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Workflow Separator

# FIRELIGHT BASE

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FireLight®

Platform

**WORKFLOW SEPARATOR**

**Document Version: 1.0**

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**Insurance Technologies, LLC**

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# iConnect 239391 Design Approach - Workflow Separator

## Project Overview

FireLight needs the ability to separate out the workflow so firms can control progression to the next page based on all the validations being cleared. For example, present a final checkbox once the app is 100%. Today, to do this technically you cannot be 100% because once all data is entered, a new requirement is presented which means the app is no longer at 100%. The old consumer portal had this logic where the final acknowledgement and the next button would not show until the previous screen was 100%.

This enhancement will add the ability for the admin to configure a workflow separator between wizard screens that must be clear of all errors before the user can proceed. This enhancement will eliminate the need to control the workflow via rules which is not smooth and error prone. From a UI perspective, when the separator is added, the wizard workflow will hide the Next button and grey out the screen navigation until all the errors on the previous screen are corrected. There are many use cases for this. One common use case is for agent attestation prior to continuing to sign.

To implement this, concept of section break is introduced that is applicable to wizard setup only.

This is an optional enhancement. Clients that do not want to add sections to their wizard will not be impacted. Those that add section breaks will have the below impacts:

1. Wizard Design- New object of Section Break will be added to the Page Order screen to group pages within a wizard and create the sections.
2. Wizard Validations- Section Break will impact only Wizards and not forms.
3. Wizard Navigation- User is unable to navigate to another section of the wizard until the prior section is 100% complete with no errors.
4. Embedded API - the API for embedded that returns the wizard pages and navigation graph will now show the section breaks and pages within the section breaks.

# 1 Admin - Section Break Implementation

To implement Workflow Separator, a concept of section break will be introduced that is applicable to wizard setup only. A section break will be added after a page to logically group all pages prior to that page (that are not already added to another section) into one section. When section break is added to a wizard, the user cannot continue to another section in the application until all errors on all pages in the section are 100% complete. This functionality will apply to wizards only and will not be implemented for forms.

Impact: Admin -> Wizard Designer -> Page Order

## 1.1 Admin - Add 'Section Break' for wizards

To support additional step for agent attestation on wizards and to give flexibility to clients to group together pages to create sections, a new functionality of 'Section Break' will be introduced.

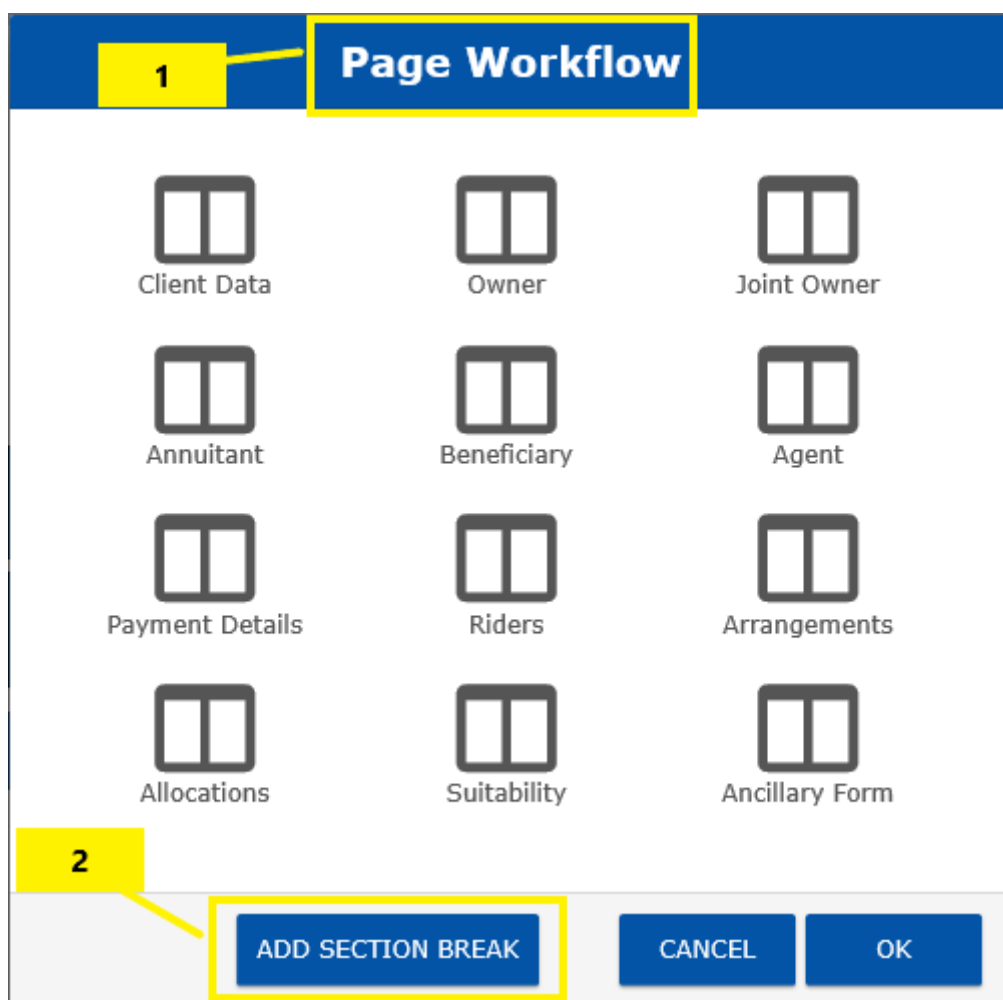
Scope of these sections will not include availability for forms but will be within Wizards only. Section Breaks will be managed from the Page Order window, where current functionality to order pages in a wizard will work the same as it does currently. Adding section break will be an additional feature available through Page Order window.

Within a wizard, adding a section break after a page will logically group all pages prior to that page (that are not already added to another section break) into one section. Adding section break will require all errors on all pages within the section to be 100% complete in the application before the user is able to move to next pages. Multiple section breaks cannot be placed next to each other or first in the Wizard.

### Enhancement:

A. Items will be added to the Page Order screen.

1. Title will be changed to 'Page Workflow' to indicate new function/change
2. New button 'Add Section Break' will be added to allow adding a section break to page workflow
3. Icon for Section Break to be used from Font Awesome is 'page-break' (as shown in below mock-up).

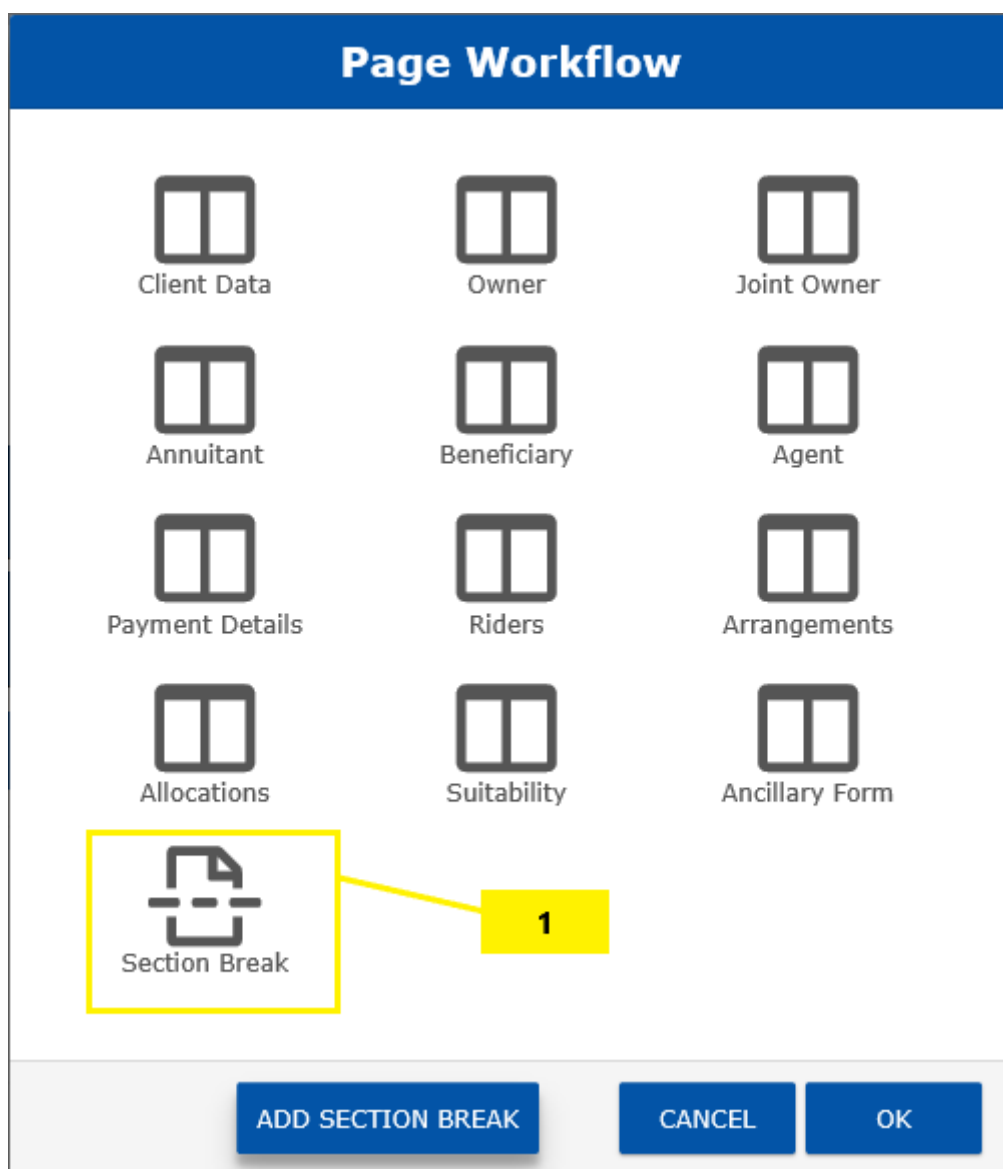


## B. Adding Section Breaks

1. Click on 'Add Section Break' button and by default, the new Section Break will be added after the last place with a default name (Data Item Id). Once a Section Break has been added to a Wizard in the admin, it can be moved by using drag-drop functionality to place after a required page, as currently done for page order.

### Validation:

1. A Section Break will be required to have a page prior to it. When adding a new Section Break, it will by default be added after the last page in the wizard. If there is already a Section Break present at that position, new Section Break will not be added, and FireLight will alert the admin user to change position of the previous Section Break.
2. When changing position of a Section Break, it will be placed between two pages, hence drag-drop function will validate this condition.
3. Section Break cannot be the first item in a wizard.

