
Auto Save FireLight Application 2.22 (244603)

FIRELIGHT BASE



Platform

AUTO SAVE FIRELIGHT APPLICATION 2.22 (244603)

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Insurance Technologies, LLC

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iConnect 244603 Design Approach - Auto Save FireLight Application 2.22 (244603)

1 FireLight Application - Auto Save Activities

Enhancing FireLight Application with auto save will feature a slight variance in behavior across activities. Activities such as Illustration and Quote require the user to make a manual save selection for the activity to display on the FireLight dashboard. The auto save functionality will occur behind the scenes but will not save the activity to the dashboard/home page without a manual save request for these activities.

All other activities will be saved automatically and will not prompt the user with a save dialog upon exiting. The auto save functionality will apply and allow the activity to be accessed from the FireLight dashboard/home page.

1.1 Auto Saved Activities Saved to Recent Activity and All Activities

Many activities are currently saved upon creation to Recent Activity and All Activities. This current process allows the user to begin an activity, which will be displayed in the user's list of saved activities for later accessibility. While the activity currently saves, the data items/input values entered are not always saved unless the user chooses to manually save.

An enhancement will be made to Auto Save all user selections/inputs for the activities created. Adding a true auto save user experience to FireLight application will allow the data to save without the need for a manual save button. The manual save button will be removed. Activities that are saved and added to Recent Activity and All Activities are:

- Multiple Activities
- Application
- Presale
- Post Issue
- Account Opening
- Sub-Pay
- My Appointment

Upon leaving the activity, the user will not be prompted to save as the auto save has captured all user inputs/selections.

Auto Save will apply for any change to data items. This will include LexisNexis and Milliman calls, rules that cause a change in data items, etc. Once the data is changed, there will not be an option in the current design to rollback/revert changes made to a previous value.

Acceptance Criteria

- Auto Save is performed for new/deleted/updated information/changes across all activities within FireLight Application.
- Auto Save will be performed during data entry, regardless of percent complete; auto save functionality is already performed when an activity is locked (ie: signature process, etc).
- Manual Save button is removed and activities are automatically saved and added to the Recent Activity and All Activities after creating new activity for:
 - Multiple Activities
 - Application
 - Client Need/Needs Determination
 - Post Issue
 - Account Opening
 - Sub-Pay
 - My Appointment
- Activities are not automatically saved and added to the Recent Activity and All Activities after creating new activity for:
 - Illustration
 - Quote
- Request Client to Fill is not negatively impacted; all data is saved and not lost during the transaction.
- Request Client to Fill and Sign is not negatively impacted; all data is saved and not lost during the transaction.
- Auto Save applies to LexisNexis service calls.
- Auto Save applies to Milliman service calls.
- Auto Save applies to rules that result in a change of data items.
- Once data is changed, there is not an option to revert to previous value(s) without manually changing the value(s).
- The Group Option, "Disable Save Activities" functionality remains in place and does not allow a save of the activity to Recent Activity or All Activities when enabled.
- The option to Recover or Discard data will not be available; the auto save will replace data recovery.
- Changes are applied to Wizards, Forms and Form/Wizard Combination.

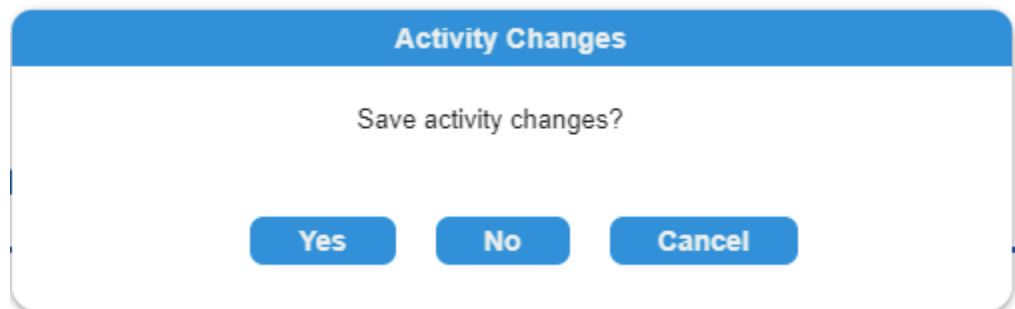
1.2 Auto Save: Remove Dialogs pertaining to Save

