Merative Social Program Management 8.1

Developing Evidence

Note

Before using this information and the product it supports, read the information in

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

Contents

1 Developing static evidence

You can develop static evidence manually, that is, hand-crafted, or you can use the Evidence Generator to create evidence entities.

1.1 Developing evidence manually

Custom evidence solutions can be developed with Cúram Evidence. All of the evidence server-side infrastructure artifacts are available in the curam.core.sl.infrastructure.impl package. The evidence metadata entity contains metadata about each evidence type. This entity must be populated before evidence maintenance can proceed. Evidence maintenance functions are available in the administration application.

Use Social Program Management's Evidence framework to design and implement evidence solutions. Before you design or implement evidence solution, ensure that you are familiar with the information in the *Evidence patterns* related link.

Related concepts

When you design evidence entities for large modules, all entities must fit into a relatively small number of patterns. These patterns are typically governed by how an evidence type, or entity, relates to another evidence type.

Evidence components

The two types of evidence components are server-side artifacts and client-side artifacts.

Server-side artifacts
All the evidence server-side infrastructure artifacts are shipped in the `curam.core.sl.infrastructure.impl` package.

The key elements in the `curam.core.sl.infrastructure.impl` package include the Evidence Controller Hook classes and the Evidence Interfaces. For more information, see the *Evidence Controller Hook* and the *Standard Evidence Interface* related links.

The interfaces are part of the interface hierarchy. Both the Participant Evidence Interface and the Evidence Interface extend the Standard Evidence Interface, which is the parent interface. Each evidence entity must implement the evidence interface artifacts.

Related concepts

The Evidence Controller Hook is the evidence infrastructure class that contains the extension points for the evidence maintenance pattern.

The Standard Evidence Interface defines the following methods, which are common to both inheriting interfaces. The interface and its associated methods are shown with the appropriate Javadoc comments.

Standard Evidence Interface

The Standard Evidence Interface defines the following methods, which are common to both inheriting interfaces. The interface and its associated methods are shown with the appropriate Javadoc comments.

```java
/*
 * Copyright Merative US L.P. 2005, 2012
 */

package curam.core.sl.infrastructure.impl;


import curam.core.sl.infrastructure.entity.struct.AttributedDateDetails;
import curam.core.sl.infrastructure.struct.EIEvidenceKey;
import curam.core.sl.infrastructure.struct.EIEvidenceKeyList;
import curam.core.sl.infrastructure.struct.EIFieldsForListDisplayDtls;
import curam.core.sl.infrastructure.struct.ValidateMode;
import curam.core.struct.CaseKey;
import curam.util.exception.AppException;
import curam.util.exception.InformationalException;
import curam.util.type.Date;


/**
 * This interface is a key component of the Curam Temporal Evidence Solution.
 * Implementations hoping to manage evidence via the Temporal Evidence Solution
 * must ensure that the evidence entities contained within the solution
 * implement the Evidence Interface. By doing this, the evidence is utilizing
 * the Evidence Controller pattern whereby a lot of the common business
 * functions for maintaining evidence are contained within the out-of-the-box
 * evidence infrastructure.
 *
 * This interface is the super interface that that will be extended by other
 * evidence interfaces that wish to provide custom functionality for that type
 * of evidence. The methods defined on this evidence are common to any interface
 * that extends it.
 */
public interface StandardEvidenceInterface {

  // _____
  /**
   * Method for calculating case attribution dates. The calculation of evidence
   * attribution is an integral part of a temporal evidence solution as it
   * determines the period of time for which a piece of evidence is effective.
   * The implementation of this function will contain the logic that derives the
   * appropriate effective period for the evidence of a particular type.
   *
   * @param caseKey
   * Contains a case identifier
   * @param evKey
   * Contains the evidenceID / evidenceType pairing of the evidence to
   * be attributed
   *
   * @return Case attribution details
   */
  AttributedDateDetails calcAttributionDatesForCase(CaseKey caseKey,
    EIEvidenceKey evKey) throws AppException, InformationalException;

  // _____
  /**
   * <P>
   * Retrieves a summary of evidence details which are used to populate the
   * 'Details' column on the following evidence pages:
   * <P>
   * <P>
   * <LI>All evidence workspace pages
   * <LI>Apply changes page
   * <LI>Apply user changes page
   * <LI>Approve page
   * <LI>Reject page
   * <P>
   *
   * @param key
   * Contains an evidenceID / evidenceType pairing
   *
   * @return A summary of the evidence details to be displayed
   */
  EIFieldsForListDisplayDtls getDetailsForListDisplay(EIEvidenceKey key)
    throws AppException, InformationalException;
   * Method to get the business end date for this evidence record.
   *
   * @param key
```

Evidence Interface

The Evidence Interface and its associated methods are shown with the appropriate Javadoc comments.

```java
/*
 * Copyright Merative US L.P. 2005, 2017
 */

package curam.core.sl.infrastructure.impl;

import curam.core.sl.entity.struct.CaseParticipantRoleDtlsList;
import curam.core.sl.infrastructure.struct.EIEvidenceKey;
import curam.core.sl.infrastructure.struct.EvidenceTransferDetails;
import curam.core.struct.CaseHeaderKey;
import curam.util.exception.AppException;
import curam.util.exception.InformationalException;
import curam.util.type.Date;
import curam.util.type.Implementable;

/**
 * This interface extends the StandardEvidenceInterface, therefore any class
 * that implements EvidenceInterface must provide its own implementations of the
 * methods defined in the standard interface. Any methods specific to "classic"
 * (i.e. not participant) evidence are to be defined in this interface.
 */
@Implementable
@curam.util.type.AccessLevel(curam.util.type.AccessLevelType.EXTERNAL)
public interface EvidenceInterface extends StandardEvidenceInterface {

  // BEGIN, CR00078469, VM
  // _____
  /**
   * Transfers evidence from one case to another.
   *
   * @param details
   * Contains the evidenceID / evidenceType pairings of the evidence to
   * be transferred and the transferred
   * @param fromCaseKey
   * The case from which the evidence is being transferred
   * @param toCaseKey
   * The case to which the evidence is being transferred
   */
  @curam.util.type.AccessLevel(curam.util.type.AccessLevelType.EXTERNAL)
  void transferEvidence(EvidenceTransferDetails details,
    CaseHeaderKey fromCaseKey, CaseHeaderKey toCaseKey)
    throws AppException, InformationalException;
  // END, CR00078469

  /**
   * Reads all CaseParticipantRoles associated with a given evidence instance.
   *
   * @param key
   * Contains the evidenceID / evidenceType pairings of the evidence
   * @returns A list of all CaseParticipantRoleDtls.
   */
  public CaseParticipantRoleDtlsList getCaseParticipantRoles(
    EIEvidenceKey key) throws AppException, InformationalException;

  /**
   * Method to set the business end date for the give evidence object.
   *
   * @param dtls
   * The evidence object to be updated
   * @param date
   * The value which the evidence object's end date should be set with
   *
   * @throws AppException
   * {@link BPOEVIDENCEMESSAGE#ERR_ENT_EVIDENCE_ERROR_ENDDATE_FV_ERRORMSG_NOT_SET}
   * thrown if the evidence type has no End Date attribute
   * @throws InformationalException
   * Generic Exception Message
   *
   * @see #getEndDate(EIEvidenceKey)
   */
  void setEndDate(Object dtls, Date date)
    throws AppException, InformationalException;

  /**
   * Method to set the business start date for the give evidence object.
   *
   * @param dtls
   * The evidence object to be updated
   * @param date
   * The value which the evidence object's start date should be set
   * with
```

Participant Evidence Interface

The Participant Evidence Interface and its associated methods are shown with the appropriate Javadoc comments.

```
/*
 * Copyright Merative US L.P. 2007, 2012
 */

package curam.core.sl.infrastructure.impl;


import curam.core.sl.infrastructure.struct.EIEvidenceKey;
import curam.core.sl.infrastructure.struct.EIEvidenceKeyList;
import curam.core.sl.struct.ConcernRoleIDKey;
import curam.util.exception.AppException;
import curam.util.exception.InformationalException;
import java.util.ArrayList;


/**
 * This interface extends the StandardEvidenceInterface therefore any class that
 * implements ParticipantEvidenceInterface must provide its own implementations
 * of the methods defined in the standard interface. Any methods specific to
 * participant evidence be defined in this interface.
 */
public interface ParticipantEvidenceInterface extends
    StandardEvidenceInterface {

  // _____
  /**
   * Method to check if the attributes that changed during a modify require
   * reassessment to be run when they are applied.
   *
   * @param attributesChanged
   * - A list of Strings. Each represents the name of an attribute that
   * changed
   *
   * @return true if Reassessment required
   */
  boolean checkForReassessment(ArrayList attributesChanged)
    throws AppException, InformationalException;

  // END, CR00069014

  // _____
  /**
   * Method for creating the snapshot record related to a participant evidence
   * record.
   *
   * @param key
   * Contains an evidenceID / evidenceType pairing
   *
   * @return The uniqueID and the evidence type of the Snapshot record.
   */
  EIEvidenceKey createSnapshot(EIEvidenceKey key) throws AppException,
      InformationalException;

  // BEGIN, CR00069014, JPG
  // _____
  /**
   * Method to compare attributes on two records of the same entity type. It
   * then returns an ArrayList of strings with the names of each attribute that
   * was different between them.
   *
   * @param key
   * - Contains an evidenceID / evidenceType pairing
   * @param dtls
   * - a struct of the same type as the key containing the attributes
   * to be compared against
   *
   * @return A list of Strings. Each represents an attribute name that differed.
   */
  ArrayList getChangedAttributeList(EIEvidenceKey key, Object dtls)
    throws AppException, InformationalException;

  // BEGIN, CR00059697, SK
  // _____
  /**
   * Method to search for records on a participant entity by concernRoleID and
   * status.
   *
   * @param key
   * - The unique concernRoleID of the participant.
   *
   * @return A list of EIEvidenceKey objects each containing an
```

Adopting an interface approach enforces a pattern upon entity design and development as each entity must implement the same interface. By using this approach, the Merative ™ SPM Platform can provide as much common functionality as possible so that custom implementations can concentrate more on business aspects of evidence maintenance, such as validations. Each evidence entity must implement the Evidence Interface to have access to the Evidence Controller class. This class implements the common business logic across all evidence entities and the custom business logic specific to each evidence entity.

Accessing non-modeled functions

When the Evidence Interfaces are implemented by evidence entities, the methods that are defined by these interfaces are implemented by those evidence entities.

As the methods are non-modeled, the methods exist only on the evidence entity `impl` classes. To access the non-modeled functions, you must cast from the `impl` class. For more information, see the *List evidence* related link.

For the casting mechanism to work, the factory class must extend the `impl` class rather than to the base class. For the factory class to extend the `impl` rather than to the base class, if no non-stereotyped functions are being added to the class, is to add a non-stereotyped dummy function. If a non-stereotyped dummy function is not added, a runtime error results when the casting is run.

Related concepts

[List evidence on page 27](#)
A list evidence operation involves client and server development. The list operation is used to populate an evidence workspace page.

Client-side artifacts

The client-side infrastructure artifacts are located inside the `\webclient\components \core\Evidence Infrastructure` directory.

The `\webclient\components\core\Evidence Infrastructure` folder primarily contains `uim` and `vim` client pages. The `vim` files are typically included inside solution-specific `uim` pages to manage generic evidence details. The `vim` pages contain complete default functions for evidence maintenance.

Benefits of the `vim` files

The key benefit of the `vim` files is that the files can be changed to match with any enhancements that are made to the evidence maintenance solution without affecting specific implementations. So, the upgrade is seamless.

The following four files are examples of infrastructural `vim` files:

- `Evidence_createHeader.vim`
- `Evidence_modifyHeader.vim`
- `Evidence_viewHeader.vim`
- `Evidence_viewHeaderForModal.vim`

Managing infrastructural attributes

The proceeding artifacts are used to manage the infrastructural attributes of evidence maintenance and must be included in the create, modify, and view evidence pages. The following three files are further examples of `vim` files to include.

- `Evidence_typeWorkspace.vim`

- `Evidence_workspaceInEditHighLevelView.vim`
- `Evidence_workspaceActiveHighLevelView.vim`

The preceding artifacts are used to populate evidence workspaces. An evidence workspace is a central location for managing evidence. The preceding `vim` files are included by the `workspace.uim` pages.

The proceeding three files are examples of infrastructural `uim` pages that provide entire evidence maintenance functions:

- `Evidence_applyChanges1.uim`
- `Evidence_addNewEvidence.uim`
- `Evidence_dashboard.uim`

`Evidence_applyChanges1` lists all work-in-progress evidence, that is, all new and updated evidence or evidence that is pending removal. The display and action bean on the page live on the Evidence facade that is part of the centralized evidence maintenance functions.

`Evidence_addNewEvidence` lists all possible evidence types, which are filtered by category, and starts an appropriate create page for each.

`Evidence_dashboard` lists all evidence types on the case and is broken into categories. It highlights that types have `In Edit` evidence that is recorded and that have verifications or issues outstanding.

> **Note:** In some cases, `.vim` files in the client infrastructure package are included in infrastructure pages. For instance, `Evidence_dashboardView.vim` is included inside the **Evidence_dashboard** page.

Developing an evidence solution

Developing an evidence solution can involve various steps, such as creating, modifying, reading, and listing evidence maintenance operations, evidence attribution and reattribution, registering evidence implementations, and customizing evidence.

Administration: Evidence Metadata entity and Product Evidence Link entity

The Evidence Metadata entity contains metadata information that relates to each evidence type. The Product Evidence Link entity links evidence to a product.

Evidence Metadata entity

The Evidence Metadata entity must be populated before evidence maintenance can proceed. A number of evidence page names, including the view and modify page names, are included in the metadata. The page names are retrieved at run time by using evidence infrastructure resolve scripts and by using implementations of the Evidence Type interface on the server. The records on the Evidence Metadata entity are effective dated to facilitate pages that change over time, for example, due to legislation.

Product Evidence Link entity

In some circumstances, evidence might be stored at the Integrated Case level but only some of the evidence might apply to a product on the Integrated Case. To determine the evidence to attribute

to a product, a lookup of this entity is performed as part of the attribution processing. Then, only evidence that is linked to the product is attributed.

Create, modify, read, and list evidence maintenance operations

Create, modify, read, and list evidence maintenance operations are outlined by using sequence diagrams, client screen captures, and server code snippets from a sample product implementation.

Create evidence

A create evidence operation involves client and server development.

Sequence diagram for creating evidence
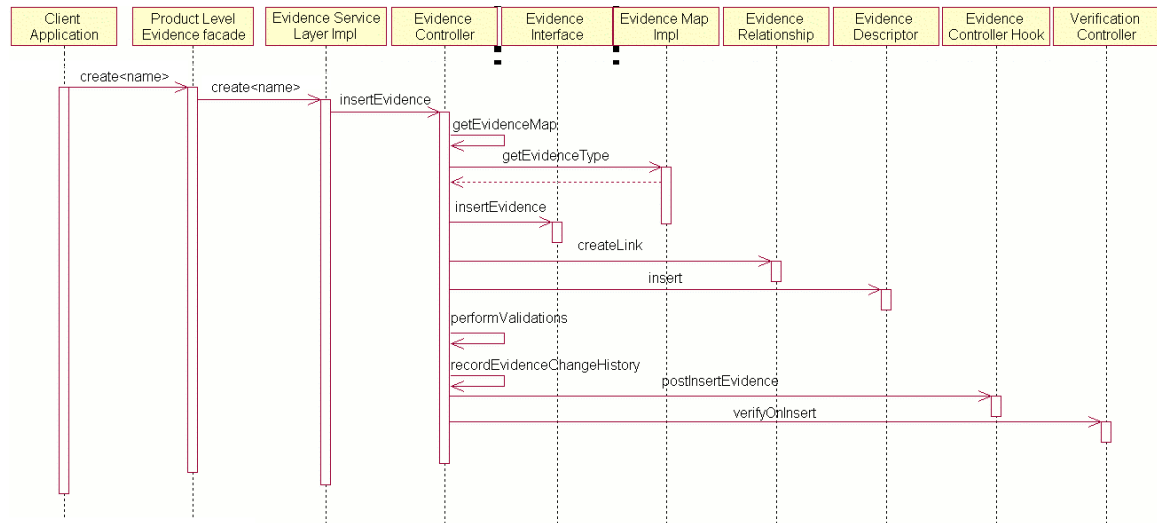
Client screen to be developed

The client page to be developed must include the evidence infrastructure page
`Evidence_createHeader.vim`. The included `.vim` page facilitates the management of
infrastructure attributes. For example, the Evidence Descriptor's `receivedDate` attribute

is managed through this infrastructure page. If, in the future, more attributes that need to be managed through the create function are added to the Evidence Descriptor entity, then these attributes might be mapped through this infrastructure page. So, the operation requires just a once-off infrastructure change rather than many changes to custom artifacts.

Server methods to implement

The `SEGEvidenceMaintainenance.createAssetEvidence` facade operation calls the evidence service layer implementation.

```
// _____
/**
 * Creates an Asset evidence record.
 *
 * @param dtls Details of the new evidence record to be created.
 *
 * @return The details of the created record.
 */
public ReturnEvidenceDetails createAssetEvidence(
 AssetEvidenceDetails dtls)
 throws AppException, InformationalException {

  // set the informational manager for the transaction
  TransactionInfo.setInformationalManager();

  // Asset evidence manipulation object
  Asset evidenceObj = AssetFactory.newInstance();

  // return object
  ReturnEvidenceDetails createdEvidenceDetails =
    new ReturnEvidenceDetails();

  // create the Asset record and populate the return details
  createdEvidenceDetails =
    evidenceObj.createAssetEvidence(dtls);

  createdEvidenceDetails.warnings =
    EvidenceControllerFactory.newInstance().getWarnings();

  return createdEvidenceDetails;
}
```

These overloaded `Asset.createAssetEvidence` service layer operations call the Evidence Controller infrastructure function for inserting evidence.

```
// _____
/**
 * Creates an Asset record.
 *
 * @param dtls Contains Asset evidence record creation details.
 *
 * @return the new evidence ID and warnings.
 */
public ReturnEvidenceDetails createAssetEvidence(
  AssetEvidenceDetails dtls)
  throws AppException,InformationalException {

  return createAssetEvidence(dtls, null, null, false);
}


// _____
/**
 * Creates a Asset record.
 *
 * @param dtls Contains Asset evidence record creation details.
 *
 * @param sourceEvidenceDescriptorDtls If this function is called
 * during evidence sharing, this parameter will be non-null and
 * it represents the header of the evidence record being shared
 * (i.e. the source evidence record)
 *
 * @param targetCase If this function is called during evidence
 * sharing, this parameter will be non-null and it represents the
 * case the evidence is being shared with.
 *
 * @param sharingInd A flag to determine if the function is
 * called in evidence sharing mode. If false, the function is
 * being called as part of a regular create.
 *
 * @return the new evidence ID and warnings.
 */
public ReturnEvidenceDetails createAssetEvidence(
  AssetEvidenceDetails dtls,
  EvidenceDescriptorDtls sourceEvidenceDescriptorDtls,
  CaseHeaderDtls targetCase, boolean sharingInd)
  throws AppException,InformationalException {

  // validate the mandatory fields
  validateMandatoryDetails(dtls);

  EvidenceControllerInterface evidenceControllerObj =
    (EvidenceControllerInterface)
      EvidenceControllerFactory.newInstance();
  EvidenceDescriptorInsertDtls evidenceDescriptorInsertDtls =
    new EvidenceDescriptorInsertDtls();

  ReturnEvidenceDetails createdEvidence =
    new ReturnEvidenceDetails();

  if (sharingInd) {

    EvidenceDescriptorDtls sharedDescriptorDtls =
      evidenceControllerObj.shareEvidence(
        sourceEvidenceDescriptorDtls,
        targetCase);

    // Return the evidence ID and warnings
    createdEvidence.evidenceKey.evidenceID =
      sharedDescriptorDtls.relatedID;
    createdEvidence.evidenceKey.evType =
      sharedDescriptorDtls.evidenceType;

  } else {

    // As there is no participant associated with this evidence
    // we must retrieve the case participant to set the evidence
    // descriptor participant.
    CaseHeaderKey caseHeaderKey = new CaseHeaderKey();
    caseHeaderKey.caseID = dtls.caseIDKey.caseID;
    evidenceDescriptorInsertDtls.participantID =
      CaseHeaderFactory.newInstance().readCaseParticipantDetails(
        caseHeaderKey).concernRoleID;

    // Evidence descriptor details
    evidenceDescriptorInsertDtls.caseID = dtls.caseIDKey.caseID;
    evidenceDescriptorInsertDtls.evidenceType =
```

Modify evidence

A modify evidence operation involves client and server development.

