
Define Rank Order for Home Screen Icons/Buttons 2.19
December (iConnect 209667)

FIRELIGHT BASE



Platform

**DEFINE RANK ORDER FOR HOME SCREEN ICONS/BUTTONS 2.19 DECEMBER
(ICONNECT 209667)**

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Insurance Technologies, LLC

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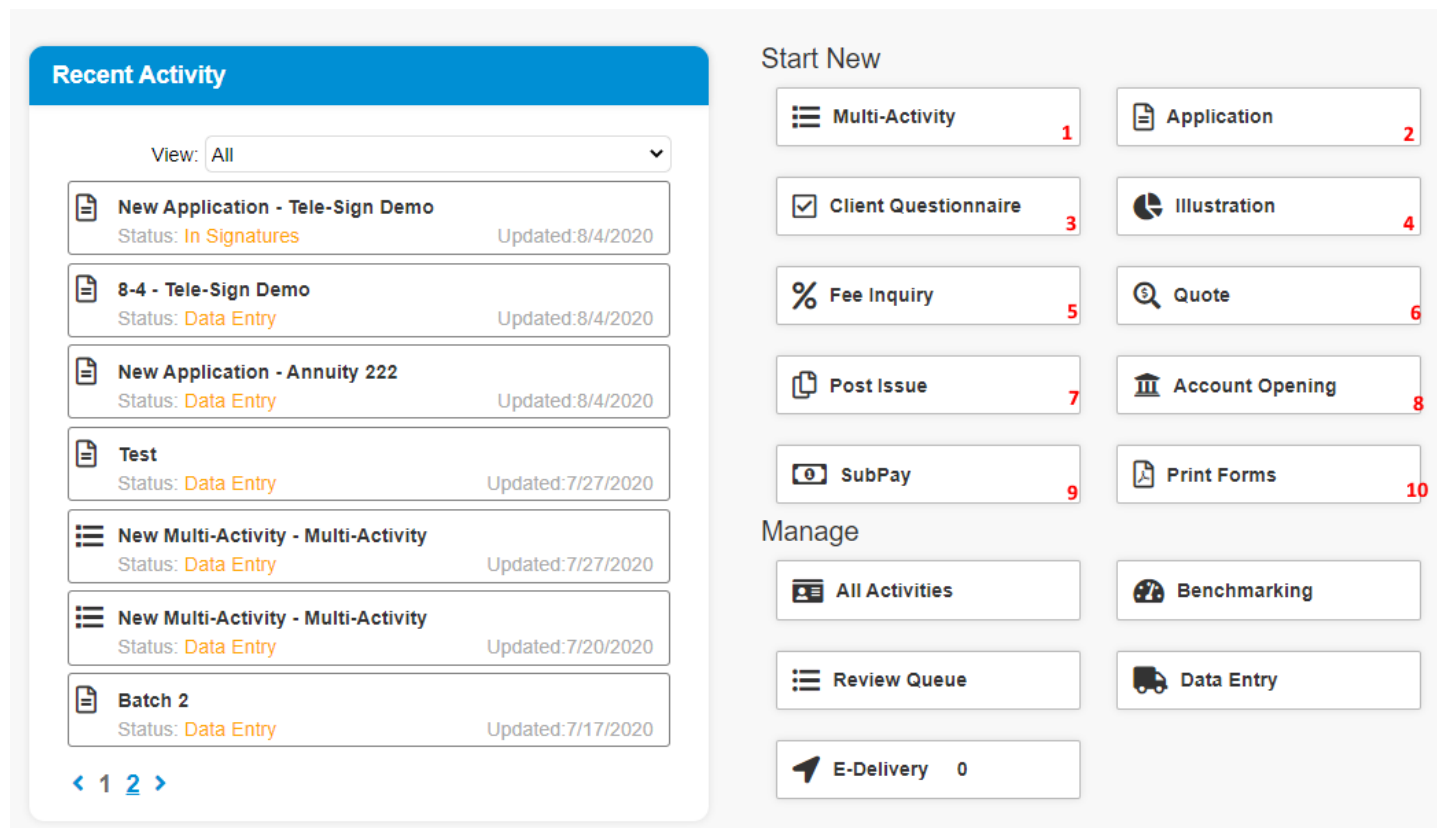
Design Approach - Define Rank Order for Home Screen Icons/Buttons 2.19 December (iConnect 209667)

This enhancement will allow the administrator of a platform to define the order in which activities appear on their home page. In the image below, the red numbers are present for demonstration purposes only. The numbers represent the rank order defined in the FireLight admin tool and where the corresponding navigation buttons will appear based on the rank order number defined in the admin tool.