The implementation of Auto Save will eliminate the need for the save dialogs for the following activities:

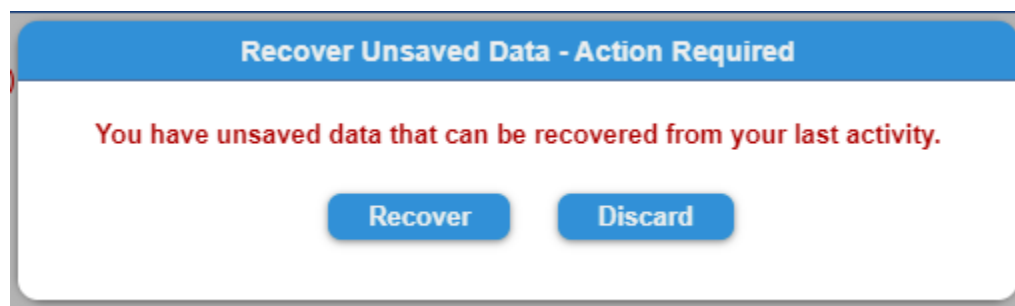
- Multiple Activities
- Application
- Presale
- Post Issue
- Account Opening
- Sub-Pay
- My Appointment
- E-Delivery

Users will no longer be prompted with the Save Dialog or the Recover Unsaved Data dialog. Dialog windows to remove for these activities include:

- This dialog will be removed for all activities except Quote and Illustration. For Quote and Illustration, this dialog will only display if an initial save has not been selected by the user to save the activity in Recent Activity and All Activities.



- This dialog will be removed for all activities, including Quote and Illustration.



Acceptance Criteria

- Save Activity Changes and Recover Unsaved Data dialogs are not presented to the user for activities:
 - Multiple Activities
 - Application
 - Presale
 - Post Issue
 - Account Opening
 - Sub-Pay
 - My Appointment
 - E-Delivery
- Save Activity Changes dialog is presented to the user for activities:
 - Quote
 - Illustration
- Recover Unsaved Data dialog is removed for all activities:
 - Multiple Activities
 - Application
 - Presale
 - Post Issue
 - Account Opening
 - Sub-Pay
 - My Appointment
 - E-Delivery
 - Quote
 - Illustration
- Changes are applied to Wizards, Forms and Form/Wizard Combination.

1.3 Activities requiring Manual Save for Recent Activity and All Activities

Adding an auto save to the FireLight application will provide a better user experience for clients. However, there are activities that will not adhere to the auto save logic across the FireLight platform. Activities that will retain the manual save functionality are:

- Illustration
- Quote

For Quote and Illustration, the "Save" button will remain available. These activities do not currently save to Recent Activity or All Activities without the user manually saving, so the ability to select a manual save will be retained. If the user elects to save the activity, it will be available on the Recent

Activity and All Activities. If the user does not manually save the activity, the data will be discarded and the activity will not be placed in the Recent Activity or All Activities for future access.

The "Save As" functionality will be moved from the current position under the "Save" button and listed under the "Other Actions" menu with a new label of "Copy Activity". This will provide the ability to perform the same "Save As" action while keeping the location of this functionality consistent with all other FireLight activities.

If the Quote or Illustration has not been selected to manually save, the user will be prompted upon leaving the activity to save changes. The user will continue to receive prompts to save upon leaving the activity when additional changes are made. When navigating to an activity setup as the "Next Activity" in the workflow, FireLight will prompt the user to save the activity and link to the next activity selected.

For Transfer and Share of these activities, the user will be required to save before the options will be available, which is the current functionality in FireLight. When a Quote or Illustration is Shared or Transferred, the activity will be displayed in the appropriate user's Recent Activity and All Activities.

Acceptance Criteria

- Activities will continue to require a manual save to display on Recent Activity or All Activities for:
 - Illustration
 - Quote
- Activities are automatically saved and added to the Recent Activity and All Activities after creating new activity for:
 - Multiple Activities
 - Application
 - Client Need/Needs Determination
 - Post Issue
 - Account Opening
 - Sub-Pay
 - My Appointment
 - E-Delivery
- Manual "Save" button remains available for Quote and Illustration.
- "Save As" is removed from under the "Save" button and is now displayed under the "Other Actions" menu as "Copy Activity".
- Upon leaving the activity, the user is prompted with the save dialog.
- When "Yes" is selected to save activity changes on the dialog, the user closes and re-opens the activity, makes additional changes and leaves the activity, the save dialog will be presented again.