Sequence diagram for modifying evidence
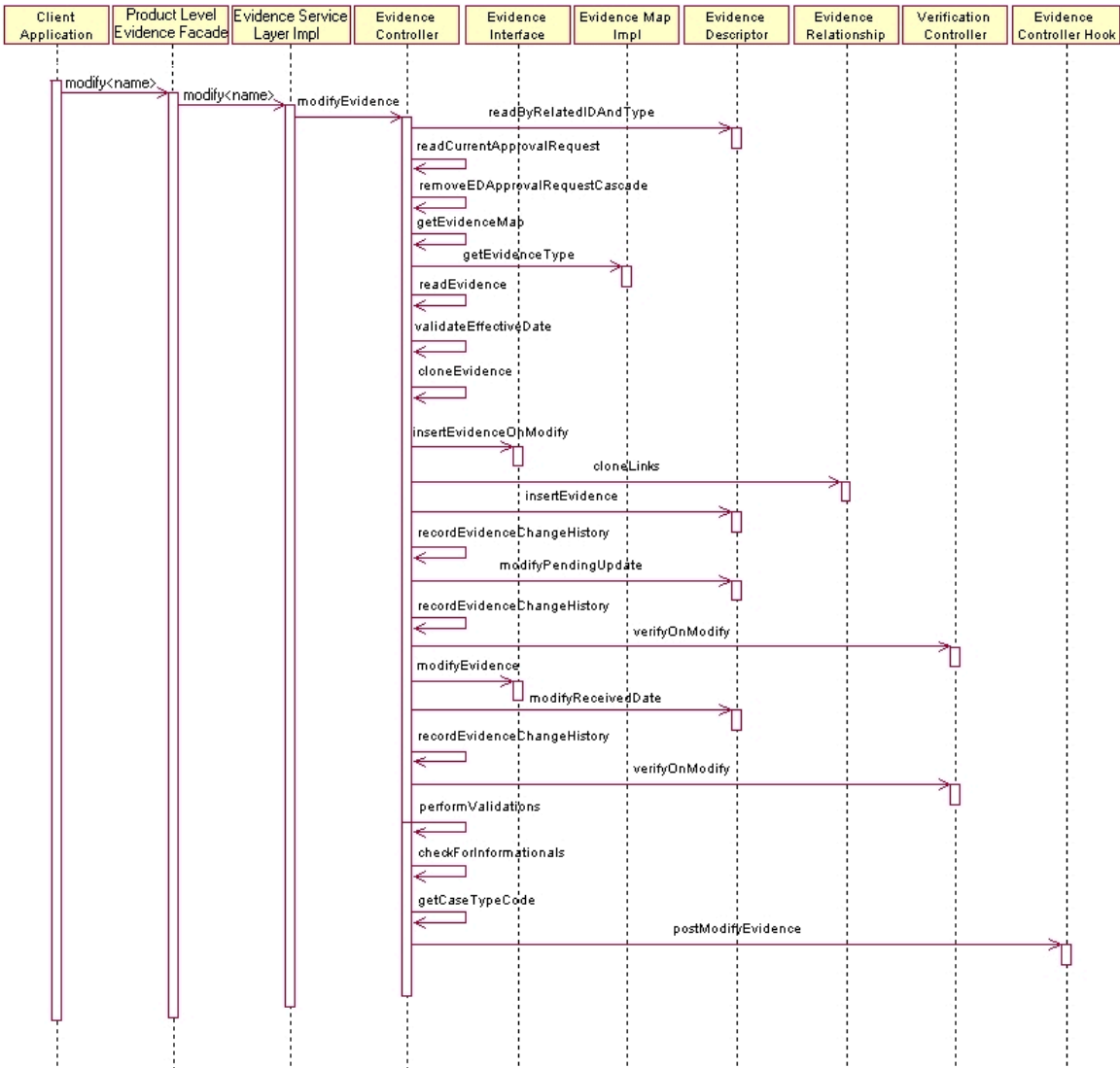
Client screen to develop

The client page to be developed must include the evidence infrastructure page `Evidence_modifyHeader1.vim`. The **included.vim** page facilitates the viewing or modification or both of some infrastructure attributes. For example, the received date can be viewed or modified by using `this.vim`. Also, the change reason and the effective date of change can be set on the edited record. If, in the future, more attributes that need to be managed through the modify function are added to the Evidence Descriptor entity, then these attributes might be mapped through this infrastructure page. So, the operation requires just a once-off infrastructure change rather than many changes to custom artifacts.

The inclusion of `Evidence_modifyHeader1.vim` facilitates the following three types of evidence modification.

- Editing evidence in place

  Editing evidence in place refers to the modification of incorrect data on a piece of evidence that is not yet activated. In this scenario, if the effective date is modified an error is thrown that informs the user that the date can be modified only when the user is updating an active record.

- Evidence correction

  An evidence correction occurs when a piece of data on an active evidence record is modified that results in superseding the current active record. In this scenario, the effective date field must not be modified because it results in a creating new record in the succession.

- Evidence succession

  If the user modifies the effective date when the user is updating a piece of active evidence, the user is specifying a new record in the succession set, that is, the new record has the same successionID as the active record. So, the active record is copied and made effective from the effective date that is specified by the user and the update is applied to this record.

> **Note:** The activation of newly created records in a succession causes the reattribution of records in that succession set.

Server methods to implement

The `SEGEvidenceMaintenance.modifyAssetEvidence` facade operation calls the evidence service layer implementation.

```
// _____
/**
 * Modifies an Asset evidence record.
 *
 * @param details The modified evidence details.
 *
 * @return The details of the modified evidence record.
 */
public ReturnEvidenceDetails modifyAssetEvidence(
  AssetEvidenceDetails dtls)
    throws AppException, InformationalException {

  // set the informational manager for the transaction
  TransactionInfo.setInformationalManager();

  // Asset evidence manipulation object
  Asset evidenceObj = AssetFactory.newInstance();

  // return object
  ReturnEvidenceDetails modifiedEvidenceDetails =
    new ReturnEvidenceDetails();

  // modify the Asset record and populate the return details
  modifiedEvidenceDetails =
    evidenceObj.modifyAssetEvidence(dtls);

  modifiedEvidenceDetails.warnings =
    EvidenceControllerFactory.newInstance().getWarnings();

  return modifiedEvidenceDetails;
}
```

The `Asset.modifyAssetEvidence` service layer operation calls the Evidence Controller infrastructure function for modifying evidence.

```
// _____
/**
 * Modifies an Asset record.
 *
 * @param dtls Contains Asset evidence record modification
 *             details.
 *
 * @return The modified evidence ID and warnings.
 */
public ReturnEvidenceDetails modifyAssetEvidence
  (AssetEvidenceDetails details)
    throws AppException, InformationalException {

  // validate the mandatory fields
  validateMandatoryDetails(details);

  // EvidenceController business object
  EvidenceControllerInterface evidenceControllerObj =
    (EvidenceControllerInterface)
      EvidenceControllerFactory.newInstance();

  EIEvidenceKey eiEvidenceKey = new EIEvidenceKey();

  //
  // Call the EvidenceController to modify the evidence
  //

  eiEvidenceKey.evidenceID = details.dtls.evidenceID;
  eiEvidenceKey.evidenceType = CASEEVIDENCE.ASSET;

  // Create the evidence interface modification struct and assign
  // the details
  EIEvidenceModifyDtls eiEvidenceModifyDtls =
    new EIEvidenceModifyDtls();
  eiEvidenceModifyDtls.descriptor.receivedDate =
    details.descriptor.receivedDate;
  eiEvidenceModifyDtls.descriptor.versionNo =
    details.descriptor.versionNo;
  eiEvidenceModifyDtls.descriptor.effectiveFrom =
    details.descriptor.effectiveFrom;
  eiEvidenceModifyDtls.descriptor.changeReceivedDate =
    details.descriptor.changeReceivedDate;
  eiEvidenceModifyDtls.descriptor.changeReason =
    details.descriptor.changeReason;
  eiEvidenceModifyDtls.evidenceObject = details.dtls;

  evidenceControllerObj.modifyEvidence(
    eiEvidenceKey, eiEvidenceModifyDtls);

  //
  // Return details from the modify operation
  //

  ReturnEvidenceDetails returnEvidenceDetails =
    new ReturnEvidenceDetails();
  returnEvidenceDetails.evidenceKey.evidenceID =
    eiEvidenceKey.evidenceID;
  returnEvidenceDetails.evidenceKey.evType =
    eiEvidenceKey.evidenceType;
  returnEvidenceDetails.warnings =
    evidenceControllerObj.getWarnings();


  return returnEvidenceDetails;
}
```

Read evidence

A read evidence operation involves client and server development.

Sequence diagram for viewing evidence
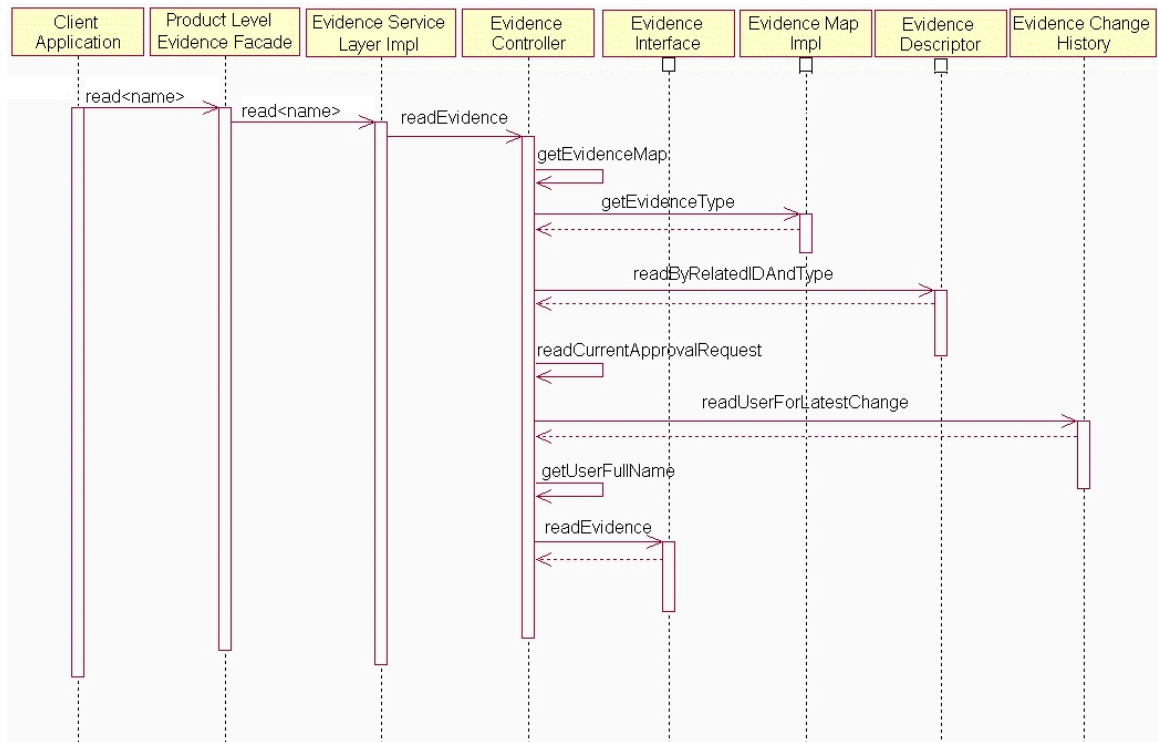
Client screen to develop

The client page includes the evidence infrastructure page
`Evidence_viewHeaderForModal.vim`. The `included.vim` facilitates the viewing of some
infrastructure attributes.

Server methods to implement

The SEGEvidenceMaintenance.readAssetEvidence façade operation calls the evidence
service layer implementation.

```
// _____
/**
 * Reads an Asset evidence record.
 *
 * @param key Identifies the evidence record to read.
 *
 * @return The details of the evidence record.
 */
public ReadAssetEvidenceDetails readAssetEvidence(
  EvidenceCaseKey key)
    throws AppException, InformationalException {

  // Asset evidence manipulation object
  Asset evidenceObj = AssetFactory.newInstance();

  // return object
  ReadAssetEvidenceDetails readEvidenceDetails =
    new ReadAssetEvidenceDetails();

  // read the Asset record and populate the return details
  readEvidenceDetails = evidenceObj.readAssetEvidence(key);

  return readEvidenceDetails;

}
```

This service layer operation calls the Evidence Controller infrastructure function for reading evidence.

```
//_____
/**
 * Reads an Asset record.
 *
 * @param key contains ID of record to read.
 *
 * @return Asset evidence details read.
 */
public ReadAssetEvidenceDetails readAssetEvidence(
  EvidenceCaseKey key)
    throws AppException, InformationalException {

  // EvidenceController business object
  EvidenceControllerInterface evidenceControllerObj =
    (EvidenceControllerInterface)
      EvidenceControllerFactory.newInstance();

  EIEvidenceKey eiEvidenceKey = new EIEvidenceKey();
  eiEvidenceKey.evidenceID = key.evidenceKey.evidenceID;
  eiEvidenceKey.evidenceType = CASEEVIDENCE.ASSET;

  // Retrieve the evidence details
  EIEvidenceReadDtls eiEvidenceReadDtls =
    evidenceControllerObj.readEvidence(eiEvidenceKey);

  // Retrieve the evidence descriptor details
  EvidenceDescriptor evidenceDescriptorObj =
    EvidenceDescriptorFactory.newInstance();

  EvidenceDescriptorKey evidenceDescriptorKey =
    new EvidenceDescriptorKey();
  evidenceDescriptorKey.evidenceDescriptorID =
    eiEvidenceReadDtls.descriptor.evidenceDescriptorID;

  EvidenceDescriptorDtls evidenceDescriptorDtls =
    evidenceDescriptorObj.read(evidenceDescriptorKey);

  //
  // Return the evidence
  //

  ReadAssetEvidenceDetails readEvidenceDetails =
    new ReadAssetEvidenceDetails();
  readEvidenceDetails.descriptor
    .assign(evidenceDescriptorDtls);

  readEvidenceDetails.descriptor.approvalRequestStatus =
    eiEvidenceReadDtls.descriptor.approvalRequestStatus;
  readEvidenceDetails.descriptor.updatedBy =
    eiEvidenceReadDtls.descriptor.updatedBy;
  readEvidenceDetails.descriptor.updatedDateTime =
    eiEvidenceReadDtls.descriptor.updatedDateTime;

  // assign the evidence to the return object
  readEvidenceDetails.dtls.assign(
    (AssetDtls)(eiEvidenceReadDtls.evidenceObject));

  return readEvidenceDetails;
}
```

Special case for reassessments

The data that is fetched by the following two methods is not required when you reassess a case and so, by default, the methods are suppressed during a reassessment transaction:

- `readCurrentApprovalRequestDetails`
- `readUserForLatestChange`

You can use application properties to control the behavior of the two methods. For more information, see the *Cúram Environment Variables Governing Behavior of Engine* related link.

Related concepts

List evidence

A list evidence operation involves client and server development. The list operation is used to populate an evidence workspace page.

Sequence diagram for listing evidence
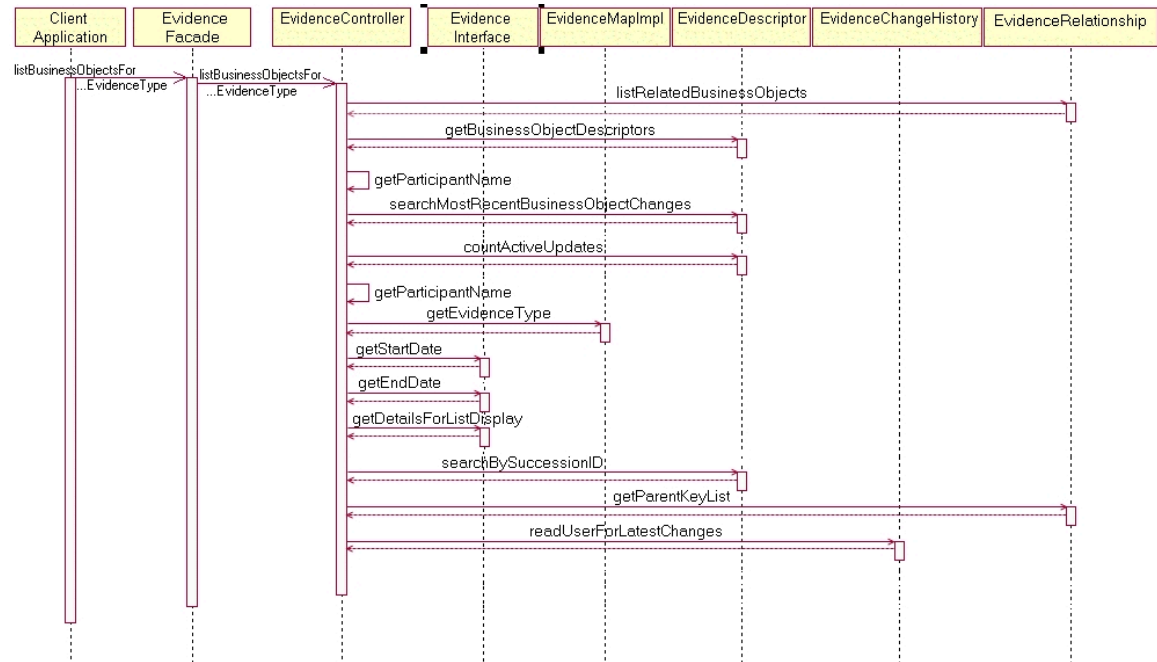
Server methods to develop

Much of the data that is displayed on the workspace page is retrieved by the Evidence Descriptor entity. The description and period are retrieved by the Evidence Interface methods that must be implemented for each evidence type.

• *Asset.getDetailsForListDisplay entity operation*

The description, or summary details, is retrieved by the `getDetailsForListDisplay` Evidence Interface method that is implemented by the evidence entities. The proceeding illustrates the implementation of the `getDetailsForListDisplay` method for the Asset.

This interface function is also used to retrieve summary data when the user is applying, approving, rejecting evidence and in evidence sharing, verifications, and, issues screens.

```java
// _____
/**
 * Gets evidence details for the list display
 *
 * @param key Evidence key containing the evidenceID and
 * evidenceType
 *
 * @return Evidence details to be displayed on the list page
 */
public EIFieldsForListDisplayDtls getDetailsForListDisplay(
  EIEvidenceKey key)
  throws AppException, InformationalException {

  // Return object
  EIFieldsForListDisplayDtls eiFieldsForListDisplayDtls =
    new EIFieldsForListDisplayDtls();

  // Asset entity key
  final AssetKey assetKey = new AssetKey();
  assetKey.evidenceID = key.evidenceID;

  // Read the Asset entity to get display details
  final AssetDtls assetDtls =
    AssetFactory.newInstance().read(assetKey);

  // Set the start / end dates
  eiFieldsForListDisplayDtls.startDate = assetDtls.startDate;
  eiFieldsForListDisplayDtls.endDate = assetDtls.endDate;

  LocalisableString summary = new LocalisableString(
    BIZOBJDESCRIPTIONS.BIZ_OBJ_DESC_ASSET);

  summary.arg(
    CodeTable.getOneItem(SAMPLEASSETTYPE.TABLENAME,
      assetDtls.assetType));

  // Format the amount for display
  TabDetailFormatter formatterObj =
    TabDetailFormatterFactory.newInstance();
  AmountDetail amount = new AmountDetail();
  amount.amount = assetDtls.value;

 summary.arg(formatterObj.formatCurrencyAmount(amount).amount);

  eiFieldsForListDisplayDtls.summary =
    summary.toClientFormattedText();

  return eiFieldsForListDisplayDtls;
}
```

Validations

The infrastructure facilitates the validation of work-in-progress changes. The validate page can be used either at a case level or on an individual evidence type.

The purpose of the case level validate page is to provide a means to test validations in advance of applying the changes. For some products, the full evidence set can be sizeable and results in the apply changes listing containing a considerable number of evidence changes of varying evidence types.

In that scenario, the individual evidence type validate page can make it easier to associate a validation message with the correct evidence record. The validate page allows a user to pre-test the evidence changes. The user can see the validations that fail and then fix the failures before the user applies the changes.

Two of the Evidence Interface functions that form part of the infrastructure support for evidence validation are `selectForValidations` and `validate`.

`selectForValidations`

The `selectForValidations` function is typically used to select all evidences that are related to or depend on the piece of evidence that is being validated. For example, modifying an amount on a parent evidence record. As part of the validation of the parent evidence, a check might need to be performed to ensure that the sum of the child evidence records does not exceed the modified parent amount.

When a user applies changes to evidence records, the Evidence Controller calls out to the `selectForValidations` interface function on the entities for each evidence record. The logic within this method retrieves all related `Active` and `In Edit` evidences within the hierarchy for validation. For instance, where the system is validating a child evidence record within a parent-child-grandchild relationship structure, both parent evidence and grandchild evidence are retrieved for the validation processing.

