iConnect 162883 Design Approach for Custom Action Print Button Override

Project Overview

Currently all print functionality is controlled by two organizations settings—'Allow NIGO Printing' and 'Print Submitted Only'. If 'Allow NIGO Print' is turned off or 'Print Submitted Only' is turned on, the user is not able to print from either the Display/Print PDF screen or from a custom action print button. This enhancement would allow the print action from the custom action print button for a select group, overriding the organization level print settings. The print functionality from the Display/Print PDF screen would remain restricted. A global dataitem would allow form rules to be built to control the visibility of the custom action print button based on the group option.

Features/Requirements

- The group setting 'Enable Custom Print' will override the organization setting 'Allow NIGO Printing' and the 'Print Submitted Only' for the custom action print button.
- The custom print button will allow printing forms bundled by tc value and forms selected from the custom action's print dialog when the option 'Enable Custom Print' is selected.
- The Display/Print PDF from the Other Actions drop-down menu will maintain the org print setting restrictions.
- A global dataitem FLI_ENABLE_CUSTOM_PRINT will be added to hold the value for the 'Enable Custom Print' group setting. This will allow form rules to set the visibility of the custom action print button based on the group setting of the application owner.

Use Cases / Workflow Changes

Use Case 1: The organization setting 'Allow NIGO Printing' is turned off in the organization. The Display/Print PDF action link in the Other Actions drop-down is disabled until the application has reached 100% completion. The custom action print button can be enabled for the group by clicking the 'Enable Custom Print' option in the group tab of the Admin tool to allow printing before the application has reached 100%.

Use Case 2: The organization setting 'Print Submitted Only" is turned on in the organization. The Display/Print PDF action link in the Other Actions drop-down is disabled until the application has submitted. The custom action print button can be enabled for the group by clicking the 'Enable Custom Print' option in the group tab of the Admin tool to allow printing before the application has been submitted.

The visibility of the custom action print button can be controlled by creating the following rule in the Form Designer:

```
<setvisibility dataitemid="Print_Btn">
<compare op="==">
  <diget dataitemid="FLI_ENABLE_CUSTOM_PRINT" />
  <const value="true" />
</compare>
</setvisibility>
```

Admin Changes

- Group option added for 'Enable Custom Print'.
- The option for 'Enable Custom Print' cannot be checked at the same time as 'Disable Display/Print PDF'
- Global dataitem 'FLI_ENABLE_CUSTOM_PRINTadded to allow rules control the visibility of the custom action print button
- Global dataitem 'FLI_ENABLE_CUSTOM_PRINTis set at app creation based on the group setting of the logged in user to allow similar functionality to the 'Enable Print Individual Forms After Lock' and 'Allow Print NIGO' group options
- Group options labels updated to clearly reflect the distinction between Display/Print in toolbar and custom action button print functionality:
  - 'Disable Display/Print PDF' changed to 'Disable Print PDF' as this group setting will disable both the toolbar print and the custom action button print.
  - 'Enable Print Individual Forms' changed to 'Enable Print Individual Forms' changed to 'Enable Print Individual Forms After Lock' as only the toolbar print is available after app lock-down.

App Changes

- Custom action print button will be enabled based on the group option, 'Enable Custom Print', overriding any print settings at the organization level.
- Global dataitem 'FLI_ENABLE_CUSTOM_PRINT' will be initialized by the group setting of the app owner each time the application is opened.
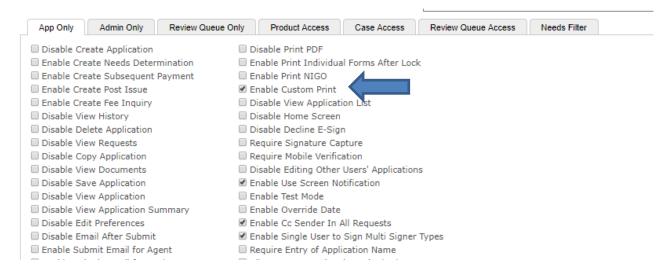
Integration Changes

N/A

UI Mock Ups

| 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
☐ Enable Create Fee Inquiry
☐ 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
☐ Enable Submit Email for Agent

☐ Disable Print PDF
☐ Enable Print Individual Forms After Lock
☐ Enable Print NIGO
☑ Enable Custom Print
☐ 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

How to Enable and Use This Feature

1. In the organization tab of the Admin tool, verify that either the 'Allow NIGO Printing' is turned off or the 'Print Submitted Only' is turned on for the organization.
2. In the groups tab of the Admin tool, select the group to allow the printing from the custom action print button. Then check the box for the 'Enable Custom Print' option.
3. In the form designer, add a button to a form. Select 'Custom Action' for the Action Type. In the Action Parameter field type "Print" for the complete custom action print dialog or add the tc value of the form after the |. For example, to print all forms of the attachment type ACORD951, type "Print|73". (See the Forms tab Attachment TC field to set the tc value for package forms.)
4. Create an application in the app portal. Click the print button and print the desired forms.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		Global dataitem added to allow visibility of custom action print button to be set based on group setting
- Profile Administration		Organization settings for print will be overridden by new group setting Group setting for 'Enable Custom Print' Updated group print labels to clarify isolation of restriction/override

- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		Custom action print button
- 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		