

# iConnect 158126 Design Approach Print Individual Forms from a Locked Application

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## Project Overview

Add ability to select individual forms in the Display/Print PDF print screen after an application has been locked. Current functionality does not allow forms to be unselected for print if they are a required form in the final application package. This enhancement would add a group option in the Admin tool to allow a role code access to print individual forms as needed from the application package after lock-down.

## Features/Requirements

- Group option to control the access to the print individual forms from a locked application functionality
- Ability to check/uncheck the forms to print in the Select Documents to Print screen that appears when the user clicks the Display/Print PDF button in the App Portal after an application has been locked.
- Restrictions for NIGO print, and other group/organization settings will remain unchanged.
- The option 'Disable Display/Print PDF' and 'Enable Print Individual Forms' cannot be selected for the same role code.

## Use Cases / Workflow Changes

A group role code, such as Home Office, may have the option to print individual forms turned on in the Admin group settings. The option will default to off for all other role codes. If the option is turned on, the ability to check/uncheck individual forms will not disable when the application transitions to locked status after it enters the signing ceremony or is submitted. This will allow the Home Office to print individual forms for review without having to print the entire application.

## Admin Changes

- Add a group option in the groups tab of the Admin tool for 'Enable Print Individual Forms'
- Add radio button functionality to 'Disable Display/Print PDF' and 'Enable Print Individual Forms' to uncheck one option if the other is checked to avoid conflicts in print functionality.

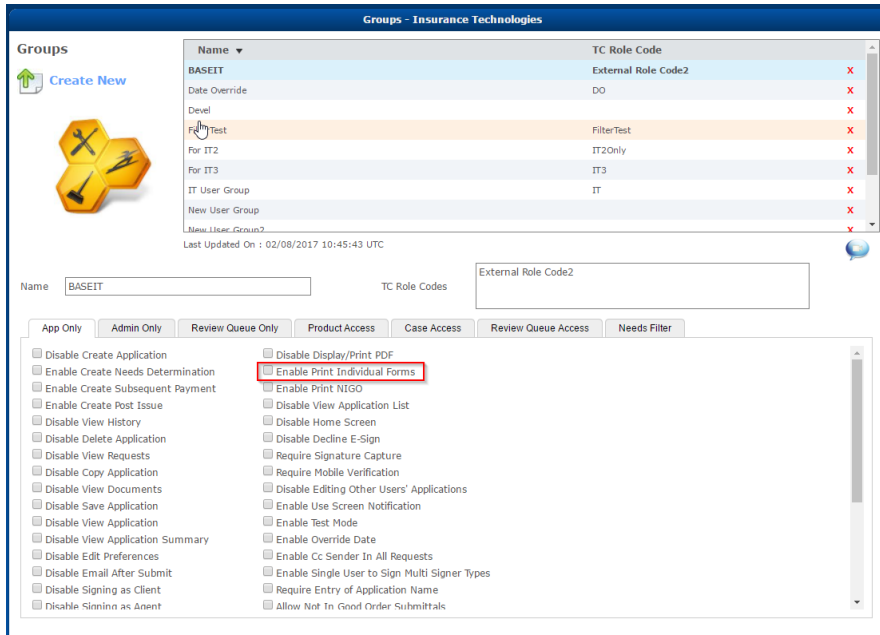
## App Changes

- If the option 'Enable Print Individual Forms' is turned on in the group settings for the user, do not disable the checkboxes for each individual form in the Select Documents to Print screen that appears when the Display/Print PDF button is clicked for a locked application.

## Integration Changes

None Needed

## UI Mock Ups



**Groups - Insurance Technologies**

**Groups**

Create New

Name	TC Role Code	
BASEIT	External Role Code2	X
Date Override	DO	X
Devel		X
FilterTest	FilterTest	X
For IT2	IT2Only	X
For IT3	IT3	X
IT User Group	IT	X
New User Group		X
New User Group2		X

Last Updated On : 02/08/2017 10:45:43 UTC

Name: BASEIT TC Role Codes: External Role Code2

App Only Admin Only Review Queue Only Product Access Case Access Review Queue Access Needs Filter

☐ Disable Create Application  
☐ Enable Create Needs Determination  
☐ Enable Create Subsequent Payment  
☐ Enable Create Post Issue  
☐ Disable View History  
☐ Disable Delete Application  
☐ Disable View Requests  
☐ Disable Copy Application  
☐ Disable View Documents  
☐ Disable Save Application  
☐ Disable View Application  
☐ Disable View Application Summary  
☐ Disable Edit Preferences  
☐ Disable Email After Submit  
☐ Disable Signing as Client  
☐ Disable Signing as Agent

☐ Disable Display/Print PDF  
☒ **Enable Print Individual Forms**  
☐ Enable Print NIGO  
☐ Disable View Application List  
☐ Disable Home Screen  
☐ Disable Decline E-Sign  
☐ Require Signature Capture  
☐ Require Mobile Verification  
☐ Disable Editing Other Users' Applications  
☐ Enable Use Screen Notification  
☐ Enable Test Mode  
☐ Enable Override Date  
☐ Enable Cc Sender In All Requests  
☐ Enable Single User to Sign Multi Signer Types  
☐ Require Entry of Application Name  
☐ Allow Not In Good Order Submittals

## How to Enable and Use This Feature

- In the Admin tool group options tab, select the checkbox for 'Enable Print Individual Forms'.
- In the App portal, create a new application and complete the app to 100%.
- Click 'Continue' to either enter the signing ceremony or submit the application.
- Click the 'Other Actions' drop-down menu, and select the 'Display/Print PDF' option.
- The checkboxes for each form in the application should be enabled and checked or unchecked to select the form to print.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- <b>Form Library</b>		
- <b>Design Forms</b>		

- <b>Profile Administration</b>		'Enable Print Individual Forms' option added to group options with 'Disable Display/Print PDF' unchecked if selected
- <b>Reports</b>		
- <b>Deployment</b>		
<b>FireLight App</b>		
- <b>New Application</b>		
- <b>Edit Application</b>		
- <b>Signature Process</b>		
- <b>Review Queue</b>		
- <b>Manual Review</b>		
- <b>User Preferences</b>		
- <b>Inbound Integration</b>		
- <b>Outbound Integration</b>		
- <b>PDF Generation</b>		Ability to check/uncheck individual forms in select documents to print after locked status.
- <b>Email System</b>		
<b>FireLight Console</b>		
- <b>Windows</b>		
- <b>iOS</b>		
<b>Other Systems</b>		
- <b>DTCC Integration</b>		
- <b>Commission Netting</b>		
- <b>Activity Reporting</b>		