INSURANCE TECHNOLOGIES

Update Legacy Forms to React July 2.25

FIRELIGHT BASE

FireLight®

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Table of Contents

Design Approach - Update Legacy Forms to React July 2.25

1 Update Legacy Forms to React July 2.25

1.1 React Forms: updates to Share and Transfer options

Share dialog will not be changed from MVC for this release. Available in edit application through Other Actions selection and through All Activities in the User Share functionality, launched from an icon located top left. Both of these options are controlled by a group option in Admin/Organization Settings/Groups. Verify that the functionality is unchanged.

Share My Activities		
Search My Contacts: dease 🔍 X		
abi_flademo Katherine Dease (FLADEMO033...	Share Full Control	Share Read Only
Chris_FLADEMO Katherine Dease (FLADEM...	Share Full Control	Share Read Only
FLADEMO_IT Katherine Dease (FLADEMO01...	Share Full Control	Share Read Only
Katherine Dease (49ae7f60-61d7-4aa7-a584-...	Share Full Control	Share Read Only
Katherine Dease (2b022031-5497-4cec-9906-...	Share Full Control	Share Read Only
Katherine_FLADEMO Katherine Dease (FLA...	Share Full Control	Share Read Only

There is also a Transfer option in edit application through the Other Actions menu. There is a React dialog currently in use for Wizards and Forms+Wizards. This also needs to open in a Forms only activity.

Transfer

Search My Contacts:

dease 🔍

Share Users ❓

Select User ⌄

Close

Transfer

Search My Contacts:

dease

Share Users ❓

Select User ⌄

abi_flademo Katherine Dease(FLADEMO0331)

Chris_FLADEMO Katherine Dease(FLADEMO0312)

FLADEMO_IT Katherine Dease(FLADEMO0100)

Katherine Dease (49ae7f60-61d7-4aa7-a584-d714735f52d4)

Katherine Dease (2b022031-5497-4cec-9906-ab9da7f686c6)

Katherine_FLADEMO Katherine Dease(FLADEMO0310)

Select User

Acceptance Criteria

- Other Actions/Share option displays existing MVC dialog for wizards, forms+wizard, and forms only. This is sharing one activity.
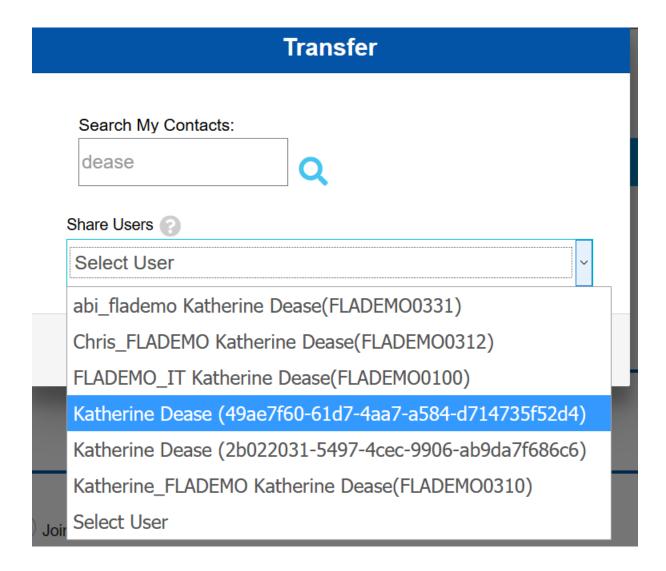- Other Actions/Transfer option displays the React dialog like it currently does in wizards and forms+wizards for a forms only activity. This is transferring one activity.
- All Activities displays a Share option.
- Verify the wizards, forms+wizards, and forms only still function as currently defined for both share and transfer.
- Verify the share options are unchanged - a user can be selected to share with, along with Full Access or Read-Only Access.

1.2   React Forms: Rewrite forms masking and formatting in react

Masking and field formatting set in the Forms Designer via the field properties needs to be rewritten to work properly in react.

Acceptance Criteria

- On forms only product sales packages
  - Verify text box field masking options: Date, Phone, SSN, TIN, Zipcode.
  - Verify text box SSN formatting options: Visible, Partial, Full.
  - Verify calendar field masking options: Date, Phone, SSN, TIN, Zipcode.
  - Verify calendar field date format options:
  - 06 April 2022
  - Apr 06, 2022
  - April 06, 2022
  - Thurs 06 Apr 2022
  - Thursday, 6 April 2022
- Verify signature box date format options (see above list).

1.3   React Forms: Change admin so wizard masks store the name not the format

Change the Admin Wizard Designer so masks are stored with the name, not the format. This will align the wizard designer masks with the form designer masks.

Acceptance Criteria

- Wizard Designer masks are stored with the name, not the format.

1.4   Add Manage Optional Forms functionality to react for legacy forms and wizards + forms UI

Currently, "Manage Optional Forms" is only available in the legacy forms UI. Add support for Manage Optional Forms in Other Actions in react legacy forms and wizards + forms. When the user navigates to Other Actions there should be a "Manage Optional Forms" option available. The user should be able to select optional forms.

Acceptance Criteria

- Manage Optional Forms is an available option in Other Actions/Manage Optional Forms when forms only are in the package. You can select one or more optional forms and see them when you page through the required and optional pages.
- Manage Optional Forms is an available option in Other Actions/Manage Optional Forms when wizards + forms are in the package. You can select one or more optional forms and see them when you page through the required and optional pages.

- Manage Optional Forms functions consistently with the way that it functions in the old legacy forms UI.
- When using the embedded functionality, Manage Optional Forms will also need to be able to be called through client API.

1.5 React Forms: Verify Review Queue reviewer forms work in React only

Part of upgrading the legacy forms to React includes verifying the Review Queue reviewer forms work in React. Currently, they are in MVC format.

Acceptance Criteria

- Verify the reviewer forms render and function as normal when flipped React only.
- Research if there is a related test script that can be run to assist in the verification process.