

## iConnect 170040 Design Approach

### Project Overview

Add the ability to save application automatically when it reaches 100%. This enhancement will eliminate extra click to save application data.

### Features/Requirements

- Add new option “Enable Auto Save” in admin tool to activate this feature.
- Once an app is reaches to 100%, it will save automatically.
- All features, which got enable once app reaches to 100% and saved by user, now they will get enable automatically once application reaches 100%.
- If app is not filled 100% and user want to save app data, he/she must need to save by clicking on save button.

### Use Cases / Workflow Changes

When application reaches 100%, we need to call save method to save application data. We will save app data immediately when application filling reach 100%. We will use same method to save app data as we are using on “Save” button click.

### Admin Changes

Add “Enable Auto Save” option in groups under app only section. If user enable this option, he/she able to auto save application data once application reaches 100%.



### App Changes

We look at application progress and when application reaches 100% and “Enable Auto Save” option enabled, we will save application data automatically.

### Integration Changes

None

### UI Mock Ups

**Groups**  
 **Create New**  


Name	TC Role Code
AJLTerm 103	10
BASEIT	External Role Code2
Date Override	DO
Devel	
FilterTest	FilterTest
For IT2	IT2Only
For IT3	IT3
<b>IT User Group</b>	<b>IT</b>
New User Group	

Last Updated On : 02/27/2018 09:36:56 UTC

Name  Illustration Services Role Code  TC Role Codes

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

☐ Disable View Activities Summary  
☐ Disable Edit Preferences  
☐ Disable Email After Submit  
☐ Enable Submit Email for Agent  
☐ Enable Submit Email for Reviewer  
☐ Disable Signing as Client  
☐ Disable Signing as Agent  
☐ Disable Sign Now  
☐ Disable Send Email Request  
☐ Disable Submit  
☐ Disable Signing Until All Pages Viewed  
☐ Agent Not Required to View All Pages  
☐ Optional Client Email  
☒ Allow PassCode Email  
☐ Auto-Email PassCode  
☐ Enable Quoting

☐ Enable Cc Sender In All Requests  
☐ Enable Single User to Sign Multi Signer Types  
☐ Require Entry of Activity Name  
☐ Allow Not In Good Order Submittals  
☐ Disable Console For Group  
☐ Case Access by Firm ID  
☐ Enable Override SSO  
☒ Enable User Share  
☒ Enable Multi-Life  
☐ Enable Use Agent Email  
☒ Enable Decline E-Sign Email  
☒ Enable Create Benchmarks  
☒ Enable View Benchmarks  
☒ Enable Leave-Behind Email  
☒ Enable CRM Preferences  
☒ **Enable Auto Save**

## How to Enable and Use This Feature

User need to select “Enable Auto Save” option under Groups-> App Only -> Enable Auto Save. Once this feature checked true, it will save app data automatically once application data entry reaches 100%.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration	Yes	Add new option “Enable Auto Save” under Groups -> App only
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application	Yes	Save app data when application reaches 100%
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		

- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		