
Multiple Open Activities 2.17 April

FIRELIGHT BASE



MULTIPLE OPEN ACTIVITIES 2.17 APRIL

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Insurance Technologies, LLC

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Design Approach - Multiple Open Activities 2.17 April

This enhancement adds the ability to have multiple activities open at once. It creates an easier way to move between activities without having to go back to the Home screen or recent activities. There is an Admin Tool group setting called "Enable Multiple Open Activities" that will control this view. If "Enable Multiple Open Activities" is selected, an Open Activities menu will appear that will allow the user to switch between activities. Users can also close activities from the Open Activities menu. This applies to all activity ACORD types. As part of this project, the menu layout is changing slightly to allow for more space. We have combined the multiple options into drop-down menus. Example: Save and Save As; Open Activities; Other Actitions will all appear as menu options. Additionally, the close button has been removed from the New Activity menu.

Impacts:

- Admin - new group option.
- User Interface impacts will be on the system level menu, Home, Preferences and All Activities. It will also impact edit activity.
- User Interface impact to Save and Save As; Open Activities; Other Actitions. These will all appear as menu options.
- User Interface impact to New Activity menu to remove close.
- Change open activities to remain open during the active session if the new group option is selected.
- Activities are closed through the Open activities menu or when the session ends.
- This applies to Web-only, not to console. No additional impacts on embedded/API.

1 Multiple Open Activities

This enhancement adds the ability to have multiple activities open at once. It creates an easier way to move between activities without having to go back to the Home screen or recent activities. There is an Admin Tool group setting called "Enable Multiple Open Activities" that controls this view. If "Enable Multiple Open Activities" is selected, an Open Activities menu appears that allows the user to switch between activities. Users can also close activities from the Open Activities menu. This applies to all activity ACORD types.

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Other Actions will all appear as menu options. Additionally, the close button has been removed from the New Activity menu.

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- Activities are closed through the Open activities menu or when the session ends.
- This applies to Web-only, not to console. No additional impacts on embedded/API.
- User Interface impact to Save and Save As; Open Activities; Other Actions. These will all appear as menu options.
- User Interface impact to New Activity menu to remove close.

1.1 FLApp: Add dropdown menu to New Activity and Other Actions buttons

Update the New Activity (main menus) and Other Actions (edit activity) buttons to have a dropdown indicator like Save to make the buttons with sub-menus consistent.

Acceptance Criteria

- Verify the New Activity menu on Home, All Activities and Preferences pages contains a dropdown to open the sub-menu when clicked.
- Verify the Other Actions menu in edit activity contains a dropdown to open the sub-menu when clicked.

1.2 Remove hardcoded CSS for clients that hardcoded inline.

Remove hardcoded CSS for clients that hardcoded inline.

I know ALZ did this, not sure who else, Kevin said we can look this up.



Acceptance Criteria

1.3 Admin: Add new group option to enable multiple open activities

Add a new group option to allow multiple open activities.

On the App tab in Organization Config/Groups add a new group option in the Other section named Enable Multiple Open Activities.

The default is unchecked.

Groups
 **Create New**


Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 12/06/2019 10:16:12 UTC

Name Illustration Services Role Code TC Role Codes

App Admin Review Queue Activity Access Product Access Case Access Review Queue Access Needs Filter Debugging Tools Training

Emails
☒ Allow PassCode Email
 ☒ Auto-Email PassCode
 ☒ Enable Auto Submit Email Notification
 ☒ Enable Cc Sender In All Requests
 ☒ Enable Decline E-Sign Email
 ☒ Enable Leave-Behind Email
 ☒ Enable Submit Email for Agent
 ☒ Enable Submit Email for Reviewer
 ☒ Enable Use Agent Email
 ☐ Disable Email After Submit
 ☐ Disable Send Email Request
 ☒ Optional Client Email

Menu Options
☐ Disable Edit Preferences
 ☐ Disable Log Off
 ☒ Enable CRM Preferences

Other
☐ Active Agent User List
 ☐ Disable Console For Group
 ☐ Enable Auto Save
 ☒ Enable Multi-Life
 ☒ **Enable Multiple Open Activities**

Print Options
☐ Enable Custom Print Override
 ☐ Enable Print Individual Forms After Lock
 ☒ Enable Print NIGO
 ☐ Disable Print PDF

