iConnect 195320 Wizards and Forms in Same UI Design Approach

Project Overview

This enhancement will allow the ability to have wizards and forms in the same activity which allows data entry in any order based on the order of the forms and wizards in the package. Both wizards and forms are seen or hidden in the UI using existing FireLight visibility logic – state approvals, rules, and form settings. Templates also continue to use the existing FireLight logic.

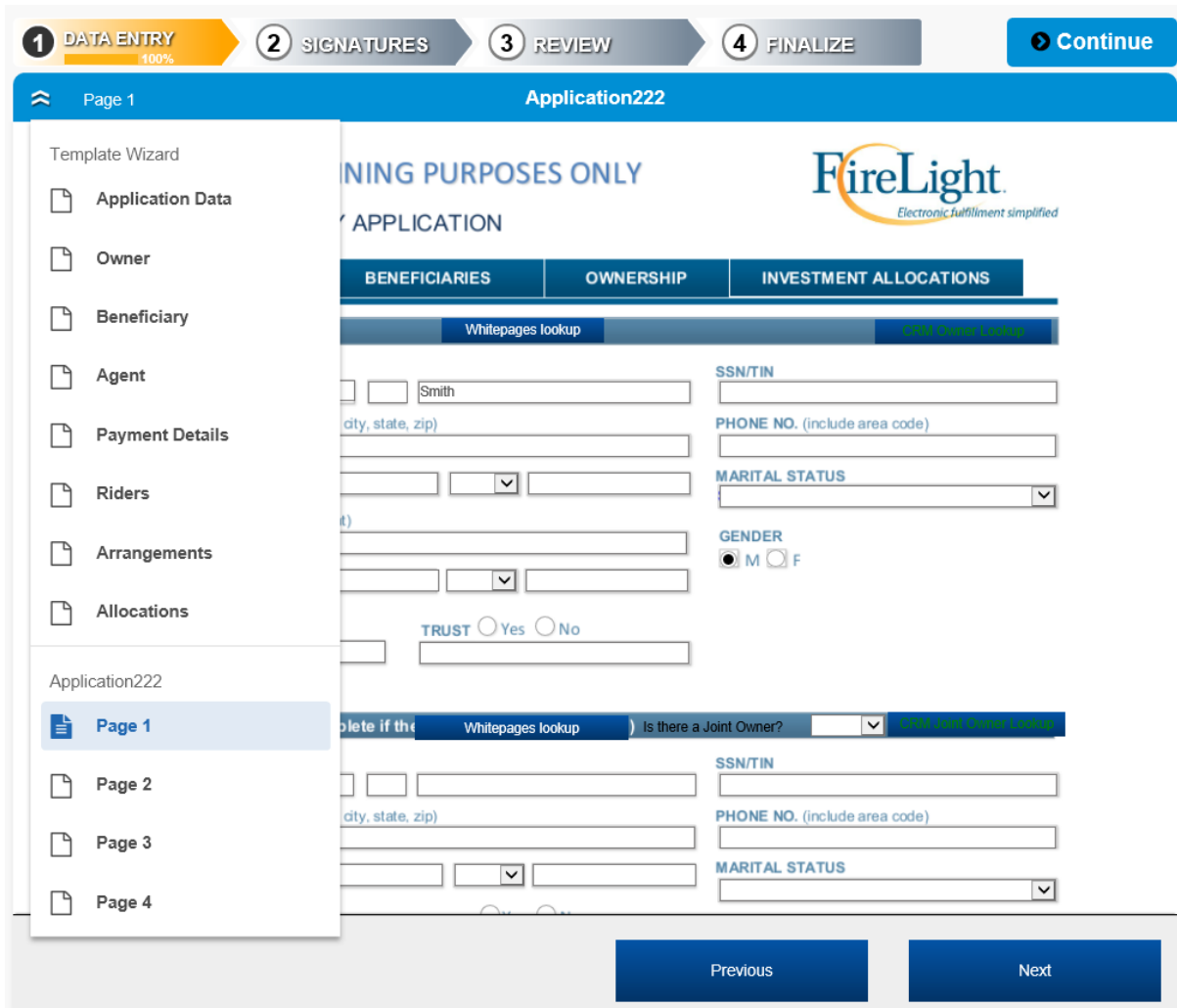**Manage wizards and forms visibility in same UI**

- Forms will be seen in products that contain wizards, determined by the order set through the admin tool (package > form ordering)
- The same rules for visibility will apply to the forms in the wizard products – jurisdiction, rules, form settings
- The same rules for type of form will apply – required, conditional, print only, optional, signing ceremony only

