INSURANCE TECHNOLOGIES

Prevent Application Unlock when Locked by Reviewer

FIRELIGHT BASE

FireLight®

Platform

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iConnect 257500 Design Approach – Prevent Application Unlock when Locked by Reviewer

Project Overview

Currently, when an application has been locked by a reviewer, it can still be unlocked by the agent, resulting in loss of reviewer comments. Enhancements will be made to disable the unlock action based on the review status, as well as display a toast message to the agent/user when the activity is in review.

Impacts:

- FL App > Activity > Other Actions (menu) > Unlock
- FL App > Activity > Other Actions (menu) > Rename/Summary, Unlock
- FL App > Activity > Other Actions (menu) > Requests > Cancel the request (link)
- FL App > All Activities > Pending Requests > Cancel the request (link)
- New FireLight toast message

1 Disallow Unlocking Application Based on Status

When an application has been locked in review by the reviewer, the agent should not be able to unlock the activity. To implement this, the "Unlock" option under the "Other Actions" menu will remain disabled for the application, when the application display status is any of the below:

1. In Pre-Submit Review
2. In Review

The screenshot below shows the menu option "Unlock" under "Other Actions" that will be disabled when the activity is in any of the above display statuses.
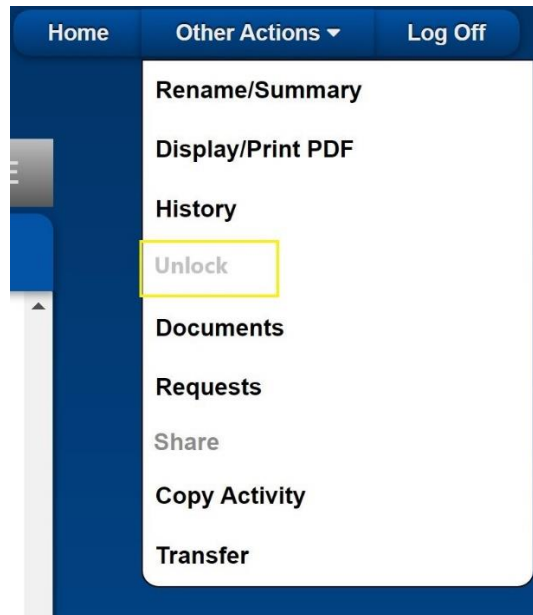
"Unlock" button on Activity Summary dialog will also be disabled when reviewer has locked the application for review. This displays from "Rename/Summary" option under "Other Actions" menu when the application is in lock state, or by clicking on the lock icon.

Acceptance Criteria

- "Unlock" option in the "Other Actions" menu is disabled when activity status is:
  - "In Pre-Submit Review"
  - "In Review"

- "Unlock" button on Activity Summary dialog is disabled when activity status is:
    - "In Pre-Submit Review"
    - "In Review"
- "Unlock" option is available in the "Other Actions" menu when the activity status is not any of the above statuses. [Regression]
- Unlock option is disabled for both MVC and React interfaces.
- REST API to Unlock Activity checks before unlocking activity if the supplied activity id is already locked by the reviewer and when the case is true it provides the error prompt "Application is locked in review.".

2   Display Toast Message When Application is Locked in Review

When the reviewer has locked the application to begin the review process and the agent/user loads the application, FireLight will display a toast message to indicate the application is in the review process. This message will inform the user they cannot unlock the application due to the review status. If there is a need to unlock the application, the user will be required to contact the reviewer offline to reject the application from the review process. Rejecting the application for review will unlock the application and bring it back to data entry status.

The toast message that will be displayed is "Application is locked in review.".

This toast message will only appear when the application is in any of the below display statuses.

1. In Pre-Submit Review
2. In Review

Acceptance Criteria

- When application is locked by the reviewer and the application is opened by the agent/user, toast message appears with text, "Application is locked in review."
- Toast message appears on application load only when the reviewer has locked the application.
- User can close toast message.
- Format of toast message is identical to all other toast messages across FireLight.
- Toast message appears for both MVC and React interfaces.
- REST API to Unlock Activity checks before unlocking activity if the supplied activity id is already locked by the reviewer and when the case is true it provides the error prompt "Application is locked in review.".