When processing returns to the Evidence Controller, a filter is applied to the list of evidence. The filter determines the input list and leaves only `Active` records, or `In Edit` records, depending on whether the function must validate against work-in-progress or active only evidence. The filtered list is then passed to the validate function where custom validation is applied.

The proceeding program listing displays a `selectForValidations` implementation that is used in the Asset demonstration.

```
// _____
  /**
   * Selects all the records for validations
   *
   * @param evKey Contains an evidenceID / evidenceType pairing
   *
   * @return List of evidenceID / evidenceType pairings
   */
  public EIEvidenceKeyList selectForValidation(
    EIEvidenceKey evKey)
    throws AppException, InformationalException {

    // Return object
    EIEvidenceKey eiEvidenceKey = new EIEvidenceKey();

    // Casting to impl due to calling non-modeled interface
    curam.seg.evidence.entity.intf.AssetOwnership
```

```
      assetOwnershipObj =
        (curam.seg.evidence.entity.impl.AssetOwnership)
          AssetOwnershipFactory.newInstance();

    eiEvidenceKey.evidenceID = evKey.evidenceID;
    eiEvidenceKey.evidenceType =
      CASEEVIDENCE.ASSET;

    EIEvidenceKeyList eiEvidenceKeyList =
      assetOwnershipObj.readAllByParentID(eiEvidenceKey);

    eiEvidenceKeyList.dtls.add(0, evKey);

    return eiEvidenceKeyList;
  }
```

The code here, on the Asset parent entity, calls the `readAllByParentID` interface method implementation on the child entity, Asset Ownership. The proceeding program listing displays the implementation of the `readAllByParentID` function on the Asset Ownership.

```
// _____
/**
 * Read all Asset Ownership records
 *
 * @param key Contains the evidenceID and evidenceType
 *
 * @return A list of evidenceID and evidenceType pairs
 */
public EIEvidenceKeyList readAllByParentID(EIEvidenceKey key)
  throws AppException, InformationalException {

  // Return object
  EIEvidenceKeyList eiEvidenceKeyList = new EIEvidenceKeyList();

  // Create the link entity object
  EvidenceRelationship evidenceRelationshipObj =
    EvidenceRelationshipFactory.newInstance();

  // parent entity key
  ParentKey parentKey = new ParentKey();
  parentKey.parentID = key.evidenceID;
  parentKey.parentType = key.evidenceType;

  // Reads all relationship details for the specified parent
  ChildKeyList childKeyList =
    evidenceRelationshipObj.searchByParent(parentKey);

  // Iterate through the link details list
  for (int i = 0; i < childKeyList.dtls.size(); i++) {

    if (childKeyList.dtls.item(i).childType.equals(
      CASEEVIDENCE.ASSETOWNERSHIP)) {

      EIEvidenceKey listEvidenceKey = new EIEvidenceKey();

      listEvidenceKey.evidenceID =
        childKeyList.dtls.item(i).childID;
      listEvidenceKey.evidenceType =
```

```
        childKeyList.dtls.item(i).childType;

      eiEvidenceKeyList.dtls.addRef(listEvidenceKey);
    }
  }

  return eiEvidenceKeyList;

}
```

The preceding function retrieves all child evidence keys for the specified parent. The `childID` and `childType` pairings are returned to the calling mechanism.

Evidence attribution and reattribution

Evidence attribution refers to the assignment of a time period to a piece of evidence during which that piece of evidence is used for entitlement calculations.

Attribution

The attribution period can range from a basic one-to-one mapping from the business start and end dates through to a more sophisticated algorithm that considers various factors. This custom logic calculates the attribution period. The evidence controller manages the synchronizing of the attribution period with the specified effective dates.

> **Note:** The attribution from and to dates can be null in which case the piece of evidence is assumed effective from the case start date to the expected end date.

Example

One of the Evidence Interface functions is `calcAttributionDatesForCase` and the implementation of this function on an entity class is where the attribution **From** and **To** dates are determined for evidence on that entity.

Re-attribution

When evidence is modified as part of a succession and later activated, reattribution of the evidence records in the succession set occurs.

Example

Business Start Date: 3 May 2006 (=attribution from date)

Business End Date: 30 July 2006 (=attribution to date)

A succession record is created effective from 5 June 2006. On activation of this record, the evidence is reattributed and the proceeding attribution records are created.

- 3 May 2006 to 4 June 2006
- 5 June 2006 to 30 July 2006

Reattribution also occurs where evidence in a succession set is removed. In the proceeding example, three attribution records exist for records in the same succession set.

- 3 May 2006 to 4 June 2006
- 5 June 2006 to 30 July 2006
- 31 July 2006 to 29 Sept 2006

The evidence record associated with the second entry, that is, 5 June 2006 to 30 July 2006, is removed. So, by applying changes the proceeding reattribution is caused.

- 3 May 2006 to 4 June 2006
- 31 July 2006 to 29 Sept 2006

The attribution record 5 June 2006 to 30 July 2006 remains on the database, but is not selected by eligibility processing as the associated evidence is removed, that is, the associated evidence has a status of `Canceled`.

EvidenceRelationship **link entity**

By default, the Evidence infrastructure facilitates the linking of parent-child evidence by using the `EvidenceRelationship` link entity.

The proceeding table lists the structure of the `EvidenceRelationship` link entity.

Evidence relationship
evidenceRelationshipID
parentID
parentType
childID
childType

The `EvidenceRelationship` supports the relationship between any parent-child evidence and eliminates the necessity for customers to model their own link entities for managing such relationships. When evidence is being inserted, the generic `EvidenceController.insertEvidence` function calls to the business process `EvidenceRelationship.createLink`.

Where a parent type is specified, that is, passed in from the client as part of the insert, then a record is written to the `EvidenceRelationship` entity that links the child evidence to its parent. Also, the system calls to the business process `EvidenceRelationship.cloneLinks` directly after the call to the interface operation `insertEvidenceOnModify`. From `cloneLinks`, two further calls are made to `cloneLinksForParent` and `cloneLinksForChild`.

Where customers are using their own link entities to manage relationships, customers must override the Evidence Relationship business processes for creating and cloning links. The evidence type is available in the input keys of both these functions. So, responsibility can be delegated to the appropriate custom relationship processing based on the evidence type in the key.

Registering evidence implementations

The evidence maintenance pattern requires the set of evidence entities to be registered before they can be used so that the controller can access the evidence entities at runtime.

The Core Cúram Framework cannot anticipate the evidence entities to use for the evidence maintenance facility associated with a particular product implementation. So, the evidence types and their implementation must be paired at run time.

Evidence registrar module

Use Google Guice dependency injection to register the different evidence types and their implementations. To register the different evidence types and their implementations, write a new module class or add the evidence type and their implementations to an existing evidence module

class. When the module class is added to the `ModuleCalssName` table, then at runtime it is loaded and the evidence types registered.

The proceeding is an example of a Google Guice dependency injection.

```
/*
 * Copyright 2011 Cúram Software Ltd.
 * All rights reserved.
 *
 * This software is the confidential and proprietary information
 * of Cúram Software, Ltd. ("Confidential Information").  You
 * shall not disclose such Confidential Information and shall use
 * it only in accordance with the terms of the license agreement
 * you entered into with Cúram Software.
 */

package curam.seg.evidence.service.impl;


import curam.codetable.CASEEVIDENCE;
import com.google.inject.AbstractModule;
import curam.core.impl.FactoryMethodHelper;
import java.lang.reflect.Method;
import com.google.inject.multibindings.MapBinder;
import curam.core.impl.RegistrarImpl;
import curam.core.impl.Registrar.RegistrarType;


/**
 * A module class which provides registration for all of the
 * evidence hook implementations.
 */
public class SEGRegistrarModule extends AbstractModule {

  @Override
  public void configure() {

    // Register all hook implementations which implement the
    // interface EvidenceInterface.
    MapBinder<String, Method> evidenceInterfaceMapBinder =
      MapBinder.newMapBinder(binder(), String.class,
        Method.class, new RegistrarImpl(RegistrarType.EVIDENCE));

    evidenceInterfaceMapBinder
      .addBinding(CASEEVIDENCE.ASSET)
        .toInstance(FactoryMethodHelper.getNewInstanceMethod(
          curam.seg.evidence.entity.fact.AssetFactory.class));
  }
}
```

Legacy evidence registrar

The legacy mechanism for registration of evidence entities is still supported, that is, by using the Application Properties to specify the factories to populate a hash map of the hook classes. The factory code does not change to maintain compatibility with an earlier version. However, all default legacy implementations are deprecated.

Customizing evidence maintenance

As the Evidence Controller functionality is generic to all evidence solutions, the only way to facilitate an organization's unique requirements is to provide hooks where custom logic can be located to extend the core solution. Callouts to these hooks, or extension points, are made within the Evidence Controller maintenance functions.

The Social Program Management infrastructure handles the maintenance of evidence, such as adding, modifying, removing, and applying changes. The infrastructure is independent of the evidence type, that is, by default all evidence types are treated the same.

Customers might need to customize the processing available for immediate use to meet project-specific needs. To facilitate the customize the processing, the `EvidenceControllerHook` interface provides a set of extension points that allows custom code to be run at points in the evidence maintenance process.

As well as adding custom code to the extension points, customers can specify 'case type' specific logic. Customers can use 'case type' specific logic to allow multiple implementations of the `EvidenceControllerHook` to be provided. Each implementation can be mapped to a 'case type' to give case type-specific customization. For example, the `postRemoveEvidence` for evidence on a Product Delivery case might be different than the `postRemoveEvidence` that is run on an Integrated Case.

Evidence Controller Hook

The Evidence Controller Hook is the evidence infrastructure class that contains the extension points for the evidence maintenance pattern.

Example

An example of a hook in the evidence infrastructure class is `postRemoveEvidence`. A call is made to this function inside the Evidence Controller `removeEvidence` operation. Where customers want to perform post-remove evidence processing, customers must override the hook with their custom version.

Providing a custom implementation of the `EvidenceControllerHook`

To inject a custom implementation at the provided extension points, the abstract base class `curam.core.sl.infrastructure.impl.EvidenceControllerHook` can be extended and the wanted methods can be overridden.

For most methods of the base abstract class, the implementation does nothing, but some default implementations are provided, such as for the `PreRemoveEvidence` method. The Java docs of the class can be referenced to recognize the default implementation. If required, the super().`methodname`() notation can be used to start the default implementation from an overridden method to retain the base functions.

To create a new custom `EvidenceController` hook, use the proceeding steps.

- A new process class is modeled in, for example, `CustomHook`. This process must have a 'Generalization' relationship with `EvidenceControllerHook` class (extends `EvidenceControllerHook`).
- An implementation of the newly created process is created, in which any wanted methods are overridden:

```
public class CustomHook extends curam.sample.sl.base.CustomHook {

    @Override
    public void postInsertEvidence(CaseKey caseKey,
        EIEvidence eiEvidenceKey){

    }
}
```

- A new Module class is created, where the wanted product type is bound to the custom hook implementation. This class must extend AbstractModule and a configuration for this module class must be added to MODULECLASSNAME.dmx:

```
public class TestRegistrarModule extends AbstractModule{

    @Override
    protected void configure() {
       MapBinder<String, Method> evidenceControllerMapBinder =
         MapBinder.newMapBinder(binder(), String.class, Method.class,
         new RegistrarImpl(RegistrarType.EVIDENCE_CONTROLLER_HOOK));

         evidenceControllerMapBinder
           .addBinding(PRODUCTTYPE.CUSTOMPRODUCTTYPE)
           .toInstance(FactoryMethodHelper.getNewInstanceMethod(
             CustomHookFactory.class));
    }
}
```

The preceding adds a binding of `CustomHook` implementation to PRODUCTTYPE.CUSTOMPRODUCTTYPE product type string. Product type is used as a key during the `EvidenceControllerHook` implementation look-up. The infrastructure compares this key to the value returned by the implementation of `CaseTypeEvidence.getCaseTypeCode()` that is specific to the evidence type that is being processed. CaseTypeEvidence has many implementations, and the implementation return different case type codes. Refer to the Javadoc to determine the run type of any particular implementation. The key that is used in the binding Module must match the value that is returned by `getCaseTypeCode()`, otherwise the custom hook is not picked up. For example, evidence on a Product Delivery case uses a "productType" code that is defined in the PRODUCTDELIVERY database table. Commonly used case type codes are listed in the proceeding table.

Case name	Case type code database location
Default	CASHEADER.caseTypeCode
Integrated Case	CASHEADER.integratedCaseType
Product Delivery	PRODUCTDELIVERY.productType
Screening Case	SCREENINGCONFIGURATION.name
Assessment Delivery	ASSESSMENTCONFIGURATION.assessmentType
Investigation Delivery	INVESTIGATIONDELIVERY.investigationType

The Evidence Controller Hook Manager class manages the static initialization of the Evidence Controller Hook mapping and the retrieval of the subclass of the Evidence Controller Hook. If no subclass is found, the version of the Evidence Controller Hook class that is available for immediate use is returned.

Evidence Controller Hook Registrar and Manager
The registration of the Evidence Controller Hook class uses a similar pattern to the Evidence Registrar and the underlying Dependency Injection pattern. An Evidence Controller Hook Registrar interface is shipped as part of the evidence infrastructure.

As before, at run time, the Evidence Controller starts the Registrar's register method that performs the dependency injection of the associated custom Evidence Controller Hook. This is the class that extended the default Evidence Controller Hook and overridden the methods that are being customized. This "injector" class is located through runtime configuration where the injector class itself is referred to as the "Evidence Controller Hook Registrar".

Dependency injection

The dependency injection involves two steps. First, a custom Evidence Controller Hook Registrar, which implements the Evidence Controller Hook Registrar interface, must be located and the Registrar then started to register the customized hook class. For example, the product type and custom Evidence Controller Hook class pairing is entered into a hash map and then the class looked up by the product type when it is required. To locate the Evidence Controller Hook Registrar, its class name must be configured that uses the environment variable `curam.case.evidencecontrollerhook.registrars`.

> **Note:** More entries need to be added to the environment variable in a comma-delimited format.

The implementation of the Registrar's register method must reference the customized Evidence Controller Hook class. By using code, rather than as configuration, provides a compile-time check that the referenced class exists. The existence of the Registrar, though, is only ascertained from the provided configuration, and can result in a runtime failure if the application is not correctly configured.

The Evidence Controller Hook Manager class manages the static initialization of the Evidence Controller Hook mapping as well as the retrieval of the subclass of the Evidence Controller Hook. If no subclass is found, the default version of the Evidence Controller Hook class is returned.

Customizing multiple participant evidence
Use the multiple participant evidence to insert multiple records, modify multiple records, or discard multiple records in a single action.

Multiple participant evidence can save time and effort when caseworkers are managing multiple clients on a case, such as adding the same address for all family members in a single operation.

Multiple participant evidence extension points
You can use six extension points for customization.

The proceeding six hook points are provided.

- Pre-create multiple participant evidence.
- Post-create multiple participant evidence.
- Pre-modify multiple participant evidence.
- Post-modify multiple participant evidence.
- Pre-discard multiple participant evidence.
- Post-discard multiple participant evidence

Implementation example

Perform the proceeding two steps to enact custom functionality.

1. Create a new class in your custom package that implements the
   `curam.core.sl.infrastructure.impl.MultiEvidenceHook`
2. Implement each method of the interface.

> **Note:** The arguments supplied to the customization hook points are clones of the original. Modifications of the values are not reflected in the default flow.

```
class CustomMultiEvidenceHookImpl implements
 curam.core.sl.infrastructure.impl.MultiEvidenceHook
  {
    /**
     * Include your custom processing in this function
     * and it will
     * be invoked before the multiple create operation.
     */
      public void preCreateMultiEvidence( final List<CaseParticipantRoleKey>
 participantList)throws AppException, InformationalException
       {
         for (final CaseParticipantRoleKey item : participantList) {
          // Custom participant processing for pre create
          // multiple participant evidence
          …
         }
       }
     // Implement all other interface methods, even if they do nothing.
     …
    }
```

Configuration example

When you create a `MultiEvidenceHook` implementation, perform the proceeding two steeps to configure the implementation for use.

1. In your custom package,, create a new class that extends `com.google.guice.AbstractModule`.
2. Bind the custom implementation to interface that uses Guice binding.

```
public class HookModule extends AbstractModule {
    @Override public void configure()
      {
       // Bind custom multi evidence hook
        bind(MultiEvidenceHook.class).to(CustomMultiEvidenceHookImpl .class);
      }
}
```

Configuring custom filters for multiple participant evidence

You can customize multiple participant evidence to configure custom filters.

Use the multiple participant evidence maintenance filter to control the list of options that are presented to the user during multiple participant operations, specifically in the proceeding three scenarios.

1. The list of participants that are presented to the user during create operations.
2. The list of evidence that is presented to the user during modify operations.
3. The list of evidence that is presented to the user during a discard operations.

Filter types

You can use two types of filters: global filters and evidence type filters.

1. Use global filters as general filters to apply to all evidence, removing the need to apply for every evidence type. Also, global filters ensue that the filter is applied to newly created evidence types that support multiple participant evidence.
2. Use evidence type filters as specific filters to apply at the evidence type level. Evidence type filters permit a more fine grained control over how filters are applied.

Configuring global filters

Global filters are applied to all evidence types. Global filters can be used to provide general rules that are applied across all evidence types.

Using global filters removes the need to replicate filtering rules across multiple types and removes the need to create new filters for each newly created evidence type.

Default global filters

When the system displays a multiple participant create, update or discard page, the list of items that is presented to the user is constructed from the case participants or evidence records. For more information about how these lists are constructed, see the Javadoc information of the `curam.evidence.impl.DynamicEvidenceMultiEvidenceOperations` class.

After the unfiltered list is constructed, a global filter is applied for each operation type. For more information about how each default global filter works, see the Javadoc information of the `curam.core.sl.infrastructure.impl.MultiEvidenceFiltersImpl..`

Replacing global filters

If the default global filter is not suitable for your business scenario, the default global filter can be replaced with a custom version by configuring a new global filter.

You can implement a global filter for a multiple create scenario, multiple modify scenario, and multiple discard scenario.

Global filter for multiple create

The proceeding example shows how a global create filter can be applied to all evidence types that use multiple participant evidence maintenance. The class must extend the `AbstractMultiEvidenceFiltersImpl` and implement the `evaluateParticipantForMultiCreate` operation.

The filter in the proceeding example uses three criteria.

1. Participant exists on the case for the given received date.
2. Participant is of type PRIMARY or MEMBER.

3. Participant is active.

```
        public class CustomMultiEvidenceFiltersImpl extends
AbstractMultiEvidenceFiltersImpl
        {
        /**
          * Removes the given participant from the list presented during multiple
participant create
          * operation.
          * The participant will be removed if they are not active, current and have a
participant
          * type of PRIMARY OR MEMBER.
          *
          * @param participant
          *     a case participant who is currently included in the multiple create
list.
          * @return
          *     true if the participant should be excluded from the list.
          *
          */
        protected boolean excludeParticipantFromMultiCreate(final
MultiParticipantDtls participant)
          {
           return participant.recordStatus.equals(RECORDSTATUS.NORMAL) &&
            (participant.typeCode.equals(CASEPARTICIPANTROLETYPE.PRIMARY) ||

              participant.typeCode.equals(CASEPARTICIPANTROLETYPE.MEMBER)) && new
                DateRange(participant.startDate,
participant.endDate).contains(getCurrentReceivedDate());
          }
        }
```

Global filter for multiple modify

The proceeding example shows how a global modify filter can be applied to all
evidence types that use multiple participant evidence maintenance. The class
must extend the `AbstractMultiEvidenceFiltersImpl` and implement the
`evaluateParticipantForMultiModify` operation.

The filter in the proceeding example uses two criteria.

1. For the participant whose evidence the modify operation was initiated from, filter out all other
evidence records belonging to this participant.

2. Filter evidence that does not exist on the case for the given received date.

```
    /**
      * Custom class to redefine the global filter for the multiple participant
maintenance
      * evidence lists.
      */
    public class CustomMultiEvidenceFiltersImpl extends
AbstractMultiEvidenceFiltersImpl
      {
        /**
          * Return true if you want to filter this item from the list of evidence
that can be
          * modified.
          *
          * @param evidence
          *    an evidence record that is currently included in the multiple
participant update list.
          *
          * @return true if the evidence should be excluded from the multiple
participant update
          * list.
          */
         protected boolean excludeEvidenceFromMultiModify(final MultiEvidenceDtls
evidence) {
            // Do not exclude by default
            boolean shouldExclude = false;
            try {
                shouldExclude = evidence.participantID !=
getCurrentEvidenceDescriptorDtls().participantID
                    && !new DateRange(evidence.startDate, evidence.endDate).contains(

                        getCurrentDynamicEvidenceObject().getReceivedDate());
            } catch (AppException e) {
                // Do not exclude
            } catch (InformationalException e){
                // Do not exclude
            }
             return shouldExclude;
            }
        }
```

Global filter for multiple discard

The proceeding example shows how a global discard filter can be applied to all evidence types that use multiple participant evidence maintenance. The class must extend the `AbstractMultiEvidenceFiltersImpl` and implement the `evaluateParticipantForMultiDiscard` operation.