Quote
☐ Disable Annuity Quotes
 ☐ Disable Life Quotes

Share/Transfer/Case Access
☒ Allow Activity Share
 ☒ Allow Transfer Activity

Signing: Tele-Sign
☒ Enable Tele-Sign Download Forms
 ☒ Enable Tele-Sign Generate Link
 ☒ Enable Tele-Sign Email Link
 ☒ Enable Tele-Sign

Submit
☐ Allow Not In Good Order Submittals
 ☒ Enable Auto Submit
 ☐ Enable Custom Submit Page
 ☐ Disable Submit

Testing
☒ Enable Create Benchmarks
 ☐ Enable Test Mode
 ☐ Enable Override Date
 ☒ Enable View Benchmarks
 ☒ Enable Distributor Testing View

User Rights Home/All Activities

Acceptance Criteria

- The option appears on App tab in the Other section in Organization Config/Groups.
- The option appears in alphabetical order in the Other section.
- The option label is Enable Multiple Open Activities.


- The default is unchecked.


1.4 Admin: Add new group option to disable Save As

To support the original Save button and the new split Save/Save As buttons, we need a new group option, Disable Save As.

On the App tab in Organization Config/Groups add a new group option in the Menu Options section named Disable Save As.

The default is unchecked.

Groups
 **Create New**



Name ▼	TC Role Code	
Admin Test	Admin	X
BASEIT	External Role Code2	X
Date Override	DO	X
Devel	TEST8	X
Embedded Testing Group	EmbeddedTest	X
FilterTest	FilterTest	X
For IT2	IT2Only	X
For IT3	IT3	X
GRole	GRole	X

Last Updated On : 12/06/2019 02:35:22 UTC

Name
Illustration Services Role Code
TC Role Codes

App
Admin
Review Queue
Activity Access
Product Access
Case Access
Review Queue Access
Needs Filter
Debugging Tools

☐ Disable Email After Submit
☐ Disable Send Email Request
☐ Optional Client Email

Menu Options
☐ Disable Edit Preferences
☐ Disable Log Off
☐ **Disable Save As**
☐ Enable CRM Preferences
☐ Enable Training

Notifications
☐ Enable Form Changes Notifications
☐ Enable Use Screen Notification

Obfuscation/Screen Security
☐ Enable Obfuscation
Timeout: seconds (0 for None)

Other Actions
☐ Disable Show Annotations

Quote
☐ Disable Annuity Quotes
☐ Disable Life Quotes

Share/Transfer/Case Access
☐ Allow Activity Share
☐ Allow Transfer Activity
☐ Case Access by Firm ID
☐ Enable All Activities User Share

Signing: General
☐ Agent Not Required to View All Pages
☐ Allow Edits to Mobile
☐ Disable Decline E-Sign
☐ Disable Signing as Agent
☐ Disable Signing as Client
☐ Disable Signing Until All Pages Viewed
☐ Disable Sign Now
☐ Enable Single User to Sign Multi Signer Types

Testing
☐ Enable Create Benchmarks
☐ Enable Test Mode
☐ Enable Override Date
☐ Enable View Benchmarks
☐ Enable Distributor Testing View

User Rights Home/All Activities
☐ Disable Copy Activities
☐ Disable Delete Activities
☐ Disable Editing Other Users' Activities
☐ Require Entry of Activity Name
☐ Disable Home Screen
☐ Disable Save Activities
☐ Disable View Activities
☐ Disable View Activity List

Acceptance Criteria

- The option appears on the App tab in the Menu Options section in Organization Config/Groups.
- The option appears in alphabetical order in the Menu Options section.
- The option label is Disable Save As.
- The default is unchecked.

1.5 FLApp: Change open activities to remain open during the active session if the Enable Multiple Open Activities group option is selected

Change open activities to remain open during the active session if the Enable Multiple Open Activities group option is selected for the active user. An activity can only be specifically closed using the X to close an activity from the open activities list.

Auto-Save the current activity when switching between open activities.