3   Remove Cancel Request link

When the reviewer has locked the application for review, agent will not be able to cancel the review request.
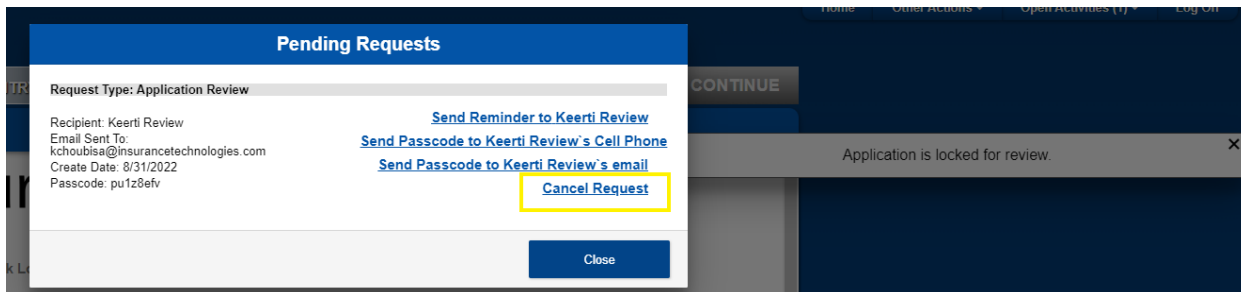
The link "Cancel this request" at the agent view will be disabled/removed from the agent interface for the application that has below activity status.
1.   In Pre-Submit Review
2.   In Review

This option will be removed from all the below interfaces:
1.   Request pop-up on activity view
2.   Request dialog under Other Actions menu for an activity
3.   Both MVC and React interfaces
4.   Request dialog on All Activities page

Below is the screenshot for the Request pop-up on an activity.

Below is the screenshot for Request dialog on All Activities screen.
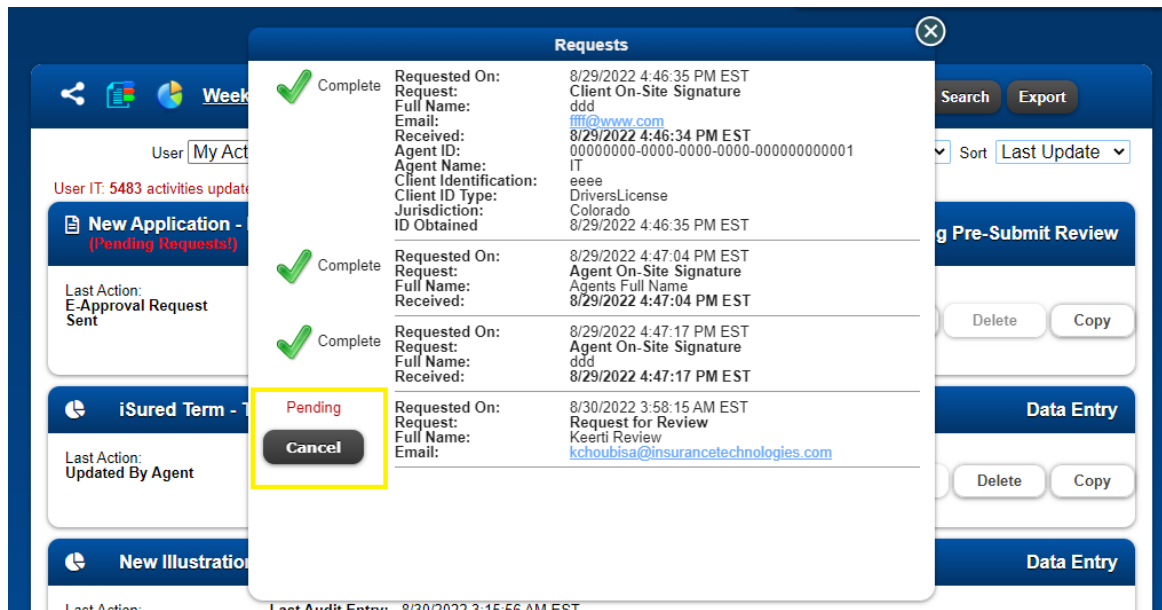
Acceptance Criteria

- Link "Cancel this request" is not available on the request dialog at the agent view.
- Agent is not able to cancel the review request when the application is locked by the reviewer.