The filter in the proceeding example uses one criteria.

1. For the participant whose evidence the discard operation was initiated from, filter out all other evidence records belonging to this participant.

```
        /**
          * Custom class to redefine the global filter for the multiple participant
maintenance
          * evidence lists.
          */
        public class CustomMultiEvidenceFiltersImpl extends
AbstractMultiEvidenceFiltersImpl implements MultiEvidenceFilters {

          /**
           * Return true if you want to filter this given item from the list of
evidence that can be
           * discarded.
           *
           * @param evidence
           *    an evidence record that is currently included in the multiple
participant update list.
           *
           * @return true if the evidence should be excluded from the multiple
participant update
           * list.
           */
          protected boolean excludeEvidenceFromMultiDiscard(final MultiEvidenceDtls
evidence) {
              boolean shouldFilter = false;
              try {
                 shouldFilter = evidence.participantID !=
getCurrentEvidenceDescriptorDtls().participantID;
              } catch (AppException e) {
                 // Do not filter
              } catch (InformationalException e){
                 // Do not filter
              }
           return shouldFilter;
          }
        }
```

Global filters configuration

The proceeding example shows how to configure your custom filter for use. In the example, the `CustomMultiEvidenceFiltersImpl` class is bound to the default `MultiEvidenceFiltersImpl` class that results in the custom class that is overriding the default class.

1. In your custom package, create a new class that extends `com.google.guice.AbstractModule`.
2. Bind the custom implementation to interface using Guice binding.

```
        /**
          *   Configure Filters for Multiple Participant Evidence Maintenance.
          */
        public class FilterModule extends AbstractModule {
         @Override
         public void configure() {
           // Bind custom evidence filter

bind(MultiEvidenceFiltersImpl.class).to(CustomMultiEvidenceFiltersImpl.class);
          }
        }
```

Configuring evidence type filters

Use evidence type filters to customize specific evidence types for multiple participant update operations. A custom filter can be configured to apply to one or more evidence types.

> **Note:** Evidence type filters replace global filters. The type-specific filter receives the full set of records that can be legitimately displayed for the operation. For example, all case participants, including canceled ones, or all evidence of the same type, regardless of whether it is canceled or end dated. Evidence type filters provide you with full control over how records are filtered. However, it is likely that you must reapply some of the global rules.

Evidence type filters are configured by mapping the evidence type code of an evidence to a custom filter.

Implementing the multiple participant evidence filter

A multiple participant evidence filter can be implemented by extending the `curam.core.sl.infrastructure.impl.AbstractMultiEvidenceFiltersImpl` abstract class.

Perform the proceeding two steps to customize the filter.

1. Implement a custom filter by extending the `AbstractMultiEvidenceFiltersImpl`.
2. Add a binding for the custom filter implementation that uses Guice binder.

Implementing the new multiple participant evidence-specific filter

The proceeding example demonstrates how to create an evidence type-specific filter. The example excludes email addresses from the multiple update list of an email address modify or discard operation where email addresses are not of the same type as the email address record selected for update.

1. Create a custom class that extends `AbstractMultiEvidenceFiltersImpl` and implements the exclude methods for modify and discard operations.

```
public class MyCustomEmailAddressMultiEvidenceFiltersImpl extends
AbstractMultiEvidenceFiltersImpl {

    @Override protected boolean excludeEvidenceFromMultiModify(final
MultiEvidenceDtls evidence){
        return excludeEmailAddressEvidence(evidence);
    }

    @Override protected boolean excludeEvidenceFromMultiDiscard(final
MultiEvidenceDtls evidence){
        return excludeEmailAddressEvidence(evidence);

    }

    /**
     * Exclude evidence from email address multiple evidence update.
     */
    protected boolean excludeEmailAddressEvidence(final MultiEvidenceDtls
evidence) {
        boolean shouldExclude = false;
        // Include by default.

        final EvidenceDescriptorKey evidenceDescriptorKey = new
EvidenceDescriptorKey();
        evidenceDescriptorKey.evidenceDescriptorID =
evidence.evidenceDescriptorID;
        try {
            // Re-apply the global filter rules because we have disabled them by
            // adding this type specific filter.
            boolean evidenceShouldBeConsidered = evidence.participantID !=
getCurrentEvidenceDescriptorDtls().participantID
                && !new DateRange(evidence.startDate,
evidence.endDate).contains(getCurrentDynamicEvidenceObject().getReceivedDate());

            if (evidenceShouldBeConsidered) {
                boolean shouldExclude =

((String)readDynamicEvidenceObject(evidenceDescriptorKey).getAttributeValue( PDCEmailAddress.ema
                (String)

getCurrentDynamicEvidenceObject().getAttributeValue(PDCEmailAddress.emailAddressTypeAttr));
            }
        } catch (AppException e) {
            // Default to include
        }catch (InformationalException e){
            // Default to include
        }
        return shouldExclude;
    }
}
```

2. Create a Guice module to bind the implementation. For more information about using the Guice modules with Curam, see the *Creating a Guice module* related link. Use the evidence type code to bind the implementation that uses the standard Guice map binder strategy. In the example, the evidence type code that is needed for the binding is PDC0000260, which maps to the 'Email Addresses' evidence type. You can look up the evidence type code value on the EvidenceType code table.

```
public class EvidenceFilterModule extends AbstractModule {

    @Override public void configure() {
        final MapBinder<String, MultiEvidenceFilters>
        pdcMultiEvidenceFiltersMapBinder = MapBinder.newMapBinder(binder(),
String.class, MultiEvidenceFilters.class);
        pdcMultiEvidenceFiltersMapBinder.addBinding("PDC0000260").to(
        MyCustomEmailAddressMultiEvidenceFiltersImpl.class);
    }
}
```

Related concepts

Evidence end dating feature implementation

Caseworkers create an evidence record by recording the evidence in the first page of the evidence wizard. If an administrator enables the end dating feature for the evidence type and the end dating criteria are met, a second page is displayed in the evidence wizard. On the page, caseworkers can end date previous evidence records. Administrators need to be aware of some implementation details and behavior in relation to the end dating of evidence records through the evidence wizard.

The following information supplements the configuration information that is described in the *Enabling the End Dating of Previous Evidence When Creating Evidence* topic. Also, the following information supplements the procedural information that is described in the *Applying end dating in the creation of evidence records* topic. For more information, see the related links.

Navigating to the end dating evidence option in the evidence wizard

In the evidence wizard, to navigate from the first page where an evidence record is created to the second page where evidence records can be end dated, caseworkers must click **Save and Next**. Note the following points:

- If the create evidence transaction fails, the transaction is rolled back, no record is committed to the database, and the appropriate validation error is displayed to the caseworker on the same evidence record creation page. The caseworker is not redirected to the next wizard page.
- If the create evidence transaction is successful, the evidence is created and committed to the database, and the caseworker is directed to the second page of the wizard. Therefore, as the create and end date processes are separated as end-to-end transactions, the caseworker cannot navigate back to the previous evidence record creation page.

Completing the evidence wizard

In the evidence wizard, when the caseworker clicks **Finish** in the evidence end dating page, the end date evidence transaction is triggered. Note the following points:

1. If the end date evidence transaction fails, the transaction is rolled back, no record is committed to the database and the appropriate validation errors are displayed to the caseworker in the same evidence end dating page. For dynamic evidence records, the end dating validation errors are aggregated so that all validation errors are displayed to the caseworker. To enable aggregated validation error messages for non-dynamic evidence records, in the customized non-dynamic evidence validation classes, replace the `InformationalManager.failOperation()` method call with the `MultiFailOperation.failOperationWithMPO()` method call. If you do not replace the method, when the first validation error occurs, the application might display the validation error message in the user interface instead of in the aggregated validation error messages.

   > **Note:** The end date of all selected evidence records is aggregated in one single transaction. Therefore, if the end dating of one evidence record fails, the whole transaction is rolled back and no evidence records are end dated.

2. If the end date evidence transaction is successful, all selected evidence records are end dated and the data is committed to the database.

Customizing the default implementation

You can customize the default implementation in the
`curam.core.sl.infrastructure.impl.ListAutoEndDateEvidenceImpl.listEvidenceForAutoEn`
method. The method lists the evidences to be end dated that are displayed in
the evidence record end dating page of the evidence wizard. To customize
the method, create a custom implementation class that extends the
`curam.core.sl.infrastructure.impl.ListAutoEndDateEvidenceImpl` default
implementation class.

The custom class must never directly implement the interface class because compilation
exceptions might occur during an upgrade if you add new methods to the interface. To ensure
that the application runs the new custom class rather than the default implementation, you must
use the standard Guice dependency injection mechanism to implement a new module class
that extends the `com.google.inject.AbstractModule` module. You must insert the fully
qualified module class name into the `MODULECLASSNAME` database table.

Enabling hook points

You can enable the hook points through the standard Guice dependency injection mechanism.
Hook points are provided to the evidence end dating feature through the following interface
methods:

- The
  `curam.core.sl.infrastructure.impl.AutoEndDateEvidenceHook.preAutoEndDateEvidence`
  interface method is started before the end dating of evidence records.
- The
  `curam.core.sl.infrastructure.impl.AutoEndDateEvidenceHook.postAutoEndDateEvidenc`
  interface method is started after the end dating of all evidence records.

The hook points are started only through the end dating process that is triggered when a
caseworker clicks **Finish** in the evidence wizard evidence end dating page.

Related tasks

1.2 Developing with the Evidence Generator

The Evidence Generator greatly reduces the repetitive work that is required to build custom
evidence entities and ensures that all evidence entities that are developed comply with the
evidence standards.

Designing, developing, and maintaining custom evidence entities and the screens necessary
for capturing the evidence takes time. With evidence, every custom entity must implement the
evidence interface. Therefore, there is repetition in the code that is used to create and maintain
evidence entities.

Using the Evidence Generator makes creating evidence entities easier and saves you time. The
evidence entities are also far easier to maintain. Changes to how the entities work can be made
through a single change to the Evidence Generator instead of making many individual changes to
all the entities.

Inputs and outputs

To use the Evidence Generator, you must provide evidence type information in four files. When you run the Evidence Generator, it produces specific server code, client screens, and online help screens.

Inputs for the Evidence Generator

- **Rational® Software Architect Designer Model**
  You must model the evidence type in Rational® Software Architect Designer. You must add new evidence entity, its attributes, and its operations to the Rational® Software Architect Designer Model.
- **XML file**
  Extra server-side metadata is recorded in an XML file. This additional information can include, for example, the evidence entity's relationship with a parent or child entity.
- **EUIM file**
  Extra client-side metadata is recorded in an Evidence User Interface Metadata (EUIM) file. The information that the EUIM file produces is used by the Evidence Generator to build all the screens that are needed for maintaining an evidence entity.
- **Properties file**
  The properties file contains globalized information and online help content that is required for the evidence maintenance screens.

Outputs from the Evidence Generator

- **Server code**
  All the necessary server code is generated for the functions:

  - Creating a new evidence record.
  - Reading an evidence record.
  - Modifying an evidence record.
  - Deleting an evidence record.

  The Evidence Generator also provides list functions so that lists of the evidence records can be displayed on various pages.
- **Client screens**
  The Evidence Generator produces the evidence client screens and views, which includes tab configurations and the dmx data that is necessary for evidence wizard pages. The generated client screens use the Evidence User Interface (EUI), and, so, are consistent with the existing evidence screens.
- **Online help screens**
  The Evidence Generator produces an individual online help screen for each evidence maintenance page.

Attribution periods or validations are not generated

The Evidence Generator does not produce the attribution periods or validations of an evidence type.

- **Attribution periods**
  Attribution periods are the periods of time during which a piece of evidence is used in case assessment. The Evidence Generator does not generate the code that is used for attribution periods. Instead, you must write module-specific code that calculates:

  - The attribution From date.
  - The attribution To date.

- **Validations**
  Evidence validations are checks that are run on a piece of evidence to ensure that the evidence meets the business requirements that are defined for the evidence type. Handcrafting the validations is more efficient than attempting to generate them. Use the Evidence Generator to generate evidence entities to "call out" to the validations you create. For more information about Validate CallOut patterns, see the *Validate CallOut patterns* related link.

Related information

Evidence patterns

When you design evidence entities for large modules, all entities must fit into a relatively small number of patterns. These patterns are typically governed by how an evidence type, or entity, relates to another evidence type.

These patterns are the basis of the Evidence Generator. To use the Evidence Generator to create a new evidence type, you must analyze the relationships and behaviors of your proposed evidence type. When you identify the evidence type's relationships, typically the correct choice of pattern is clear. An evidence entity can use more than one pattern.

The characteristics of each Evidence Generator pattern are explained to help you recognize them when you analyze the requirements for your own custom evidence types.

Parent-Child pattern

Use the Parent-Child pattern to capture a logical relationship between two entities that meet the criteria of a parent-child relationship.

The Parent-Child pattern is the most common pattern. Use it for entities that have a parent-child relationship.

The characteristics of a Parent-Child relationship are:

- The child entity must belong to a parent, and cannot exist without a parent.
- The parent entity can have many children.

Example of when to use the Parent-Child pattern

Use the Parent-Child pattern to model the relationship between income evidence and income usage evidence. An income record for the money that is received by the client must exist before you can create an income usage record for how that money was spent. As the money received might be spent to pay a number of bills, multiple income usage records can be associated with the income record.

When not to use the Parent-Child pattern

The Parent-Child pattern is not suitable in these two instances:

- Loosely associated evidence entities.
- The evidence entity in the child role can exist without a relationship to the parent entity.

Pre-Association pattern

A Pre-Association relationship exists between two evidence entities that can live independently of each other until they are associated with each other by a caseworker.

Like the Parent-Child pattern, the Pre-Association pattern is commonly used.

Example of when to use the Pre-Association pattern

Use the Pre-Association pattern where a logical relationship exists between two records and to facilitate a caseworker in easily establishing this relationship. Before a caseworker can enter data about the main evidence type, the caseworker is prompted to select evidence as defined by this pre-association pattern. By selecting evidence, a relationship between the two evidence records is established.

For example, a client is a member of a household. The member details are captured in a household member evidence record. Later, a child is born to the household member. A household member evidence record captures the child's birth. However, the mother-child relationship must also be captured by using a household relationship evidence record. By specifying a pre-association pattern for household relationship evidence to household member evidence, when a caseworker creates a new household relationship record to capture the mother-child relationship, the caseworker is prompted to:

1. Select the household member.
2. Enter the household relationship details.

Performing the preceding steps shows that there is a logical relationship between the member and the household relationship. The member must be selected before a relationship and related member can be created.

When not to use the Pre-Association pattern

Do not use the Pre-Association pattern for evidence entities that are not logically related or entities that more naturally fall into a Parent-Child relationship. To record an associative relationship between an evidence entity and a non-evidence entity, use a Related pattern not a Pre-Association pattern. For more information about the Related pattern, see the *Related Pattern* link.

Related concepts

[Related pattern on page 48](#)
Use the Related pattern to show a relationship between a new evidence entity and a record that is not an evidence entity.

Related pattern

Use the Related pattern to show a relationship between a new evidence entity and a record that is not an evidence entity.

Creating the evidence entity depends on the existence of the other record. Likewise, a child record requires a parent record.

When to use the Related pattern

Use the Related pattern to link an evidence entity to a non-evidence entity. A common example of the Related pattern is where creating a paid employment record depends on the existence of a (core) employment record. A paid employment record is an evidence entity, and an employment record is part of the data that is captured for a client in the participant manager. The relationship between a paid employment record and an employment record is typically a foreign key relationship.

Search Case Participant pattern

Use the Search Case Participant pattern where creating or maintaining your new evidence entity requires that you search for any case participant.

Example of when to use the Search Case Participant pattern

Use the Search Case Participant pattern to associate a case participant with the evidence that is being created. For example, it might be necessary to search for the client's employer when you are creating employment evidence as the employer's case participant role identifier might be stored on the client's employment record.

Validate CallOut pattern

Use the Validation CallOut pattern to add validations to generated evidence entities.

Validations for a generated evidence entity are not created by the Evidence Generator. Instead, you create validations in a separate file. Use the Validation CallOut Pattern when you design the evidence entity to ensure that it can "call out" to the file that contains the validations.

When you use the Validate CallOut pattern, the generated validate class is only generated once. Therefore, during subsequent generation the generated validate class is not overwritten. Add this class to your own software versioning control system so that you can modify it as required.

When to use the Validation CallOut pattern

You must use the Validation CallOut pattern if custom validations must be added to the generated evidence entity.

Page Hierarchy pattern

Use the Page Hierarchy pattern when you design an evidence entity that can be associated with many different types of records.

An evidence entity can have many different relationships. Where an evidence entity is associated with many different types of record, these types of records must be accessible from the navigation bar on the evidence maintenance screens.

When to use the Page Hierarchy pattern

Use the Page Hierarchy pattern to generate the page hierarchy where many evidence types can be associated with an evidence entity.

Modeling that is required for the evidence patterns

Specific entity modeling is required when you use the Cúram Evidence Generator as the generator relies on certain, attributes, structs, and aggregations within the generated code. Use

this information to learn about entity modeling that is required to use the evidence generator. The evidence generator relies on the existence of certain attributes, structs, and aggregations within the generated code. Various modeling strategies are required for the different metadata patterns available in the generator.

To model the structs, ensure that you are familiar with the information in the following three links: *Cúram Server Developer*, *Designing an evidence solution*, and *Developing with evidence*.

Related concepts

[Developing evidence manually on page 9](#)
Custom evidence solutions can be developed with Cúram Evidence. All of the evidence server-side infrastructure artifacts are available in the curam.core.sl.infrastructure.impl package. The evidence metadata entity contains metadata about each evidence type. This entity must be populated before evidence maintenance can proceed. Evidence maintenance functions are available in the administration application.

Related information

Entity modeling: entities

In addition to the normal entity modeling, specific settings are required so that the entity can work correctly with the generated code.

Code package

The code package for the entity and its associated structs must be specified in the model. For example:

```
CODE_PACKAGE=seg.evidence.entity
```

> **Note:** The code package must correspond with the *product.ejb.package* property. For more information about the *product.ejb.package*, see the *Asset as generated evidence: implementing a sample evidence type* related link.

Optimistic locking

Optimistic locking must be turned on at the entity level because the evidence solution, which interacts with the entity, relies on database-controlled versioning.

Required attributes

The evidence generator relies on certain attributes to run successfully.

Key field

The key field of the entity must be named *evidenceID* because it results in fewer generated entity key structs on the server side.

Required operations

The evidence generator relies on the existence of certain operations to successfully run.

Insert

The `insert` operation must use the stereotype `insert`. With the `insert` operation, you can use the Auto ID setting and the `pre-data access` operation in the following ways:

- The Auto ID setting must be turned on for the *evidenceID* to generate the unique identifier to insert records into the database. The evidence generator is configured to expect that the Auto ID setting is turned on.
- The pre-data access operation must be set to **Yes**.

modify

The `modify` operation must use the stereotype `modify`. With the `modify` operation, you can use the `pre-data access` operation and optimistic locking in the following ways:

- The `pre-data access` operation must be set to **Yes**.
- Optimistic locking must be set to **Yes**.

read

The `read` operation bus use the stereotype `read`.

remove

The `remove` operation must use the stereotype `remove`.

Customizing a default evidence entity

To customize a default evidence entity, create an entity extension in the custom model. For more information on creating an entity extension in the custom model, see the *Cúram Server Modeling Guide*.

Code package

The code package for the extension must be specified in the model. For example:

```
CODE_PACKAGE=custom.seg.evidence.entity
```

> **Note:** The code package must correspond with the *product.ejb.package* property that is configured in the default product, prepended with the text `custom.`, as in preceding example. For more information about the *product.ejb.package*, see the *Asset as generated evidence: implementing a sample evidence type* related link.

Related information

Entity modeling: required structs

Rather than creating similar or identical structs at each layer, the evidence generator uses the structs that are created at the entity layer to pass data to the façade layer.

So, it is important for the generator that certain structs are created and named with the correct naming convention. Also, extra aggregations are required under certain conditions. For more information about the conditions that apply, see the proceeding `<EntityName>EvidenceDetails` and `Read<EntityName>EvidenceDetails` sections and the *Entity modeling: build process* related link.

