
Wizard Changes 2.16 December

FIRELIGHT BASE

FireLight®

Platform

WIZARD CHANGES 2.16 DECEMBER

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Insurance Technologies, LLC

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Table of Contents

Design Approach - Wizard Changes 2.16 December	4
1 Update Wizard Other Action options to be consistent with legacy UI.....	4
1.1 (197376) Add Transfer functionality to wizard UI	5
1.2 (197491) Add Requests functionality to wizard UI	6

Design Approach - Wizard Changes 2.16 December

Currently there are many options missing from Other Actions if the user is utilizing wizards within FireLight. We need to implement the missing pieces to support the same level of functionality that is currently offered in the legacy UI.

Options to be added:

- Transfer
- Requests

Once added to the wizard, these options will function as they do in the legacy UI.

Release Documentation for Wizard Transfer Impacts:

Other Actions Drop down

Transfer (Adding functionality for Wizard, not just Form)

Requests (Adding functionality for Wizard, not just Form)

1 Update Wizard Other Action options to be consistent with legacy UI

Currently there are many options missing from Other Actions if the user is utilizing wizards within FireLight. We need to implement the missing pieces to support the same level of functionality that is currently offered in the legacy UI.

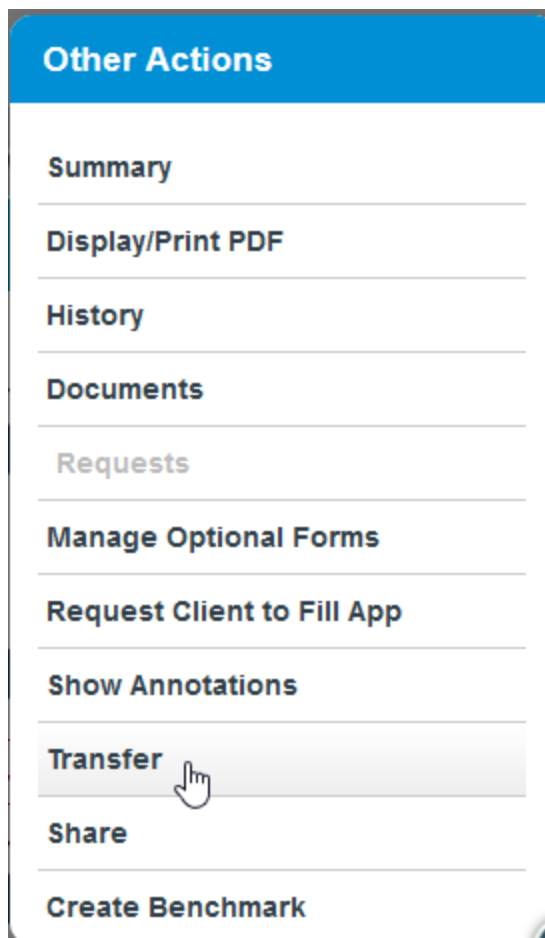
Options to be added:

- Transfer
- Requests

Once added to the wizard, these options will function as they do in the legacy UI.

1.1 (197376) Add Transfer functionality to wizard UI

Currently, "Transfer" is only available in the legacy UI. We need to support transfer functionality in wizards. When the user navigates to Other Actions there should be a transfer option available. Reference DRs 122279 and 127681 for original enhancement.



https://iconnect.insurancetechnologies.com/bug/UpdateBug.aspx?dst=A&bug_id=197376

Acceptance Criteria

- Transfer is an available option in Other Actions > Transfer when wizards are in the package.
- Transfer functions consistently with the way that it functions in the legacy UI.
- Applies to all activities with a wizard.

1.2 (197491) Add Requests functionality to wizard UI

Currently, "Requests" is only available in the legacy UI. We need to support Requests in wizards. Support for Requests varies by activity.

E-Delivery: "Requests" already exists & appears on the navigation bar as expected when requests are sent out. Add "Requests" to Other Actions as well which does the same thing.

eApp/Pre-Sale/Post-Issue: There is currently no room on the navbar to have a "Requests" button. Make the "pending request" text under Data Entry clickable to bring up the "Pending Requests" dialog and add it to Other Actions > Requests. If a forms package is used (100% forms), the Legacy UI will still be used, but utilize the React UI for Wizard and forms packages.

1

DATA ENTRY
 pending request

Pending Requests

Request Type: Client Fill Application Owner

Recipient: Julie Client
 Email Sent To: jhenry@insurancetechnologies.com
 Create Date: 10/8/2019
 Passcode: dkvopemx

[Send Reminder to Julie Client](#)
[Send Passcode to Julie Client's Cell Phone](#)
[Send Passcode to Julie Client's email](#)
[Cancel Request](#)

Close

Illustration and Quotes: We do not have a use case for any requests in illustration and quotes. Requests do not need to be available in the illustration and quote activity.

Acceptance Criteria

- Requests is an available option in Other Actions > Requests when wizards are in the package.
- Requests is greyed out in other actions unless a request has been sent out, then it is enabled.
- Requests is not an option in the illustration activity in "Other Actions".
- Requests is not an option in the quote activity in "Other Actions".
- In eApp, Pre-Sale, and Post-Issue, if the user clicks on "Pending Requests" under data entry it will show the "Pending Requests Dialog that is shown when they click it in Other Actions.