Adding this functionality will allow FireLight clients to present the activities in an order that they will define that they believe is a logical workflow based on the market in which they compete.

1 Define Rank Order for Home Screen Icons/Buttons

This feature will allow the administrator for the hosting organization to define the ranking/presentation order of the activities they support on the home page of FireLight. The image below shows in red numbers the rank/presentation order that will be defined on the "Activities" page in the FireLight Admin Tool.



The screenshot displays the FireLight Admin Tool interface. On the left, the 'Recent Activity' section shows a list of activities with their status and update dates. On the right, the 'Start New' and 'Manage' sections show various activity buttons, each with a red rank number indicating its position in the workflow.

Activity Name	Status	Updated	Rank
New Application - Tele-Sign Demo	In Signatures	8/4/2020	1
8-4 - Tele-Sign Demo	Data Entry	8/4/2020	2
New Application - Annuity 222	Data Entry	8/4/2020	3
Test	Data Entry	7/27/2020	4
New Multi-Activity - Multi-Activity	Data Entry	7/27/2020	5
New Multi-Activity - Multi-Activity	Data Entry	7/20/2020	6
Batch 2	Data Entry	7/17/2020	7

Start New


Multi-Activity	1	Application	2
Client Questionnaire	3	Illustration	4
Fee Inquiry	5	Quote	6
Post Issue	7	Account Opening	8
SubPay	9	Print Forms	10

Manage

All Activities	Benchmarking
Review Queue	Data Entry
E-Delivery	0

This functionality will be driven from the Activities page in the admin tool through the addition of a Rank Order field shown in the image below. The rank order in the image below of "8" corresponds to the location it is presented above.

Activity Detail
Next Activities

Activity Name	Account Opening
ACORD Type	Account Opening (106)
Activity Type	Pre-Sale
Billing Code	
Rank Order	8
Branding Icon (Font Awesome Icons)	bank 
Complete Purge Policy	60
Incomplete Purge Policy	60
Continue/Apply Label	Account Opening
Allow Pre-Signature Review	<input type="checkbox"/>
Allow Post-Signature Review	<input type="checkbox"/>
Bypass New Activity Prompts	<input type="checkbox"/>
Disable Transfer Data Items to Next Activity	<input type="checkbox"/>
Lock Transferred Data Items	<input type="checkbox"/>
Include InsTech Managed Products	<input checked="" type="checkbox"/>

[Edit Activity Pop-up Messages](#)

- Rank order definition in the admin tool is not required.
- Rank Order is currently defined in the "Activity" table. Activity availability is defined by Group/Role Code in the admin. Available activities are presented to the user based on the order defined in the Activity table.
- New Rank Order functionality
 - Add the ability to define a numeric rank order in the admin tool
 - If no rank order values are entered for any enable activities, then activities will be presented in the default order defined by base FireLight.
 - If rank order values have been defined for all enabled activities, then the activities will be presented in a Z order (top to bottom, left to right) from smallest to largest rank order.
 - If rank order values have been defined for some, but not all enabled activities, then activities with defined rank order will be listed first in a Z order (top to bottom, left to right) from smallest to largest rank order. Any enabled activities without a rank order defined will appear in alphabetical order following ranked activities
 - As you save the rank order, validate that you cannot save the same rank number twice. Display the message "Cannot save the same rank number twice"

1.1 UI: Rank Order of Activities on Home Screen

On the home page of the user interface, implement a grid for layout of activity buttons to the right of the "Recent Activity" panel. General button location can be defined by the "Rank Order" entered by the client in the FireLight Admin Tool. Button positions will follow a "Z" pattern in the grid with the lowest numeric position being in the upper left-hand corner and subsequent numeric values following a left to right, top to bottom Z order. The numeric representing the button location will not be visible to the user.

- If no rank order has been defined in the organization admin, then the buttons will appear in the default order defined by FireLight
- If rank order values have been entered for all active activity modules, they will appear in the Z order described above from smallest to largest.
- If rank order has been defined for some, but not all of the active modules, those with a rank order defined will appear first in the Z order. Any activities that do not have a rank order defined will appear after ranked activities and will be ordered alphabetically.

