
Support Display of Wizards in UI after Lockdown

FIRELIGHT BASE

FireLight®

Platform

SUPPORT DISPLAY OF WIZARDS IN UI AFTER LOCKDOWN

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Insurance Technologies, LLC

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Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

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iConnect 256841 Design Approach - Support Display of Wizards in UI after Lockdown

Project Overview

Distribution partners often receive questions from their financial advisors or carriers regarding what was selected in the Wizard on the FireLight UI. Once an activity is locked for review or submission, the data entered is no longer visible to the distributor.

Clients would like the ability to be able to keep Wizard screens viewable beyond the lock of the application. Allowing the Wizard data to remain visible will provide clients the ability to view the selections made by the user for troubleshooting purposes. This will be a FireLight feature available to all users with a Wizard; there will not be an Organization or Group setting to control this enhancement

1 Change View from MVC to REACT for Locked Activities

Once an activity is locked, the view is displayed using MVC. In order to support display of Wizards after an activity is locked, the view will need to change from using MVC to REACT.

Acceptance Criteria

- View is changed from MVC to use REACT after activities are locked.
- All forms and wizards in locked view display appropriately.

2 Keep Wizard UI Visible After Locking

Once an activity is locked (ie: in Signatures, Complete, Submitted, etc.), the Wizard will be available to the user for display. The Wizard will remain in read-only status to the user after locking an activity. The navigation pane will reflect the Wizard pages as it does while in unlocked status, but the user will be unable to edit.

When a user navigates back to the activity details after locking, they will be navigated to the first page of the wizard. The user can then view the Wizard entry in locked/read-only mode. No edits can be made unless the activity is unlocked (if status allows).

Acceptance Criteria

- Wizard pages are read only mode listed in navigation pane after activity is locked.
- User is navigated to the first page in the wizard when locked activity is opened.
- When activity is unlocked, the user will be navigated to the first page of the wizard and is able to make edits.
- Fields are distinguishable to the user that they are in read-only and not able to be edited.
- Forms viewable during unlocked status are viewable when in locked status.

3 Display PDFs and Render Signatures Correctly

Changing the view from MVC to REACT for locked activities could impact PDF displays and rendering signatures on forms. Locked activities with a completed the e-signature process will display the PDFs properly with stamped values and signatures as expected on the locked form(s).

Acceptance Criteria

- PDFs display properly and are stamped with values.
- Locked activities with completed e-signatures display as expected.

4 Retain Wizard Functions/Features Upon Locking

When an activity is locked, the wizard features/functions at the time of locking will be retained. If there are changes made in FireLight Admin, Wizard Designer, (controls added, deleted, etc.) those changes will not apply to the locked wizard; the locked wizard will not be updated with the changes made in the Wizard Designer. If changes are made in the Wizard Designer, the changes will only be reflected if the Wizard is unlocked.

Acceptance Criteria

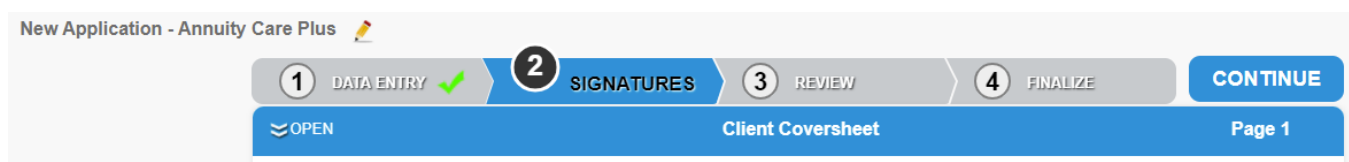
- Locked Wizard does not display changes made via Wizard Designer while in locked status.
- Locked Wizard unlocked by the user displays changes made via Wizard Designer.

5 Lock Icon


When an activity is locked, the pencil icon will be changed to a lock icon. This will provide greater visibility to the user for functionality available. Clicking on the lock icon will open the current summary window with an option to unlock the activity. Clicking on the unlock from the Rename/Summary dialog will provide the same functionality as selecting "Unlock Application" from the "Other Actions" menu.


1. Change pencil icon to Font Awesome "lock" icon.

Before:



After:

New Application - Annuity Care Plus 

1 DATA ENTRY 

2 SIGNATURES

3 REVIEW

4 FINALIZE

CONTINUE


OPEN

Client Coversheet

Page 1

2. Add an "Unlock" feature on the Rename/Summary Dialog.

Before:

Activity Summary 

Name:

New Application - Annuity Care Plus

Status:

Pending Signatures

Carrier:

FL Access Carrier

Product:

Annuity Care Plus

Activity Name:

Application

Jurisdiction:

Alabama

Policy Number:

Errors On Forms:

