iConnect #133365/137689 Print Access Design Approach

Project Overview

Ability to limit print functionality to only submitted applications at the organization level.   Ability to control 'Print Submitted Only' and 'Allow NIGO print' at the distribution level rather than solely at the carrier level. Ability to override the organization print setting to allow a select group to print NIGO application.

Features/Requirements

- Ability to limit print/display pdf functionality to only applications in the submitted or transmitted status
- If the 'Print Submitted Only' option is turned on in the organization settings, then 'Allow NIGO print' will necessarily be
- turned off and vice versa
- If a package in a distributor environment contains forms from another carrier environment, the print settings from the carrier will be used instead of the distributor settings
- If neither the 'Print Submitted Only' and the 'Allow NIGO print' are turned on, the print setting will be set to allow printing after the application has reached 100%.
- Ability to control print privileges by group by using 'Disable Display/Print PDF' in the Admin group settings will remain unchanged
- Ability to allow a group to print a NIGO application regardless of organization print settings by checking 'Enable Print NIGO'
- If 'Disable Display/Print PDF' is checked in the Groups tab in the Admin tool, the option 'Enable Print NIGO' will necessarily turned off and vice versa.

Use Cases / Workflow Changes

If 'Print Submitted Only' is checked in the organization settings, the user must complete and submit the application before the option to print/display pdf will be enabled in the 'Other Actions' drop down menu in the edit application view.

In cases where the distributor has the 'Allow NIGO print' turned on, but the application contains forms from a carrier who has the option turned off, the carrier setting will be used. This functionality will also apply to the 'Print Submitted Only' organization setting.

A group, such as a Home Office user, may be given the ability to print a NIGO application regardless of the organizational print setting. That user may print an application that is not at 100% complete even if the organizational setting dictates that an application must be submitted before the print option is enabled. Group settings will not be overridden by a carrier's settings in the distributor environments.

Admin Changes

- Checkbox option added to the Organization screen for 'Print Submitted Only'
- Check/uncheck functionality added to prevent user from selecting 'Print Submitted Only' and 'Allow NIGO print' which would conflict
- Group option added to the Groups screen for 'Enable Print NIGO'
- Check/uncheck functionality added to prevent user from selecting 'Disable Display/Print PDF' and 'Enable NIGO Print' which would conflict

App Changes

- Add a check for carrier forms within the distributor package. If found, organization print settings will be set by the carrier environment rather than the user's distributor environment
- Add check for organization setting 'Print Submitted Only'. If checked, the ability to print/display pdf will be allowed after the application status is submitted
- Add check for group option 'Enable NIGO Print' to allow a group member to print before the application reaches 100% complete, regardless of the organization's print settings

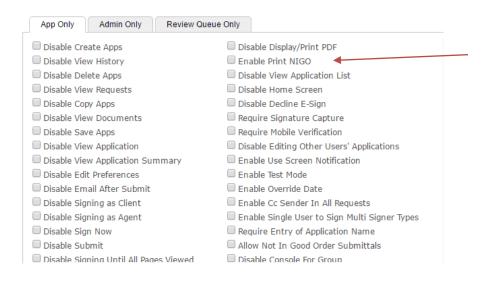## Integration Changes

N/A

UI Mock Ups

Admin Organization Tab- 'Print Submitted Only' option will require applications to be submitted before 'Display/Print PDF' option is enabled in the app portal in the Other Actions drop down. 'Allow NIGO Printing' cannot be checked if 'Print Submitted Only' is selected.

Use Back Office	☑	Allow E-Signature	☑
Allow E-Approval	☑	Allow Client E-Fill	☑
Use Enhanced Security	☑	Allow NIGO Printing	☐
Allow Submit on E-Sign Decline	☐	Print Submitted Only	☑
Prevent Email Editing	☐	Submit on ALL Reviewer Approval	☐
Allow Branding of UI	☑	Submit on ANY Reviewer Approval	☐
Validate Identity Verification	☐	Use DMARC	☑
Archive App on Complete	☑		

Requests Timeout	15	days (0 for never)
Purge Uncompleted Apps	121	days
Purge Completed Apps	121	days
Expiration Warning Threshold	0	days (0 for never)
1228 Validity Window	0	minutes
Policy Block Settings	Click to Edit	
Authentication Timeout	60	minutes (0 for default)
IDP Identifier	https://localhost/egsts/trust	
IDP Certificates (primary)	Click to Edit	
IDP Certificates (backup)	Click to Edit	

Save Organization

Admin Groups Tab- 'Enable Print NIGO' will allow a group to print an application before 100% completion. 'Display/Print PDF' option will be enabled in the app portal in the Other Actions drop down. 'Disable Display/Print PDF' cannot be checked if 'Enable Print NIGO' is selected.

App Only | Admin Only | Review Queue Only

☐ Disable Create Apps	☐ Disable Display/Print PDF
☐ Disable View History	☐ Enable Print NIGO
☐ Disable Delete Apps	☐ Disable View Application List
☐ Disable View Requests	☐ Disable Home Screen
☐ Disable Copy Apps	☐ Disable Decline E-Sign
☐ Disable View Documents	☐ Require Signature Capture
☐ Disable Save Apps	☐ Require Mobile Verification
☐ Disable View Application	☐ Disable Editing Other Users' Applications
☐ Disable View Application Summary	☐ Enable Use Screen Notification
☐ Disable Edit Preferences	☐ Enable Test Mode
☐ Disable Email After Submit	☐ Enable Override Date
☐ Disable Signing as Client	☐ Enable Cc Sender In All Requests
☐ Disable Signing as Agent	☐ Enable Single User to Sign Multi Signer Types
☐ Disable Sign Now	☐ Require Entry of Application Name
☐ Disable Submit	☐ Allow Not In Good Order Submittals
☐ Disable Signing Until All Pages Viewed	☐ Disable Console For Group

How to Enable and Use This Feature

For Print Submitted Only option:

1. In the Admin Tool open the Organizations tab on the Profile Administration menu.
2. Check the 'Print Submitted Only'.
3. Open Groups tab and ensure that 'Disable Display/Print PDF' is not checked.
4. Create a new application- click on 'Other Actions' menu and the option should not be enabled.
5. In the app portal, complete an application and then click 'Complete' to submit.
6. Click 'Other Actions' and choose 'Display/Print PDF.

For Organization Print Settings at Distributor Level:

1. In the admin tool open the Organizations tab on the Profile Administration menu.
2. Set 'Print Submitted Only' or 'Allow NIGO printing' in the carrier organization.
3. Create a carrier-owned application in the app portal within the distributor environment.
4. Print settings should follow the carrier's print settings rather than the distributor's settings.

For Enable Print NIGO

1. In the Admin Tool open the Organizations tab on the Profile Administration menu.
2. Ensure the option for 'Allow NIGO printing' at the organization level is unchecked.
3. Open Groups tab and select the group in the top box that will be given the ability to print incomplete applications and then check the 'Enable Print NIGO' checkbox in the App Only options list.
4. Login to FireLight App Portal with a user login of the selected group.
5. Create a new application- click on 'Other Actions' menu and the option should be enabled.
6. Login to FireLight with a user login of another group and the option to print should be disabled if the application is not complete.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**		
- **Profile Administration**		- Organization 'Print Submitted Only' option - Group option 'Enable NIGO print'
- **Reports**		
- **Deployment**		

FireLight App		
- **New Application**		
- **Edit Application**		- Print/Display PDF option in 'Other Actions' menu
- **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**		