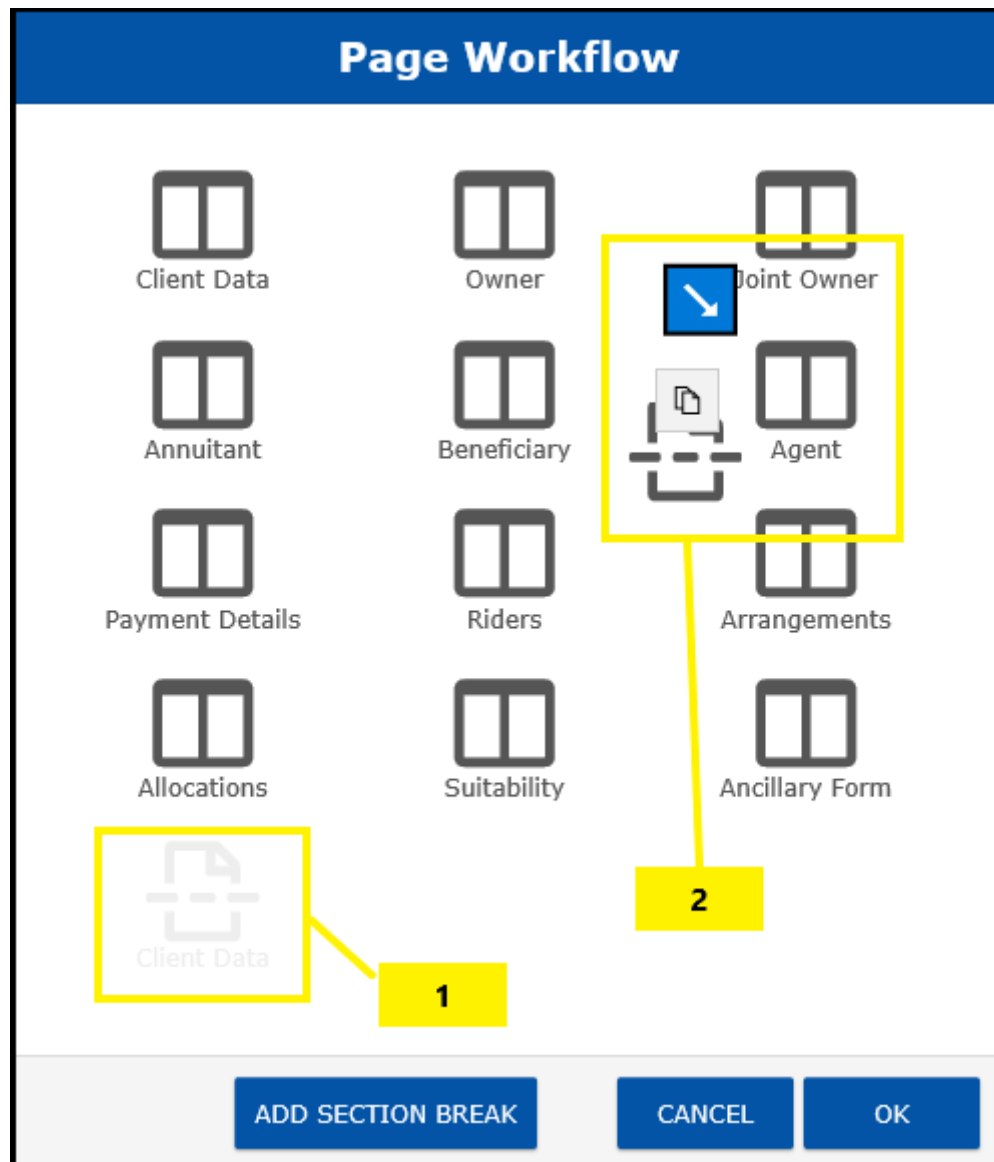


### C. Example: Adding a Section Break after Beneficiary and before Agent pages

1. Drag-drop the icon to place into position. This function will happen the same way it works currently for Page Order. By default, Section Break is added after the last page.
2. Select the icon and place it in the required position.

#### Validation:

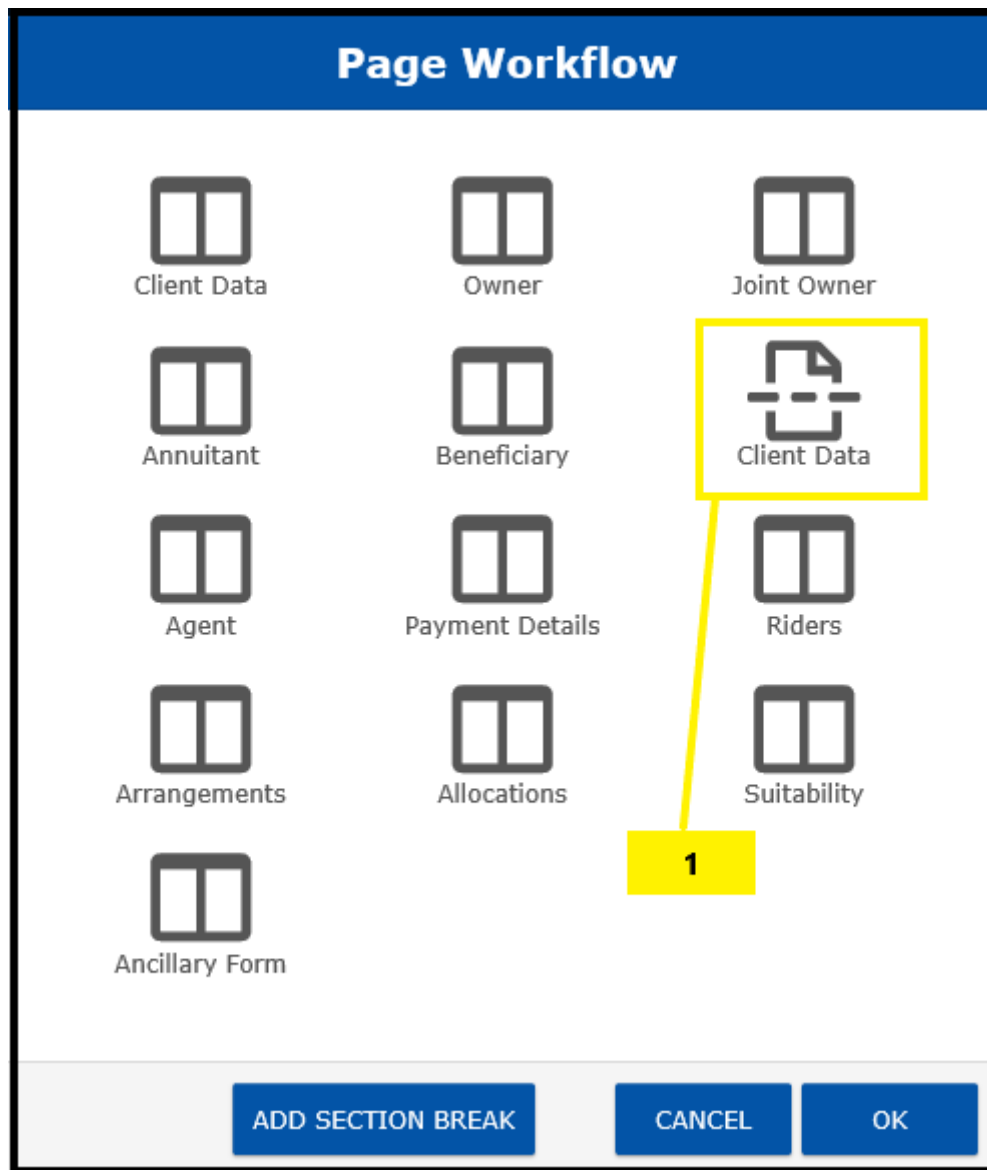
When changing position of a Section Break, it is placed between two pages, hence drag-drop function will validate this condition.



If section break in above mock-up is placed between Beneficiary and Agent, it will show like below mock-up.

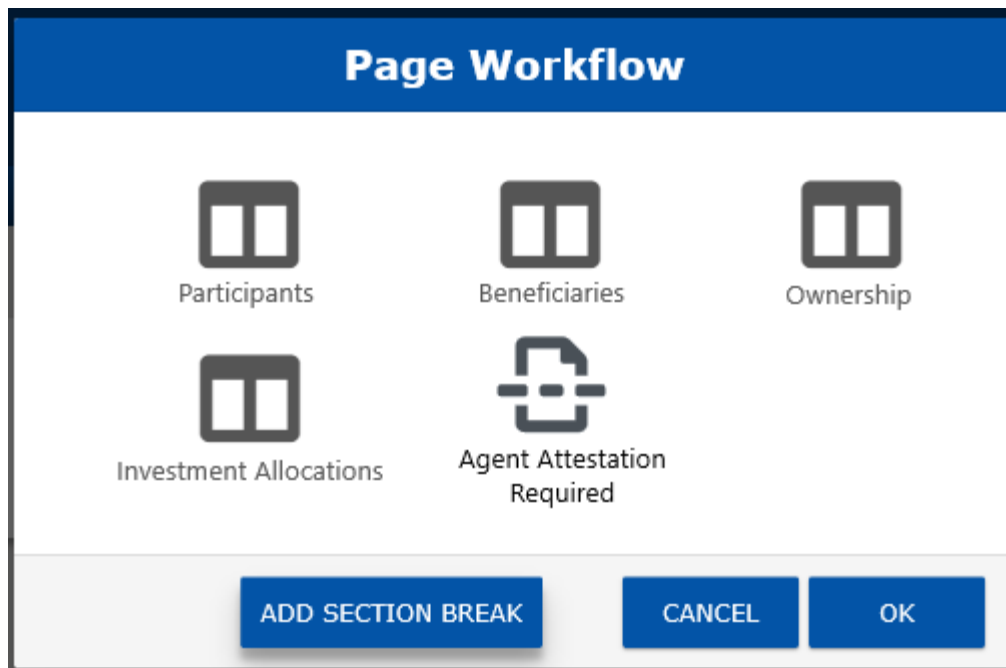
1. Section Break placed at required position





#### E. Example: One section in a wizard

In this case, the section break will be placed at the end, i.e. after the last page in wizard. Logically, this means when data entry/errors on all pages in the wizard are complete, the user can move to the Next Form/Wizard in the application. Hence, when user is on the last page of the wizard (in below case Investment Allocations page), all errors are complete and Next button on that page is enabled/clickable.



**F. Example: Wizard with multiple Section Breaks (There are 4 section breaks in this example.)**

1. Client Data: after Beneficiary page

- For application implementation, unless all errors are completed on all 5 pages (i.e. Client Data, Owner, Joint Owner, Annuitant, Beneficiary) within the Client Data section, the "Next" button on the Beneficiary page will not be enabled. Also, all pages after the Beneficiary page will remain disabled/inactive.

2. Agent Data: after Agent page

- For application implementation, unless all errors are completed on the Agent page within the Agent Data section, the "Next" button on the Beneficiary page will not be enabled. Also, all pages after the Agent page will remain disabled/inactive.


















3. Contract Data: after Ancillary Form page

- For application implementation, unless all errors are completed on all 6 pages (i.e. Payment Details, Riders, Arrangements, Allocations, Suitability, Ancillary Form) within Contract Data section, the "Next" button on the Ancillary page will not be enabled. Also, all pages after the Ancillary page will remain disabled/inactive.

4. Agent Attestation Required page: after Agent Attestation Form page.

- For application implementation, unless all errors are completed on the Agent Attestation Form within the Agent Attestation section (required), "Next" button on Agent Attestation Form page will not be enabled. Also, all Forms/Wizards after the Agent Attestation Form page will remain disabled/inactive.

**Page Workflow**

 Client Data	 Owner	 Joint Owner
 Annuitant	 Beneficiary	 Client Data
 Agent	 Agent Data	 Payment Details
 Riders	 Arrangements	 Allocations
 Suitability	 Ancillary Form	 Contract Data
 Agent Attestation Form	 Agent Attestation Required	

ADD SECTION BREAK

CANCEL

OK

**Acceptance Criteria**

- On Wizard designer, new object 'Section Break' is added on Page Order window.
- Set Page Order link is renamed as "Set Page Workflow"
- Page Order window title is renamed as "Page Workflow".
- 'Section Break' is added to the end by default.
- Rules can be written using section break names, like rules written for page names.
- Section break is given a default Name and Text upon creation.
- No changes to the ordering of pages on Page Order window; functionality remains the same.
- Manual movement of Section Break is managed using drag and drop functionality.
- When managing page workflow, section break has one or more pages prior to it. It will not be placed first in the order and neither will there be two section breaks, one after the other.

**1.2 Admin - Remove/Edit Section Break**

Section Breaks will have two properties as "Name" and "Text". Name property will be the data item id. Text will be displayed to the user on the app side. Default values will be given to both these properties when a section break is added. Admin user can also edit these values by double clicking on the section break icon. Section break properties window will show default values for both the properties and allow customizing them.

From the same properties window, Admin user can also remove the selected section break from Page Workflow.

To edit the heading or remove the section break, double click on the icon to open properties box.

1. When Section Break icon is double clicked, it will open another dialog window to enter Name (Data Item Id) and Text (Section Heading). Functioning of this will be like other field properties dialog box. When section break is created, a default Name and Text is added that can be changed from this properties box.

2. Section Break can be removed from the Page Workflow from same screen by clicking the 'Remove Section Break' button.

3. Character limit for Name and Text properties will be up to 75 chars.

4. Name and Text properties for the Section Break cannot be left blank; these can remain with the default values or the user can create a custom value for both the properties. On keeping these values blank, an error will prompt.