Recent Activity

View: All

New Application - Tele-Sign Demo
Status: In Signatures Updated: 8/4/2020

8-4 - Tele-Sign Demo
Status: Data Entry Updated: 8/4/2020

New Application - Annuity 222
Status: Data Entry Updated: 8/4/2020

Test
Status: Data Entry Updated: 7/27/2020

New Multi-Activity - Multi-Activity
Status: Data Entry Updated: 7/27/2020

New Multi-Activity - Multi-Activity
Status: Data Entry Updated: 7/20/2020

Batch 2
Status: Data Entry Updated: 7/17/2020

< 1 2 >

Start New

Multi-Activity 1

Application 2

☒
Client Questionnaire 3

Illustration 4

Fee Inquiry 5

Quote 6

Post Issue 7

Account Opening 8

SubPay 9

Print Forms 10

Manage

All Activities

Benchmarking

Review Queue

Data Entry

E-Delivery 0

Acceptance Criteria

- Rank order behavior
 - If no rank order values are entered for any enable activities, then activities will be presented in the default order define by base FireLight.
 - If rank order values have been defined for all enabled activities, then the activities will be presented in a Z order (top to bottom, left to right) from smallest to largest rank order.
 - If rank order values have been defined for some, but not all enabled activities, then activities with defined rank order will be listed first in a Z order (top to bottom, left to right) from smallest to largest rank order. Any enabled activities without a rank order defined will appear in alphabetical order following ranked activities.


1.2 Admin Tool: Rank Order of Activities on Home Screen

Add a new control to the Admin Tool to control the rank order.

- Insert a new text field in-between "Billing Code" and "Branding Icon" on the Activity Detail tab in the admin tool.
 - Label of the field will be "Rank Order"
 - Rank Order is optional
 - Field will be numeric
 - It is not necessary that the rank order given be sequential starting 1,2,3,etc. The admin may choose to set rank order initially as 10, 20, 30, etc. This would allow the admin user to activate an additional activity at a later time and insert it between two existing activities without having to renumber all subsequent activities. For example, a rank order of 25 would be inserted between 20 and 30 and no other numbering changes would be required.
 - Validate that duplicate rank order is not allowed. Generate error message that duplicates are not allowed and prevent the user from saving until the issue is corrected.
 - Location defined will follow Z order (top to bottom, left to right)
- Rank order behavior
 - If no rank order values are entered for any enable activities, then activities will be presented in the default order define by base FireLight.
 - If rank order values have been defined for all enabled activities, then the activities will be presented in a Z order (top to bottom, left to right) from smallest to largest rank order.
 - If rank order values have been defined for some, but not all enabled activities, then activities with defined rank order will be listed first in a Z order (top to

bottom, left to right) from smallest to largest rank order. Any enabled activities without a rank order defined will appear in alphabetical order following ranked activities.

Activity Detail
Next Activities

Activity Name	Account Opening
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Rank Order	8
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Complete Purge Policy	60
Incomplete Purge Policy	60
Continue/Apply Label	Account Opening
Allow Pre-Signature Review	<input type="checkbox"/>
Allow Post-Signature Review	<input type="checkbox"/>
Bypass New Activity Prompts	<input type="checkbox"/>
Disable Transfer Data Items to Next Activity	<input type="checkbox"/>
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Include InsTech Managed Products	<input checked="" type="checkbox"/>

[Edit Activity Pop-up Messages](#)

Acceptance Criteria

- Rank order behavior
 - If no rank order values are entered for any enable activities, then activities will be presented in the default order define by base FireLight.
 - If rank order values have been defined for all enabled activities, then the activities will be presented in a Z order (top to bottom, left to right) from smallest to largest rank order.
 - If rank order values have been defined for some, but not all enabled activities, then activities with defined rank order will be listed first in a Z order (top to bottom, left to right) from smallest to largest rank order. Any enabled activities without a rank order defined will appear in alphabetical order following ranked activities.
- New text box field labeled "Rank Order" is presented between "Activity Type" and "Branding Icon" fields on the Activity Detail tab.
- Field is numeric only

- Validate that duplicate rank order is not allowed. Generate error message that duplicates are not allowed and prevent the user from saving until the issue is corrected.
- Entries are saved