INSURANCE TECHNOLOGIES

Copy with Changes Modifications

FIRELIGHT BASE

FireLight®

Platform

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Table of Contents

iConnect 249180 Design Approach - Copy with Changes Modifications

Project Overview

Distributors are reporting issues with changing the carrier when using Copy with Changes because some data items are not being cleared. To correct this problem, clients want to disallow changing the carrier when selecting Copy with Changes. Additionally, another carrier mentioned disallowing Copy with Changes in the feedback for this change. As a result, support will be added for both options.

1 Remove Disable Copy in All Activities and replace with two new options in Groups

Remove the current group option, Disable Copy in All Activities, which disables the Copy button while you are in All Activities. The section should be alphabetized.

User Rights Home/All Activities
☐ Disable Copy in All Activities

Replace it with two new options, Disable Copy As Is and Disable Copy with Changes,

User Rights Home/All Activities
☐ Disable Change Carrier Copy With Changes
☐ Disable Copy As Is
☐ Disable Copy with Changes
☐ Disable Delete in All Activities
☐ Disable Editing Other Users' Activities

Acceptance Criteria

- Disable Copy in All Activities does not appear in Groups under User Rights Home/All Activities section.
- Disable Copy As Is and Disable Copy with Changes options appear in Groups under User Rights Home/All Activities section.
- The section is alphabetized.

2 Add new Disable Change Carrier Copy with Changes to Groups

Add new Disable Change Carrier Copy with Changes option in the User Rights Home / All Activities section above the two new copy options.

This option only appears if the organization is a Distributor.

Acceptance Criteria

- Disable Change Carrier Copy with Changes appears in the User Rights Home / All Activities section if the organization is a Distributor.
- Disable Change Carrier Copy with Changes does not appear in the User Rights Home / All Activities section if the organization is a Carrier.
- Alphabetized

3 Hide carrier selection on Create New dialog if Disable Change Carrier Copy with Changes selected

Hide the carrier selection on the Create New dialog when Copy with Changes is selected and Disable Change Carrier Copy with Changes is selected in Groups.

Also, if the Product Type drop-down list is changed to All or any other option, make sure only the active carrier's products show.

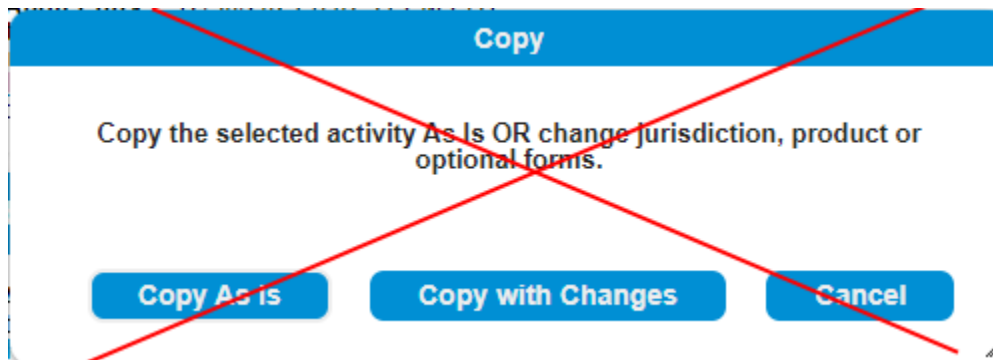*Acceptance Criteria*

- The carrier selection is hidden if Disable Change Carrier Copy with Changes is selected in Groups and Copy with Changes is selected in All Activities in an activity with a product defined. The user can only change the Jurisdiction and/or Product Type/Product. This assumes Disable Copy with Changes is not selected.
- The carrier selection is not hidden if Disable Change Carrier Copy with Changes is not selected in Groups and Copy with Changes is selected in All Activities in an activity with a product defined. This assumes Disable Copy with Changes is not selected.
- If Disable Copy with Changes AND Disable Change Carrier Copy with Changes are both selected on a Group, then Copy with Changes does not appear in All Activities.
- If the Product Type is changed to All (or any other option), verify only the active carrier's products appear.
- Verify product availability (embedded).

4 Hide the Copy dialog in All Activities if one Copy option selected and launch correct option

In Admin/Groups, if Disable Copy As Is OR Disable Copy with Changes is selected, hide the Copy dialog when the Copy button is selected on an activity in All Activities and launch the correct copy option.

Steps:

Open All Activities, and select Copy, such as an Application.

If Copy with Changes is disabled, you will see the Copy Activity dialog next.

If Copy As Is is disabled, you will see the Create New dialog next.

Acceptance Criteria

- When the dialog is hidden, verify the correct copy option is launched.
- If Disable Copy As Is is selected for the group role code, make sure the Copy with Changes option is launched.
- If Disable Copy with Changes is selected for the group role code, make sure the Copy As Is option is launched.
- If Disable Copy As Is OR Disable Copy with Changes is selected, the Copy dialog does not appear when the Copy button is selected in All Activities on a saved activity, such as an Application.
- If Disable Copy As Is AND Disable Copy with Changes are selected, the Copy button in All Activities is disabled on all of the activities.

5 Database script created to select new Copy group options

If the current Group option, Disable Copy in All Activities, is selected, create a script to be run on the various environments, UAT/Staging/Production, to select the two new options, Disable Copy As Is and Disable Copy with Changes.

Acceptance Criteria

- Get a list of clients prior to being promoted to the UAT environment to test.
- If Disable Copy in All Activities is selected, after the script is run, both Disable Copy As Is and Disable Copy with Changes should be selected.
- If Disable Copy in All Activities is not selected, after the script is run, both Disable Copy As Is and Disable Copy with Changes should not be selected.