- When a user elects to save the activity from the dialog presented, the activity is visible on the Recent Activity and All Activities.
- If the user does not elect to save the activity from the dialog presented, the activity is not visible on the Recent Activity and All Activities.
- Next Activity selection saves the illustration and/or quote activity and links the activity to the selected next activity.
- Transfer activity requires the user to manually save the data before the option to Transfer is available.
- Share activity requires the user to manually save the data before the option to Share is available.
- The Group Option, "Disable Save Activities" remains intact and does not allow a save of the activity to Recent Activity or All Activities when enabled.
- Changes are applied to Wizards, Forms and Form/Wizard Combination.

1.4 Auto Save: Relabel "Save As" to "Copy Activity" Option in Menu Bar for Activities

The Auto Save functionality will save the values on user input/selection, so a physical save will not be required. With the implementation of Auto Save, we are relabeling "Save As" to "Copy Activity" and adding "Copy Activity" within the "Other Actions" menu (with Quote and Illustration as an exception). The "Save As" option is currently located as a dropdown off the Save button in edit activity. Quote and Illustration will feature the "Copy Activity" functionality as a dropdown under the "Save" on the menu bar.

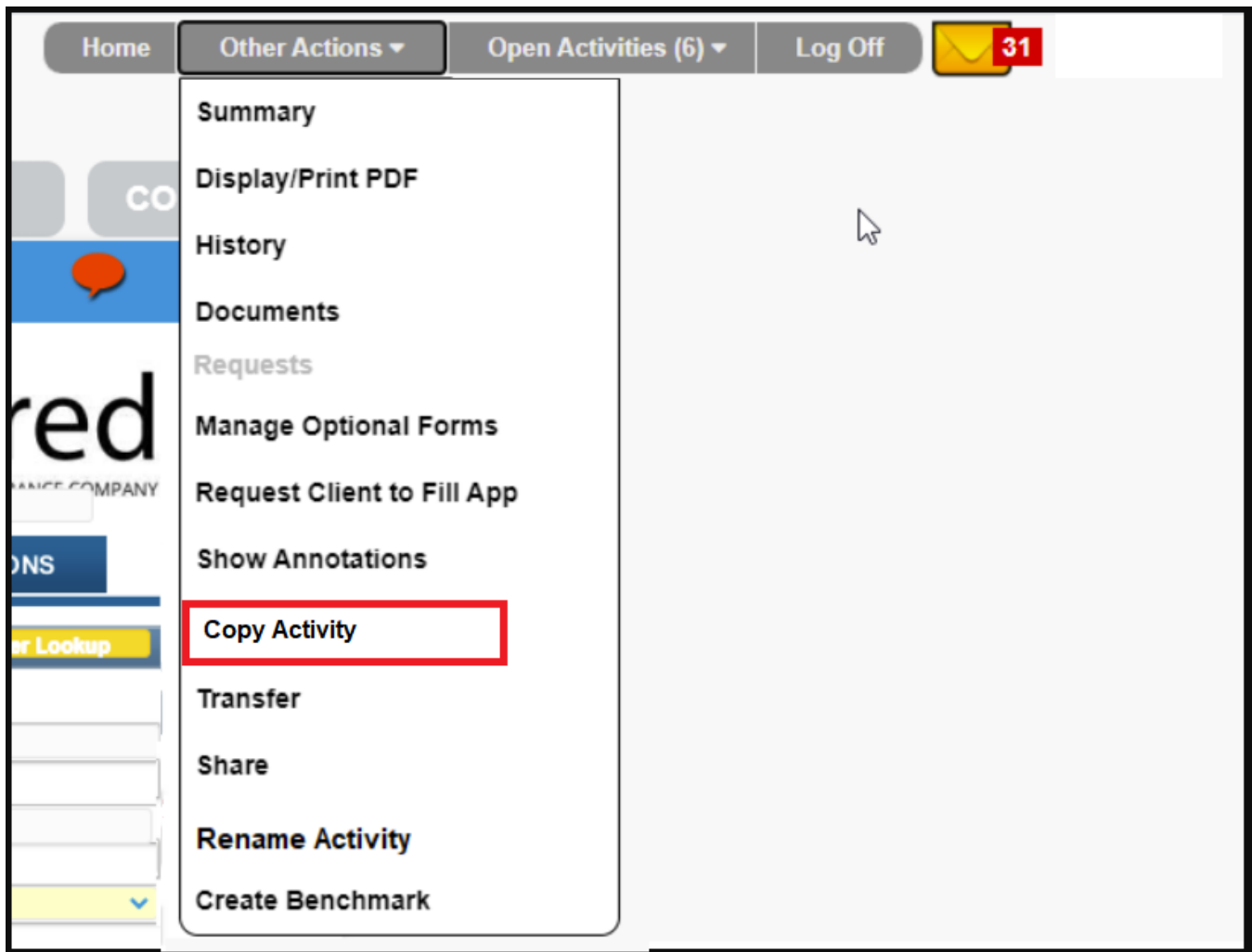
"Copy Activity" is available within the "Other Actions" menu for the following activities:

