INSURANCE TECHNOLOGIES

Admin Read Only Group/Role in the Admin Tool
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Platform

ADMIN READ ONLY GROUP/ROLE IN THE ADMIN TOOL

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iConnect 232787 Design Approach - Admin Read Only Group/Role in the Admin Tool

Project Overview

Users need access to the Admin to view settings, but not the ability to make changes. Providing a read only group setting based on the role will provide the user with viewing capability while ensuring settings cannot be changed by the user.

Impacts:

Group Options-new group option for read only access to admin

User Rights-provides read only access based on role code and group setting

1 Add a Read Only Setting to Groups, Admin

Add a Read Only setting to the Groups, Admin tab by role code called "Enable Read Only User Admin Access". A user with a higher level of security is required to clear this option once it has been selected. The user logged in with read only access cannot clear the setting because they cannot change or modify existing settings. The read only admin access setting will be managed for the role code by another user with a role code that does not have read only admin access turned on.

Acceptance Criteria

- Read Only setting is added in Admin to Groups, Admin tab.
- Once this setting is selected, the read-only user cannot clear the option.
- The setting for the read only user can be cleared by a user with higher security access.

2 Add "Read Only Access" Below Environment Version Number

When a user has been granted Read Only Access privilege to the Admin, the page will display "Read Only Access". The text will be featured below the environment version number in the same color text.

This text will remain on display, regardless of the page the user is visiting.

Example: Activities Page

Acceptance Criteria

- "Read Only Access" is displayed on landing page below environment version number.

3 Read Only Group/Role Access in Admin Tool-Product Configuration

If the group has the read only role code, all updating actions will fail. With read only access, the following limitations will be in place for the Admin Tool:

- Product Configuration
    - Activities
        - Add New Activity is not accessible/removed from view
        - Red "X" for delete action is not accessible/removed from view

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- Save Activity button is disabled for each tab view (Activity Detail, Next Activities, Activity History)
  - Fee Inquiry
    - Upload File, Delete Files are disabled
  - Product Repository
    - Upload File button is disabled
    - Product Documents-Link can be accessed, but Choose File, Upload and Remove options are not accessible
    - Save options for Life Details - Configuration and Mapping are removed/disabled.
  - Products
    - Add New Product is not accessible/removed from view
    - Red "X" for delete action is not accessible/removed from view
    - Save Product Config is disabled/hidden from view
    - Product Features link is accessible, but Add Feature and Save are disabled/not visible
  - Packages
    - Add New Package is not accessible/removed from view
    - Red "X" for delete action is not accessible/removed from view
    - "Duplicate" is not accessible/removed from view
    - Replace Form/Wizard in Package is not accessible/removed from view
    - Add Standard Api Role is not accessible/removed from view
    - Package Detail, Forms/Wizards in Package, Rule Sets in Package, Package History tabs are all accessible with the Save Package button disabled/hidden from view.
  - Rule Sets
    - Add New Rule Set is not accessible/removed from view
    - Red "X" for delete action is not accessible/removed from view
    - Lock/Unlock icon is not accessible/removed from view
    - Rules Window link can be accessed with only the Export Rules and Close buttons enabled (New Rule, Delete All and Save Rule Set buttons disabled/hidden from view)
    - View All Rule Definitions link can be accessed with the Update button disabled
    - Templates Window is accessible with New, Save and Edit Validation buttons disabled. The red "X" for delete action is not accessible/removed from view.
  - Sales Agreements
    - Red "X" for delete action is not accessible/removed from view
    - Save Sales Agreement is disabled/hidden from view
    - Back Office Script
    - Edit link is available
    - Save is disabled on Edit window

Acceptance Criteria

- Read only Admin access prevents the user from making any changes (create, edit/update, delete) in the Product Configuration location of the admin system.