<EntityName>EvidenceDetails

A struct that is named `<EntityName>EvidenceDetails` must be created. This struct must have no attributes of its own, and must include the following three aggregations:

Object	Aggregation name	Multiplicity
The entity that is being modeled	dtls	1:1
core.sl.EvidenceDescriptorDetails	Descriptor	1:1
core.sl.CaseIDKey	caseIDKey	1:1

Read<EntityName>EvidenceDetails

A struct that is named `Read<EntityName>EvidenceDetails` must be created. This struct must have no attributes of its own, and must include the following two aggregations:

Object	Aggregation name	Multiplicity
The entity that is being modeled	dtls	1:1
core.sl.EvidenceDescriptorDetails	Descriptor	1:1

Related concepts

No additional modeling is required beyond the entity layer because the evidence generator infers the classes that are requiredthat are at service and façade layer.

Entity modeling: the build process

No additional modeling is required beyond the entity layer because the evidence generator infers the classes that are requiredthat are at service and façade layer.

For the following two reasons, the evidence generator can infer the classes that are requiredthat are at service and façade layer:

- The evidence solution provides the necessary tools for maintaining evidence records.
- The evidence generator uses a combination of the structs you created at the entity layer and a number of structs that are provided by the evidence solution.

Service layer

During the build, the generator creates a process class for each evidence entity at the service layer level. The process class that is created has at least the following three operations:

- `create<Entity Name>`
- `read<Entity Name>`
- `modify<Entity Name>`

More functions might be created to handle the more specialized scenarios, but those functions are generated by the evidence generator. Likewise, the implemented code that is required to run these functions is generated by the evidence generator.

Facade layer

At the façade layer, the evidence generator generates a single process class per product that contains all the functions that are required for evidence maintenance. For each single entity, at least the following three functions are added to this process class:

- `create<Entity Name>Evidence`
- `create<Entity Name>Evidence`
- `modify<Entity Name>Evidence`

Similar to the service layer, extra functions might be created to handle the more specialized scenarios, but those functions are generated by the evidence generator.

> **Note:** No `list<Entity Name>Evidence` function is listed in the preceding section as the generic `listEvidence`function on the evidence facade is used instead. The generic `listEvidence` function also accounts for no `list<Entity Name>` function on the service layer.

Parent-child relationships

Where an evidence entity is taking the role of a child in a parent-child relationship, additional aggregations must be specified.

Additional aggregations: <EntityName>EvidenceDetails

The `<EntityName>EvidenceDetails` struct must now also aggregate the structs that are listed in proceeding table.

Object	Aggregation name	Multiplicity
core.sl.EvidenceKey	parEvKey	1:1
core.sl.ParentSelectDetails	selectedParent	1:1

Multiple mandatory parent relationships

Where an evidence entity is taking the role of a child with multiple mandatory parents, additional aggregations must be specified.

Additional aggregations
<EntityName>EvidenceDetails

The `<EntityName>EvidenceDetails` struct must now also aggregate the following struct for each of the mandatory parent types.

Object	Aggregation name	Multiplicity
core.sl.EvidenceKey	<Parent Entity Name>ParEvKey	1:1

> **Note:** To keep with standard Java® naming practices, the first letter in the preceding aggregation name must be lowercase.

Read<EntityName>EvidenceDetails

The `Read<EntityName>EvidenceDetails` struct must now also aggregate the following struct for each of the mandatory parent types.

Object	Aggregation Name	Multiplicity
core.sl.ParentEvidenceLink	<Parent Entity Name>ParentEvidenceLink	1:1

> **Note:** To keep with standard Java® naming practices, the first letter in the preceding aggregation name must be lowercase.

Pre-association relationships

When you use the pre-association pattern, specific additional modeling is required.

Additional aggregations
<EntityName>EvidenceDetails

The `<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Object	Aggregation name	Multiplicity
core.sl.EvidenceKey	preAssocKey	1:1

Case participant attributes

When you add a case participant attribute to the entity, further aggregations are required to permit the details be added correctly.

Additional aggregations
<EntityName>EvidenceDetails

The `<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Object	Aggregation name	Multiplicity
core.sl.CaseParticipantDetails	caseParticipantDetails	1:1

Read<EntityName>EvidenceDetails

The `Read<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Object	Aggregation name	Multiplicity
core.sl.ReadCaseParticipantDetailss	caseParticipantDetails	1:1

Additional case participant attributes

In certain circumstances, a business requirement might be to have a case participant, other than the primary case participant, stored as a piece of evidence data. For example, a piece of evidence named 'Medical Report'. In such a case, two requirements apply:

- It is necessary to store the ID of the person for whom the medical report was commissioned.
- It is necessary to store the ID of the medical practitioner who compiled the report.

Other examples of case participants are Education Faculties, Unions, or Employers.

You can flag an attribute, by using metadata, as being a special 'case participant' attribute. This means that this attribute stores the role ID of the case participant. You must provide the `name` attribute in the `CaseParticipant` element of the EUIM metadata, and use this name when aggregating the structs.

Additional aggregations

To facilitate the generator in its handling of this special flag, the two required structs must aggregate additional structs.

- **<EntityName>EvidenceDetails**

  The `<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Object	Aggregation name	Multiplicity
core.sl.CaseParticipantDetails	<name>CaseParticipantDetails	1:1

- **Read<EntityName>EvidenceDetails**

  The `Read<EntityName>EvidenceDetails` struct must now also aggregate the proceeding structs:

Object	Aggregation name	Multiplicity
core.sl.ReadCaseParticipantDetails	<name>CaseParticipantDetails	1:1

Related entity attributes

In certain circumstances, a business requirement might require that a field value from a related entity is available either to display or to use when the user is maintaining an entity.

For users, the availability of such a field value can be a helpful hint when users are entering information. Typically, the information that is used is from a parent evidence record. For example, displaying the remaining unallocated amount of an income record when a user wants to allocate this income against expenses.

Additional structs
Additional structs

In a scenario similar to the preceding scenario, an additional struct must be created at the entity layer to hold the related information.

- **<EntityName>RelatedEntityAttributesDetails**

  The `<EntityName>RelatedEntityAttributesDetails` struct must have, as attributes, any attribute that is to be shared between the entities. The attribute must be of the appropriate type.

Additional aggregations

- **Read<EntityName>EvidenceDetails**

  The `Read<EntityName>EvidenceDetails` struct must now also aggregate the proceeding structs.

Object	Aggregation name	Multiplicity
<EntityName>RelatedEntityAttributesDetails	relatedEntityAttributes	1:1

Non-evidence attributes

Where an entity uses the non-evidence details pattern, an extra struct must be modeled and aggregated into the standard evidence struct.

Additional struct that are required

- **<EntityName>NonEvidenceDetails**

  The `<EntityName>NonEvidenceDetails` struct must be modeled. The struct must hold all the extra attributes that are required for this entity.

Additional aggregations

- **<EntityName>EvidenceDetails**

  The `<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Table 1: Additional aggregations

Object	Aggregation name	Multiplicity
<EntityName>NonEvidenceDetails	nonEvidenceDetails	1:1

- **Read<EntityName>EvidenceDetails**

  The `Read<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Table 2: Additional aggregations

Object	Aggregation name	Multiplicity
<EntityName>NonEvidenceDetails	nonEvidenceDetails	1:1

Non-modifiable entities

Where you require that the entity cannot be modified, additional modeling is required.

Additional struct that are required

Additional aggregations

- **Read<EntityName>EvidenceDetails**

  The `Read<EntityName>EvidenceDetails` struct must now also aggregate the proceeding struct.

Table 3: Additional aggregations

Object	Aggregation name	Multiplicity
curam.core.sl.infrastructure.struct.ECWarningsDtlsList	warnings	1:1

Evidence Generator specification

Use the Evidence Generator as a rapid way to develop the server side code and client-side screens for evidence entities that integrate fully with the standard Evidence Solution.

> **Note:** The generator requires that the entity is modeled with specific options set, and that certain associated structs are created according to a naming convention and with specific aggregations. For more information, see the *Modeling for the Evidence Generator* related link.

This section provides a complete reference for the following:

- Configuring the Evidence Generator
- Developing the evidence entities that use the Evidence Generator

This section also describes the patterns that can be applied at development time, the meta data required for each, and how it affects the generated output.

Related concepts
Specific entity modeling is required when you use the Cúram Evidence Generator as the generator relies on certain, attributes, structs, and aggregations within the generated code. Use this information to learn about entity modeling that is required to use the evidence generator. The evidence generator relies on the existence of certain attributes, structs, and aggregations within the generated code. Various modeling strategies are required for the different metadata patterns available in the generator.

Input sources for the generator
The generator relies on specific input sources to produce its outputs.

Configuration
The generator is configured by using a components *evidence.properties* file. The file provides options for, for example, setting the code package of generated code, the location of generated files, and so on.

Standard properties and message files

Each component must also provide a general message, and the following two standard properties files:

- *general.properties*
  The file provides many of the standard properties that are needed by the generator, such as various page and list titles and standard action control links. It helps to ensure a consistent experience across all evidence types under the generators control.

- *employment.properties*
  The file provides many of the standard properties that are needed by the generator when it is linked with core employments, including various page and list titles and standard action control links. The file helps to ensure a consistent experience across all evidence types under the generators control.

- *Ent<product.prefix>GeneralError.xml*
  This file provides many of the error messages that the generated code attempts to throw under certain circumstances.

Entity metadata

Each entity that is generated requires its own metadata files to be provided. These describe various features of the entity that is generated, and are roughly separated into two distinct sections.

- **Server side**
  The server side metadata is used to define various things, including the relationships between various entities, the participant the record relates to, the business dates of the entity, and any cached database operations.

- **Client side**
  The client side metadata is more concerned with the layout of the generated screens, and the text labels and descriptions that appear on them.

Outputs from the generator

The Evidence Generator produces the code, screens, and configuration files that are required for evidence types to fully integrate with the standard Social Program Management Evidence Solution. No further coding is required.

The generator also produces skeleton implementations of various extension points in the code to permit simple customization of the generated evidence. For example, for validations, and both pre- and post-processing for the standard Create, Read and Update methods.

Modeling

For each entity that is handled by the generator, a service layer class and various extension classes are modeled. The modeling ensures that all generated code can be accessed by using the normal application interface-factory method. In addition, a facade class is generated per component to provide access to all the Create, Read, Update, and Delete operations for those entities.

Code implementation

Implementation code is generated for all of the modeled classes that are created by the generator, and for the entity layer. The code implementation ensures that there is no requirement to write any further code.

However, there are several extension points that are generated where custom code can be easily integrated into the generated implementation code. The extension points are useful for things such as validations, evidence object descriptions.

Message files

The generator also produces a message file per entity with specific error messages that are contained within.

Screens

The generator writes all the screens that are required for creating, modifying, viewing, listing, and so on, the different evidence records. The generator also resolves scripts that are required to integrate the generated screens with the standard infrastructure screens.

Wizards

When you select to create an evidence object at runtime, often related or parent objects must be selected. In this case, the generator produces all the wizard configuration and screens that are required to take the user through this process, step-by-step.

Tabs

Each entity also has a Business Object Tab that is produced to permit the user to view all details about an evidence object, such as its change history, and any related objects.

Base directory and directory structure setup

The base directory for the configuration and metadata must be named *evidence*, and the file *evidence.properties* must exist. The base directory must contain three sub-directories: properties, server metadata, and client metadata.

The Evidence Generator is designed to automatically find any locations where evidence must be generated by looking for a specific directory and file structure within each component in the component order. It is essential to get the structure correct.

> **Note:** The case of letters in the directory and file names is important and must be created exactly as specified.

Properties directory

Within the *evidence* directory, there must be a directory that is called *properties*. The directory is the location for the *general.properties* and *employment.properties* files.

Server metadata directory

Within the *evidence* directory, there must be a directory that is called *server*. Within *server* is a directory that is called *metadata*. The directory is the location for your server metadata files.

Client metadata directory
Integrated case level

Within the *evidence* directory, there must be a directory that is called *integrated*. Within the directory, there is a directory that is called *metadata*. The directory must be the location for your client metadata files for integrated level cases.

Product delivery case level

Within the *evidence* directory, there must be a directory that is called *product*. Within the directory, there is a directory called *metadata*. The directory is the location for your client metadata files for product delivery level cases.

Configuration and common page properties

You can customize different aspects of the Evidence Generator. Two common page properties are *general.properties* and *employment.properties*.

Configuration

The *evidence.properties* file permits customization of different aspects of the Evidence Generator. The customization ranges from the location of generated output files to the java code package used.

For more information about the customization options, see the *evidence.properties* related link.

general.properties

The *general.properties* file is used to specify common properties that are used on many generated pages. The properties range from page titles and list column headers to labels for common actions.

For more information about the properties' options, see the *general properties* related link.

employment.properties

The *employment.properties* file is used to specify common properties that are used on generated pages that involve related generated evidence to the core employment entity.

For more information about the properties' options, see the *employment properties* related link.

Server metadata: the entity node

The server-side metadata is used to describe the relationships between entities, and several options in respect of cached methods and the participant to associate the evidence to.

For more information about the metadata format and possible values to use, see the *Server metadata: document structure* related link.

The entity node

The root node of a server metadata XML document is the `Entity` node. The node contains attributes for specifying the logical name of the `Entity` and an attribute to specify which case participant a record must be associated with.

```
<Entity logicalName="PaidEmployment"
       relateEvidenceParticipantID="employeeCPRID"
    >
     ...
     </Entity>
```

Relationships

The `Relationships` node is used to specify information about how the current entity relates to other evidence entities, and certain core entities. There are no attributes on this node. However, four sub-patterns can be used:

- Parent-child relationships
- Multiple mandatory parents
- Pre-association relationships
- Related relationships

Parent-child relationships

The parent-child relationship pattern describes a hierarchical relationship between two evidence entities. It is the fundamental relationship in Social Program Management Evidence. The relationship essentially means that the child cannot be created until a parent record is created. The relationship is enforced by the navigation within the application. The pattern can be used to create multitier, that is, generational, relationships. For example, parent-child-grandchild-greatgrandchild.

- **Metadata entries**

  The metadata for describing a parent-child relationship requires listing the possible parent or child types for each entity. In the following example, a parent-child relationship exists between Paid Employment (Parent) & Employment Address (Child).

  From PaidEmployment.xml (that is, the XML to describe the Paid Employment entity):

```
<Relationships>
        <Child name="EmploymentAddress" />
      </Relationships>
```

  From EmploymentAddress.xml (that is, the XML to describe the Employment Address entity):

```
<Relationships>
        <Parent name="PaidEmployment"/>
      </Relationships>
```

Multiple mandatory parents

The multiple mandatory parents pattern is similar to the standard parent-child pattern except that more than one parent must be specified for each.

- **Metadata entries**

  To describe a multiple mandatory parents relationship, the list of parent types must be wrapped in a `MandatoryParents` node.

  Expanding on the example from the parent-child section, from EmploymentAddress.xml:

```
<Relationships>
        <MandatoryParents>
          <Parent name="PaidEmployment"/>
          <Parent name="AnotherParentType"/>
        </MandatoryParents>
      </Relationships>
```

Pre-association relationships

The pre-association pattern is used when an association exists between two entities and the user is required to select the associated record before the user creates the record that completes the association.

- **Metadata entries**

  The metadata for this pattern is simple and involves specifying the list of entity types to be chosen as a pre-association.

```
<Relationships>
        <PreAssociation to="AnotherEntityType"/>
      </Relationships>
```

Related relationships

The related pattern is used to relate an evidence record to a non-evidence record. The related pattern is typically achieved by storing the unique identifier of the non-evidence record as a foreign key on the evidence entity. An example might be to relate a Paid/Self-Employment evidence record to a core Employment record. The related pattern is done by storing the unique identifier of the core Employment record on the Paid/Self employment entity.

A feature of the related pattern is that it is necessary to specify a list of case participant roles to be able to list the related records that might be selected.

- **Metadata entries**

   Taking the example of a PaidEmployment evidence type, the following metadata would be used to allow the user to choose from a list of core Employments relating to case participants of types PRIMARY or MEMBER

```
<Relationships>
        <Related to="Employment">
          <ParticipantType type="PRIMARY"/>
          <ParticipantType type="MEMBER"/>
        </Related>
      </Relationships>
```

Related concepts

Server metadata: document structure on page 82

The server-side metadata is provided as a well-formed XML document, named <Entity Name>.xml.

The `Business Dates` pattern and override

The `Business Dates` pattern is used to specify which, if any, of the date fields on the entity correspond to the business start and end dates of that entity. These dates are then used in the calculation of the period for which the evidence object applies.

The generator returns these dates from the `getStartDate()` and `getEndDate()` methods that are defined on the `EvidenceInterface`.

Metadata entries

Using the `BusinessDates` node, either the `startDate`, `endDate` or both can be specified as follows:

```
<Entity logicalName="PaidEmployment" ... >
        <BusinessDates startDate="employmentStartDate"
            endDate="terminationDate"/>
      </Entity>
```

Override

Use the `Override` node to override a default entity that is provided with application modules or to add a custom entity to a default product.

For more information, see the *Overriding a default evidence entity: example* related link.

Related concepts

Overriding a default evidence entity: example on page 104

To meet business requirements, customers can override the default evidence entity by, for example, editing the server-side metadata and client-side metadata.

The `Cached Operation` pattern and metadata entries

Use the `Cached Operation` pattern to cache SQL operations in the generated entity layer class.

The generator uses a caching pattern to implement and manage the cache. The operation must be an SQL operation on the entity because the entity class is generated. Therefore, it is not possible to implement business logic within it.

Metadata entries

In the PaidEmployment example, to cache the `readDetails` method, use the following code:

```
<Entity logicalName="PaidEmployment" ... >
        <CachedOperation>
          databaseRead = "read"
          operationName = "readDetails"
          returnType =
            "curam.example.evidence.entity.struct.
               PaidEmploymentDtls"
        </CachedOperation>
      </Entity>
```

Client metadata

Typically, the client-side metadata is used to describe the layout of the screens that must be generated. The client metadata code specifies how to select values for case participant fields and when to create new role types for those participants.

Entity node

The root node of a client metadata EUIM document is the `Entity` node. The node contains attributes for specifying the name of the entity and the display name for use on screens. You can also specify here whether the entity can be modified.

```
<Entity name="PaidEmployment"
      displayName="Paid Employment"
      modify="Yes"
    >
     ...
      </Entity>
```

User interface (UI)

The `UserInterface` node is the containing node for all UI elements. The node includes an attribute that you can use to specify whether the create screen for the entity must contain a `Save & New` button.

```
<UserInterface saveAndNewButton="Yes">
      ...
      </UserInterface>
```

Cluster node

As with developing in UIM, the EUIM `Cluster` node is used to group UI elements. There are a number of attributes available for specifying the number of columns, the label, and description text. There are also three special attributes, create, modify and view, so that the `Cluster` can be hidden, or shown on different screens, allowing a different layout to be used on create screens versus modify ones.

The proceeding code creates one `Cluster` that is visible on create and modify pages only, and is a label that is specified by the property `Cluster.Label` in the associated properties file, and a second `Cluster` that is only shown on view pages.

```
<Clusters>
      <Cluster label="Cluster.Label" create="Yes" view="No">
      ...
```

```
        </Cluster>
        <Cluster label="Cluster2.Label" create="No" modify="No">
        ...
        </Cluster>
      </Clusters>
```

Field node

The `Field` node is used to specify an individual field on the screen. There are many attributes that can be used to control the behavior of this node, including the database `columnName` it is associated with and the use of blank or default values in codetable fields.

An extra attribute, `metatype`, can also be used to control the behavior of the field.

For more information about the available meta types, see the *Meta types* related link.

Using an example of an entity attribute that is called `employmentType`, that is a codetable of possible employment types, the proceeding code produces a field on screen that started with the default value from the codetable. When set on the entities create page, the codetable cannot be modified from the entities modify page.

```
<Cluster ... >
        <Field columnName="employmentType" use_default="true"
          label="Field.EmploymentType.Label" modify="No"
        />
      </Cluster>
```

Related concepts
[Meta types on page 90](#)
The Evidence Generator supports seven meta types.

Case participant fields

When you use a `Field` node to represent a case participant attribute on the entity, a number of further metadata entries are required.

> **Note:** The `metatype` attribute of the `Field` node must be set to `CASE_PARTICIPANT_SEARCH`

There are three ways of specifying a participant on screens that are created by the generator.

- **Selecting from a drop-down list**

  The metadata can be used to specify what case participant types must be included in the list.
- **Searching**

  The system can be searched for an appropriate participant.
- **Registering a new representation**

  A new representative can be added to the system.

CaseParticipant node

The `CaseParticipant` node provides extra information about the field and how the information is stored. It includes options for, among other things, telling the system to create a new case participant role for the chosen participant.

`SearchType` node

The `SearchType` node is used to specify a particular type of case participant role that must be listed in the drop-down select box.