- Multiple Activities
- Application
- Presale
- Post Issue
- Account Opening
- Sub-Pay
- My Appointment
- Illustration
- Quote

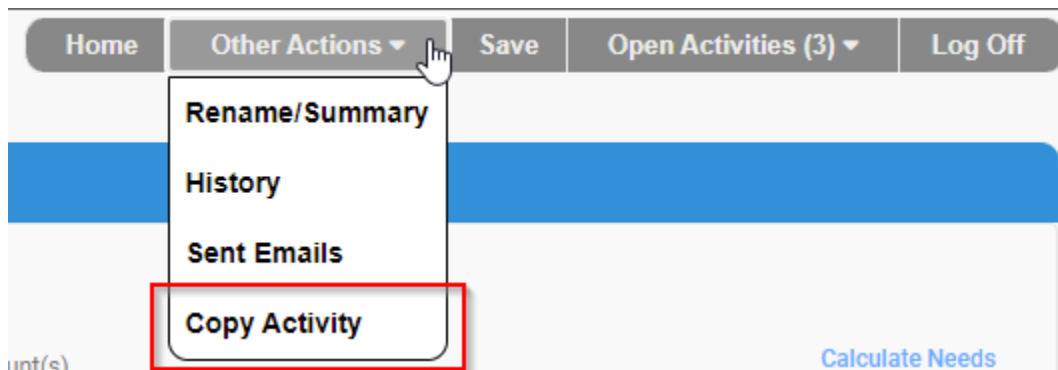
Before Enhancement:



After Enhancement (All Activities except Quote and Illustration):

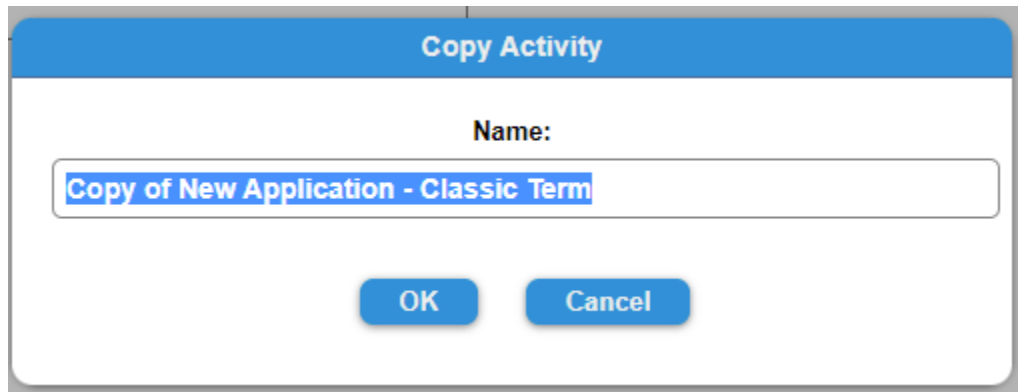


After Enhancement (Quote and Illustration):



E-Delivery will not feature the option to "Copy Activity".