4 Read Only Group/Role Access in Admin Tool-Designer

If the group has the read only role code, all updating actions will fail. With read only access, the following limitations will be in place for the Admin Tool:

- Designer
  - Form Designer
    - Save button disabled
    - Form Properties
      - Update button is disabled
    - Copy Fields
      - Copy Selected Fields is disabled
    - Field Properties
      - Update button is disabled
    - Rules Window
      - New, Update, Create Multiple buttons are disabled
      - The red "X" for delete action is not accessible/removed from view.
      - Delete All is not accessible/removed from view.
    - Set Tab Order is disabled
    - Toolbox is disabled
    - Add Control to Form options are disabled
      - Text Box
      - CheckBox
      - Calendar
      - Radio Button
      - Combo Box
      - Label
      - Signature Box
      - Signature Initials
      - BarCode
      - Button
      - Address Autocomplete
  - Form Library
    - Upload Forms is not accessible/removed from view
    - Red "X" for delete action is not accessible/removed from view

- Lock/Unlock icon is not accessible/removed from view
- Save and Replace Form buttons are disabled
  - o Wizard Designer
    - ▪ Save button is disabled
    - ▪ Edit Rules
      - New Rule, Delete All, Save Rule Set buttons are disabled
      - Delete icon is not accessible/removed from view
    - ▪ Page Options are disabled
      - Add New Page
      - Edit Page is displayed with save functionality removed
      - Delete Page
      - Copy Page
      - Set Page Order
      - Add Comment Box
    - ▪ Wizard Library
      - Create Wizard is not accessible/removed from view
      - Red "X" for delete action is not accessible/removed from view
      - Lock/Unlock icon is not accessible/removed from view
      - Save, Import Wizard buttons are disabled

Acceptance Criteria

- Read only Admin access prevents the user from making any changes (create, edit/update, delete) in the Designer location of the admin system.

5 Read Only Group/Role Access in Admin Tool-Organization Configuration

If the group has the read only role code, all updating actions will fail. With read only access, the following limitations will be in place for the Admin Tool:

- ▪ Organization Configuration
  - o Custom Lists
    - ▪ Red "X" for delete action is not accessible/removed from view
    - ▪ Links for Update This List, Add New List are disabled
  - o Email
    - ▪ Save Email Template button is disabled
  - o Groups
    - ▪ Create New is not accessible/removed from view
    - ▪ Red "X" for delete action is not accessible/removed from view

- Save button is disabled
  - o Mapping
    - Save Mappings and Delete Mappings buttons are disabled
  - o Organization Settings
    - Mobile Configuration and Maintain Devices links are accessible, but no changes can be made
    - Organization
      - Save Organization button is disabled
      - Localization-Click to Edit link, Update button is disabled
    - Security
      - Red "X" for delete action is not accessible/removed from view
      - Add New Supported Service Record link is disabled
    - Activity
      - Masks cannot be edited/added/deleted
      - Save button is disabled
    - Signature
      - Signature Fonts-Signature Font Styles-Update button is disabled
    - Admin
      - Policy Block Settings
        - o Save button is disabled
        - o Red "X" for delete action is not accessible/removed from view
        - o Add New link is not accessible/removed from view
      - Third Party Service Configuration
        - o Add New link is not accessible/removed from view
        - o Update and Delete links are not accessible/removed from view
  - o Review Queue
    - Add New Queue is not accessible/removed from view
    - Red "X" for delete action is not accessible/removed from view
    - Edit Review Queue Script link can be opened-Save button is disabled
  - o Tele-Sign Scripts
    - Add New Script is not accessible/removed from view
    - Delete option is not accessible/removed from view
    - Save Tele-Sign Script button is disabled

Acceptance Criteria

- Read only Admin access prevents the user from making any changes (create, edit/update, delete) in the Organization Configuration location of the admin system.

6 Read Only Group/Role Access in Admin Tool-Utilities and Support

If the group has the read only role code, all updating actions will fail. With read only access, the following limitations will be in place for the Admin Tool:

- Utilities
  - Branding
    - View/Modify All UI Items tab will be accessible.
    - Items in the dropdown and search are accessible.
    - Modify fields are not able to be modified.
    - Save Changes button remains disabled.
    - Add or Update Sub/Firm Brand tab is disabled.
  - Deployments, Download Tag Lists, Generate Mapping Rules, Package Conversion, Provider Conversion, Transfer User Activities disabled/removed from view.
  - Localization from the toolbar menu is also removed from view.
  - Reports
    - No restrictions
- Support
  - Rule Tracing
    - No restrictions
  - API Insights
    - No restrictions
- The only options available for view under Utilities will be Branding and Reports.

Acceptance Criteria

- Read only Admin access allows the user to access the Branding section in Utilities with restrictions.
- Read only Admin access allows the user to access the Reports section in Utilities.
- Read only Admin access allows the user to access the Rule Tracing and API Insights in the Support section.