



Powerview Guidelines for UX

Please refer the PowerView help video available at Riskmaster Knowledgebase before working with PowerViews in 17.2 release version or above.

Impact on Existing Powerviews: All the existing Powerviews will get ported to the new UX PV automatically at the time of upgrade. User can see in the UX version of Powerview Editor that all his existing PVs are available there.

Creating New Powerview: User can create new PV from UI Powerview Editor only and not from UX PV. The created Powerview would get updated in the UX PV as well after creation. User need to also check 'Update UX View' checkbox in UI PV to make both UI and UX PV in sync.

User can clone an existing Powerview or create a clone of Base View from UI PowerView Editor only, and the same would be reflected in the UX PV.

Updating a Powerview: User can make changes in the Powerview from both UI and UX PowerView editor.

1. Editing from UI PV: If the user wants the changes made to be synchronized in UI and UX both, then 'Update UX View' checkbox present in the UI Powerview Editor should be checked at the time of saving the changes or anytime later to sync the PVs. Otherwise, changes made would only be effective for UI, and in UX user will get to see either the last updated changes or the default view.
2. Editing from UX PV: If the user is making any changes in the PV using the UX Powerview Editor, then the changes made are only effective for the UX screens and the changes cannot be seen in the UI PV.

If user wants to remove all the changes made in the UX PV and want to see the default state of a screen, then uncheck the desired screen in the UX PV and save the PV. Now, again check the same screen and save the PV, the desired screen would be seen in the default state and now user can make the changes.

Deleting a Powerview: User can delete a PV either from UI or UX, it will get deleted for both irrespective of screen of operation.

Exception: After upgrade, screens mentioned in *Table 1.1* will be seen in the UX PV as it appears in the default state, due to complexities associated with UX PVs. Any edit done in the past in UI PV editor for



Powerview Guideline For UX

these screens will not get ported in the UX and user must manually update the UX PV from Powerview Editor to reinstate the desired changes.

If user updates the UI PV with checkbox 'Update UX View', then also UX PV does not gets updated for the below mentioned screen. User needs to make changes in the UX PV for these screens.

Please contact Riskmaster tech support team for any assistance required to setup PowerViews.

Claim Screens	Funds Screens	Policy Screens	Diary Screens	Maintenance Screens
Case management Non-Occupational claim Leave Leave detail	Funds Split Third Party Payments Future Payments Reserve Current Auto Claim Checks	Policy	Create Diary	Entity ID Type Admin Tracking Entity Maintenance Entity Addresses People Maintenance Employee Maintenance Org. Hierarchy Maintenance Physician Maintenance Staff Maintenance Patient Maintenance Vehicle Maintenance Patient Procedure Entity Contact Info Entity Operating as Client Limits

Table 1.1