INSURANCE TECHNOLOGIES

Enhance Save Logic for Groups, Product Access and Needs Filter

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iConnect 243551 Design Approach - Enhance Save Logic for Groups, Product Access and Needs Filter

Project Overview

Changes can be made to the Product Access and Needs Filter by Organization dropdown selection. Currently, the save logic on the Groups setting does not capture all changes made at an Organization level on the History tab. Enhancements will be made to add the Organization name to the change made by role on the Group History. The Groups, Product Access View will also be restored to the pre-2.20 release view.

1   Restore the Groups, Product Access View from 2.20 Release Change

A temporary change was implemented for the April 2.20 release to guide users to manually save prior to changing Organizations on the Product Access tab. The August 2.21 release will implement a change to the save logic, allowing for the Product Access page to be restored to its original design.

Remove the phrase, "Changes must be saved before selecting new Organization"

Restore the location of "Check/Uncheck All" be its original position, next to the Organization dropdown menu.

Before enhancement:

After enhancement:

Acceptance Criteria

- Groups, Product Access does not display, "Change must be saved before selecting new Organization".
- Groups, Product Access displays "Check/Uncheck All" next to the dropdown for Organization.

2 Enhance the Group History with Organization Detail

The Group History currently does not reflect the Organization in which the change was made for by role. Enhancing the Group History with the Organization detail will allow more information for the clients to determine what changes were made to the Activity Access and Needs Filter by Organization and role.

Group History before enhancement:

Group History after enhancement:

Acceptance Criteria

- Changes made on the Product Access tab are reflected in Group History by role with the Organization name detail.
- Changes made on the Needs Filter tab are reflected in Group History by role with the Organization name detail.