KY LA ME MD MA			
22			MI MN MS MO MT NE			
23			NV NH NJ NM NY NC			
24			ND OH OK OR PA PR RI			
25			SC SD TN TX UT VT VI			
26	State Jurisdiction inserted for Selling Org: Insurance Technologies		VA WA WV WI WY	########	IT	
27	Sales Agreement saved and updated for Selling Org: Peak Life Insurance			########	dcartwright	

Acceptance Criteria

- PDF report can be downloaded and will include info from the latest changes and saves from the Sales Agreement History
- CSV report can be downloaded and will include info from the latest changes and saves from the Sales Agreement History
- For the report, all states must show. In the UI side, if there are more states added or deleted than will fit in the space, we are using a tool tip to display the overflow but, in the report, we must list all states that are changed.

Add an Option to select Audit Reports

With the addition of the Package. Product and Sales Agreement History in place we will now need to ensure all Audit reports will be available to the user. Therefor we will need to add an option to the Reports screen for the user to view the Package, Product and Sales Agreement History. We will want to ensure the user can view these options in both CSV and PDF form. This will give the user an audit report to all changes that have occurred with the selected package.

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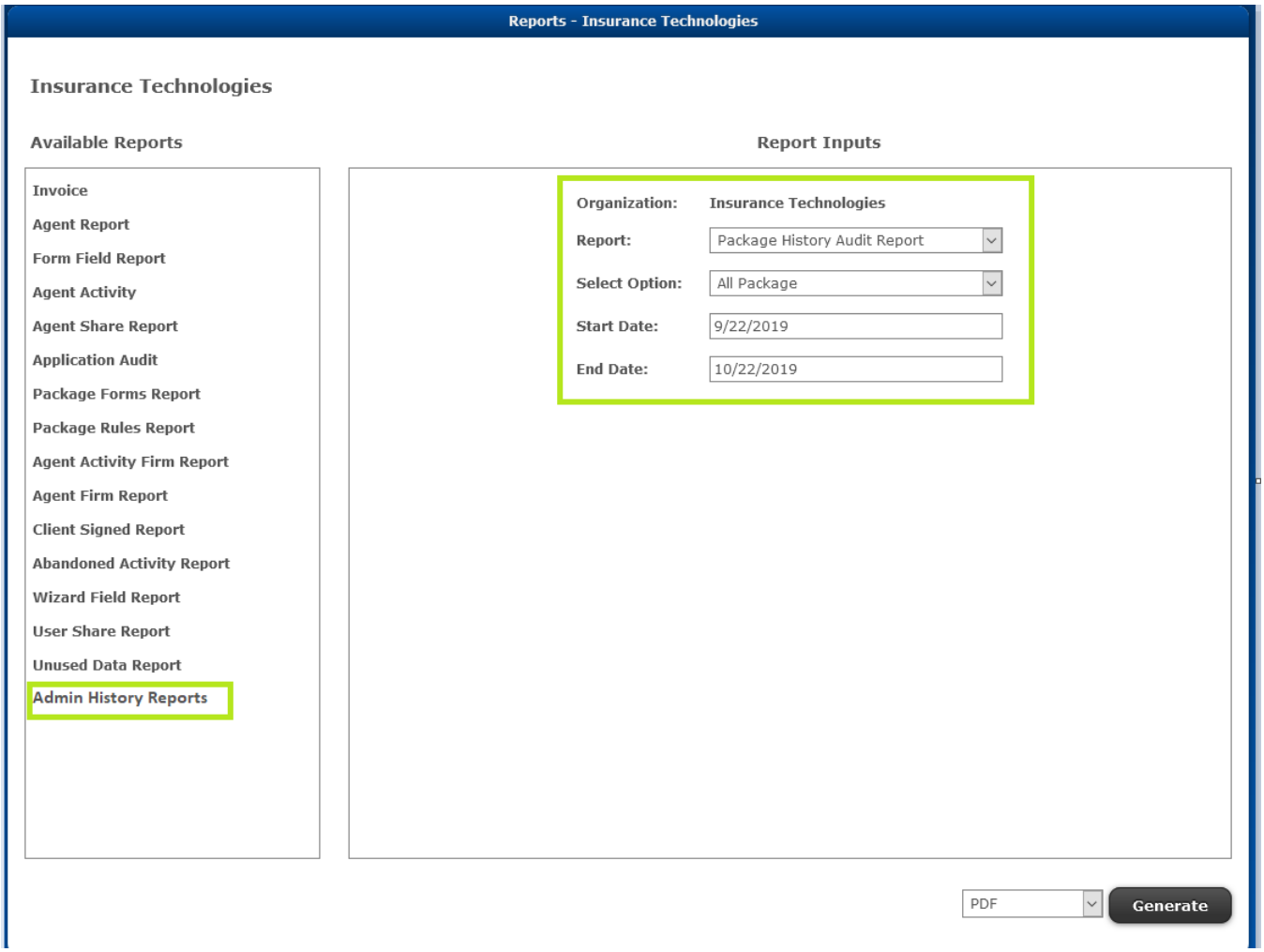

The Addition of the Admin History Reports option in the Available Reports section will enable a dropdown field under the Report Inputs section with the Package, Product and Sales Agreement options. Once option from the enabled dropdown and form of the Audit report, (CSV or PDF) is selected and the generate button is clicked the report will download.

Acceptance Criteria

- Selection of the Deployment History Report will enable a dropdown field for the user to select from. Package, Product and Sales Agreement History will be the available options in this dropdown field.
- Once an option from the enabled dropdown and form of the Audit report, (CSV or PDF) is selected and the generate button is clicked the report will download.

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