INSURANCE TECHNOLOGIES

Locked Wizard UI Display

FIRELIGHT BASE

FireLight®

Platform

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iConnect Design Approach - Locked Wizard UI Display

Project Overview

With the 2.24 Base FireLight release, the enhancement was introduced to allow Wizard fields and data to be displayed upon locked activity status. The functionality was not optional and did not allow clients to turn this feature off. We will introduce an Organization level setting to allow clients further flexibility in determining what their locked functionality will consist of; the previous version of forms only or allow the new functionality view of the locked wizard fields and data to be displayed along with the forms.

Impacts:

- New Organization setting for "Lock Mode" selection
- Default for "Lock Mode" will be "View Forms Only" - clients who wish to have the current Wizard lock view will be required to make an update to their settings

1   Locked Wizard UI Display: Organization Toggle On/Off of Functionality

A new dropdown selection for "Lock Mode" will be provided on the Organization, Activity tab. The options available in the dropdown will be "View Forms Only" and "View Forms and Wizard" with the default of "View Forms Only". Clients who wish to have the new view introduced in the 2.24 release of the Wizard fields and data after the activity is locked will be required to update this in the Admin under the Organization, Activity setting after the 2.25 base release.

Acceptance Criteria

- New Organization level setting under "Organization Configuration", "Organization Settings", "Activity" tab: "Lock Mode" with dropdown.
- Dropdown options are" View Forms Only" and "View Forms and Wizard".
- Default to dropdown selection is "View Forms Only".
- Selecting "View Forms Only" does not display the Wizard view when an activity is in locked status.
- Selecting "View Forms and Wizard" displays the Wizard view with the forms when an activity is in locked status.

2   Update Wizards UI to Material Design

Update base Firelight Wizards UI to reflect material design visualization.

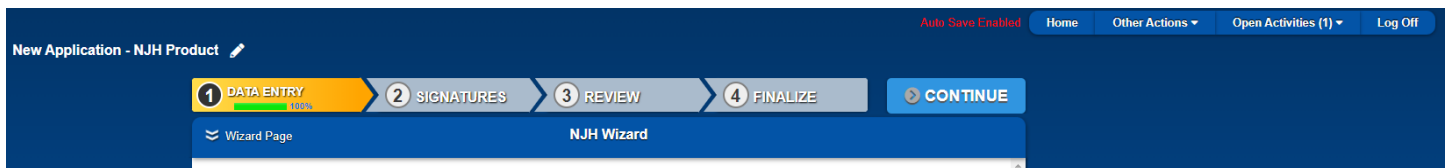Items may include:

Top Status Bar

Continue Button

Panel Headers

Top Right Tools Buttons

Previous display:

New display:

Acceptance Criteria

- Validate FireLight UI updated for Wizards to reflect material design visualization for status and menu bar, rename/summary window.
- colors/shadows/gradients (remove/minimize)
- icons
- general layout
- borders (removing outlines)