5. Section Break Name and Text properties will be named uniquely within the wizard. When duplicate values are entered, an error will prompt.

When button 'Remove Section Break' is clicked, it will also close window Section Break Properties (along with removing section break icon from Page Workflow window). As the current functionality works to save changes made to the wizard by clicking button 'Save Wizard', page workflow changes will also be saved in the same way.

**Section Break Properties**

Name  
SectionBreak1403

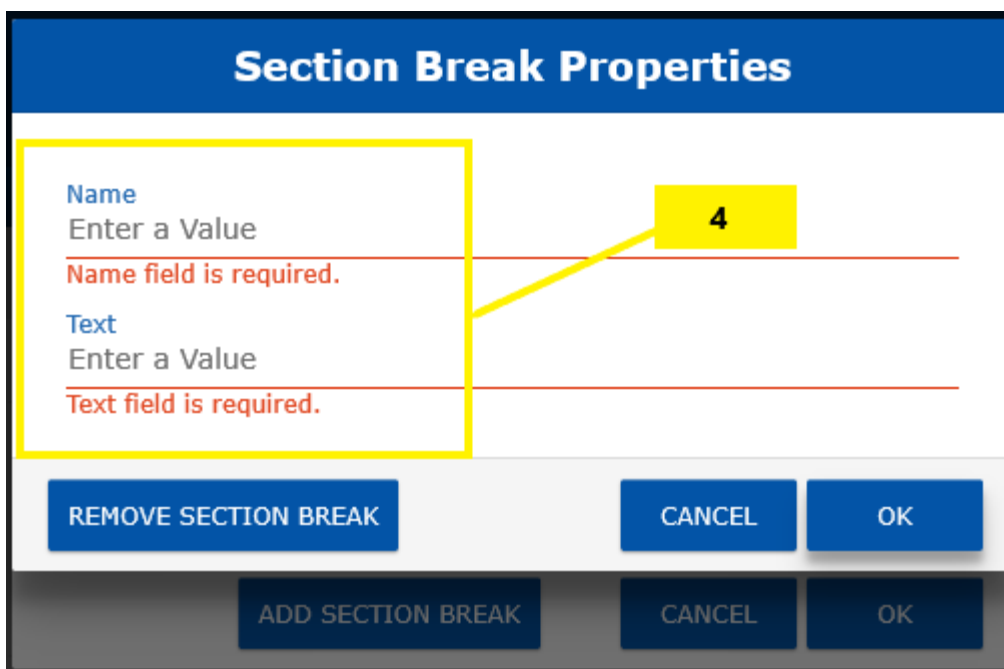
Text  
Section Break

REMOVE SECTION BREAK CANCEL OK

ADD SECTION BREAK CANCEL OK

Leaving Section Break Name field blank will display error - "Name field is required.".

Leaving Section Break Text field blank will display error - "Text field is required.".



**Section Break Properties**

**Name**  
Enter a Value  
Name field is required.

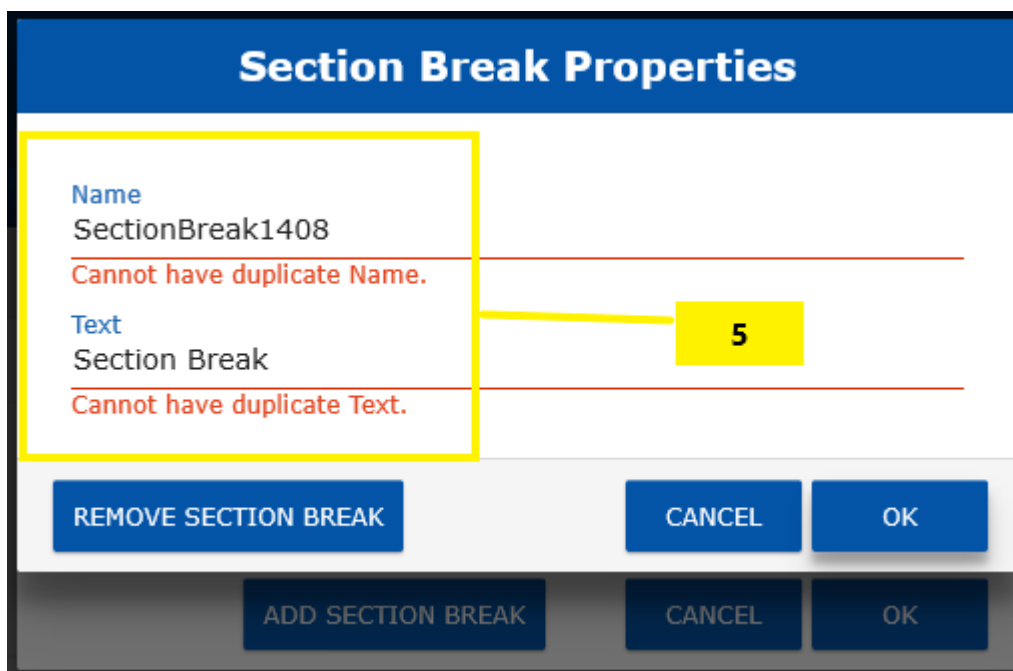
**Text**  
Enter a Value  
Text field is required.

REMOVE SECTION BREAK CANCEL OK

ADD SECTION BREAK CANCEL OK

If duplicate section break name is added an error will be thrown as "Cannot have duplicate Name.".

If duplicate section break text is added an error will be thrown as "Cannot have duplicate Text.".



**Section Break Properties**

**Name**  
SectionBreak1408  
Cannot have duplicate Name.

**Text**  
Section Break  
Cannot have duplicate Text.

REMOVE SECTION BREAK CANCEL OK

ADD SECTION BREAK CANCEL OK

***Acceptance Criteria***

- Double clicking on section break icon opens its properties window.
- Double click functionality is not functional for pages.
- Section Break removal processes successfully.
- Removing a section break does not impact the page order; sequence in which pages are placed remains the same.
- Custom Section Heading Name and Text can be entered for the 'Section Break'.
- Section Name and Text are mandatory; they cannot be left blank.
- Maximum limit of characters to be entered in Name property is 75 chars.
- Maximum limit of characters to be entered in Text property is 75 chars.
- Section Break Name are not duplicate within the wizard.
- Section Break Text are not duplicate within the wizard.

**1.3 Admin - Error validations for Section Breaks**

To allow Section Breaks to function as required and without conditional conflicts, a few validations will be enforced by the system. While adding a section break, it will be added at the end of the workflow by default. The user can add multiple section breaks by clicking “Add Section Break”, which will add one new section break per click at the end of the workflow. User can then arrange the section breaks between pages to group the pages together. When the user clicks the “OK” button, FireLight will check for below validations and provide error messages when necessary.


1. Section Break cannot be placed directly next to another Section Break. There must always be a page prior to a Section Break.
2. Section Break cannot be placed before the first page in wizard.


**Validation Examples:**


A. User attempts to add a new Section Break directly after another Section Break:


Error Message - “Section breaks cannot be next to each other.”


**Page Workflow**
ⓘ


  
 Client Data


  
 Insured


  
 Owner


  
 Beneficiary


  
 Client Data


  
 Agent


  
 Agent Splits


  
 Agent Data


  
 Payment Details


  
 Riders


  
 Allocations


  
 Arrangements

  
 Suitability

  
 Contract Data

  
 High Risk Questions

  
 Agent Attestation

  
 Section Break 1303

Section breaks cannot be next to each other.

ADD SECTION BREAK

CANCEL


















OK

B. User places section break first in the order.

Error Message - "Section break cannot be the first item."



**Page Workflow** ❗

 Section Break 1303	 Client Data	 Insured
 Owner	 Beneficiary	 Client Data
 Agent	 Agent Splits	 Agent Data
 Payment Details	 Riders	 Allocations
 Arrangements	 Suitability	 Contract Data
 High Risk Questions	 Agent Attestation	

Section break cannot be the first item.

ADD SECTION BREAK
CANCEL
OK

### Acceptance Criteria

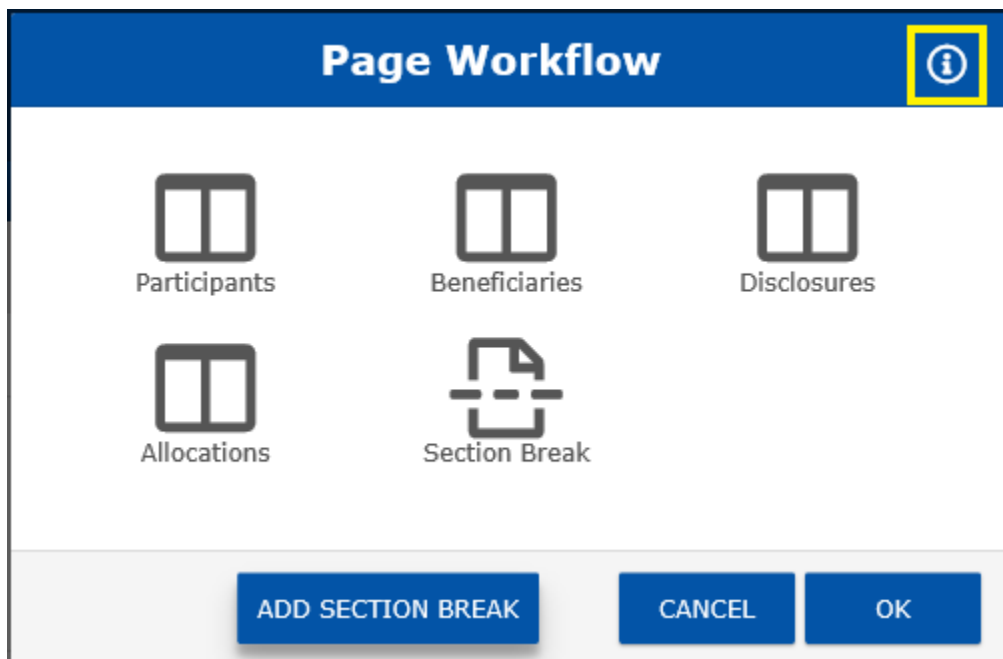
- Error message is presented if a section break is added next to an existing section break when “OK” button is selected.
- Error message is presented if a section break is placed before the first page in wizard when “OK” button is selected.

## 1.4 Admin - Add Help Bubble icon

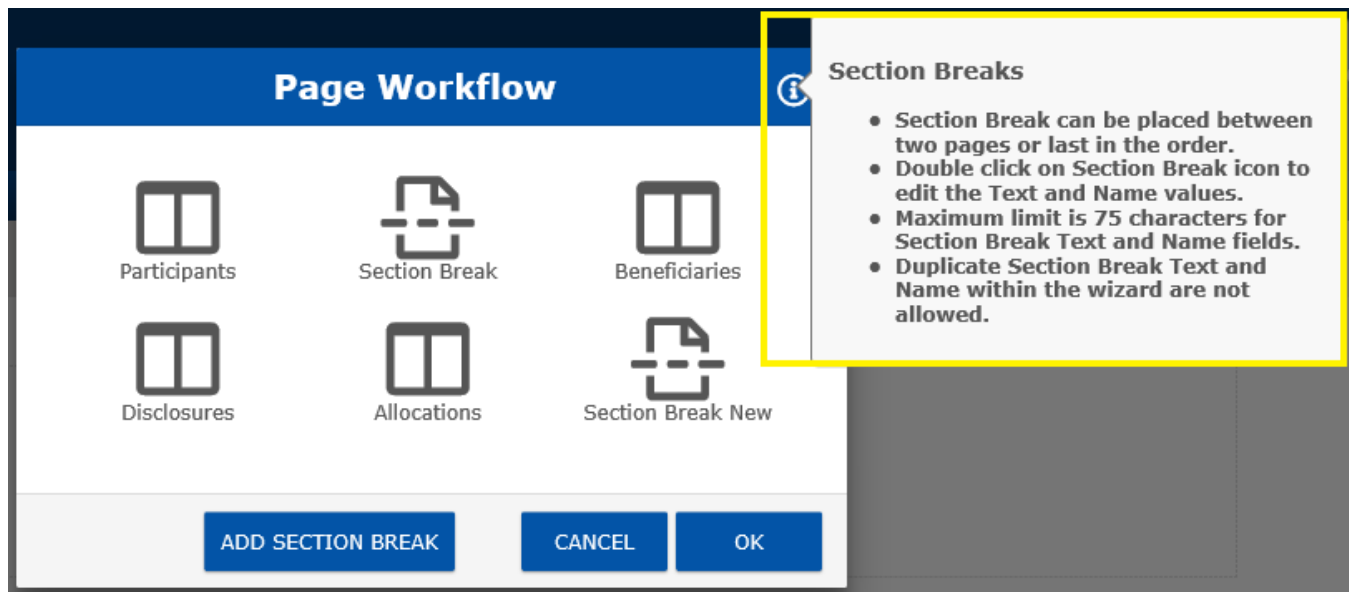
To guide users about validations and conditions applicable for Section Breaks on the Page Workflow screen, a help bubble icon will be placed at the title bar. When the user hovers over the icon, it will open a box to show help text. This will work like other screens in the admin.

