
Create new group options to control Read Only functionality

FIRELIGHT BASE



CREATE NEW GROUP OPTIONS TO CONTROL READ ONLY FUNCTIONALITY

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Design Approach - Create new group options to control Read Only functionality


1 Admin: Create new group options to control Read-Only functionality


Create new group options to control read-only functionality.

1. A new group option called "Enable Read-only Activity" will appear under the User Rights Home/All Activities section. When this option is checked, the standard Activity Read-only logic will be implemented for the assigned role code. If "Enable Read-only Activity" is checked, the role code will not be able to edit orders, no edits means no saving, and no continuing. Additionally, the user cannot edit the Documents dialogue. The read-only functionality will support printing unless other group codes to disable print is checked. This setting should appear under the User Rights Home/All Activities section.

Groups - FL Access Carrier

Groups

 [Create New](#)



Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 11/22/2019 10:42:24 UTC

Name

Illustration Services Role Code

TC Role Codes

App | Admin | Review Queue | Activity Access | Product Access | Case Access | Review Queue Access | Needs Filter | Debugging Tools | Training

☐ Disable Send Email Request
☐ Optional Client Email

Menu Options

☐ Disable Edit Preferences
☐ Disable Log Off
☒ Enable CRM Preferences
☒ Enable Training

Notifications

☐ Enable Form Changes Notifications
☒ Enable Use Screen Notification

Obfuscation/Screen Security

☐ Enable Obfuscation
 Timeout: seconds (0 for None)

Other Actions

☐ Disable Show Annotations
☐ Disable View Activities Summary
☐ Disable View Documents

☐ Disable Annuity Quotes
☐ Disable Life Quotes

Share/Transfer/Case Access

☒ Allow Activity Share
☒ Allow Transfer Activity
☐ Case Access by Firm ID
☒ Enable All Activities User Share

Signing: General

☐ Agent Not Required to View All Pages
☒ Allow Edits to Mobile
☐ Disable Decline E-Sign
☐ Disable Signing as Agent
☐ Disable Signing as Client
☐ Disable Signing Until All Pages Viewed
☐ Disable Sign Now
☒ Enable Single User to Sign Multi Signer Types
☐ Enable Override SSO

Training

☒ Enable Create Benchmarks
☐ Enable Test Mode
☒ Enable Override Date
☒ Enable View Benchmarks
☐ Enable Distributor Testing View

User Rights Home/All Activities

☐ Disable Copy Activities
☐ Disable Delete Activities
☐ Disable Editing Other Users' Activities
☐ Require Entry of Activity Name
☐ Disable Home Screen
☐ Disable Save Activities
☐ Disable View Activities
☐ Disable View Activity List
☐ Enable Read-Only

Save

1.1 App Activity View: When "Enable Read-only Activity" is checked, initiate Read-only for role code

When this option is checked, the standard Read-only logic in the Activity will be implemented for the assigned role code. If "Enable Read-only Activity" is checked, the role code will not be able to edit orders, no edits means no saving, and no continuing. Validation messages will appear but no edits can be made. When the role code setting "Enable Read-only" is checked, the Other Action: documents will be read-only. If "Enable Read-only" is checked, the role code will not be able to upload or remove documents. The read-only functionality will support printing unless other group codes to disable print is checked.

This will apply to wizards and forms in the same UI and legacy forms.

Activity View: Edit Name – disabled, Save and Save As – Disabled

Other Actions:

Documents - If "Enable Read-only" is checked, the Other Action: documents will be read-only. The Role code will not be able to upload or remove documents.

Summary - If "Enable Read-only" is checked, they can view. Currently, we have the ability to edit the name under summary. If "Enable Read-only" is checked, they could view but the edit name would be removed.

Display/Print PDF - If "Enable Read-only" is checked, the user can access display/print and can check/uncheck forms and hit Print Selected Documents.

History – If "Enable Read-only" is checked, the user can view the history.