Acceptance Criteria

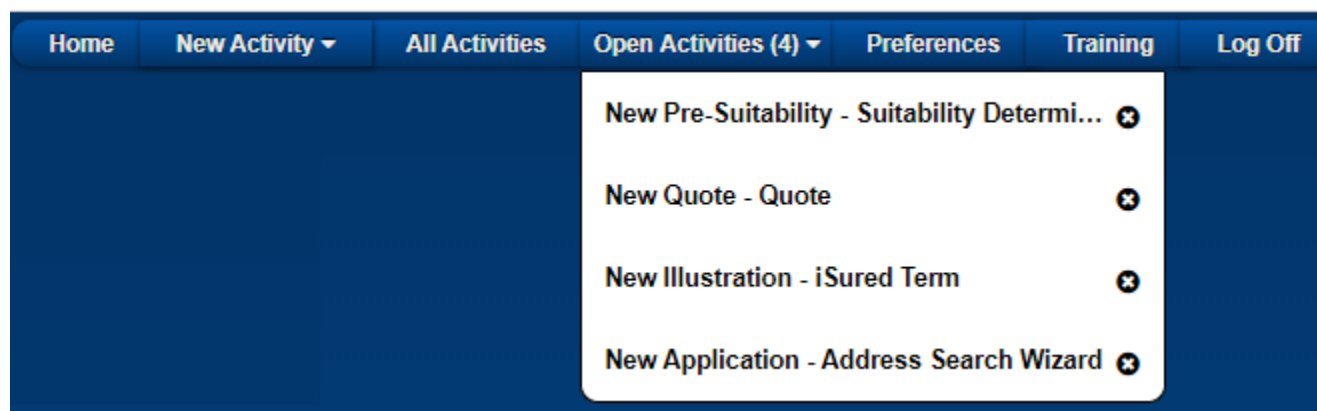
- All open activities remain open if the Enable Multiple Open Activities group option is selected for the active user unless an activity is specifically closed using the X in the open list.
- No changes in the Home menu option - save dialog, etc. appears (whatever applies) and the activity closes.
- Only a single activity is open when the Enable Multiple Open Activities group option is not selected for the active user.
- Verify the current activity is saved when switching to another open activity.
- Do not display illustration and quote in the recent list and all activities unless specifically saved.
- Verify with the Disable Save Activities option.

1.6 FLApp: Add Open Activities menu option to system level pages, such as the Home page

Add Open Activities to the main menu system-level pages. This includes Home, Preferences, and All Activities pages. It will appear to the right of All Activities.

Open Activities will display the number of open activities after the label in parenthesis, which can be 0. Add a down arrow to the menu option to indicate it can be opened along with a menu that lists the open activities. When 0 activities are open, either show nothing when selected or a blank menu.

When an activity is selected from the menu list, it opens to the selected open activity.



Acceptance Criteria

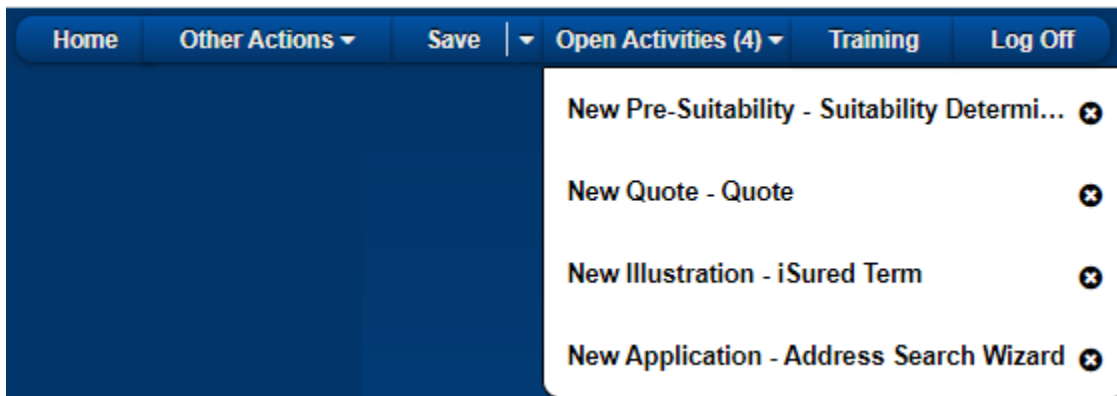
- The new menu option appears on system-level pages, Home, Preferences and All Activities if the group option Multiple Open Activities is selected.
- The menu option shows the number of open activities, which may be zero.
- The menu option contains a down arrow.
- The menu option contains a menu with a list of open activities unless none are open, then the menu is blank.
- Verify open illustration and quote activities do not show up in the recent list unless saved; no change.
- Verify activities that auto-save, such as e-Applications, show up in the recent list; no change.

1.7 FLApp Edit Activity: Add Open Activities menu option

In edit activity, add Add Open Activities to the top menu to the right of the Save option. This should be the same Open Activities menu and functionality shown in the main system menus, such as on the Home page.

When selected, display the list of open activities. When a different activity is selected from the list, switch to the selected activity.