Icon to be used for the help bubble at admin UI will be <https://fontawesome.com/icons/info-circle?style=regular>

Below mock-ups show position where help text icon will be displayed (at the title bar on top right of the screen).



Below mock-up displays how the box with help text will be shown when hovered over the help icon.



Text displayed in help screen will be:

Heading - Section Breaks

Help Text -

- Section Break can be placed between two pages or last in the order.
- Double click on Section Break icon to edit the Text and Name values.
- Double click on Section Break to remove it from page workflow.
- Maximum limit is 75 characters for Section Break Text and Name fields.
- Duplicate Section Break Text and Name within the wizard are not allowed.

### ***Acceptance Criteria***

- Information to guide users about the validations applicable will be provided on the Page Workflow screen via a help icon.
- Info-circle icon is used as help icon (<https://fontawesome.com/icons/info-circle?style=regular>).
- Info-circle icon is placed on the title bar at the top right section.
- Hover over the info-circle icon shows below help text
- Heading - Section Breaks
- Help Text -
  - Section Break can be placed between two pages or last in the order.
  - Double click on Section Break icon to edit the Text and Name values.
  - Double click on Section Break to remove it from page workflow.
  - Maximum limit is 75 characters for Section Break Text and Name fields.
  - Duplicate Section Break Text and Name within the wizard are not allowed.

## 1.5 Admin - Delete page condition

The admin user can remove a page in the wizard designer, which could invalidate a section break. In that case, section break will also be deleted along with the page if deleted page is the only one in a section break. An alert will prompt the user upon selection of delete informing them to check for potential section break removal.

Below is an example in which pages and section breaks are present in the wizard and how the page deletion in different cases will be managed.

### Page workflow example...

Page 1

Section Break A

Page 2

Section Break B

Page 3

Page 4

Page 5

Page 6

Section Break C

Page 7

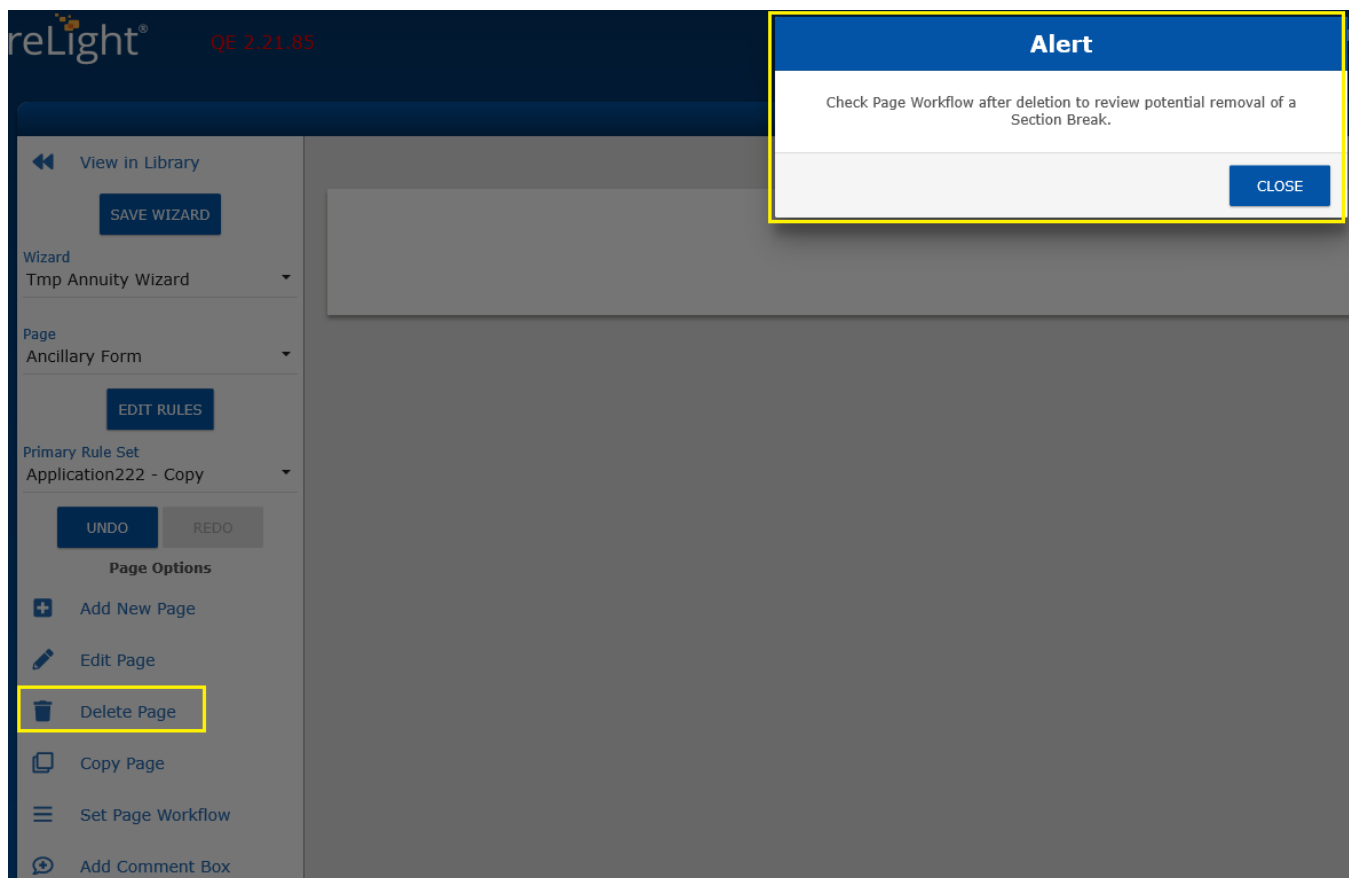
Page 8

1. If Page 1 is removed in the Designer: This case invalidates section break condition since Section Break A will become the first in the order. Associated Section Break A will also be deleted along with Page 1. An alert message will be shown to the user.
2. If Page 2 is removed in the Designer: This case also invalidates section break condition since Section Break B will then be next to Section Break A. Associated Section Break B will also be deleted along with Page 2. An alert message will be shown to user.

3. If Page 4 is removed in the Designer: This case will not invalidate any section break condition, hence associated Section Break (Section Break C) will not be deleted, only Page 4 will be deleted. An alert message will still appear in this case.

4. If Page 8 is removed in the Designer: This case will not invalidate any section break condition, hence associated Section Break (Section Break C) will not be deleted, only Page 8 will be deleted. An alert message will still appear in this case.

Alert Message: "Check Page Workflow after deletion to review potential removal of a Section Break." will be provided as a pop-up message when "Delete Page" link is clicked. Clicking "OK" button on the alert popup will delete the page and any associated section break(s) as per above mentioned examples.



**Acceptance Criteria**

- An alert is prompted in the form of a pop-up window at the time a user attempts to delete a page.
- If deleting a page invalidate section break condition, section break containing the page is also deleted along with the page.
- If deleting a page does not invalidate section break condition, section break containing the page is not deleted.
- Alert message displays as a pop-up window, "Check Page Workflow after deletion to review potential removal of a Section Break. ".
- Selecting "OK" on the alert pop-up window closes the window and performs associated delete/removal actions based on page and section break set-up.

## 2 App - Agent Attestation and Next Navigation

Add the ability per wizard screen to hide the Next button until all errors on the previous screen are corrected. This will be used for agent acknowledgement prior to continuing to sign.

To implement this, a concept of section break will be introduced that is applicable to wizard setup only. A section break will be added after a page to logically group all pages prior to that page (that are not already added to another section) into one section. When section break is added to a wizard, the user cannot continue to another section in the application until all errors on all pages in the section are 100% complete. This functionality will apply to wizards only and will not be implemented for forms.

Impact: For an application wizard, if there are section breaks added, they are displayed while in data-entry under 'Open' menu.

### 2.1 App - Application workflow with section breaks

If there is a wizard in an application with section breaks defined within it by the admin, required data in all pages under the section break need to be complete before the user can navigate to the next pages.

Examples below display how section break, and page flows work when a wizard has section break(s).

If an application has a wizard with a section break, the user cannot jump from one page to another or from one form/wizard to another unless data entry on pages within section break are 100% complete. The data entry flow will occur from top to bottom (first page of the first form/wizard to the next). To implement this, pages after the first section break will be disabled or non-editable (greyed out) and

once all those pages are 100% complete 'Next' button will be enabled to allow movement to the next section break/page/form/wizard.

Errors within data completion will also be indicated with an error icon (red triangle) beside a section break.

When there are errors on one or more pages within a section break, the red triangle alert icon will display at the left side of the section name. Also, on the last page of the section break with errors, the 'Next' button will be disabled. On remaining pages within that section, the 'Next' button will be enabled for user to move between the pages for data entry.

When data entry is 100% complete in all the pages within a section, a green check mark icon will display to the left of the section name. To keep the appearance consistence, existing page icons will show to the left of page names in both cases when the page is selected, and data entry is complete on the page.

### **Example: Wizard with Forms**

The left side displays the Open menu when 'Open' button is clicked. The right-side section displays how the wizard is setup at admin. Highlighted sections depict how Section Breaks will function.

Open Menu:

1. Section Break Headings will appear before the pages that are within the section breaks. If there is more than one section break, they will look like this in below screenshot.
2. When there are section breaks, the pages within them will appear indented to indicate pages that are within the section break.
3. For the Section Breaks that are not complete, pages (or section breaks) after them will be disabled/inactive. The user cannot access those pages before completing data entry for pages prior to them. If the data entry is not complete for a section and there are other form/wizards present after the wizard in the application, then those will also be disabled until data entry is complete in all the section breaks.

In this example, Application 222 is a form after Annuity Wizard and since there are errors in Agent Data section break, all pages and sections are disabled including Application222. Also, on the last page of the section break with errors, the 'Next' button is disabled, as shown below on the Agent page under Agent Data section break.