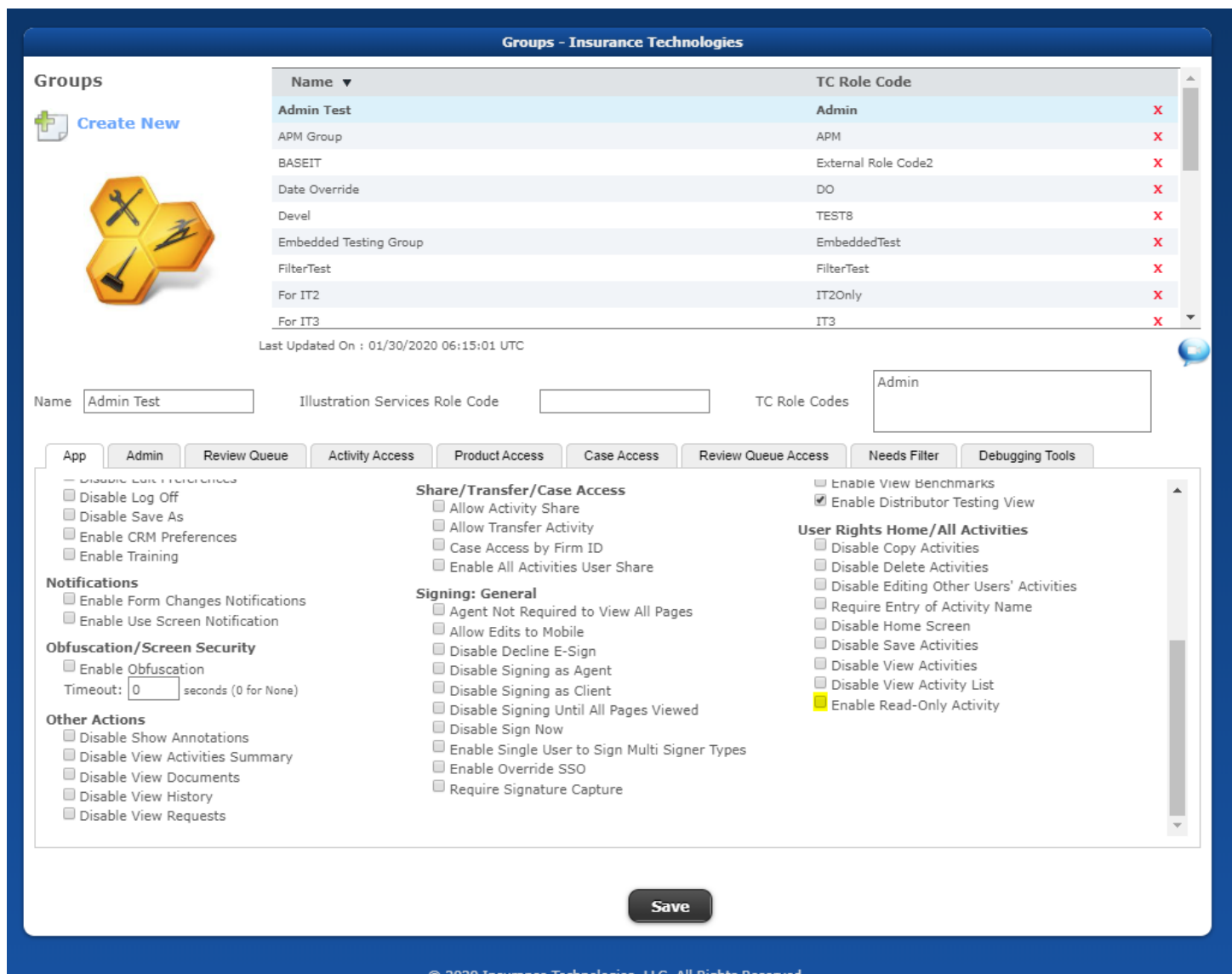
Acceptance Criteria

- If "Enable Read-only Activity" is checked, the role code will not be able to edit orders, Validation messages will appear but no edits can be made.
- If "Enable Read-only Activity" is checked, the role code will not be able to edit the order name.
- If "Enable Read-only Activity" is checked, the role code will not be able to Save or Save As
- If "Enable Read-only Activity" is checked, the role code will not be able to continue.
- If "Enable Read-only Activity" is checked, the role code will have this functionality in Other Actions:
 - **Summary** - If "Enable Read-only" is checked, they can view. Currently, we have the ability to edit the name under summary. If "Enable Read-only" is checked, they could view but the edit name would be removed.
 - **Display/Print PDF** - If "Enable Read-only" is checked, the user can access display/print and can check/uncheck forms and hit Print Selected Documents.
 - **History** – If "Enable Read-only" is checked, the user can view the history.
 - **Documents** - "Enable Read-only" is checked, the user can access Documents and view anything that is already loaded. The role code cannot remove existing documents or upload new documents
 - If "Enable Read-only" is checked, the role code will be able to printing unless other group codes to disable print is checked.