Do not display a save dialog when switching activities. The user can save the open activity if desired when it is closed with the X in the menu or by selecting the Home menu option. Also, do not display the Recover/Discard dialog when switching activities.



Acceptance Criteria

- The new menu option appears in edit activity if the group option Multiple Open Activities is selected.
- The menu option shows the number of open activities, which may be zero.
- The menu option contains a down arrow.
- The menu option contains a menu with a list of open activities unless none are open, then the menu is blank.
- When an activity from the list is selected FL switches the activity to the new selection.
- The save or incomplete activity or recover data dialogs do not appear when switching activities.
- Verify open illustration and quote activities do not show up in the recent list unless saved; no change.
- Verify activities that auto-save, such as e-Applications, show up in the recent list; no change.

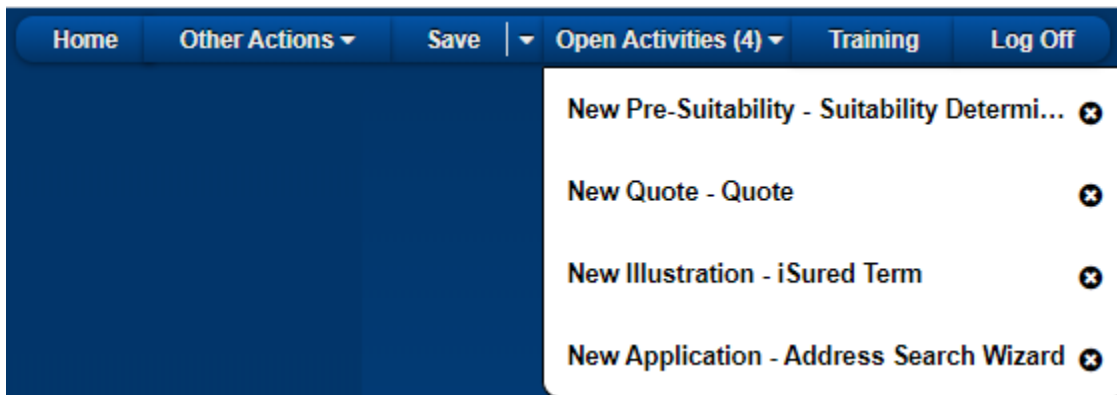
1.8 FL App: Add X close in open activities and edit activity lists

To allow closing an activity without selecting and switching to it, add an X close symbol in the Open Activities and edit activity lists.

In the Open Activities menu, add an X next to all activities shown in the list.

In edit activity, add an X next to all activities shown in the list except the first, which is the open activity. The user will use the Close menu option to close it.

When the X is selected, remove the activity from the list once it is closed. Applies to both the Open Activities and edit activity lists.