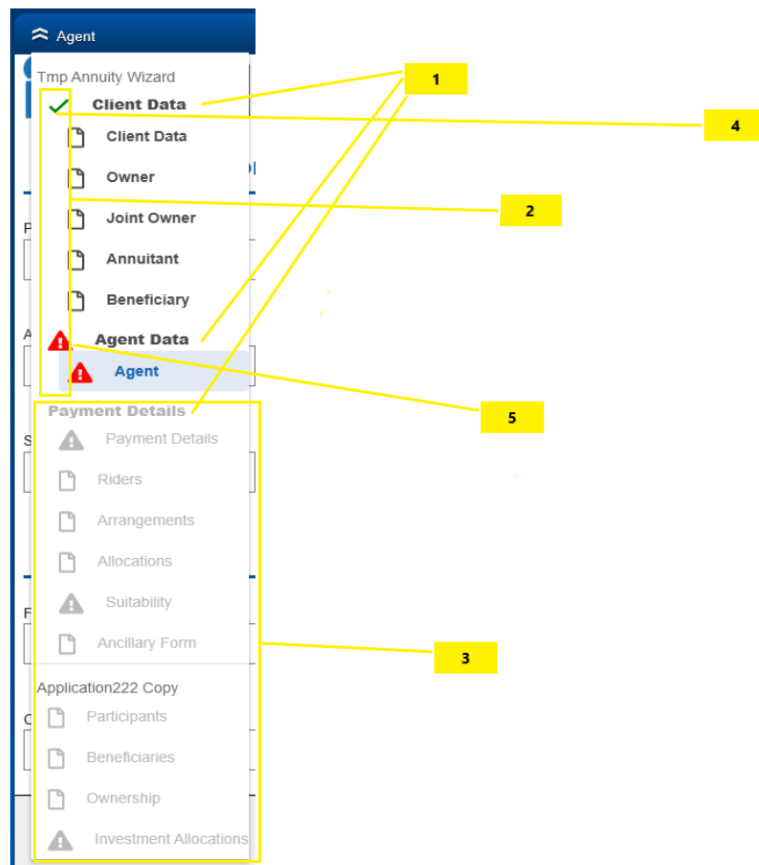
4. For pages where data entry is complete and there are no errors, current page icon is displayed before the page names. For a section break, if all errors are completed in all pages within them, a green check mark will be prefixed to the section break name.

In below screenshot - When data entry in Client Data section break is complete, the 'Next' button on the last page of the section is clickable, i.e. on Beneficiary page.

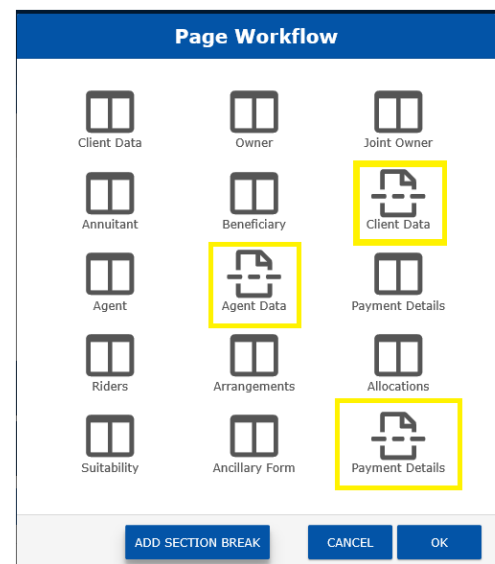
5. If within a section break, any of the pages has error on them, a red alert icon will be prefixed to the section break name. Currently, this icon appears for the page name if there are errors.

In this example, the data entry is complete for all pages in the Client Data section, hence a green check mark icon shows prefixed to Client Data section break. Since there are errors on Agent page, the error icon shows prefixed to Agent Data section break name and the page name. Also, all pages and sections after Agent Data section are greyed out indicating the user cannot advance to those pages.

#### Page Workflow for Annuity Wizard in Application Data Entry



#### Page Workflow for Annuity Wizard setup in Admin



Since data entry is not complete on Agent page, NEXT button is not present to restrict navigation on next pages.



Agent

Tmp Annuity Wizard

Tmp Annuity Wizard

✓ Client Data

Client Data

Owner

Joint Owner

Annuitant

Beneficiary

! Agent Data

! Agent

Payment Details

! Payment Details

Riders

Arrangements

Allocations

! Suitability

Ancillary Form

Application222 Copy

Participants

Beneficiaries

Ownership

! Investment Allocations

First Name

Middle Name

Last Name

Suffix

Team ID

Email Address

Phone Number

Relationship to Owner

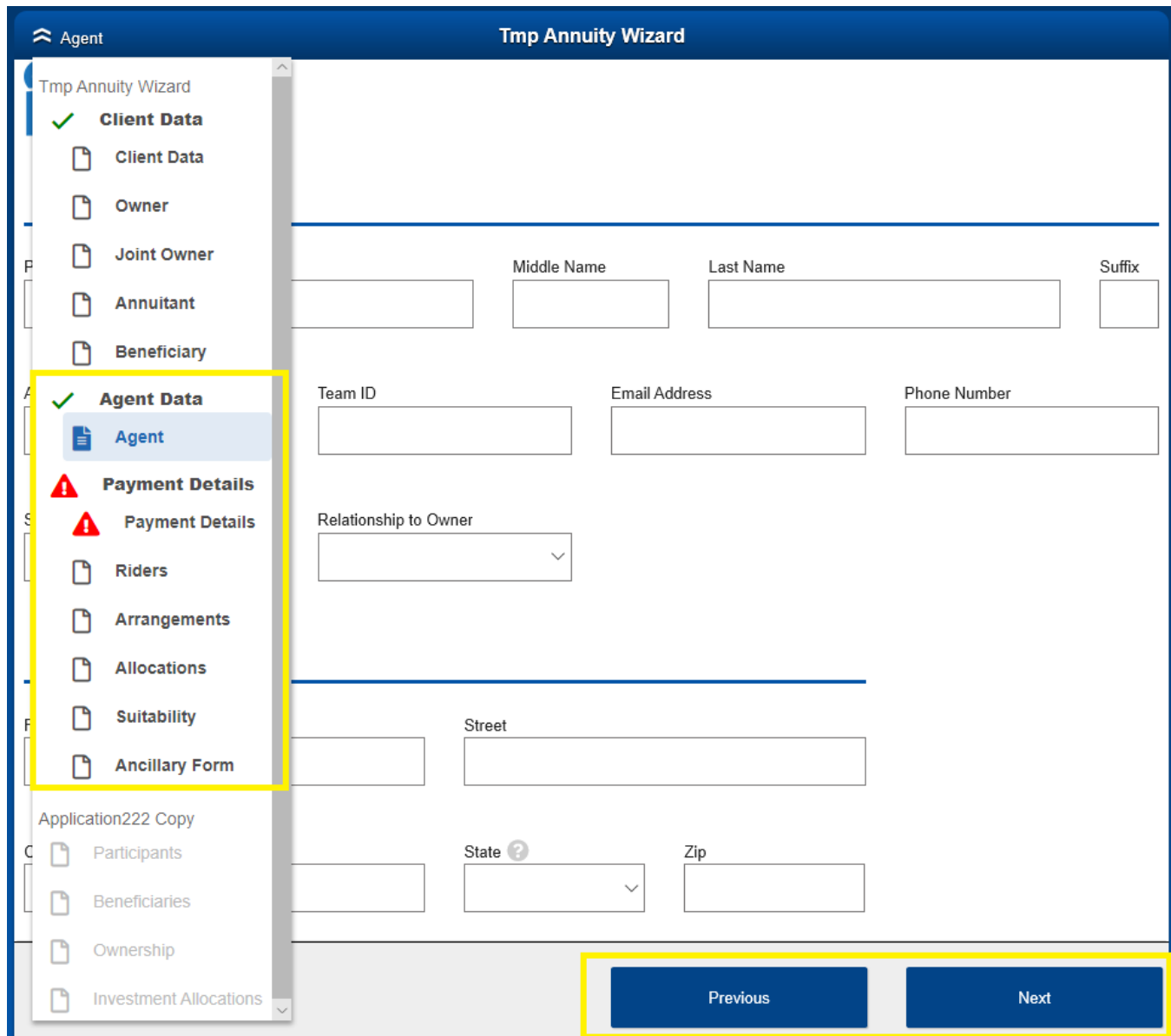
Street

State ?

Zip

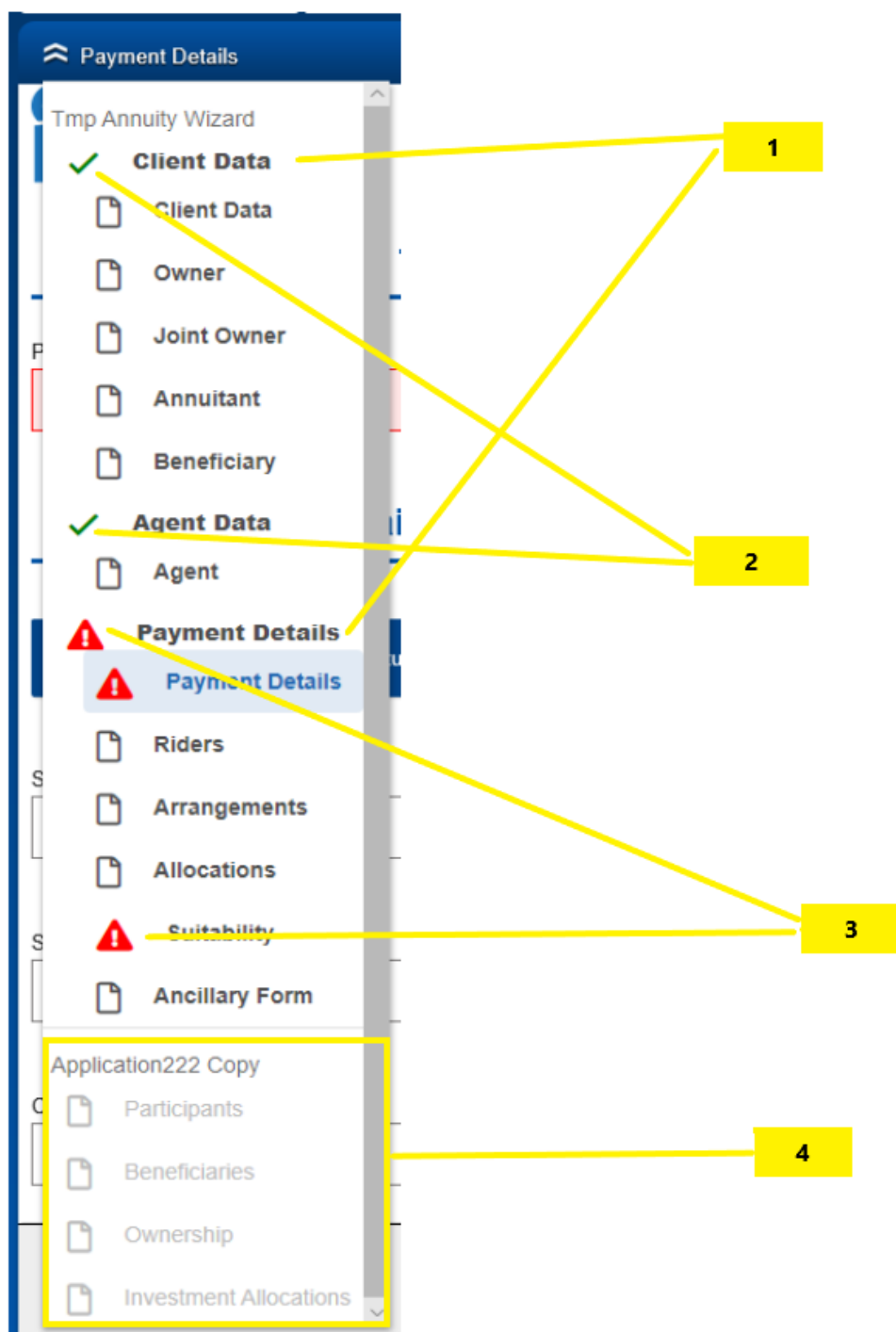
Previous

Once the data entry is complete on the Agent page, the Agent Data section break will display a green check mark. The pages and section breaks following the Agent Data section break are now editable for user to complete. Also "NEXT" button appears on "Agent" page to allow navigation to the next page.