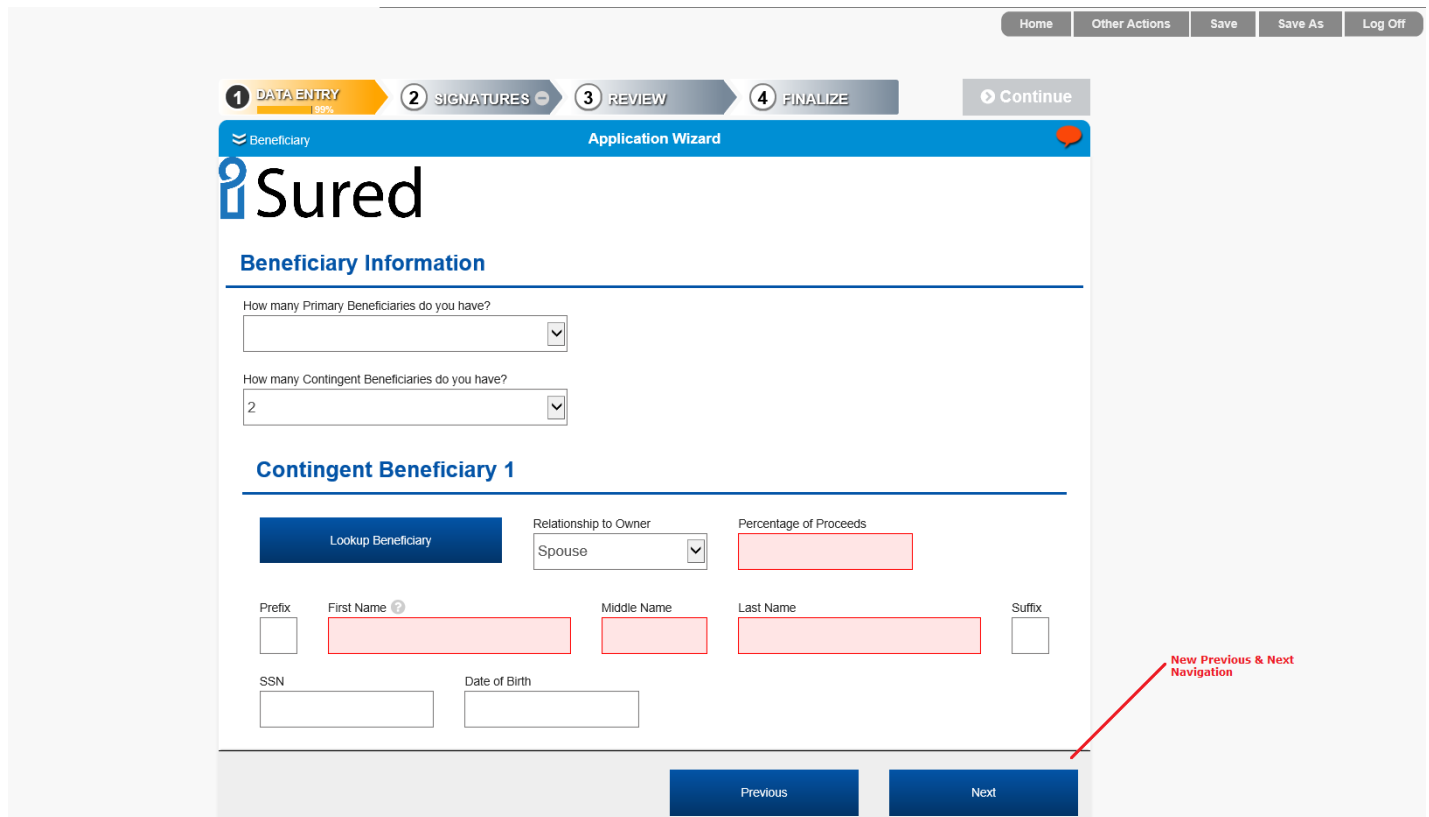See below for an example of the UI for a wizard and form within the same activity (eApp).