The "Copy Activity" functionality will allow the user to save a copy of the activity with the desired naming convention like a save as action. Selecting "Copy Activity" will display a dialog to the user:



Acceptance Criteria

- "Copy Activity" is available in the "Other Actions" menu for
- Multiple Activities
- Application
- Presale
- Post Issue
- Account Opening
- Sub-Pay
- My Appointment
- "Copy Activity" is available under "Save" on the menu bar for
- Illustration
- Quote
- E-Delivery, Print Forms and Fee Inquiry do not save, so they will not feature the option for "Copy Activity".
- Selecting "Copy Activity" displays "Create a Copy" dialog to user.

- "Copy Activity" places a copy of the activity with the desired naming convention (determined by the user from dialog) on Recent Activity and All Activities.
- Changes are applied to Wizards, Forms and Form/Wizard Combination.
- "Copy Activity" is not available for selection in the "Other Actions" menu if Groups, App, User Rights Home/All Activities, "Disable Copy Activities" is selected for applicable activities.
- "Copy Activity" is not available for selection under the "Save" on the menu bar if Groups, App, User Rights Home/All Activities, "Disable Copy Activities" is selected for Quote and Illustration.

1.5 Auto Save: Add "Auto Save Enabled" to Left of Menu Bar

With the removal of the "Save" and "Save As" options, we will ease the user transition by placing a label indicating the data is "Auto Saved Enabled" to the left of the menu bar. This will be displayed as a constant and will not flash or move on the screen. Certain client settings, CSS, or other factors may interfere with the placement or ability for this text to display but will be displayed when possible to serve as a visual reminder to the user for an easier transition from manual save to Auto Save.

After Enhancement:

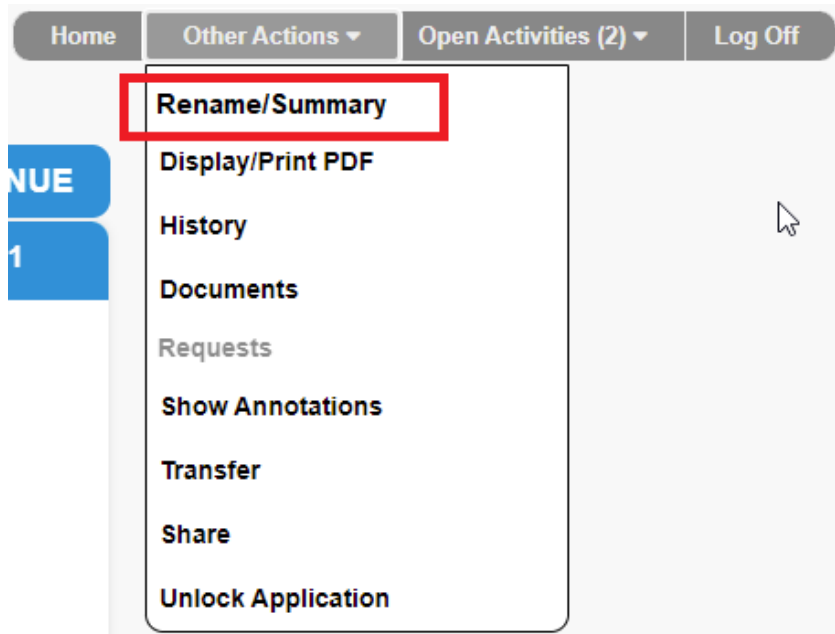


Acceptance Criteria

- "Auto Save Enabled" is placed to the left of the menu bar to ease user transition.
- "Auto Save Enabled" remains in the same location; does not flash or move, is always visible.
- Localization will be available.
- Changes adhere to WCAG standards.

1.6 Auto Save: Rename Summary on "Other Actions" Menu

The "Summary" option on the "Other Actions" menu will be renamed to "Rename/Summary". This will provide a better user experience to clarify the current ability to rename an activity within the summary window.



Acceptance Criteria

- "Summary" option in "Other Actions" is renamed to "Rename/Summary".

1.7 Async Call to reflect latest validation state

The callasyncaction rule initiates an asynchronous process. When that process completes, it writes any data items initialized by the provider to the ApplicationPendingData table. During data entry for an activity, there is logic in the base system, at load/save and when loading a form/wizard page, to query that table and update the session app data with those data item values, but validation in the UI is not properly refreshed to reflect all resulting changes. For some users, this resulted in some required values that had been populated still showing as being required. The latest validation state should be reflected in the UI after updating the session app data from the pending app data.