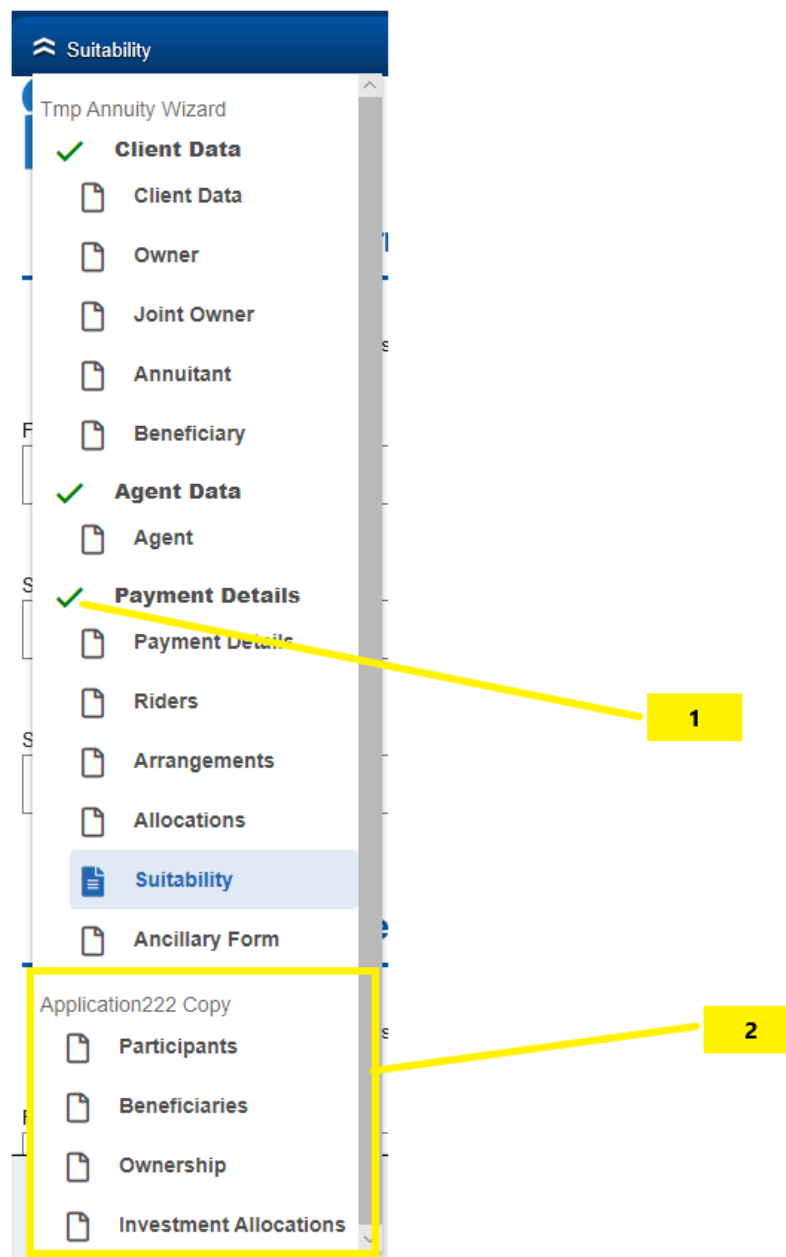
1. Section Break name will be displayed first with the pages under the section listed as indented text.
2. When errors are 100% complete on all pages within a section break, a green check mark icon shows prefixed to the section break. The last page in the section break (Agent page in this example), the 'Next' button becomes enabled to allow movement to the next page for data entry (Contract Data in this example).
3. When there are errors on pages within a section break, the red triangle error icon shows prefixed to the section break and pages names. The 'Next' button is disabled on the last page of the section break with errors ('Ancillary Form' page in 'Contract Data' section break in this example). On other pages of this section, the 'Next' button becomes enabled for data entry.

4. If the last page of a wizard is added to a section break and there are errors, any wizard or form added to the application will remain non-editable until all errors in the last section break are complete.



C. When required data entry is complete for all pages in a wizard with section breaks, the user can proceed with data entry in the next wizard/form in the application.

1. All errors are complete in Contract Data section break (last section-break in the wizard Annuity Wizard), so a green check mark icon shows prefixed to section break name. Also, 'Next' button can now be selected on the last page ('Agent Attestation Form').
2. Since all errors are complete in Annuity Wizard, next wizard/form is enabled for data entry.



D. Example: Application with Two Wizards-first wizard has no section break and second wizard has one section break

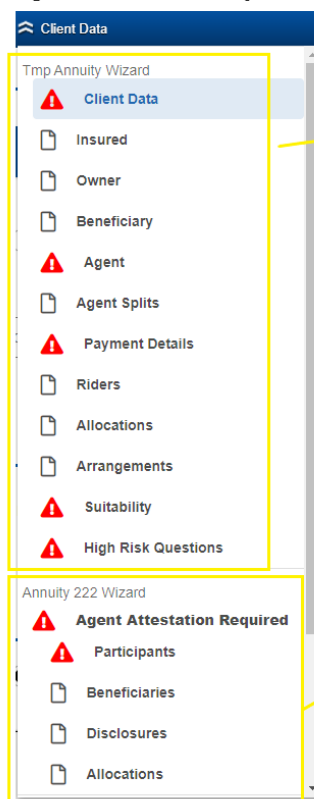
Tmp Annuity Wizard without section break, while Annuity 222 wizard has one section break.

No section breaks appear for Tmp Annuity Wizard. Next button on all the pages in this wizard are enabled and user can move to the next wizard/form. Wizard after Tmp Annuity Wizard is in editable mode to allow data entry.

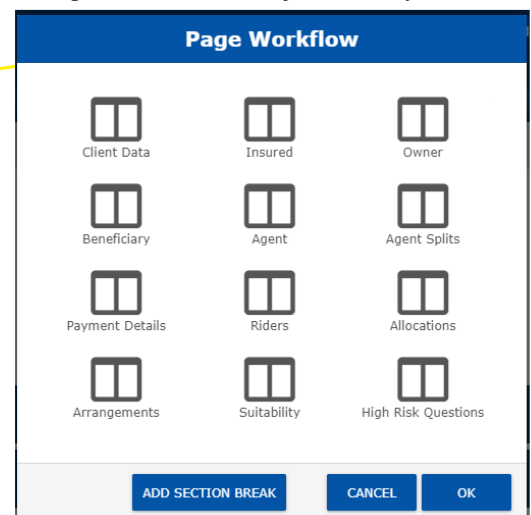
On Annuity 222 wizard, since there is one section break, it shows on the application. When there are errors on the pages under the section, the error icon shows prefixed to section name. When all errors are complete, a green check mark icon displays prefixed to section break and page names.

If there is another form or a wizard after Annuity222 wizard, the user cannot navigate to the third form/wizard unless data entry is 100% complete in Annuity222 wizard.

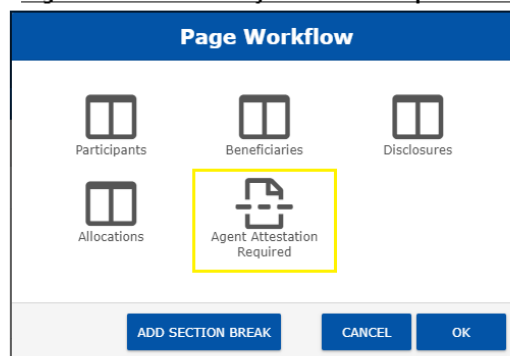
**Page Workflow for Annuity Wizard in Application Data Entry**



**Page Workflow for Annuity Wizard setup in Admin**



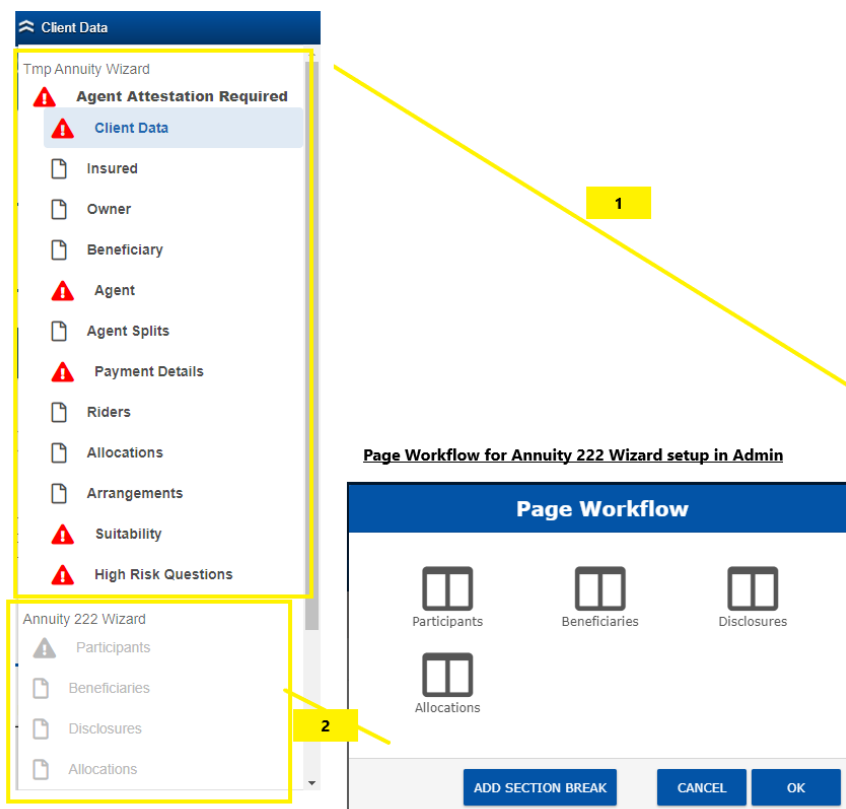
**Page Workflow for Annuity 222 Wizard setup in Admin**



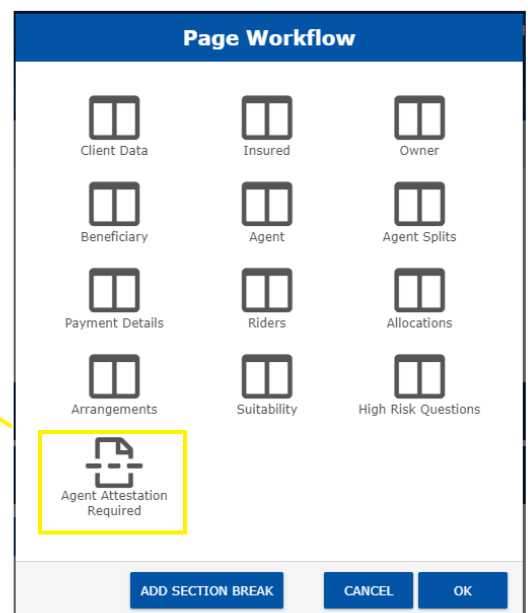
E. Example: Application with two wizards-first wizard has one section break, second wizard does not have a section break

1. Tmp Annuity Wizard has one section break and all pages in that wizard are added to the section break. The user can navigate forward to any of these pages, but from the last page the user cannot move to the next form/wizard in the application. 'Next' button on last page 'Ancillary Form' is disabled unless all errors in all the pages in section break 'Agent Attestation Required' are 100% complete.
2. Annuity222 Wizard has no section breaks and will be inactive until previous wizard 'Annuity Wizard' is 100% complete. Once previous wizard is complete, the next form/wizard in the application becomes active for data entry.