- If "Enable Read-only" is checked, the user with the role code setting checked can access Documents and view anything that is already loaded. The user with the role code setting cannot remove existing documents or upload new documents.
- If "Enable Read-only" is not checked, the normal read-write capabilities will be utilized.
- This will apply to all activity types that have access to this role code.
- Applies to forms and wizards in the same UI and legacy forms.

1.2 Admin: Add new group option for Read Only and Read Only Docs

Create a new group option called Enable Read-only Activity. This option will appear under the User Rights Home/All Activities section. This will control the activity actions and the documents and set all to Read Only. This setting should appear under the User Rights Home/All Activities section.



Name ▼	TC Role Code	
Admin Test	Admin	X
APM Group	APM	X
BASEIT	External Role Code2	X
Date Override	DO	X
Devel	TEST8	X
Embedded Testing Group	EmbeddedTest	X
FilterTest	FilterTest	X
For IT2	IT2Only	X
For IT3	IT3	X

Last Updated On : 01/30/2020 06:15:01 UTC

Name: Illustration Services Role Code: TC Role Codes:

App Admin Review Queue Activity Access Product Access Case Access Review Queue Access Needs Filter Debugging Tools

Activity Access

☐ Disable Log Off
☐ Disable Save As
☐ Enable CRM Preferences
☐ Enable Training

Notifications

☐ Enable Form Changes Notifications
☐ Enable Use Screen Notification

Obfuscation/Screen Security

☐ Enable Obfuscation
 Timeout: seconds (0 for None)

Other Actions

☐ Disable Show Annotations
☐ Disable View Activities Summary
☐ Disable View Documents
☐ Disable View History
☐ Disable View Requests

Share/Transfer/Case Access

☐ Allow Activity Share
☐ Allow Transfer Activity
☐ Case Access by Firm ID
☐ Enable All Activities User Share

Signing: General

☐ Agent Not Required to View All Pages
☐ Allow Edits to Mobile
☐ Disable Decline E-Sign
☐ Disable Signing as Agent
☐ Disable Signing as Client
☐ Disable Signing Until All Pages Viewed
☐ Disable Sign Now
☐ Enable Single User to Sign Multi Signer Types
☐ Enable Override SSO
☐ Require Signature Capture

☐ Enable View Benchmarks
☒ Enable Distributor Testing View

User Rights Home/All Activities

☐ Disable Copy Activities
☐ Disable Delete Activities
☐ Disable Editing Other Users' Activities
☐ Require Entry of Activity Name
☐ Disable Home Screen
☐ Disable Save Activities
☐ Disable View Activities
☐ Disable View Activity List
☒ Enable Read-Only Activity