`CreateCaseParticipant` node

When you select a pre-existing case participant from the drop-down list, there is the option of creating a new role for that participant, if they do not already have it. For example, you might select to populate the drop-down with all case participants of type PRIMARY, MEMBER and ALIEN, and select to create a new role for the participant of type ALIEN. Then, if the participant selected was already of type ALIEN, no new role would be created. However, if the type was either PRIMARY or MEMBER, a new role is created.

Example

The following EUIM code, provides a Case Participant field onscreen where the drop-down is populated with participants of type PRIMARY and MEMBER. As the create option is turned off, the user must search the system for a participant, or to register a new representative.

```
<Cluster ... >
        <Field columnName="myCaseParticipant"
          label="Field.MyCaseParticipant.Label"
          metatype="CASE_PARTICIPANT_SEARCH"
        >
          <CaseParticipant create="No">
            <SearchType type="PRIMARY"/>
            <SearchType type="MEMBER"/>
          </CaseParticipant>
        <Field>
      </Cluster>
```

The following EUIM code, builds on the first example, and now creates a role type of MEMBER if the chosen participant does not already have that role. As well as the drop-down list, the user can now search the system for a suitable participant and can specify a new representative.

```
<Cluster ... >
        <Field columnName="myCaseParticipant"
          label="Field.MyCaseParticipant.Label"
          metatype="CASE_PARTICIPANT_SEARCH"
        >
          <CaseParticipant create="Yes">
            <CreateCaseParticipant
              participantType="Person"
              roleType="MEMBER"
            />
            <SearchType type="PRIMARY"/>
            <SearchType type="MEMBER"/>
          </CaseParticipant>
        <Field>
      </Cluster>
```

Adding functionality

There are a number of extension classes that can be coded, with the generator providing a default skeleton implementation for each in your source code directory. Additionally each of these

classes is automatically modeled by the generator, so all follow the standard factory, interface, implementation pattern used in the application.

Customize class

The customize class provides methods that get called at specific points within the generated service layer code. You can use this to implement your own custom logic, and modify the values that are passed to and from the screen.

- **Class name**

  The class is named `Customise<Entity Name>.java`

- **Package name**

  The class is placed in the package

  `curam.<product.package>.evidence.customise.impl`

  where `product.package` is as specified in the *evidence.properties* file.

- **Customize methods**

  The proceeding customize methods are provided.

Method	Details
preCreate	Allows custom processing to be performed before the evidence insert operation happens.
postCreate	Allows custom processing to be performed after the evidence insert operation happens.
preModify	Allows custom processing to be performed before the evidence modifies operation happens.
postModify	Allows custom processing to be performed after the evidence modify operation happens.
preRead	Allows custom processing to be performed before the evidence read operation happens.
postRead	Allows custom processing to be performed after the evidence read operation happens.

Hook class

The hook class provides you with access to a number of infrastructure methods from the `EvidenceInterface` that must be implemented for each entity. Typically, you implement these methods on the entities implementation class. However, as this is now generated, the hook class must be used instead.

- **Class name**

  The class is named `<Entity Name>Hook.java`

- **Package name**

  The class is placed in the package

  `curam.<product.package>.evidence.hook.impl`

  where `product.package` is as specified in the *evidence.properties* file.

- **Methods**

  The proceeding methods are provided.

Method	Details
calcAttributionDatesForCase	Returns the attribution dates for an entity.
getDetailsForListDisplay	Returns the textual description of an evidence object.

Validate class

The validate class provides methods where custom validations can be added for an entity.

- **Class name**

  The class is named `Validate<Entity Name>.java`

- **Package name**

  The class is placed in the package

  `curam.<product.package>.evidence.validation.impl`

  where `product.package` is as specified in the *evidence.properties* file.

- **Validate methods**

  The proceeding methods are provided.

Method	Details
preModifyValidate	Called from within the entities `preModify` method.
preInsertValidate	Called from within the entities `preInsert` method.
validate	Called from within the entities standard `validate` method.

Related attributes class

When you use the related entity attributes pattern, a further class is generated that provides a method for reading these related values and returning them. The method is called during the service layers read operation. The method is also called when the create screen is being loaded so that the values can also be displayed there.

- **Class name**

  The class is named `<Entity Name>RelatedEntityAttributes.java`.

- **Package name**

  The class is placed in the package

  `curam.<product.package>.evidence.relatedattribute.impl`

  where `product.package` is as specified in the *evidence.properties* file.

- **Validate methods**

  The proceeding methods are provided.

Method	Details
getRelatedEntityAttributes	Method to read any related attributes from alternative sources.

evidence.properties: explanation and sample file

The *evidence.properties* file is used to configure the generator options.

Description of properties

The proceeding provides a full list of the properties that can be set and the function of each.

Property key	Description
product.build.option	Defaults to `false`. Must be set to `true` to build or clean evidence for this product. Otherwise, the Evidence Generator ignores evidence for this product.
product.name	Insert the product name here. It is used to specify to where all generated files are output.
product.ejb.package	Code package name that is used for all `impl` layer directories in the product for which evidence is being generated.
product.prefix	The prefix is prepended to the name of all generated UIM pages and certain generated classes, such as the façade.
product.appendAltID	Flag to determine whether the primary alternate ID is appended to all Case Participant names (on generated evidence screens). Defaults to `false`.
product.component.root	Root directory that specifies where generated server files are copied to.
product.evidence.build.root	Root directory that specifies where all temp generated output is copied.
evidence.properties.dir	Location for individual products properties file, which contains all product building config information. This must end with an 'evidence' directory.
properties.home	Product properties directory. Contains properties files and localized values for product-wide client screen label values.
product.webclient	Root directory that specifies where generated client pages are output to.
server.evidence	Location of EvidenceEntities.xml output that is used for server-side and infrastructure generation.
casetype.product.evidence	Name and location of EvidenceEntities.xml output for caseType 'Product' used for client-side Product Delivery evidence screen generation.
casetype.integratedCase.evidence	Name and location of EvidenceEntities.xml output for caseType 'Integrated Case' used for client-side integrated evidence record screen generation.
server.metadata	Location of server XML files that describe the entity's relationships, function creation, and infrastructure generation.
caseType.integratedCase.metadata	Location of EUIM files that are used for EvidenceEntities.xml generation that is used for client-side integrated evidence record screen generation.

Property key	Description
caseType.product.metadata	Location of EUIM files that are used for EvidenceEntities.xml generation that is used for client-side Product Delivery evidence screen generation.

Sample file

Four properties must be set to specific values for your product. The values are listed first in this sample file. Recommended values are provided for the subsequent files as the properties mostly relate to intermediary files produced during generation. So, in most situations, no benefit is gained by customizing the properties.

> **Note:** No line breaks in individual properties are permitted.

```
## Values Specific to your component
product.name = <Component Name>
product.prefix = <Chosen Prefix>
product.ejb.package = <Chosen Package>
product.webclient = ${sysenv.CLIENT_DIR}/components/<Component
 Name>

## Recommended Values
product.build.option = true
product.appendAltID = false
product.component.root =
   ${product.components.root}/${product.name}
evidence.properties.dir =
   ${product.components.root}/${product.name}/evidence
properties.home = ${evidence.properties.dir}/properties/
product.evidence.build.root =
  ${evidence.build.root}/${product.name}
server.evidence = ${product.evidence.build.root}/model/server
casetype.product.evidence =
   ${product.evidence.build.root}/model/product/
     EvidenceEntities.xml
casetype.integratedCase.evidence =
   ${product.evidence.build.root}/model/integrated/
     EvidenceEntities.xml
server.metadata =
   ${product.components.root}/${product.name}/evidence/
     server/metadata
caseType.integratedCase.metadata =
   ${product.components.root}/${product.name}/evidence/
     integrated/metadata
caseType.product.metadata =
   ${product.components.root}/${product.name}/evidence/
     product/metadata
create.employment.link = true
create.clientlist.for.employment  = false
```

general.properties

The *general.properties* file contains all generic label values for the product. The generic labels consist of localized label values for all common buttons, page titles, and so on. Some

generic labels permit dynamic values, that is, the name of the evidence entity the page title is describing. All properties within this file must be set.

> **Note:** The property keys cannot be changed, added, or removed as doing so would cause errors in the running of the evidence generator.

Dynamic properties

For dynamic properties, use a dynamic placeholder to give more meaning to the operation of the dynamic property.

Dynamic property values

Dynamic properties are properties where you can add a dynamic value to a property at generation time. The feature can be useful for page titles, menu options, and so on, or anywhere that further context is useful.

Dynamic properties are achieved by using a placeholder where you want the dynamic value to be placed during the generation of the properties file. One placeholder type is supported by the evidence generator. The placeholder type is directly related to metadata tags within the EUIM files.

> **Note:** A dynamic placeholder can be used multiple times in a property value and or a combination of different placeholders. However, the user must be aware of the relationship between these placeholders and the actual evidence metadata that the evidence generator processes. A value is substituted into the placeholder only if the metatype tag that this placeholder maps to exists in the evidence entity metadata.

- **<displayName>**
  The name of the evidence entity as it appears on-screen. The name is not the same as the physical name appears on the table in the database, as demonstrated in the following example:

  physical name = PaidEmployment

  display name = Paid Employment
- **Examples of dynamic value usage**

  The proceeding uses displayName as an example:

  Using for this example the Page.Title.EntityWorkspace the value for this property would be entered as follows:

  ```
  Page.Title.EntityWorkspace=<displayName> Evidence
  ```

  At build time, the correct substitutions occur when the evidence generator processes the EUIM files. Using the Paid Employment evidence entity, for instance, the following property would be generated into the *appropriate.properties* files.

  ```
  Page.Title=Paid Employment Evidence
  ```

Page title keys

The proceeding table describes the property keys for generic page title properties.

This table describes the property keys for generated Page Title properties.

Property key	Description
Page.Title.ModifyEntity	Title that is used for the generated modify pages.
Page.Title.NewEntity	Title that is used for generated create pages.
Page.Title.ViewEntity	Title that is used for generated view pages.

Help.PageDescription keys

UIM pages use a property that is called `Help.PageDescription` to provide help for the page. The proceeding table describes the property keys that must be set to provide help for generated pages.

This table describes the property keys for generic Page Help properties.

Property	Description
Help.PageDescription.CreateEntity	Provides help for the generated create pages.
Help.PageDescription.List.EvidenceEntities	Provides help for all generated workspace list pages.
Help.PageDescription.ModifyEntity	Provides help for the generated modify pages.
Help.PageDescription.ViewEntity	Provides help for the generated view pages.
Help.PageDescription.List.EvidenceTypeVerifications	Provides help for the generated workspace verification pages.
Help.PageDescription.List.EvidenceTypeIssues	Provides help for the generated workspace issues pages.
Help.PageDescription.List.ChangeHistory	Provides help for the generated business object tab change history pages.

Field label keys

The proceeding table displays the field label properties and their associated descriptions that are required in the `general.properties` file.

By creating another property of the same name but with `.Help` appended, each property can include an associated help property that is specified.

This table describes the property keys for generic Field Label properties.

Property	Description
Field.Label.New	Label that is used for the `New` link in the actions menu on the generated evidence workspace.
Field.Label.Validate	Label that is used for the `Validate` link in the actions menu on the generated evidence workspace.

Page informational keys

Page informationals are warning messages that are shown on screen in response to user actions. The properties are a special case as they take the formatting options that are used in normal application message files. So, the number of parameters cannot be changed. However, the message itself can be changed. The properties required no help.

- **Page.Informational.NotModifiable**

  The warning message is displayed on the screen when a user attempts to modify an evidence entity record that was marked as not modifiable in the EUIM metadata.

  The suggested value is `%1s Evidence is not modifiable.`

  This table describes the parameters for the Page.Informational.NotModifiable property.

Parameter	Description
%1s	The parameter is filled with the display name of the evidence entity in question.

Static properties

Static properties include action control label keys, field label keys, list label keys, cluster keys, business object tab keys, and wizard screen description keys.

Action control label keys

The proceeding table lists the static action control properties and the properties' associated descriptions that are required in the `general.properties` file.

Each property can have an associated help property that is specified by creating another property of the same name but with `.Help` appended.

This table describes the property keys for generic static Action Control Label properties.

Property	Description
ActionControl.Label.Cancel	Button label that is used on multiple pages to cancel the action within that context.
ActionControl.Label.Close	Button label that is used on multiple pages to close the dialog.
ActionControl.Label.Save	Button label that is used in Create and Modify evidence entity pages to save new evidence entity.
ActionControl.Label.View	Link label that is used on to view specific evidence entity.
ActionControl.Label.SaveAndNew	Button label that is used on Create pages to save and add a new entity of this type.
ActionControl.Label.Search	Button label that is used for a Search button on various pages.
ActionControl.Label.Yes	Button label for a `Yes` button.
ActionControl.Label.No	Button label for a `No` button.
ActionControl.Label.New	Button label for a `New` button.
ActionControl.Label.Details	In Page Navigation link that is used on the view modal pages for an entity.
ActionControl.Label.History	In Page Navigation link used on the view correction history modal pages for an entity
ActionControl.Label.Back	Label for a `Back` button, which is used on generated wizard screens.
ActionControl.Label.Next	Label for a `Next` button, which is used on generated wizard screens.

Property	Description
ActionControl.Label.Finish	Label for a `Finish` button, which is used on generated wizard screens.

Field label keys

The proceeding table displays the static field label properties and their associated descriptions that are required in the `general.properties` file.

This table describes the property keys for generic static Field Label properties.

Property	Description
Field.Label.firstName	Used for the first name field when registering a new representative.
Field.Label.secondName	Used for the second name field when registering a new representative.
Field.Label.address	Used for the address field when registering a new representative.
Field.Label.areaCode	Used for the area code field when registering a new representative.
Field.Label.phoneNumber	Used for the phone number field when registering a new representative.

List label keys

The proceeding table displays the static list label properties and their associated descriptions that are required in the `general.properties` file.

No help properties are associated.

This table describes the property keys for generic static List Label properties.

Property	Description
List.Title.Type	Used for the type of an evidence object on an evidence create wizard screen.
List.Title.Description	Used for the description of an evidence object on an evidence create wizard screen.
List.Title.Period	Used for the period of an evidence object on an evidence create wizard screen.
List.Title.Participant	Used for the participant of an evidence object on an evidence create wizard screen.

Cluster keys

The proceeding table displays the static cluster properties and their associated descriptions that are required in the `general.properties` file.

No help properties are associated.

Property	Description
Cluster.EvidenceHeader.Modify.Title	Title for the `Cluster` that is used to wrap the included infrastructure evidence header VIM on an entities-generated modify screen.

Business object tab keys

The proceeding static properties are used when you generate the business object tab for each evidence type.

No help properties are associated.

Property	Description
leaf.title.Home	The title of the main navigation tab on generated Business Object Tabs for each entity type.
leaf.title.ChangeHistory	The title of the change history navigation tab on generated Business Object Tabs for each entity type.
leaf.title.Verifications	The title of the Verification navigation tab on generated Business Object Tabs for each entity type.
leaf.title.Issues	The title of the Issues navigation tab on generated Business Object Tabs for each entity type.
Submenu.Title.New	The actions menu `New` link for any child entities. The display name of the child entity is automatically appended to the end of the property.
Submenu.Tooltip.New	The actions menu `New` tooltip for any child entities. The display name of the child entity is automatically appended to the end of the property.
MenuItem.Title.Edit	
MenuItem.Tooltip.Edit	
MenuItem.Title.Delete	
MenuItem.Tooltip.Delete	
MenuItem.Title.ContinueEdititing	
MenuItem.Tooltip.ContinueEdititing	
MenuItem.Title.Discard	
MenuItem.Tooltip.Discard	
MenuItem.Title.CancelDeletion	
MenuItem.Tooltip.CancelDeletion	

Wizard screen description keys

The proceeding static properties are used as default, helpful text descriptions to users on the generated create wizard select screens.

The cluster for selecting a core employment record uses a simple text property. In contrast, the cluster for selecting a parent or pre-association record uses a separate starting and ending property, that is combined with a comma delimited list of the possible types that are being listed.

For example, if the list contained records of type Paid Employment and Self Employment, the proceeding constructed description text would apply.

Property	Description
Wizard.SelectEmployment.Description	Text description for the core Employment object list cluster on the generated create wizard pages.
Wizard.SelectEvidence.Description.Start	Start of the text description for the select evidence object cluster
Wizard.SelectEvidence.Description.End	Start of the text description for the select evidence object cluster

```
<Wizard.SelectEvidence.Description.Start> Paid Employment,
    Self Employment <Wizard.SelectEvidence.Description.End>
```

Sample file for dynamic and static properties

Use the *general.properties* sample file as a reference for dynamic and static properties.

> **Note:** No line breaks in individual properties are permitted.

```
##
##   Dynamic Values
##

##   Page Titles

Page.Title.EntityWorkspace=<displayName> Evidence

Page.Title.ModifyEntity=Edit <displayName> Evidence

Page.Title.NewEntity=New <displayName> Evidence

Page.Title.ViewEntity=View <displayName> Evidence


## Page Help Descriptions

Help.PageDescription.CreateEntity=This page allows you to create
  a <displayName> evidence record.

Help.PageDescription.List.EvidenceEntities=This page allows you
   to view a list of the <displayName> evidence recorded
     in the system.

Help.PageDescription.ModifyEntity=This page allows you to modify
  a <displayName> evidence record.

Help.PageDescription.ViewEntity=This page allows you to view a
   <displayName> evidence record.

Help.PageDescription.List.EvidenceTypeVerifications=This page
   allows you to view a list of the <displayName> verifications
     recorded in the system.

Help.PageDescription.List.EvidenceTypeIssues=This page allows
   you to view a list of the <displayName> issues recorded
```

```
      in the system.

   Help.PageDescription.List.ChangeHistory=This page allows you to
      view the change history of a <displayName> record.


   ## Page Informationals

   Page.Informational.NotModifiable=%1s Evidence is not modifiable


   ## Field Labels

   Field.Label.New=New
   Field.Label.New.Help=Press the New button to create a new
      <displayName> evidence record.

   Field.Label.Validate=Validate
   Field.Label.Validate.Help=Press the New button to create a new
   <displayName> evidence record.

   ##
   ## Static Values
   ##

   ## Action Controls

   ActionControl.Label.Cancel=Cancel
   ActionControl.Label.Cancel.Help=Generic help message for cancel
      actions

   ActionControl.Label.Close=Close
   ActionControl.Label.Close.Help=Generic help message for close
      actions

   ActionControl.Label.Save=Save
   ActionControl.Label.Save.Help=Generic help message for save
      actions

   ActionControl.Label.SaveAndNew=Save & New
   ActionControl.Label.SaveAndNew.Help=The Save & New creates
      a new record from the information entered on the page and
      resets the page allowing an additional record to be created.

   ActionControl.Label.View=View
   ActionControl.Label.View.Help=Generic help message for View
      actions

   ActionControl.Label.Search=Search
   ActionControl.Label.Search.Help=Generic help message for search
      actions

   ActionControl.Label.Yes=Yes
   ActionControl.Label.Yes.Help=Yes

   ActionControl.Label.No=No
   ActionControl.Label.No.Help=No
```

```
ActionControl.Label.New=New
ActionControl.Label.New.Help=New

ActionControl.Label.Details=Details
ActionControl.Label.Details.Help=Shows details of the current
  record.

ActionControl.Label.History=History
ActionControl.Label.History.Help=Choose this to view the
  correction history of this record.

ActionControl.Label.Back=Back
ActionControl.Label.Next=Next
ActionControl.Label.Finish=Finish


## Field Labels

Field.Label.caseParticipant=Case Participant

Field.Label.participant=Participant

Field.Label.firstName=First Name

Field.Label.secondName=Surname

Field.Label.singleName=Name

Field.Label.address=Address

Field.Label.areaCode=Phone Area Code

Field.Label.phoneNumber=Phone Number

Field.Label.singleName=Name


## List Titles

List.Title.Type=Type

List.Title.Description=Description

List.Title.Period=Period

List.Title.Participant=Participant

## Page Titles

Page.Title.NewEvidenceWizard=New Evidence
Wizard.Text.SelectEmployment=Select Employment
Wizard.Title.SelectEmployment=Select Employment
Wizard.Text.SelectEvidence=Select Evidence
Wizard.Title.SelectEvidence=Select Evidence

InPageNav.Label.Verifications=Verifications
InPageNav.Label.Verifications.Help=Select this tab to view
  Verifications
```

```
InPageNav.Label.Issues=Issues
InPageNav.Label.Issues.Help=Select this tab to view Issues

InPageNav.Label.Evidence=Evidence
InPageNav.Label.Evidence.Help=Select this tab to view Evidence

## Generated Tab Properties

leaf.title.Home=Home

leaf.title.ChangeHistory=Change History

leaf.title.Verifications=Verifications

leaf.title.Issues=Issues

Submenu.Title.New=New
Submenu.Tooltip.New=New

## Miscellanious

Cluster.EvidenceHeader.Modify.Title=Change Details
Cluster.EvidenceHeader.Modify.Title.Help=Contains header details
  for the evidence record.

Wizard.SelectEmployment.Description=Please select one of the
  following Employments.
Wizard.SelectEvidence.Description.Start=Please select one of
Wizard.SelectEvidence.Description.End= from the following list.
```

employment.properties

The *employment.properties* file contains all generic label values for the employment pages generated. The generic label values consist of localized label values for all common buttons, page titles, and so on.