Wizard

Form

Update navigation to support wizards and forms in same UI

- If a wizard exists anywhere in the sales agreement, the chevrons will no longer be used for navigation. This ensures we have a consistent navigation structure that is user friendly.
- Navigation will now use "Previous" and "Next" buttons that are always visible at the bottom of the screen.
- Modified style of navigation button bar so it is always available and absolutely positioned at the bottom of the page or bottom of the rendering container if the user has scrolled the bottom of the rendering container into view.
- Updated text on buttons to show "Previous" and "Next" unless the current activity is a Consumer Portal activity.
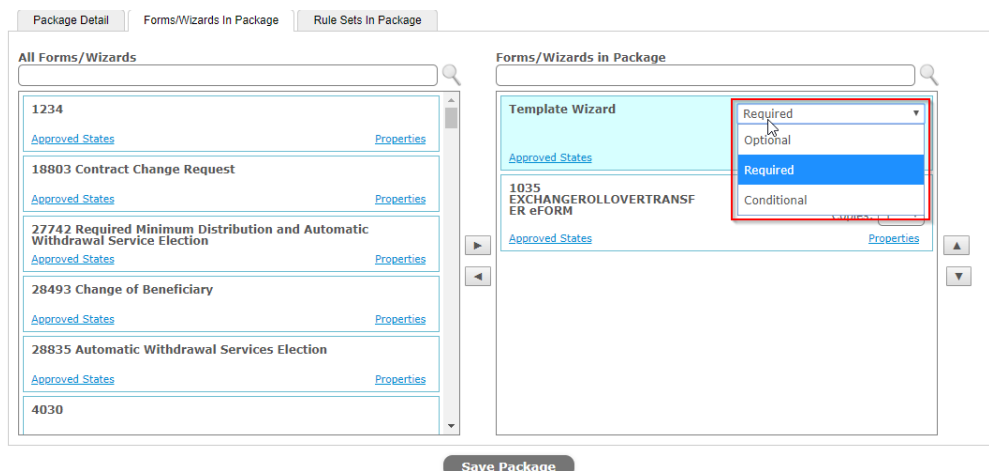- Modernized look and feel of navigation menu at the top of the page.

Support embedded for wizards and forms in same UI

- Embedded FireLight should work the same while using forms/wizards in same UI.
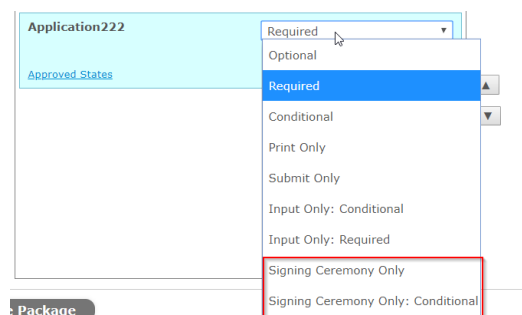- Embedded works correctly, and all features available in forms are applied correctly.

Only allow wizard forms to be set to required, conditional, and optional in the Admin tool's Sales Agreements

- If is a wizard form moved into the sales agreement, then the options are limited to required, conditional, and optional in the duty type drop-down menu.

Update "Signing Ceremony Only" functionality to meet new wizards and forms in the same UI requirements and add "Signing Ceremony Only: Conditional" option

- Currently, forms that are in a package with a wizard are only shown in the signing ceremony. Once wizards and forms can be used in data entry together, it will be necessary to specify if a form will be in data entry and signing ceremony, or signing ceremony only. This setting will specify that the form only shows in the signing ceremony.
- Form set to Signing Ceremony Only does **not** show in package form selection.
- Form set to Signing Ceremony Only does **not** show in data entry when app is in unlocked status.
- Form set to Signing Ceremony Only does **not** show in page drop-down menu.
- Form set to Signing Ceremony Only **does** show in the edit app view when the app is locked and you return to the edit app view during signing.
- Form set to Signing Ceremony Only **does** show in Display/Print PDF in select documents to print with checked by default and type labeled as Signing Ceremony Only.
- Form set to Signing Ceremony Only **does** show in Display/Print PDF in select documents to print with check disabled when app has transitioned beyond signing and is labeled as Signing Ceremony Only.
- Form set to Signing Ceremony Only **does** show in signing ceremony for each signer if there are no signature controls present on the form.
- Form set to Signing Ceremony Only **does** show in signing ceremony for only the appropriate signers if there are signature controls present on the form.
- Data pre-fills appropriately from wizard to form in signing ceremony. Data is visible in the display/print pdf screen, in the signing ceremony acknowledgement screen, and in the edit app view when the app is locked.
- Form set to Signing Ceremony Only is included in forms sent to the carrier by default (unless otherwise specified in the provider). Document is set to SigningCeremonyOnly to allow the provider to control exclusion.
- If Signing Ceremony Only form includes signature controls, the signature is visible on the form after signing in the edit app view, the form acknowledgement view, and in the Display/Print PDF view.

Update the navigation bar to no longer scroll

- The FireLight navigation bar no longer scrolls and stays visible at all times.
- The user is now able to view and access functionality on the navigation bar at any time.

Make wizard pop-up text customizable

- Any wizard pop-up text can be customized manually by Insurance Technologies for each client.