**Page Workflow for Annuity Wizard and Annuity 222 Wizard in Application Data Entry**



**Page Workflow for Annuity Wizard setup in Admin**

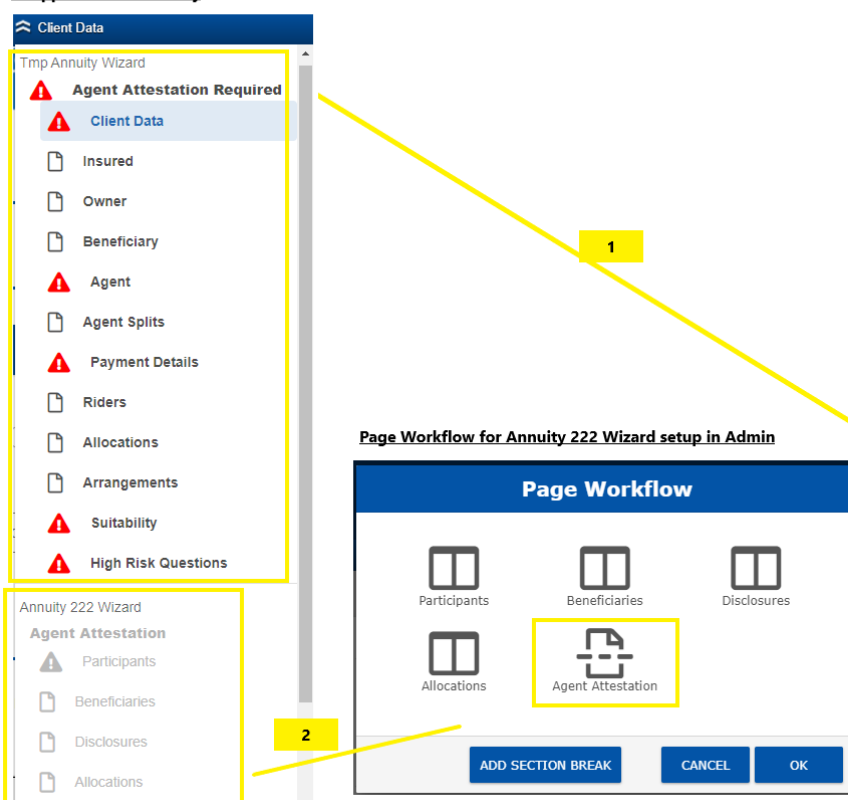


## F. Example: Application with Two Wizards-both wizards have a section break

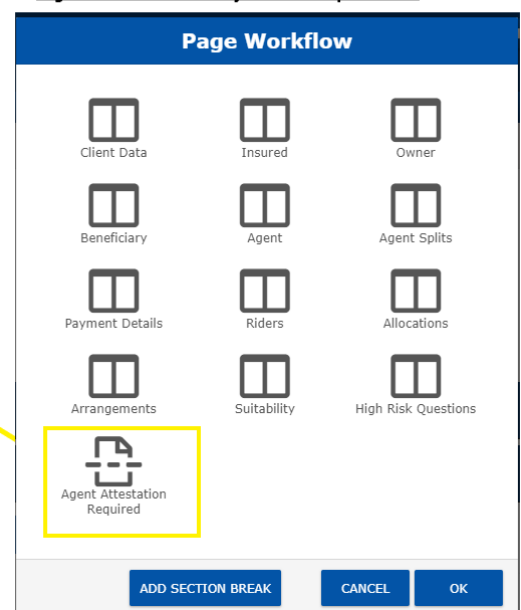
1. All pages in the wizard are added to the section break and will appear indented to indicate this. The user can move between all these pages using 'Open' or using Next/Previous buttons. Unless all pages under section break 'Agent Attestation Required' are 100% complete, the user cannot move to the next form/wizard. The 'Next' button on the last page in the section break (i.e. High-Risk Questions) will remain disabled until all required data entry is 100% complete.

2. Annuity 222 wizard has one section break and all pages in that wizard are within that one section break. If data entry in the previous wizard is not 100% complete, the user cannot perform data entry in this wizard. Pages in this wizard will be editable for once Annuity Wizard is 100% complete.

**Page Workflow for Annuity Wizard and Annuity 222 Wizard in Application Data Entry**



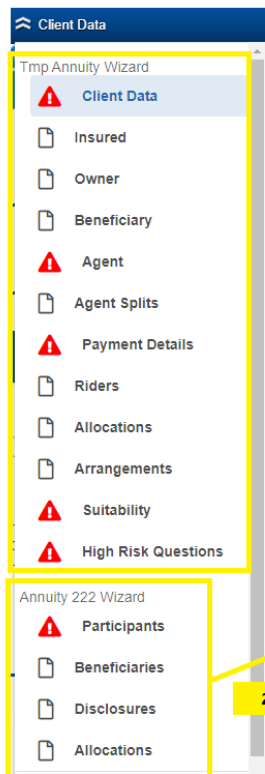
**Page Workflow for Annuity Wizard setup in Admin**



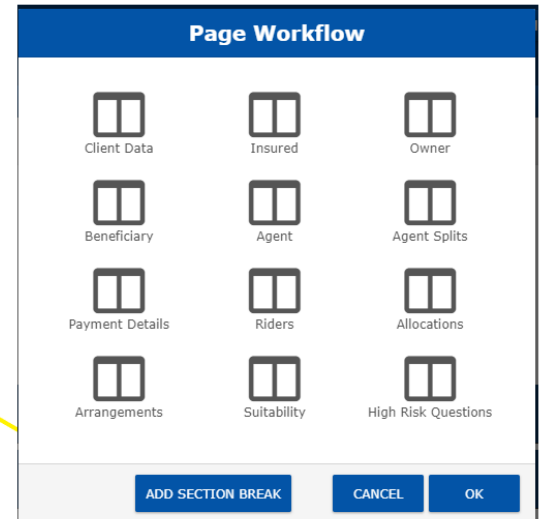
### G. Example: Application with Two Wizards-no section break

Applications with wizards that do not have section breaks will allow the user to navigate to any section of the wizard without requiring the previous section to be complete.

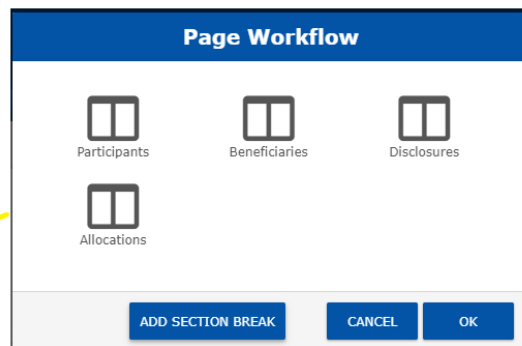
**Page Workflow for Annuity Wizard and Annuity 222 Wizard in Application Data Entry**



**Page Workflow for Annuity Wizard setup in Admin**



**Page Workflow for Annuity 222 Wizard setup in Admin**



### Acceptance Criteria

- When section breaks are present on a wizard, its heading should appear first and then pages within the section break should appear indented.
- Section break is applicable for wizard only (not forms).
- Incomplete/errors for data entry in a section break is indicated with a red triangle error icon beside the section break and page names.
- Complete data entry in a section break is indicated with a green tick mark icon beside the section break and page names.
- Next button on pages function as expected based on section break completed.
- When section break is present on a wizard, user cannot move to the next section break unless all data entry is 100% complete on all pages of the current section break.



- User can navigate forward to pages within the section break.
- With the sections added, data entry occurs from top to bottom (i.e. from 1st page of the 1st wizard/form till the last page of the last wizard/form in the application).
- If the data entry on a later page causes an error in a previous section break that was complete, user can navigate to the previous pages to complete error(s).
- New Section Break functionality works with group setting 'Allow Not In Good Order Submittals'. Which means, when NIGO is enabled, and if the user wants to submit the application with errors, they will be allowed to do so. But movement from one page to another within the wizard will be restricted based on the section breaks present in the wizard.
- Section Break functionality should also work as required in case there are multiple forms/wizards in an application.
- Error percent link will function properly with no changes. The navigation will not direct the user to the pages/part of the application which are non-editable due to section breaks.
- Activities that do not contain section breaks allow the user to navigate to any page without the requirement to complete the previous pages.

## 2.2 App - Manage wizard component 'navigation link'

In case Navigation Link object is used on wizard page, system should restrict movement to the form if it is disabled due to section break condition.

Wizard component 'Navigation Link' has a property called 'Link Type'. This property has three values - 'Internal', 'External' & 'Set in Rules'. Out of these values, 'Internal' allows placing a link to a page for the form or wizard within the application that enables navigating to that page by clicking at the link on wizard. Hence, Navigation Link object will be impacted (for Link Type "Internal") with the introduction of section breaks.

Here's the Wizard Navigation link component help. It allows navigating to a specific page.

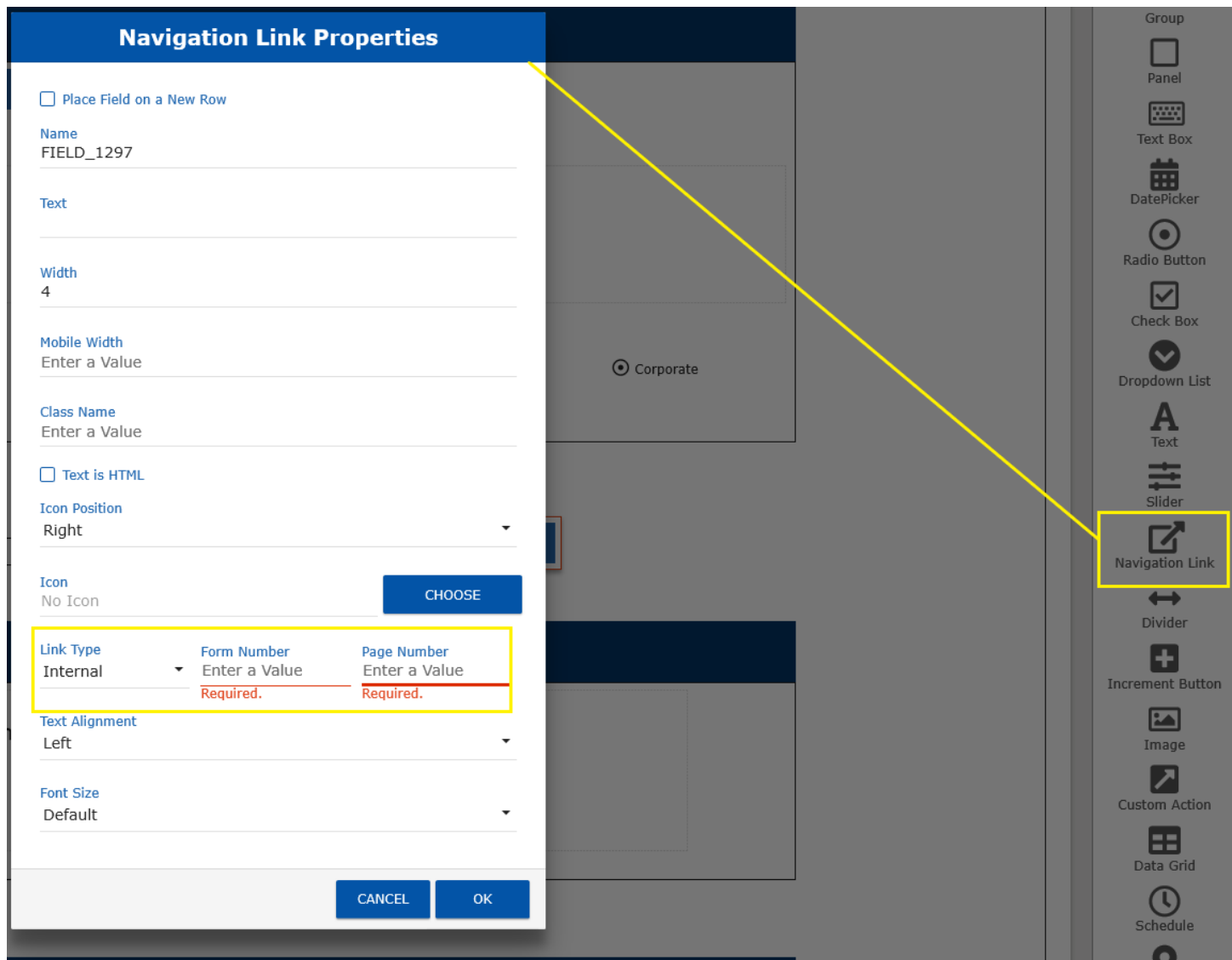
<https://firelight.insurancetechnologies.com/EGAdmin/Help/Online%20Output/Admin/Content/Design/Wizards/Navigation%20Link.htm>

### Implementation:

At the time of data entry in case wizard contains a navigation link object that links to a page or form, system should verify if that linked page is part of a section break and currently in enabled or disabled state. If the page is in disabled state, the system will display an error indicating movement to that page can only be done after errors on current wizard are completed.

Following is a mock-up of Wizard Designer screen that shows when a Navigation Link object is used. It can be linked to a page or a form using an internal link or through rule(s).

When Link type is "Internal" the form/page number can be entered for user to jump over to the specified page of the form.