> **Note:** The property keys cannot be changed, added or removed. By changing, adding, or removing property keys causes errors in the running of the evidence generator.

Page titles

The proceeding table shows the page title properties and their associated descriptions that are required in the *employment.properties* file.

This table describes the property keys for generated Page Title properties.

Property key	Description
Page.Title.Delete.Emploment	Title for the delete employment confirmation page.
Page.Title.Employment	Title for the employment list page.
Page.Title.Modify.Employment	Title for the modify employment page.
Page.Title.View.Employment	Title for the view employment page.

Field labels

The proceeding table shows the field label properties and their associated descriptions that are required in the *employment.properties* file.

Each property can have an associated help property that is specified by creating another property of the same name but with .Help appended.

This table describes the property keys for generated Field Label properties.

Property key	Description
Field.StaticText.CancelEmployment	Confirmation text for removing an employment.
Field.Label.Primary	Label for the field that indicates whether this is a primary employment or not.
Field.Label.Occupation	Label for the field that specifies the occupation that is associated with the employment.
Field.Label.Employer	Label for the field that specifies the name of the employer.
Field.Label.From	Label for the field that specifies the start date of the employment.
Field.Label.To	Label for the field that specifies the end date of the employment.
Container.Label.Action	Label for the **Action** container field on generated pages.

Action control labels

The proceeding table shows the action control label properties and their associated descriptions that are required in the *employment.properties* file.

Each property can have an associated help property that is specified, by creating another property of the same name but with .Help appended.

This table describes the property keys for generated Action Control Label properties.

Property key	Description
ActionControl.Label.Delete	Label for a Delete button.
ActionControl.Label.Edit	Label for an Edit button.
ActionControl.Label.Employment	Label for an Employment button.

Sample *employment.properties* file

> **Note:** No line breaks are permitted in individual properties.

```
###  Field Labels

    Field.StaticText.CancelEmployment=Are you sure\
      you want to delete this Employment?

    Field.Label.Primary=Primary

    Field.Label.Occupation=Occupation
```

```
Field.Label.Employer=Employer

Field.Label.From=From

Field.Label.To=To

Container.Label.Action=Action

### Page Titles

Page.Title.Delete.Emploment=Delete Employment Details

Page.Title.Employment=Employment

Page.Title.Modify.Employment=Modify Employment Details

Page.Title.View.Employment=View Employment Details

### Action Controls

ActionControl.Label.Delete=Delete

ActionControl.Label.Edit=Edit

ActionControl.Label.Employment=Add Employment
```

General error messages

The general error message file for a component must be named
`Ent<product.prefix>GeneralError.xml`. The file must be located in the components
`messages` folder.

> **Note:** The preceding `<product.prefix>` represents the same value as specified in the
> property `product.prefix` in your components `evidence.properties` file.
>
> For more information, see the *evidence.properties: explanation and sample file* related link.

- **ERR_FV_CREATE_PROVIDER_DETAILS_SET_NO_NAME**

  The error message warns of a missing name field when other details were provided for
  registering a new representative.

  The proceeding value is suggested:

  ```
  The %1s Name must be entered when any of the
      %1s details are entered.
  ```

  where the argument is the case participant field that is being specified.

- **ERR_FV_CREATE_PROVIDER_NAME_SET_NO_ADDRESS**

  The error message warns when no address is specified while the user is registering a new
  representative.

  The proceeding value is suggested:

  ```
  The %1s Address must be entered when the
      %1s Name is entered.
  ```

where the argument is the case participant field that is being specified.

- **ERR_FV_FIELD_MUST_BE_ENTERED_WHEN_ANOTHER_FIELD_ENTERED**

The error message warns when one field is specified and another isn't when the user is registering a new representative.

The proceeding is the suggested value for the error.

```
The %1s must be entered when the %2s is entered.
```

where the argument values are the two fields in question.

- **ERR_FV_REMOVE_RECORD_ASSOCIATED**

The error message warns when discarding an evidence record when it has an associated record.

The following is the suggested value for the error.

```
This %2s record cannot be discarded as there is an
    associated %1s record.
```

where the argument values are the types of the evidence records in question.

- **ERR_FV_NO_PARENT_RECORD**

The error message warns of a missing parent record when creating a child record.

The proceeding is the suggested value for the error.

```
This %1s record cannot be discarded as the
    parent %2s does not exist.
```

where the argument values are the two evidence types in question.

- **ERR_FV_PARTICIPANT_EMPTY**

The error message warns when no participant was chosen or a new one specified for a case participant field.

The proceeding is the suggested value for the error.

```
%1s Details must be provided.
```

where the argument value is the participant field left empty.

- **ERR_XFV_MORE_THAN_ONE_PART**

The error message warns when more than one option is chosen for a case participant field, that is, a registered person is chosen and a new representative is specified as well.

The proceeding is the suggested value for the error.

```
Only one %1s can be entered. Please search for
    a registered %1s or enter details for an unregistered
 %1s.
```

where the arguments are the name of the field in question.

- **ERR_XFV_PHONE_NUMBER**

The error message warns when an incomplete phone number is provided while the user is registering a new representative.

The proceeding is the suggested value for the error.

```
Phone Number must be entered when Phone Area Code is entered.
```

- **ERR_XFV_PHONE_AREA_CODE**

  The error message warns when an incomplete phone number is provided while registering a new representative.

  The proceeding is the suggested value for the error.

  ```
  Phone Area Code must be entered when Phone Number is entered.
  ```

  where the arguments are the name of the field in question.

- **ERR_XRV_CHILD_EXISTS_FOR_PARENT_TO_DISCARD**

  The error message warns when an attempt is made to discard a parent record that has a child record that is associated with it.

  The proeeding is the suggested value for the error.

  ```
  This %1c record cannot be discarded as there is a
       related %2c record. To discard the %3c record,
       you must first discard/remove the
       related %4c record.
  ```

  where the arguments are the evidence types concerned.

- **ERR_FV_CASEPARTICIPANT_CHANGE**

  The error message warns when an attempt is made to change the case participant on an evidence record.

  The proceeding is the suggested value for the error.

  ```
  A participant cannot be changed for this evidence.
  ```

- **ERR_FV_EVIDENCE_SELECTION_REQUIRED**

  The error message warns when no parent or per-association record was chosen on the create new evidence wizard screens.

  The proceeding is the suggested value for the error.

  ```
  An Evidence record must be selected.
  ```

- **ERR_FV_EMPLOYMENT_SELECTION_REQUIRED**

  The error message warns when no employment record was selected on the create new evidence wizard screens.

  The proceeding is the suggested value for the error.

  ```
  An Employment record must be selected.
  ```

Related concepts

evidence.properties: explanation and sample file on page 68
The *evidence.properties* file is used to configure the generator options.

Server metadata: document structure

The server-side metadata is provided as a well-formed XML document, named <Entity Name>.xml.

The proceeding is the full reference for the structure of the .xml file.

`Entity` node (required)

The `Entity` node is the root of the metadata document. The `Entity` node contains the proceeding basic information about the entity.

Attribute	Mandatory	Possible values	Description
logicalName	Yes	Any valid entity name	The logical name of the entity, as it appears on the database.
relateEvidenceParticipantID	No	Any valid case participant attribute from the entity	If set, `relateEvidenceParticipantID` shows the participant to be set on the EvidenceDescriptor record. If left blank on a top level entity, the participant field on the descriptor is set to the primary client of the associated case. If left blank on a child entity, the generator iterates up the hierarchy (Parent, Grandparent, and so on) until a suitable participant is identified.

`relateEvidenceParticipantID` node (required)

Attribute	Mandatory	Possible values	Description
relatedEntityAttributes	Yes	Yes/No	`relatedEntityAttributes` is a Yes/No attribute. It determines whether the entity has related entity attributes. Related entity attributes are considered to be any piece of data that is required that cannot be read from the entity table directly. The result of the value 'Yes' is that an additional class is created with a method stub. You must handcraft the code required to read any related entity attributes.
exposeOperation	Yes	Yes/No	`exposeOperation` is a Yes/No attribute. It determines whether the business process for retrieving the related entity attributes must be exposed to a facade, so generating beans for it. The bean is also be used on the create screen.

`Relationships` node (required)

The node is used to specify all relationship details about the entity. Entities can have 0..n relationships of type Parent, Child, Mandatory Parents, PreAssociation or Related.

`Parent` node (optional)

Add a Parent node for every possible parent type that the evidence entity has.

Attribute	Mandatory	Possible values	Description
name	Yes	Any valid evidence entity name.	The logical name of the parent evidence entity.

Mandatory Parents node (optional)

Where an entity has multiple parents that must all be specified, the <Parent> elements must be wrapped in an outer <MandatoryParents> element. The proceeding illustrates how the elements must be wrapped.

```
<MandatoryParents>
  <Parent name="Parent1"/>
  <Parent name="Parent2"/>
</MandatoryParents>
```

Child node (optional)

Add a Child node for every possible child type that the evidence entity has.

Attribute	Mandatory	Possible values	Description
name	Yes	Any valid evidence entity name.	The logical name of the child evidence entity.

PreAssociation node (optional)

Add a PreAssociation node where the entity must be associated with another entity before creation so that related attributes from the associated entity can be displayed on the create screen.

Attribute	Mandatory	Possible values	Description
to	Yes	Any valid entity name.	The evidence type that the entity is associated 'to'.

BusinessDates node (optional)

The Evidence Interface now defines two methods, getStartDate and getEndDate, that return the business dates of the entity. The methods getStartDate and getEndDate are used in the period calculation.

The BusinessDates node permits you to note which date attributes of the entity must be returned from these methods.

Attribute	Mandatory	Possible values	Description
startDate	No	Any valid date attribute of the entity.	The date attribute to use as the business start date for the entity.
endDate	No	Any valid date attribute of the entity.	The date attribute to use as the business end date for the entity.

Override node (optional)

Use the Override element when a customer wants to override or extend a default entity.

The relevant metadata must be copied to the custom evidence directory and, at a minimum, the element must be added.

This element must also be added where a new entity is being added to the product that is being overridden.

> **Note:** For more information about using the `Override` element, see the *Overriding a default evidence entity: example* related link.

Attribute	Mandatory	Possible values	Description
newEntity	No	Yes/No	Shows if this is a new entity or not.
customize	No	Yes/No	Set to `Yes` if you want to override the provided Customise<Entity Name> class.
hook	No	Yes/No	Set to `Yes` if you want to override the provided <Entity Name>Hook class.
relatedAttribute	No	Yes/No	Set to `Yes` if you want to override the provided <Entity Name>RelatedEntityAttributes class.
validation	No	Yes/No	Set to `Yes` if you want to override the provided Validate<Entity Name> class.

`CachedOperation` node (optional)

Use the `CachedOperation` node to specify a database read operation to be cached by the application. You must provide the following three values:

- The name of the operation to be cached.
- The name of the database read operation.
- The fully qualified name of the return struct.

Attribute	Mandatory	Possible values	Description
operationName	Yes	Any sensible operation name.	The name of the cached operation.
databaseRead	Yes	The name of the SQL entity read to be cached.	The name of the SQL entity read to be cached.
returnType	Yes	The qualified name of the struct that is returned by the entity read.	The qualified name of the struct that is returned by the entity read.

Related concepts

[Overriding a default evidence entity: example on page 104](#)

To meet business requirements, customers can override the default evidence entity by, for example, editing the server-side metadata and client-side metadata.

Client metadata: document structure

The client-side metadata is provided as a well-formed XML document, named <Entity Name>.euim, along with associated properties files that can be specified in multiple locales.

The proceeding is the full reference for the structure of the .xml file.

`Entity` node

The proceeding table displays the entity attributes.

Attribute	Mandatory	Possible values	Description
name	Yes	Any valid entity name.	The logical name of the entity.
displayName	Yes	Any sensible string value.	The name of the entity as it is to appear on client screens. For example, an entity might have a logical name of 'PaidEmployment', but on the client screens it is better to display the name as 'Paid Employment'.
modify	No	Yes/No	This attribute shows whether the entity must be modifiable. This attribute is defaulted to `Yes`.

`UserInterface` node

The `UserInterface` node is the beginning of the screen layout.

Attribute	Mandatory	Possible values	Description
saveAndNewButton	No	Yes/No	Defaults to `No`. If set to `Yes`, then a **Save And New** button is added to the entity's create page.

`Clusters` node

The `Clusters` node contains each individual cluster.

`Cluster` node

The `Cluster` node contains information about each field that appears in the cluster. The cluster can contain any number of `Field` or `SkipField` elements in any order.

Attribute	Mandatory	Possible values	Description
Description	No	Any valid entry from the associated properties file.	The attribute maps directly to the UIM cluster `description` attribute.

Attribute	Mandatory	Possible values	Description
numCols	No	Integer value.	The attribute maps directly to the UIM cluster numCols attribute. If not specified, the value defaults to 2.
label	No	Any valid entry from the associated properties file.	The attribute maps directly to the UIM cluster TITLE attribute.
create	No	Yes/No	By default, a cluster is displayed on the create page. To stop a cluster from being displayed on the create page, set this attribute to No.
modify	No	Yes/No	By default, a cluster is displayed on the modify page. To stop a cluster from being displayed on the modify page, set this attribute to No.
view	No	Yes/No	By default, a cluster is displayed on the view page. To stop a cluster from being displayed on the view page, set this attribute to No.

SkipField **node**

The SkipField node indicates to the generator to insert a blank UIM Field in this position. The node permits greater control over the formatting of the fields in the UIM Cluster.

Field **node**

The Field node contains information about the attributes of a particular field on the screen.

Attribute	Mandatory	Possible values	Description
columnName	Yes	A valid attribute name.	The entity attribute name, as it appears on the database.
label	No	Any valid entry from the associated properties file.	The attribute maps directly to the UIM field label attribute.

Attribute	Mandatory	Possible values	Description
modify	No	Yes/No/Many	By default, a field is modifiable on the entity's modify screen. By setting this attribute to No, the field is read-only on the modify screen.
			Case Participant fields are slightly different as they are typically not modifiable. By setting this attribute to Yes, it can be left blank on the create screen and to set it one time on the modify screen. After it is entered one time, it is read-only on the modify screen. Alternatively, by setting this attribute to Many, it can be overwritten many times on the modify screen.
use_default	No	True/False	If specified, it maps directly to the UIM field USE_DEFAULT attribute.
use_blank	No	True/False	If specified, it maps directly to the UIM field USE_BLANK attribute.
notOnEntity	No	Yes/No	If set to Yes, this attribute indicates that the field is not directly mapped to an entity field. The default is No.
metatype	No	Any metatype recognized by the Evidence Generator.	Use metatype to specify additional information about an attribute, and how it must be formatted.
mandatory	No	Yes/No	Determines whether the mandatory indicator must be set on the field in the create and modify screens. The default is No..

CaseParticipant node

The CaseParticipant node contains additional information about the field that relates to case participant information that is stored in the field.

Attribute	Mandatory	Possible values	Description
create	No	Yes/No	Determines whether a case participant is to be created.

Attribute	Mandatory	Possible values	Description
name	No	Any sensible string value.	The name refers to how the associated attribute is named. For example, the attribute might be named 'empCaseParticipantRoleID'. In this instance, the `name` attribute must have a value of 'emp'.
readOnly	No	Yes/No	Determines whether the case participant is 'read only'.
nsStruct	No	Yes/No	When the user searches for a previously registered participant on the system, the default is to search for the `Person` type. To search for other types, set this to `Yes`. You must model your own struct with the same structure as `CaseParticipantDetails` and aggregate this instead. A further attribute that is called `participantType` must be added, which links to a codetable of participant types that must be searchable. This displays a drop-down list of participant types beside the search button, and the correct search dialog appears based on the type that is selected from this list.
singleNameField	No	Yes/No	This attribute is used when a newly registered participant for this field must have one name only rather than a first and second name. For example, if the user is registering a school.

CreateCaseParticipant node

The CreateCaseParticipant node contains information about creating a case participant. Including this node indicates that the selected participant must be registered as the specified case participant type, if they are not already registered as such.

Attribute	Mandatory	Possible values	Description
participantType	Yes	Any valid participant type.	This field provides more meta information to the generator about the type of participant.
roleType	Yes	The Java ® Identifier of an entry from the CaseParticipantRoleType code table.	Specifies the role that the participant must be registered on the case with.

SearchType node

When you use a case participant field, the system can provide a per-populated, drop down list of existing case participants that can be selected from. The SearchType node, which can be specified multiple times within a CaseParticipant node, indicates which case participant role types to include in this list.

Attribute	Mandatory	Possible values	Description
type	Yes	Any valid Java Identifier from the CaseParticipantRoleType codetable.	Displays the case participant role type to list for selection.

Meta types

The Evidence Generator supports seven meta types.

- **PARENT_CASE_PARTICIPANT_ROLE_ID**
  On Child or Grandchild evidence, when you apply the meta type PARENT_CASE_PARTICIPANT_ROLE_ID to a field the following two things occur:

  - The field displays as the name of the parents' associated case participant role (for example, James Smith).
  - The name of the parents' associated case participant role is a link to the **Participant** home page.

- **EMPLOYER_CASE_PARTICIPANT_ROLE_ID**
  When you apply the meta type EMPLOYER_CASE_PARTICIPANT_ROLE_ID to a field, it implies that the field is storing an Employer's participant role ID in the field. The result is that the Employer's name is displayed as a link to the **Employer**home page.

- **CASE_PARTICIPANT_SEARCH**
  When you apply the meta type CASE_PARTICIPANT_SEARCH to a field, it implies that the field is storing the case participant ID of the case participant with which the evidence record is being associated. The result is that the participant's name is displayed as a link to the **Participant** home page.

- **CODETABLE_CODE**
  When you apply the meta type CODETABLE_CODE to a field, it implies that the field is storing a codetable value that is to be displayed as part of the description string that is generated by the function StandardEvidenceInterface::getDetailsForListDisplay. The result is that the code that is stored in the field is replaced by the description string from the codetable.

- **REPRESENTATIVE_LINK**

  When you apply the meta type REPRESENTATIVE_LINK to a field, it implies that the field is storing an ID that can be used to link to the **Representative** home page. The result is that the representative's name appears as a link to the **Representative** home page.

- **COMMENTS**

  When you apply the meta type COMMENTS to a field, it implies that the field is storing free text. The result is that the field is the full width of the screen and three rows high.

- **RELATED_ENTITY_ATTRIBUTE**

  When you apply the meta type RELATED_ENTITY_ATTRIBUTE to a field, the system indicates to the generator that the field comes from the modeled-related attributes struct rather than from the entity itself. Fields of this type are read-only.

Participant types

The CreateCaseParticipant node in the Evidence Generator supports five participant types.

> **Note:** Select the closest match to the participant type to be created.

- Person
- Employer
- ServiceProvider
- Union
- Unknown

Evidence Generator Cookbook

Use the evidence generator as part of the standard build targets to dynamically create evidence entities that are based on certain criteria that are set for the evidence types. The evidence generator caters for all of the high level, repeatable evidence patterns across a number of large evidence-based solutions.

Quick overview

Use the Evidence Generator for all the high level, repeatable patterns that are identified across various large evidence-based solutions that are provided by the Merative ™ SPM Platform.

Before you use the Evidence Generator

Before you use the Evidence Generator, be familiar with the information in the *Developing evidence manually* related link.

When to use the Evidence Generator

For more information about repeatable patterns, see the *Evidence Generator specification* related link. Use custom solutions to identify patterns that are not catered for by the generator. For patterns that are not catered for by the generator, the solution must develop the entities manually, that is, outside the generator. Such patterns are untypical.

The Evidence Generator is run as part of the standard Social Program Management build targets. The generator iterates through every evidence folder under each component. The generator

initially targets the file *evidence.properties*. The file *evidence.properties* defines the paths to various files and folders that are required during generation. Where the file *evidence.properties* does not exist, the generator moves to the next folder.

Sample component

A sample directory of the finished component includes:

1. A model directory. The model directory contains any model files that are used for the evidence entity modeling.
2. An 'evidence' directory that contains the *evidence.properties*.

The *evidence.properties* then defines the locations for:

- Any server, evidence metadata.
- Any integrated case, client, evidence metadata.
- Any product delivery, client, evidence metadata.
- The required properties files for common client display text.