There are multiple fixes needed for this:

- 1) CheckForPendingData should not assign result.DataItems from the current page -- it should function the same as a regular field update, integrating with the rules engine and using the trigger handler data item changes.
- 2) In all workflows where CheckForPendingData is called (for instance, when changing wizard pages), the result should be returned to the browser and processed to reflect any changes to validation messages and the error list. Currently, this is only done for field updates, and even in that case, the

pending data changes are not processed along with the user field updates, so that everything is always reflected in the UI.

Acceptance Criteria

- When an Async call occurs, the latest validation state will be reflected
- CheckForPendingData will not assign result DataItems from the current page
- CheckForPendingData will return any changes to validation messages and the error list

1.8 Auto Save: Move IXN Save Logic

Save was introduced to the IXN quotes for the August release. With the implementation of Auto Save across FireLight, development will evaluate if any of the recent pieces developed to allow the IXN Life Quotes to save in FireLight need to be moved.

Acceptance Criteria

- Save for IXN Life Quote is not interrupted with the development for Auto Save.
- All save logic for IXN Life Quote is evaluated and updated as necessary with the implementation of Auto Save to optimize code.

1.9 Auto Save: Save In Flight Activities

In flight activities where auto save applies will initiate the auto save process upon re-opening the activity.

Acceptance Criteria



- In flight activities are auto saved upon re-opening.

2 FireLight Admin Auto Save

The Auto Save functionality will exist without an Organization level setting. All activities across FireLight Application will perform an Auto Save after every user input. This will allow FireLight to perform a save for each input value when the activity is less than 100%.

2.1 Auto Save: "Disable Save Activities" Group Option Functionality

With the implementation of Auto Save, enhancements will be required for the current "Disable Save Activities" Group Option. If this selection is enabled in Group Options, FireLight will not save any changes made to the activity.

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 : 3/25/2021 5:10 PM UTC

Name Illustration Services Role Code TC Role Codes

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

☐ 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
☐ Disable View Activities Summary
☐ Disable View Documents
☐ Disable View History
☐ Disable View Requests

☒ Sales Agreement Products Only
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
☐ Enable Override SSO
☐ Require Signature Capture

☐ 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
☐ Enable Read-Only Activity

Renaming of the activity will also be disabled with this option selected. When "Rename/Summary" is selected from the "Other Actions" menu, the dialog will display as a read-only dialog. The user will not have the ability to edit the name of the activity.

The pencil icon will remain as is today, with a read only dialog displayed when the icon is selected.

Activity Summary	
Name:	New Application - Income Choice
Status:	Data Entry
Carrier:	FL Access Carrier - Test
Product:	Income Choice
Activity Name:	Application
Jurisdiction:	Alabama
Policy Number:	
Errors On Forms:	No Error
Created:	7/30/2021
Last Updated:	7/30/2021

When the group option is selected to Disable Save, "Auto Save Enabled" will not be displayed on FireLight application to the left of the menu bar.

Acceptance Criteria

- When the "Disable Save Activities" is selected in Group Options, activities are not auto saved.
- When the "Disable Save Activities" is selected in Group Options, the "Rename/Summary" option "Other Actions" menu only displays a read-only dialog.
- Selecting the pencil icon displays a read only dialog when the "Disable Save Activities" is selected in Group Options.
- "Auto Save Enabled" does not display to the left of the menu bar.

2.2 Auto Save: Re-label Group Menu Options

The Group options will require renaming with the removal of "Save As" and addition of "Copy". There are three Group Options that will be renamed for clarity.


1. Current Group Menu Option labeled "Disable Save As" will be renamed, "Disable Copy".
2. Current User Rights Home/All Activities has two options that will be renamed for clarity and consistency


- "Disable Copy Activities" renamed to "Disable Copy in All Activities"
- "Disable Delete Activities" to "Disable Delete in All Activities"

Before Enhancement:

Groups - FL Access Carrier

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 : 3/25/2021 5:10 PM UTC

Name

Illustration Services Role Code

TC Role Codes

FLA10

App

Admin

Review Queue

Activity Access

Product Access

Case Access

Needs Filter

Debugging Tools

Training

Group History

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

☐ Disable View Activities Summary

☐ Disable View Documents

☐ Disable Annuity Quotes

☐ Disable Life Quotes

☒ Sales Agreement Products Only

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

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

☐ Enable Read-Only Activity

Save

After Enhancement:

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 : 3/25/2021 5:10 PM UTC

Name
Illustration Services Role Code
TC Role Codes

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

Menu Options
☐ Disable Copy
☐ Disable Edit Preferences
☐ Disable Log Off
☒ 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
☐ Disable View Activities Summary
☐ Disable View Documents

☐ Disable Annuity Quotes
☐ Disable Life Quotes
☒ Sales Agreement Products Only

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

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

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

Save

Acceptance Criteria



- Group Menu Option "Disable Save As" is renamed to "Disable Copy".
- Group Menu Options are re-sorted to remain in alphabetical order.
- User Rights Home/All Activities "Disable Copy Activities" is renamed to "Disable Copy in All Activities".
- User Rights Home/All Activities "Disable Delete Activities" is renamed to "Disable Delete in All Activities".

2.3 Remove Auto Save Group Setting

The Group setting "Enable Auto Save" was added in the 2.15 release to allow clients the option to Auto Save at a frequency of 5 minutes. For the Auto Save enhancement, FireLight Application will

automatically save without client option. With the addition of the auto save component to FireLight Application, the Group setting for "Enable Auto Save" will be removed.

Before enhancement:

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 : 3/25/2021 5:10 PM UTC

Name Illustration Services Role Code TC Role Codes

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

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
- ☐ Optional Client Email

Menu Options

- ☐ Disable Edit Preferences
- ☐ Disable Log Off
- ☐ Disable Save As
- ☒ 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
- ☒ Sales Agreement Products Only

Share/Transfer/Case Access

- ☒ Allow Activity Share

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 Continue at 100%
- ☐ Enable HTTP Redirect on Submit

URL:


Testing


- ☒ Enable Create Benchmarks
- ☐ Enable Test Mode
- ☐ Enable Override Date
- ☒ Enable View Benchmarks

After enhancement:

Groups - FL Access Carrier

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 : 3/25/2021 5:10 PM UTC

Name

Illustration Services Role Code

TC Role Codes

FLA10

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

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

☐ Optional Client Email

Menu Options

☐ Disable Edit Preferences

☐ Disable Log Off

☐ Disable Save As

☒ Enable CRM Preferences

Other

☒ Active Agent User List

☐ Disable Console For Group

☒ 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

☒ Sales Agreement Products Only

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 Continue at 100%

☐ Enable HTTP Redirect on Submit

URL:

Testing

☒ Enable Create Benchmarks

☐ Enable Test Mode

☐ Enable Override Date

☒ Enable View Benchmarks

Save

Acceptance Criteria

- "Enable Auto Save" is removed from Group, App tab.
- Logic is removed or ignored for clients who currently have this Group setting active.

2.4 Auto Save Activity for Audits

A single audit entry will be written each time an application is opened and edited. We will write a new audit the first time the user edits the application after opening. The audit will feature the UserID and Timestamp. Each edit will update the datetime stamp for the audit record.

Acceptance Criteria

- Audit records feature a last updated timestamp with the individual UserID.
- Last updated timestamp is correct.
- Audit features a record of when activity is opened/re-opened.
- Idle time is accounted for and written out on the audit record.

2.5 Auto Save: Immediately Save Unsaved Data related to Current Hard Save

With the implementation of Auto Save, any unsaved data needs to be saved immediately for these processes where hard save is currently. Only save data when there is data that persists/updates made/unsaved data.

- LexisNexis
- Continue
- Start transfer
- Template required notification
- Close open activity
- Save test case
- External request Complete/Logoff
- Initiate client fill / Fill & sign
- Upload document
- Print PDF
- Select optional forms
- Generate illustration
- Send illustration or quote email
- Lock activity
- Save e-Delivery change items
- Request e-Delivery change
- At 100% complete with auto-save enabled
- Create update activity from multi activity nav bar
- Add child activity for multi
- CRM

Acceptance Criteria

- Code is updated to integrate background saving with any hard save/save now actions.
- For AutoSaved activities each action specified in Description should reflect any changes made to the activity.
- For non-auto saved activities each action will still save on behalf of the user and any changes made to the activity are reflected.