**Navigation Link Properties**

☐ Place Field on a New Row

Name  
FIELD\_1297

Text

Width  
4

Mobile Width  
Enter a Value

Class Name  
Enter a Value

☐ Text is HTML

Icon Position  
Right

Icon  
No Icon CHOOSE

Link Type	Form Number	Page Number
Internal	Enter a Value <u>Required.</u>	Enter a Value <u>Required.</u>

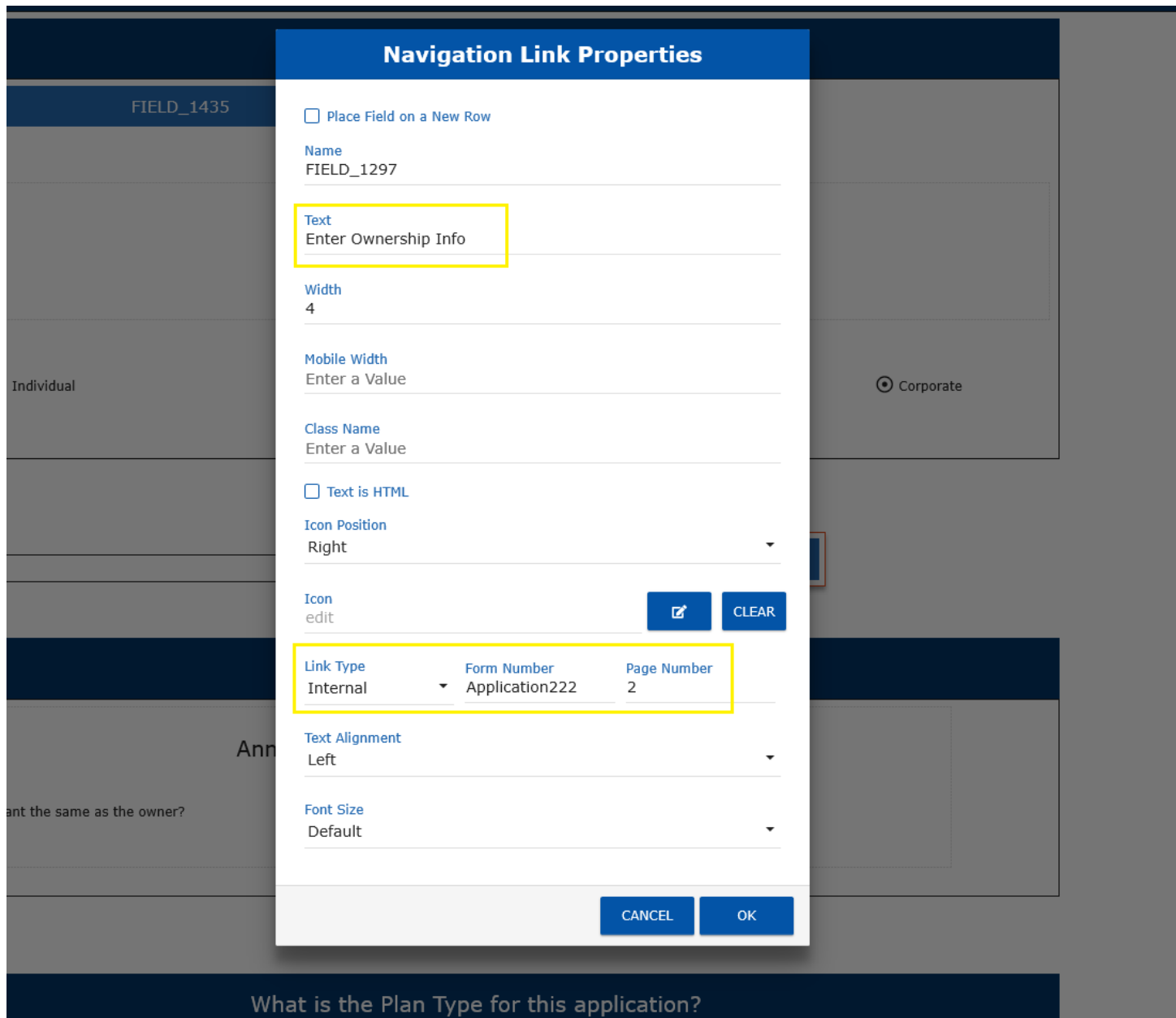
Text Alignment  
Left

Font Size  
Default

CANCEL OK

Group  
Panel  
Text Box  
DatePicker  
Radio Button  
Check Box  
Dropdown List  
Text  
Slider  
**Navigation Link**  
Divider  
Increment Button  
Image  
Custom Action  
Data Grid  
Schedule

Below mock-up shows a Navigation Link object is internally linked to a form/page in the application.



**Navigation Link Properties**

☐ Place Field on a New Row

**Name**  
FIELD\_1297

**Text**  
Enter Ownership Info

**Width**  
4

**Mobile Width**  
Enter a Value

**Class Name**  
Enter a Value

☐ Text is HTML

**Icon Position**  
Right

**Icon**  
edit

**Link Type**  
Internal

**Form Number**  
Application222

**Page Number**  
2

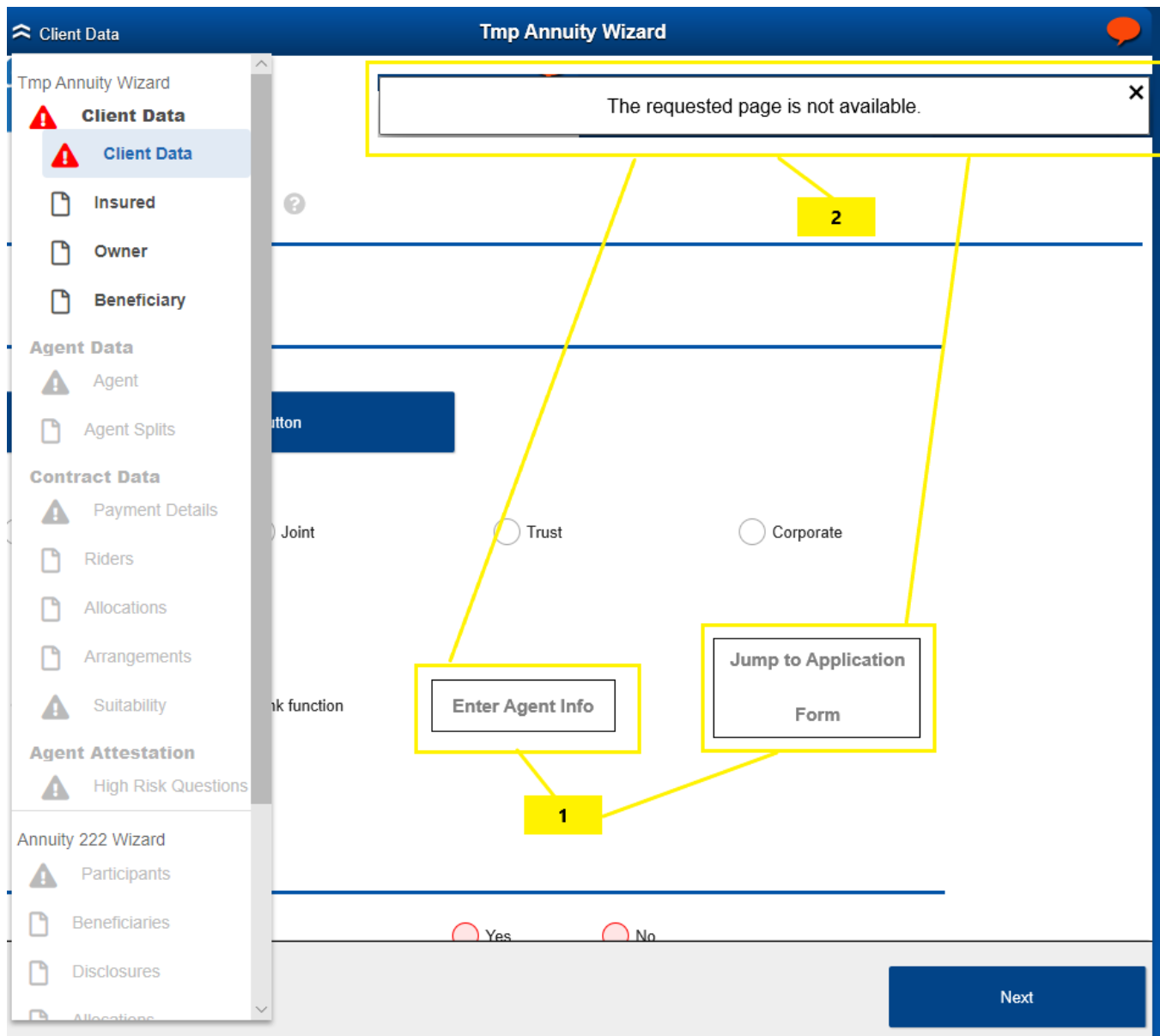
**Text Alignment**  
Left

**Font Size**  
Default

CANCEL OK

Below mock-up depicts how navigation link object shows on app wizard page. And when there are errors in the wizard, clicking on navigation link will show given error.

1. Enter Ownership Info - Navigation link object on Annuity Wizard -> Client Data page
2. Since there are section breaks in the wizard with errors, movement to the next form (Application222 -> Ownership) is disabled. Error will display when clicking on the navigation link.



The screenshot displays the 'Tmp Annuity Wizard' interface. A sidebar on the left contains a navigation menu with sections: Client Data (Insured, Owner, Beneficiary), Agent Data (Agent, Agent Splits), Contract Data (Payment Details, Riders, Allocations, Arrangements, Suitability), Agent Attestation (High Risk Questions), and Annuity 222 Wizard (Participants, Beneficiaries, Disclosures, Allocations). The main content area shows a form with a blue header bar. A yellow box labeled '2' highlights an error message at the top: 'The requested page is not available.' with a close button. Two yellow boxes labeled '1' and '2' point to navigation links: 'Enter Agent Info' and 'Jump to Application Form'. The form also includes radio buttons for 'Joint', 'Trust', and 'Corporate', and a 'Next' button at the bottom right.

The error message that will show up in both these cases will be: "The requested page is not available."

### Acceptance Criteria

- Navigation Link should not jump to a disabled page due to conditions of section break.
- When Navigation Link is directed to a form/page that is disabled due to conditions of section break, system displays an error.
- External link type is not impacted by section break change.

### 3 Embedded API - Manage Section Breaks

Introduction of Section Breaks will impact Embedded API interface that are used by clients. Embedded API and functions will reflect condition when pages are disabled due to section breaks present in a wizard. Navigation Graph API will also include section breaks and pages within them.

Impacts:

1. NavigateToPage client API
2. NavigationEvent client API

#### 3.1 Embedded API - Manage Client API function 'NavigateToPage'

When clients are using an embedded interface, the navigation should also be limited when section breaks are present. The navigation model will be updated for embedded clients to support the section break navigation restrictions.

The error message will be: "The requested page is not available."

If the page cannot be navigated to then an error should be logged and an errorEvent should be raised to the hosting page describing the issue. The error should be available in the Javascript Console, but no exception should be exposed to the user.

Here's the NavigateToPage client API help -

<https://firelight.insurancetechnologies.com/EGAdmin/Help/Online%20OutputAPI/FireLightAPI/Content/FireLight%20Embedded%20Client%20API/Common%20API%20Interface/navigateToPage.htm>

#### ***Acceptance Criteria***

- Embedded API function navigateToPage should not jump to a page that is disabled due to conditions of section break.
- When Embedded API function navigateToPage calls a page that is disabled due to conditions of section break, system should throw an error to the hosting page and it should be available in JavaScript Console.

## 3.2 Embedded API - Manage Client API 'NavigationEvent'

FireLight needs to extend the NavigationGraph so that it provides whether or not a [BundlePage](#) can be navigated to if there are section breaks present in the activity.

There will be changes done to client API NavigationEvent to incorporate section breaks in the Navigation Graph.

Here's the NavigationEvent client API help -

<https://firelight.insurancetechnologies.com/EGAdmin/Help/Online%20OutputAPI/FireLightAPI/Content/JSON%20Models/Embedded%20Client%20API%20Event%20Models/NavigationEvent.htm>

### ***Acceptance Criteria***

- Client API NavigationEvent returns info about section breaks present in an activity and the pages that belong to the section breaks.