



iConnect 170244 Design Approach

Project Overview

This project will enhance the reporting by adding a new report for abandoned activity. This will be a list of applications that are not submitted and the last updated date is X days. We will add a filter in the Admin reports to capture the timeframe to run the report (Today, week, month, YTD). For activity reports, we will allow clients to define/set the timeframe for monthly reports.

Features/Requirements

- Once an application is created, it has a last updated date. If the application is not submitted, the last updated date will indicate that the application is abandoned. This will apply to all statuses that are not complete.
- Report format layout: Application name, Policy Number, Created Date, Carrier, Product, Product type, agent ID, current status, Last Updated, and Count from today to last updated date.

Sample:

(repeat for each application)											
Application Name	Policy Number	App Created Date	Carrier	Product	Product Type	Agent ID	Agent Role code	Current Status of App	Last Updated Date	Time passed since last updated	d (days)
Katherine Dease Annuity	33r4545r	12/5/2017	Voya	Annuity for Life	Variable Annuity	Katherine_FLADEMO	FLA10	Pending Signatures	12/5/2017	13	
name	3443erer	12/5/2017	Voya	Annuity for Life	Variable Annuity	Katherine_FLADEMO	FLA10	Pending Signatures	12/6/2017	12	
name	33r45465	11/1/2017	Transamerica	ххуу	Variable Annuity	Katherine_FLADEMO	FLA10	Pending Signatures	11/1/2017	48	
name	33r45466	11/1/2017	Transamerica	ххуу	Variable Annuity	Katherine_FLADEMO	FLA10	Pending Review	11/1/2017	48	
name	33r45467	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMO	FLA10	Form Entry	11/1/2017	48	
name	33r45478	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMO	FLA10	Form Entry	11/1/2017	48	
name	33r45456	11/1/2017	Lincoln	iforeLife	Fixed Indexed Annu	Katherine_FLADEMO	FLA10	Form Entry	11/1/2017	48	
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Sample report is in folder with Design Doc.

Use Cases / Workflow Changes

No changes in existing workflow.

Admin Changes

Add new report template for "Abandoned Activity Report" and add new class to define the functionality.

App Changes

No App Changes required. (Changes may be required to track what page they last viewed)

Integration Changes

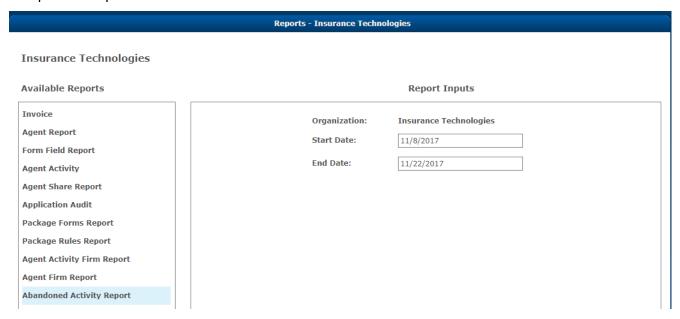
None



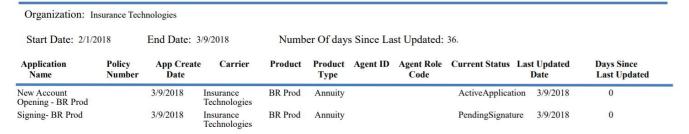


UI Mock Ups

In report section user can see new report type called "Abandoned Activity Report" and generate report for specified input details.



Abandoned Activity Report



How to Enable and Use This Feature

To enable this report we need to update the database as per request from client/user.





Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports	Yes	New report template and class will be added
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		