No Error

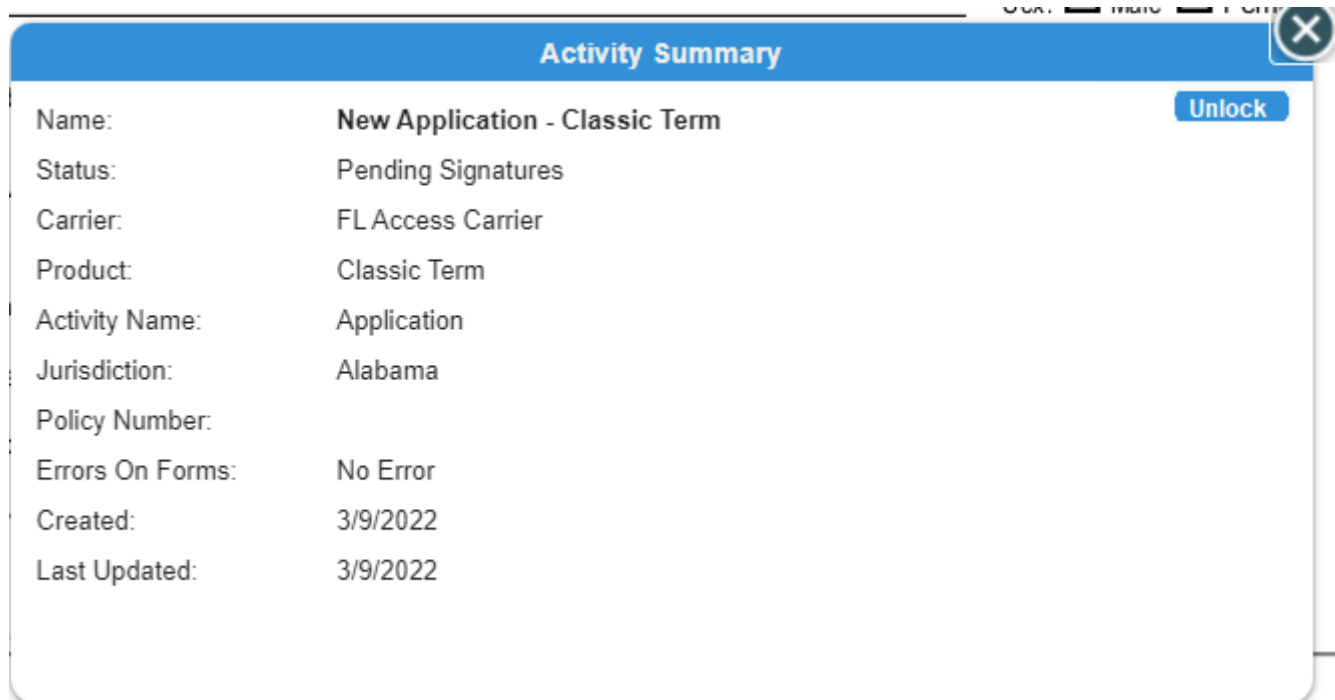
Created:

3/9/2022

Last Updated:

3/9/2022

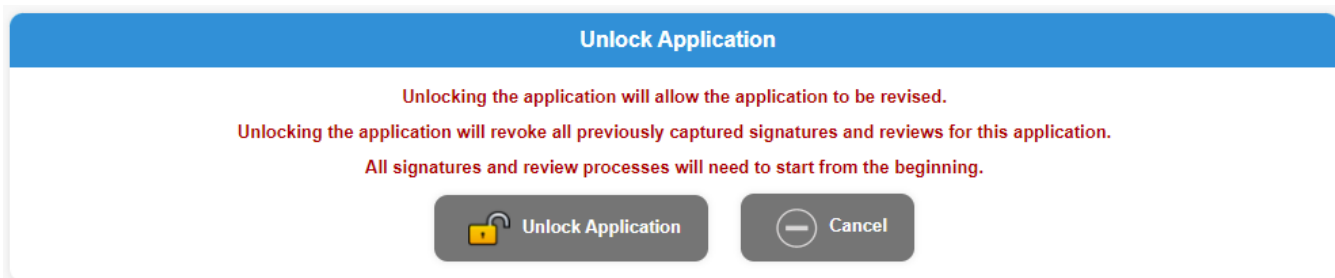
After:



The image shows a dialog box titled "Activity Summary" with a blue header bar and a close button (X) in the top right corner. The dialog contains a list of application details. In the top right corner of the dialog, there is a blue button labeled "Unlock".



Name:	New Application - Classic Term
Status:	Pending Signatures
Carrier:	FL Access Carrier
Product:	Classic Term
Activity Name:	Application
Jurisdiction:	Alabama
Policy Number:	
Errors On Forms:	No Error
Created:	3/9/2022
Last Updated:	3/9/2022

Selecting "Unlock" will open to "Unlock Confirmation Screen" (Same as selecting "Unlock Application" from "Other Actions" menu.)



The image shows a confirmation dialog titled "Unlock Application" with a blue header bar. The dialog contains three lines of red text explaining the consequences of unlocking the application. At the bottom, there are two buttons: "Unlock Application" (with a lock icon) and "Cancel" (with a minus icon).

Unlocking the application will allow the application to be revised.
Unlocking the application will revoke all previously captured signatures and reviews for this application.
All signatures and review processes will need to start from the beginning.

 Unlock Application  Cancel

Acceptance Criteria

- New lock icon is displayed in place of the pencil icon when locked.
- Pencil icon remains in-tact when activity is unlocked.
- New button for "Unlock" on Rename/Summary dialog.
- Selecting "Unlock" opens current unlock confirmation dialog; same dialog as selecting "Unlock Application" from "Other Actions" menu.
- Once activity is unlocked, the lock icon next to the activity name is changed back to the pencil icon.
- Selecting "Unlock" from the Rename/Summary dialog unlocks the activity once confirmed on the unlock confirmation dialog.

- "Unlock" is available on the Rename/Summary dialog from the "Other Actions" menu as well as accessing it from the lock icon next to the activity name.
- Unlock button on Rename/Summary is localized.
- All changes adhere to WCAG standards.