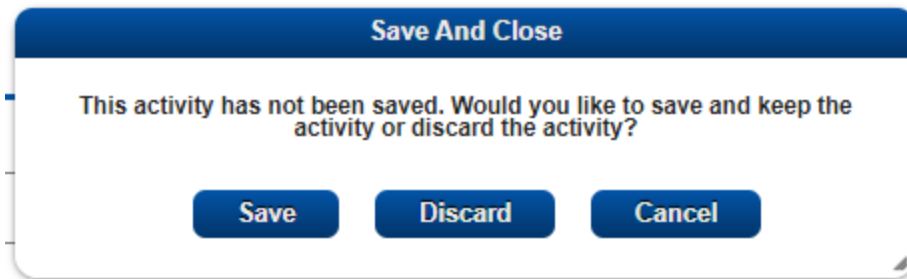


Acceptance Criteria

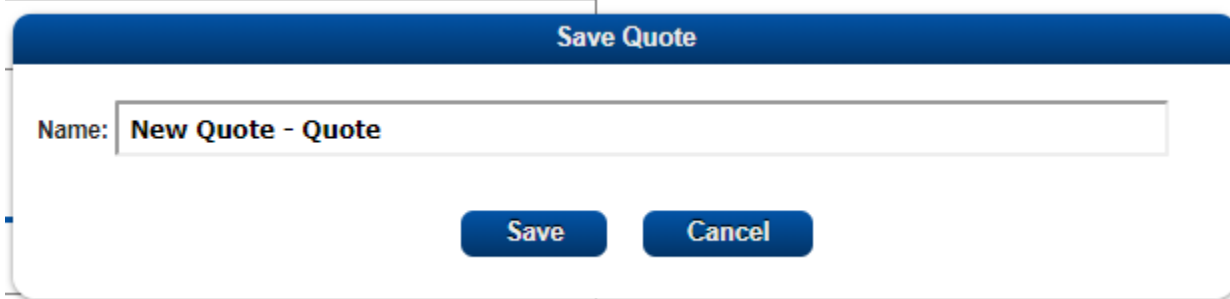
- Open Activities List: X to close an activity appears next to all activities shown in the list.
- Edit Activities List: X to close an activity appears next to all activities shown in the list except the first, which is already open.
- For all activities but Illustration and Quote, when X is selected for an activity in the list, it is auto-saved and closed.
- For saved Illustration and Quote activities, when X is selected for an activity in the list, it is auto-saved and closed.
- Activity is removed from the open activities list once it is closed.
- Activity is removed from the edit activity list once it is closed.
- If the current activity is closed while in edit app/edit wizard, you are redirected to the Home page.

1.9 FL App: Add different save message dialog for unsaved Illustration and Quote activities closed from open list

If a user selects the X to close an unsaved illustration or quote open activity in the Open Activities list, prompt the user with a different save dialog so it's clear to the user which activity it is and that it has not been saved yet.



In edit activity when Save is selected, the Save dialog to enter the activity name appears as it does on illustration and quote with a regular save. *Note:* This does not apply from the main menu locations.



Acceptance Criteria

- Save dialog appears on unsaved illustration and quote activities when X is selected in the list to close it.
- Save dialog appears after Save is selected to enter the activity name.
- Save dialog does not appear on saved illustration and quote activities when X is selected in the list to close it.
- Original save dialog appears on unsaved illustration and quote activities when Save or Save As is selected from the menu.
- Save dialog does not appear when selecting X to close an open activity from the list on all activity types but unsaved illustration and quote activities.
- When save is selected on the home page and on the all activities page, the toolbar and the recent list is updated to reflect the no longer hidden quote or illustration.

1.10 FLApp: Add activities to open list when Multi-Activities are created

When multiple activities are generated with the Multi-Activity functionality, the child activities need to be added to the Open Activities list. This will occur when the Create button is selected from the parent presale activity. Focus will remain on the presale activity and the activities in the case will be added to the Open Activities list.

Once Create has been selected, the button changes to Update. When Update is selected, this does not add existing activities to the open list. If however a 'new' activity is added to the parent and Update is selected, then the new activity will be added to the list.

For example, you have four child activities that were added to the list when Create was selected.

1. If all four are still open when Update is selected then there are no changes to the list.
2. If two are open and two are closed then Update is selected, then no activities are added to the list.
3. If two are open and two are closed and one new activity is added to the parent presale activity and then Update is selected, then only the new activity is added to the list.

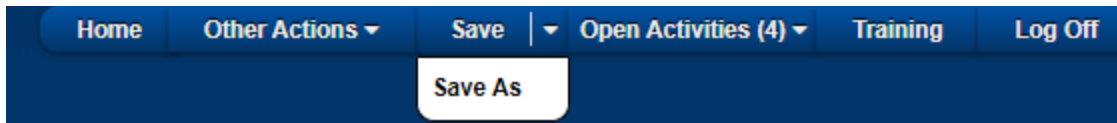
Acceptance Criteria

- Verify activities are added to the Open Activities list when Create is selected.
- Verify the correct number of activities are added to the list when Create is selected.
- Verify existing activities are 'not' added to the Open Activities list when Update is selected if they are not open.
- Verify new activities that are added to the presale parent activity after Create are added to the open list when Update is selected.
- Verify focus stays on the parent presale activity when Create or Update is selected.
- Verify you can select the activities added to the list.

1.11 FLApp Edit Activity: Change Save and Save As menu options in edit activity to one menu option with a split menu

Change Save and Save As menu option in edit activity to one menu option with a split menu. Save is the primary option when selected. If the down arrow is selected, a menu will appear with Save As.

The new split Save button only appears if the Group option Disable Save As is unchecked, else the existing Save button appears.



Acceptance Criteria

- Save and Save As buttons are changed to one button in edit activity.
- Save button is split so a user can select Save or the dropdown arrow to show the menu with Save As.
- Save As is a menu option.
- Save As closes the current activity and opens the new activity. No change to current functionality.
- Split save button only appears if the Group option Disable Save As is unchecked.
- If Disable Save As is checked in Groups, then the original Save button is displayed in the menu bar in edit activity.
- If Disable Save As is unchecked in Groups, then the split Save button is displayed in the menu bar in edit activity.