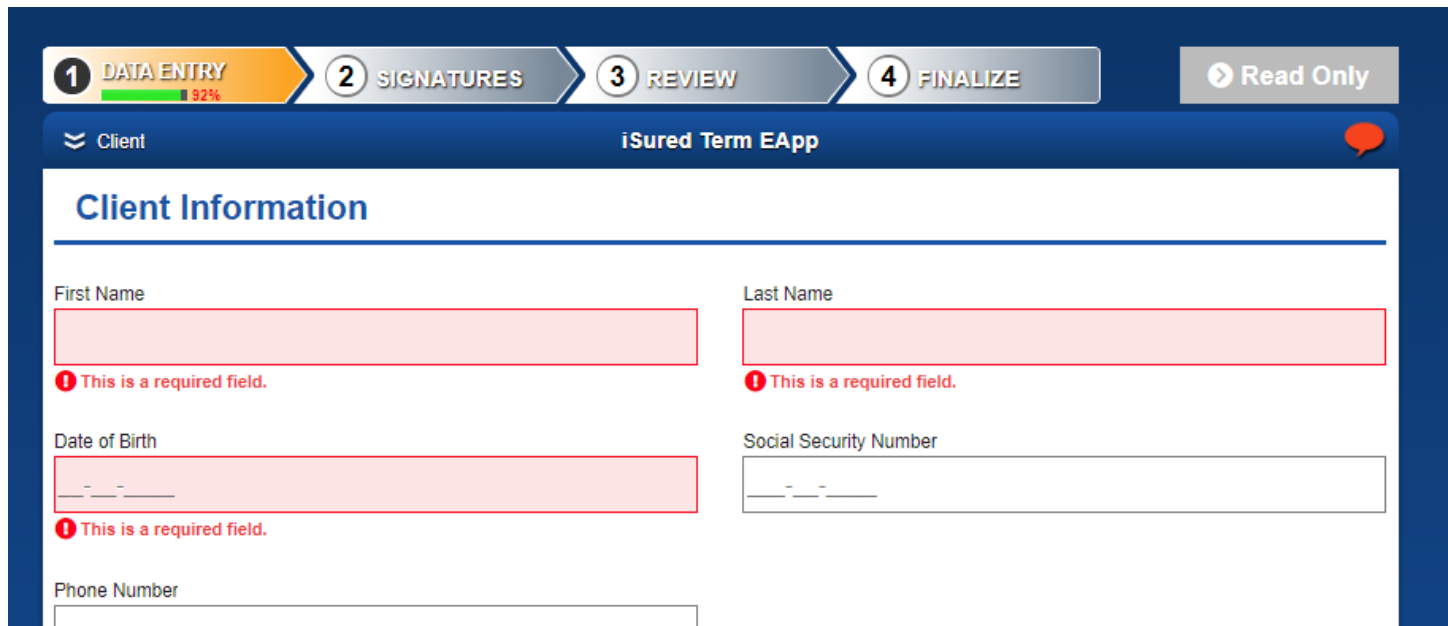
Save

Acceptance Criteria

- 1 new group option will appear under User Rights section. "Enable Read-only Activity"
- This setting is per role code.
- This setting will control Read-only functionality for the selected role code.
- This will apply to wizards and forms in the same UI and legacy Forms.

1.3 Read-only should show validation messages

When read-only is enabled, FL should show the validation messages. This will apply to any Read-only setting in FL. So, this will apply to the new "Enable Read-only Activity" and the existing Read-only for other users activities". Now, when these settings are active, the role code will not be able to edit orders but they will be able to view validation messages and errors. The red bubble will allow the toggle of errors.



The screenshot displays the 'Client Information' form within the 'iSured Term EApp'. The interface includes a progress bar at the top with steps: 1 DATA ENTRY (92%), 2 SIGNATURES, 3 REVIEW, and 4 FINALIZE. A 'Read Only' button is located in the top right. The form fields are as follows:

- First Name:** A text input field with a red border and a red error message: "This is a required field."
- Last Name:** A text input field with a red border and a red error message: "This is a required field."
- Date of Birth:** A date input field with a red border and a red error message: "This is a required field."
- Social Security Number:** A text input field with a white border.
- Phone Number:** A text input field with a white border.

A red bubble icon is visible in the top right corner of the form area.

