

iConnect 169972 Design Approach

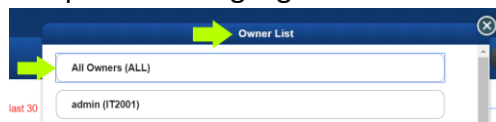
Project Overview

Add a search within the User List (previously known as Owner List) view located in All Applications. This will allow a user who has visibility into multiple agents' applications, through either User Share or Group code access, to search for a specific user name.

Features/Requirements

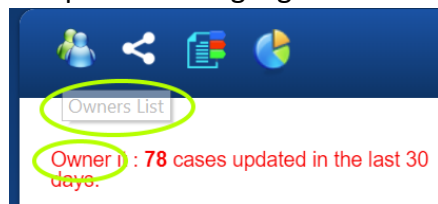
- Add search by user name in the user list dialog.
- For clarity, change all references of "owner" to "user".
 1. Applies to the title bar in the dialog, relabel Owner List to User List.
 2. Applies to the option shown at the top of the list, relabel All Owners (ALL) to All Users (ALL).

Sample of existing logic:



3. Applies to the hover over on the icon in All Activities, relabel Owners List to User List (User will not be plural).
4. Applies to the on screen identification of user (top left) on the View All Activities, relabel Owner to User (in example below see Owner it:, this will change to User it:).

Sample of existing logic:



Use Cases / Workflow Changes

There are no changes to the normal workflow of the system. Add new functionality in user list partial view to search by user name.

Admin Changes

No changes to the Admin tool.

App Changes

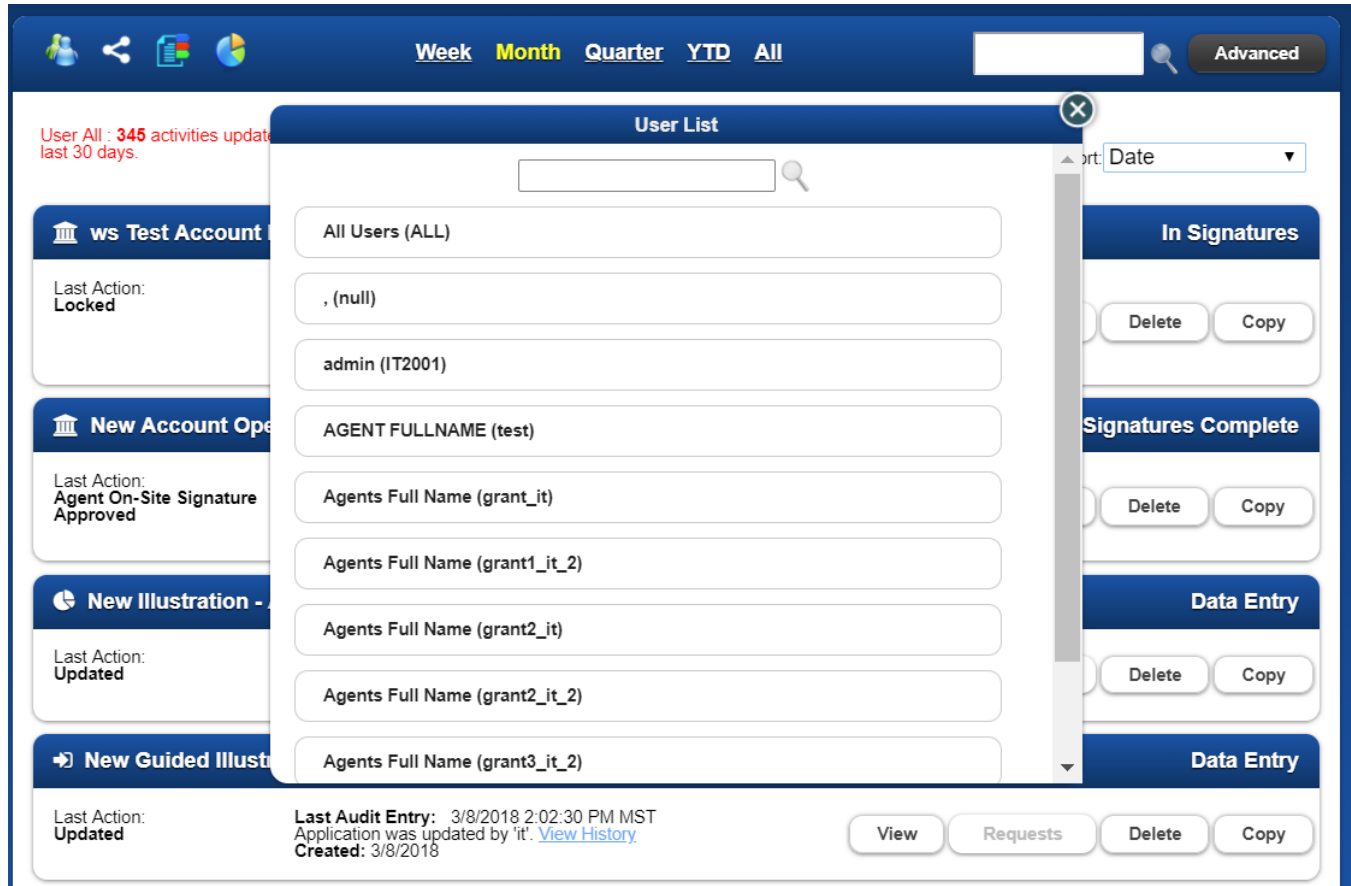
To add this functionality, we need to add textbox and search button on user list partial view, which will provide a filtered user list.

In "ApplicationController" added logic to filter by user name.

Integration Changes

None

UI Mock Ups



The mock up shows a web application interface. At the top, there's a navigation bar with icons for users, share, documents, and a pie chart. The main header includes tabs for 'Week', 'Month', 'Quarter', 'YTD', and 'All', along with a search bar and an 'Advanced' button. A sidebar on the left contains several menu items: 'ws Test Account' (Last Action: Locked), 'New Account Open' (Last Action: Agent On-Site Signature Approved), 'New Illustration -' (Last Action: Updated), and 'New Guided Illustration' (Last Action: Updated). The main content area features a 'User List' modal window. This modal has a search bar and a list of users: 'All Users (ALL)', ', (null)', 'admin (IT2001)', 'AGENT FULLNAME (test)', 'Agents Full Name (grant_it)', 'Agents Full Name (grant1_it_2)', 'Agents Full Name (grant2_it)', 'Agents Full Name (grant2_it_2)', and 'Agents Full Name (grant3_it_2)'. To the right of the modal, there are buttons for 'In Signatures', 'Signatures Complete', and 'Data Entry', each with 'Delete' and 'Copy' sub-buttons. At the bottom of the modal, there's a 'Last Audit Entry' section showing '3/8/2018 2:02:30 PM MST' and a 'View History' link. At the very bottom of the interface, there are 'View', 'Requests', 'Delete', and 'Copy' buttons.

How to Enable and Use This Feature

To use this feature type search string/character in textbox and click on search Image.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		

FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
- All Applications	Yes	Added search textbox and button on owner list partial view.
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		