1.12 FLApp: Dynamically display the correct Save button based on Disable Save As group option

Dynamically display the correct Save button based on Disable Save As group option.

Acceptance Criteria

- If Disable Save As is checked in Groups, then the original Save button is displayed in the menu bar in edit activity.
- If Disable Save As is unchecked in Groups, then the split Save button is displayed in the menu bar in edit activity.

1.13 FLApp: Handle various actions in All Activities that impact open activities

Handle various All Activities actions that impact multiple open activities.

1. Delete - when delete is selected on an open activity, close it and remove it from the Open Activities list.
2. Share removed - when a share is removed from an open activity that is shared, close it and remove it from the Open Activities list.

Acceptance Criteria

- No errors appear when an open activity is deleted through all activities.
- Verify the open activity is closed and does not appear in the list of open items when it is deleted. Applies to the main Open Activities menu and to the edit activity Open Activities menu.
- No errors appear when a shared open activity is unshared.
- Verify the open shared activity is closed and does not appear in the list of open items when it is unshared. Applies to the main Open Activities menu and to the edit activity Open Activities menu.

1.14 FLApp: Remove Open Activities menu option if Disable Home Screen Group Option is enabled

1. If Multiple Open Activities and Disable Home Screen Group Options are enabled, remove the Open Activities menu in edit activity.

Checked with Redirect to FireLight request and still able to see Open Activities menu (user login to FireLight seeing Open Activities too)

Acceptance Criteria

- Verify if Multiple Open Activities and Disable Home Screen Group Options are enabled that Open Activities menu option does not appear in edit activity.

1.15 FLApp: Change New Activity and Other Actions menu style

The menu style needs to be consistent. Change New Activity and Other Actions menu style to match Open Activities and Save menus.

Also, add some additional padding to the menus so its easier to read and select the options.

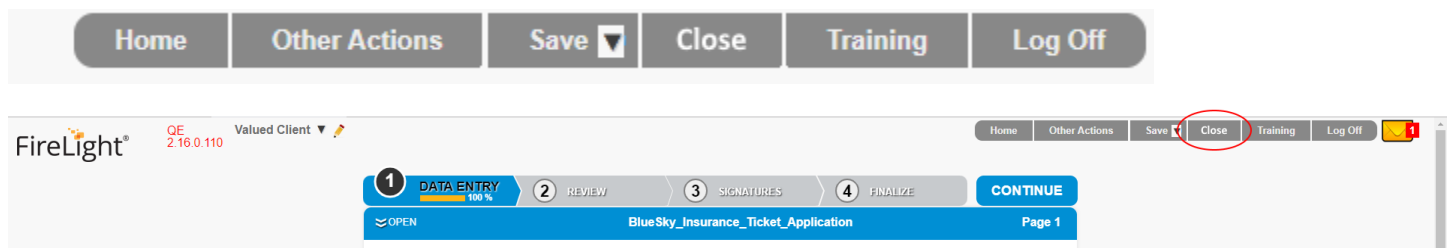
Acceptance Criteria

- Verify New Activity menu style matches Open Activities style with a dropdown.
- Verify Other Actions menu style matches Open Activities style with a dropdown.
- Remove X from Other Action and the title.
- Remove Close from New Activity.
- Verify additional padding is added to menus.
- Verify both functions with all devices.
- Verify both functions with all browsers.

1.16 REMOVE: FLApp Edit Activity: Add a Close option to the top main menu

In edit activity, add a Close option to the top main menu if Enable Multiple Open Activities is selected in groups. Position it to the right of Save (this assumes we have collapsed Save and Save As into one button).

When close is selected, the current functionality in place when selecting Home will be invoked. This is typically a Save dialog or Incomplete Activity dialog. When a selection in the dialog is complete, the activity will close and return to the home page.



Acceptance Criteria

- The new menu option always appears in edit activity to the right of Save if Enable Multiple Open Activities is selected in Groups.
- The Close menu option does not appear if Enable Multiple Open Activities is not selected.
- The new menu option closes the open activity.
- When a selection in the dialog is complete, such as Save, the activity will close and return to the home page.
- Verify open illustration and quote activities do not show up in the recent list and all activities unless saved; no change.
- Verify activities that auto-save, such as e-Applications, show up in the recent list and all activities; no change.
- Verify activities with no save or Disable Save return directly to the Home page without being prompted; no change.