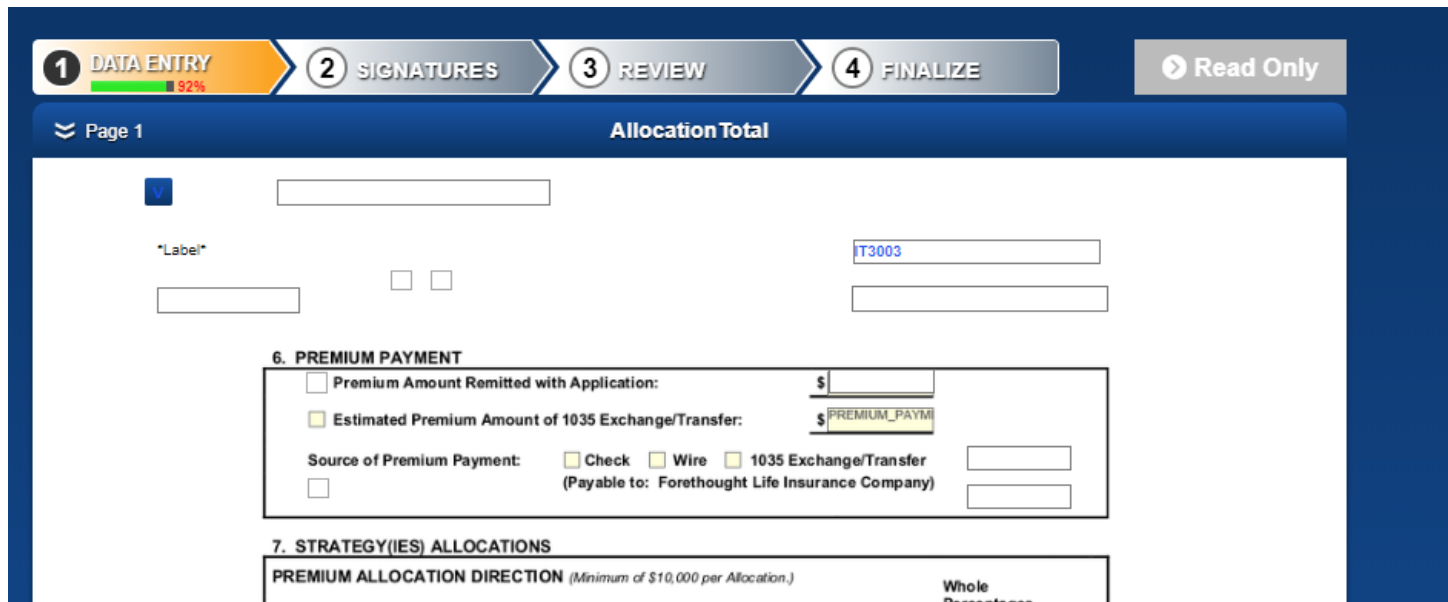
Acceptance Criteria

- If "Enable Read-only Activity" is checked, the role code will not be able to edit orders, Validation messages will appear but no edits can be made.
- Red bubble will allow the toggle of errors when read-only is enabled.

1.4 Read-only "Continue" button should be grayed out stating "read-only"

When read-only is enabled, FL will not allow the user to continue so the "Continue" button will be relabeled Read Only. It will be grayed out and will state "Read Only"

This will be how it is displayed in wizards and forms.



The screenshot displays a wizard interface with four steps: 1 DATA ENTRY (highlighted in orange), 2 SIGNATURES, 3 REVIEW, and 4 FINALIZE. A 'Read Only' button is visible in the top right corner. Below the steps, there is a section for 'Allocation Total' and a form area. The form includes a 'Label' field with the value 'IT3003'. Below this, there is a section for '6. PREMIUM PAYMENT' with fields for 'Premium Amount Remitted with Application' and 'Estimated Premium Amount of 1035 Exchange/Transfer'. The 'Source of Premium Payment' section includes checkboxes for 'Check', 'Wire', and '1035 Exchange/Transfer'. Below this, there is a section for '7. STRATEGY(IES) ALLOCATIONS' with a table for 'PREMIUM ALLOCATION DIRECTION' and a 'Whole' column.


Acceptance Criteria


- When read-only is enabled, FL will not allow the user to continue so the "Continue" button will state Read Only.
- The button will be grayed out stating "read-only"
- This will be how it is displayed in wizards and forms.

1.5 App All Activity View: When "Enable Read-only Activity" is checked

When this option is checked, the standard Read-only logic will be implemented for the assigned role code and it will apply to the functions available in the All Activities view. If "Enable Read-only Activity" is checked, the role code will not be able to Delete or Copy. This role code can only View the order in All Activity.

This will apply to wizards and forms in the same UI and legacy Forms.


Week Month Quarter YTD All

User: My Activities  Status: Any Sort: Date

User kdease: 1 activities updated in the last 30 days.

New Application - Lifetime Income		Lifetime Income	Data Entry
Last Action: Created	Last Audit Entry: 2/4/2020 12:58:19 PM EST New created by agent 'Application'. is currently unlocked and Active. View History Created: 2/4/2020	<input type="button" value="View"/> <input type="button" value="Requests"/> <input type="button" value="Copy"/>	

Acceptance Criteria

- If "Enable Read-only" is checked, the role code will not be able to copy orders,
- If "Enable Read-only" is checked, the role code will not be able to Delete orders.
- If "Enable Read-only" is checked, the role code will be able to open and view the orders.
- This will apply to all activity types that have access to this role code.
- This will apply to wizards and forms in the same UI and legacy Forms.