Related concepts

Evidence Generator specification on page 56
Use the Evidence Generator as a rapid way to develop the server side code and client-side screens for evidence entities that integrate fully with the standard Evidence Solution.

Related information

Generator inputs and outputs

The Evidence Generator uses five resources as input data. The Evidence Generator produces five outputs.

Generator inputs

The Evidence Generator uses the following resources as input data:

- **evidence.properties**
  The *evidence.properties* is a resource to configure the Evidence Generator. The file *evidence.properties* contains all the product and component-specific properties. For example, naming conventions, directory locations, and product-wide settings. Some of these properties are also included in the generation itself. These properties are defined once per product.
- **general.properties and employment.properties**
  The resources *general.properties* and *employment.properties* generate the client screens. The resources contain generic text labels that are used on many client screens. Descriptions of these fields are used in the application online help. These properties are defined once per product.
- **Server metadata file (for example, Expenses.xml)**
  The server metadata file defines the names of your entities and the entities' relationships to other evidence entities.
- **Client metadata file (for example, Expenses.euim)**
  This client metadata file defines the client screens that are used to maintain your evidence entity.

- **Client properties file (for example, Expenses.properties)**
  The client properties file is required by your Evidence User Interface Metadata (EUIM) file. The client properties file defines the text labels that are used and the descriptions of these fields that are used for the application online help and a modeled entity.

Generator outputs

The Evidence Generator produces the outputs:

1. Facade and service layer model.
2. Java code.
3. Client UIM/VIM.
4. Wizard data APPRESOURCE.dmx.
5. Tab configurations.

Configuring an existing product

By configuring an existing product for use with the Evidence Generator, the product is ready for its first generatable evidence implementations.

About this task

To configure an existing product, five steps are required:

1. Create an evidence directory.
2. Create and configure the evidence properties file (`evidence.properties`).
3. Create the general properties file (`general.properties`).
4. Create the product employment properties file (`employment.properties`).
5. Configure the module.

Procedure

1. Create directory `evidence` under the product root directory in `EJBServer`. For example, `SampleEGProduct` is used as the product name. So, the evidence directory is `EJBServer/components/SampleEGProduct/evidence`.
2. Create an `evidence.properties` file. Use the file to configure various mandatory product parameters, including locations of input files, such as EUIMs, and locations of output files, such as generated UIMs.

> **Note:** The location of the `evidence.properties` is important. The location *must* be within a directory named `evidence`. However, you can locate the directory anywhere within your component. For convenience the following location is suggested:
>
> `EJBServer/components/`
> `SampleEGProduct/evidence/evidence.properties`
>
> Within the properties file, specify the location of the remaining mandatory files in arbitrary locations. Again, for convenience, sub directories under the evidence directory are the logical choice.

The proceeding is a sample of the product parameters required. For a complete list of product parameters, see the *evidence.properties: explanation and sample file* related link.

```
product.name=SampleEGProduct
```

This setting copies the generated evidence files to `./components/SampleEGProduct`.

`product.ejb.package=seg`

Based on the product name in the previous example, the code package name might, for example, be `seg`. So, the format of the package structure of the generated classes is `curam.seg.evidence`.

> **Note:** Setting the preceding property to evidence generates a package structure of `curam.evidence` (not `curam.evidence.evidence`).

In the prefix

`product.prefix=SEG`

the prefix is prepended to the name of all generated UIM pages and certain generated classes, for example, the façade. Here, the generated façade class is `SEGEvidenceMaintenance`.

`product.webclient=${webclient.dir}/components/${product.name}`

The location of the root directory for client product is `webclient/components/SampleEGProduct`.

> **Note:** Set the property `${webclient.dir}` in the Evidence Generator. The property points to the directory `webclient/components`. Using the property is optional for the user.

3. Create the general properties file (`general.properties`). The file contains all generic client page properties, client message properties, and online help properties for this product. For more information about the general properties file, see the *general properties* related link.

> **Note:** All the keys (properties) specified in the *general properties* related link are mandatory. Omission of any keys is likely to break the build or cause compilation errors.

4. Create the product employment properties file (`employment.properties`). The file contains all generic employment that is specific to client page properties, client message properties, and online help properties for the product. For more information about the employment properties file, see the *employment.properties* related link.

> **Note:** Like `general.properties`, all the keys (properties) specified in the *employment.properties* related link are mandatory. Omission of any keys is likely to break the build or cause compilation errors.

5. Configure the module. The Evidence Generator produces a single registrar module for all the generated evidence types, which registers the implementations of the evidence interface and the evidence comparison interface. Add the fully qualified class name to the module class name initial data. In the preceding example, the class that is generated is `curam.seg.evidence.service.impl.SEGRegistrarModule`.

Related concepts

evidence.properties: explanation and sample file on page 68
The `evidence.properties` file is used to configure the generator options.

general.properties on page 69

The *general.properties* file contains all generic label values for the product. The generic labels consist of localized label values for all common buttons, page titles, and so on. Some generic labels permit dynamic values, that is, the name of the evidence entity the page title is describing. All properties within this file must be set.

The *employment.properties* file contains all generic label values for the employment pages generated. The generic label values consist of localized label values for all common buttons, page titles, and so on.

Asset as generated evidence: implementing a sample evidence type

To generate asset as evidence, you must generate the server-side and client-side artefacts for the evidence entity.

Step 1: Model evidence entity

During entity modeling, the defined metadata is used to support and connect to the Evidence Generator by using the service layer, façade layer, or client.

Modeling the evidence entity is independent from the Evidence Generator. The evidence entity is modeled in the standard way and included in the standard Social Program Management build. For more information about evidence entity modeling, see the *Modeling for the Evidence Generator* related link.

Asset entity and aggregations

The attributes of the asset entity are:

- Value
- Asset type
- Start date
- End date

The screens for maintaining the expense entity display the employer of the case participant and the associated record. The related information is not stored on the expense entity. Instead, the information is only displayed on the screens where it is deemed that it is useful to the caseworker as the caseworker maintains the expense information.

The expense entity must include the attributes (with their associated domain definition):

- The primary key of the entity `evidenceID` (this is expected by the generator).
- All other attributes as required.
- Optimistic locking on the entity enabled.
- The entity with the standard `read`, `insert`, and `modify` operations automatically generated.

Adhere to the naming conventions, for example, the naming of structs and aggregations that are required for each entity, and multiplicities for the aggregations and code packages that match the *product.ejb.package* property. For more information about naming conventions, see the *Modeling for the Evidence Generator* related link.

Additional modeling

Displaying the employment name on the maintenance screens for the `Expense` entity is not necessary. However, communicating the information from the system to the screen is required. Use a 'placeholder' to communicate the information. Use a `RelatedEntityAttribute` struct to create the placeholder. A `RelatedEntityAttribute` struct is an ordinary struct

with a specific naming convention and aggregation. You must adhere to the conventions that are outlined in the *Modeling for the Evidence Generator* related link.

In the preceding example, the new struct, `ExpenseRelatedEntityAttribute`, is created with one attribute: `employerName`. The `ReadExpenseEvidenceDetails` struct must aggregate the `ExpenseRelatedEntityAttribute` struct. The multiplicity must be 1:1 and the aggregation must be named `relatedEntityAttributes`.

Related concepts

Specific entity modeling is required when you use the Cúram Evidence Generator as the generator relies on certain, attributes, structs, and aggregations within the generated code. Use this information to learn about entity modeling that is required to use the evidence generator. The evidence generator relies on the existence of certain attributes, structs, and aggregations within the generated code. Various modeling strategies are required for the different metadata patterns available in the generator.

Asset entity diagram

You can complete the model evidence entity when the entity's attributes are defined and the necessary structs and aggregations are modeled.
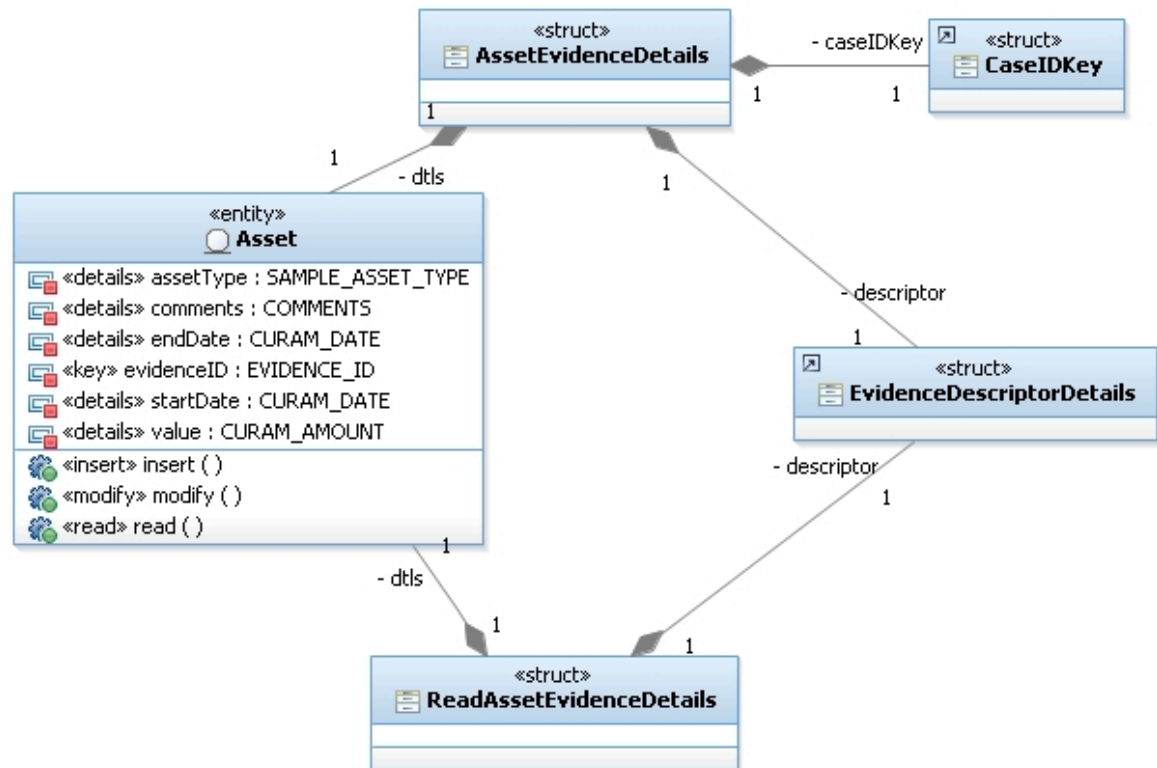

Figure 1: Asset entity diagram

Step 2: Create evidence metadata

The Evidence Generator is configured to identify specific files.

In the configured directories, the Evidence Generator is configured to identify:

- Server XML metadata files
- Integrated case EUIM metadata files and their corresponding properties files

- Product delivery EUIM metadata files and their corresponding properties files

Each entity has one server XML file and one pair of EUIM and properties files that define the entity.

Asset server XML

Specific attributes are required to generate the wizard page when you configure evidence end dating for non-dynamic evidence.

The proceeding sample is the server XML metadata file for `Asset`:

```
<EvidenceEntity>
  <Entity
    logicalName="Asset"
    relateEvidenceParticipantID=""
  >
    <RelatedEntityAttributes
      exposeOperation="No"
      relatedEntityAttributes="No"
    />
    <Relationships/>
    <BusinessDates
      startDate="startDate"
      endDate="endDate"
    />
  </Entity>
</EvidenceEntity>
```

Generating the wizard page when you configure evidence end dating for non-dynamic evidence

To generate the wizard page when you configure evidence end dating for non-dynamic evidence, the following attributes must be present in the asset server XML metadata file:

- `<AutoEndDate active ="Yes"/>`
- `<BusinessDates endDate="endDate" />`

The proceeding example shows the asset server XML file after you add the attributes:

```
<EvidenceEntity>
  <Entity
    logicalName="Asset"
    relateEvidenceParticipantID=""
  >
    <AutoEndDate active="Yes"/>
    <RelatedEntityAttributes
      exposeOperation="No"
      relatedEntityAttributes="No"
    />
    <Relationships/>
    <BusinessDates
      startDate="startDate"
      endDate="endDate"
    />
  </Entity>
</EvidenceEntity>
```

To disable the wizard page generation for the evidence end dating feature:

- Remove the `<AutoEndDate active='Yes'/>` attribute from the XML metadata OR
- Update the value of the `active` attribute value to `No`; for example, `<AutoEndDate active='No'/>`.

Asset client Evidence UIM (EUIM)

View the client Evidence UIM (EUIM) metadata file for asset and the associated properties file for *Asset.euim.*

The client Evidence UIM (EUIM) metadata file for asset is:

```
<Entity name="Asset" displayName="Asset">
  <UserInterface>
    <Clusters>
      <Cluster label="Cluster.Title.AssetDetails"
        numCols="2">
        <Field label="Field.Label.AssetType"
          columnName="assetType" mandatory="Yes"
          use_blank="true"/>
        <Field label="Field.Label.StartDate"
          columnName="startDate" mandatory="No"
          use_default="false"/>
        <Field label="Field.Label.AssetValue"
          columnName="value" mandatory="Yes"
          use_default="false"/>
        <Field label="Field.Label.EndDate"
          columnName="endDate" mandatory="No"
          use_default="false"/>
      </Cluster>
      <Cluster label="Cluster.Title.Comments">
        <Field columnName="comments" mandatory="No"
          metatype="COMMENTS" label=""/>
      </Cluster>
    </Clusters>
  </UserInterface>
</Entity>
```

> **Note:** EUIM is similar to UIM. For example, data is described in terms of 'fields' and the layout is described in terms of 'labels', 'clusters', and 'fields'. EUIM uses a format with which developers are familiar.

The associated properties file for *Asset.euim* is:

```
Cluster.Title.AssetDetails=Asset Details

Field.Label.AssetType=Type
Field.Label.AssetType.Help=The type of the asset

Field.Label.AssetValue=Value
Field.Label.AssetValue.Help=The value of the asset

Field.Label.StartDate=Received
Field.Label.StartDate.Help=The date the asset was received

Field.Label.EndDate=Disposed
Field.Label.EndDate.Help=The date the asset was disposed

Cluster.Title.Comments=Comments
Cluster.Title.Comments.Help=Additional information
```

Step 3: Standard evidence configuration
Specific steps are required to configure a new evidence type.

Checklist to configure a new evidence type before you generate an asset

- To name the asset evidence type, add an entry to the Evidence Type Code Table OR
- Create a static description for asset evidence by using a new entry in the Text Tanslation initial data. Link the Text Translation to a new entry in the Localizable Text initial data. As the step is only visible to the user on the New Evidence screen, you can defer the step until later.
- Add an entry in the Evidence Metadata initial data linking it to the Evidence Type and, optionally for now, to the Localizable Text.
- Link the Evidence Metadata to either an integrated case or a product by adding an entry to the Admin IC Evidence Link or the Product Evidence Link initial data, respectively. If the evidence is to belong to an evidence category, for example, Resources, set the category attribute here.
- If the asset Evidence Business Object Tab is to be used in a section of the application, contribute to the section definition, for example, file *DefaultAppSection.sec*. Without this contribution, the asset Evidence Business Object page loads in the current content panel only.

  A sample section file is generated for each product, including all the evidence tabs. The location of the sample is *EJBServer/components/EvGen/ tab/ BusinessObjectTab/<product.prefix>GeneratedAppSection.sec.*

```
<sc:section
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:sc=
  "http://www.curamsoftware.com/curam/util/client/section-
config"
  id="DefaultAppSection"
>
  <sc:tab id="AssetObject"/>
</sc:section>
```

> **Note:** One handcrafted implementation **must** be completed after the generator is run. If the handcrafted implementation is not completed after the generator is run, the user cannot access some evidence screens. For more information, see the *Asset handcrafted code: asset hook getDetailsForListDisplay* related link.

Related concepts
Asset handcrafted code: asset hook getDetailsForListDisplay on page 101
All evidence entities must implement the asset hook method getDetailsForListDisplay.

Executing the Evidence Generator
Users can call on Evidence Generator targets and expect specific outcomes.
Evidence Generator standard targets
The Evidence Generator builds targets into the standard targets.

The Evidence Generator has a clear design, that is, the generator integrates the standard build targets so that:

- No extra environment variables are required.
- No new targets are required to generate evidence.

When the preceding steps are complete, the standard build targets suffice to generate or clean:

- The metadata driven-evidence.
- The standard files.

build generated

By calling the build generated target, the EJBServer generates:

- The evidence inf and impl layers.
- The normal server layers.

build client

By calling the build client target in web client, the EJBServer generates and builds:

- The client screens
- The standard client screens

> **Note:** Like a normal build, if the build client is called before a build that is generated after changes to the model or metadata, the client build might fail. Typically, the failure is due to changes in the client UIMs or VIMs to use new features that are implemented on the server and then rebuilding the client without first rebuilding the server.
>
> With evidence generation, any changes to the EUIMs or server XMLs are automatically generated the next time that the client is generated. So, if the EUIM or server XML changes affect the façade layer in any way, you must first generate the server.

build clean

The target to clean generated evidence is incorporated into the standard target so that the target is clear. The target is the same on the server and the client, build clean.

> **Note:** Customized generated code is not deleted. For more information, see the *Asset handcrafted code: asset hook getDetailsForListDisplay* related link.

Related concepts

Asset handcrafted code: asset hook getDetailsForListDisplay on page 101
All evidence entities must implement the asset hook method `getDetailsForListDisplay`.

Evidence Generator specific targets

Use the specific targets `build egtools.clean` and `build egtools.client.clean` to provide more granular control over evidence generation.

By using the specific targets `build egtools.clean` and `build egtools.client.clean`, you can speed up the development process because:

- The specific targets clean the generated evidence.
- The specific targets do not remove any of the standard generated files.

`build egtools.clean` and `build egtools.client.clean` are located within *EJBServer/build.xml*.

build egtools.clean

The `build egtools.clean` target cleans all server-related evidence files. The clean is only applied if the prerequisites are met. The clean is applied whether:

- New EUIM and server XML files are added OR
- Existing EUIM and server XML files were updated since the last build.

build egtools.client.clean

The `build egtools.client.clean` target cleans all client-related evidence files. The clean is only applied if the prerequisites are met. The clean is applied whether:

- New EUIM and server XML files are added OR
- Existing EUIM and server XML files were updated since the last build.

Generator output

When evidence generation is complete, new directories are added in the locations that are specified in the *evidence.properties file*.

> **Note:** As all entity, service, and façade level-generated code is written directly to the build directory, the code is not displayed within your components source directory.

Asset handcrafted code: asset hook getDetailsForListDisplay

All evidence entities must implement the asset hook method `getDetailsForListDisplay`.

Custom code can be written in some stubs that are generated by the server output, that is, placeholders for customers to add their own code. The placeholders provide flexibility when a generated evidence pattern is not an exact match for an evidence entity. For more information about extending the function of a generated entity, see the *Adding functionality* related link.

Asset hook getDetailsForListDisplay

Implementing the asset hook method `getDetailsForListDisplay` is mandatory for all evidence entities. By using `getDetailsForListDisplay`, text descriptions are created for a particular asset business object on the evidence workspace pages. As the link text is used on the client screens, the link text must be populated to access all screens.

The `getDetailsForListDisplay` implementation for asset is:

```
//
_____
/**
 * Get evidence details for the list display
 *
 * @param key Key containing the evidenceID and evidenceType
 *
 * @return Evidence details to be displayed on the list page
 */
public EIFieldsForListDisplayDtls getDetailsForListDisplay(
  EIEvidenceKey key)
    throws AppException, InformationalException {

  // Return object
  EIFieldsForListDisplayDtls eiFieldsForListDisplayDtls =
    new EIFieldsForListDisplayDtls();
```

```
// Asset entity key
final AssetKey assetKey = new AssetKey();
assetKey.evidenceID = key.evidenceID;

// Read the Asset entity to get display details
final AssetDtls assetDtls =
  AssetFactory.newInstance().read(assetKey);

// Set the start / end dates
eiFieldsForListDisplayDtls.startDate = assetDtls.startDate;
eiFieldsForListDisplayDtls.endDate = assetDtls.endDate;

LocalisableString summary = new LocalisableString(
  BIZOBJDESCRIPTIONS.BIZ_OBJ_DESC_ASSET);

summary.arg(
  CodeTable.getOneItem(SAMPLEASSETTYPE.TABLENAME,
    assetDtls.assetType));

// Format the amount for display
TabDetailFormatter formatterObj =
  TabDetailFormatterFactory.newInstance();
AmountDetail amount = new AmountDetail();
amount.amount = assetDtls.value;
summary.arg(formatterObj.formatCurrencyAmount(amount).amount);

eiFieldsForListDisplayDtls.summary =
  summary.toClientFormattedText();

return eiFieldsForListDisplayDtls;
}
```

Related concepts

[Adding functionality on page 65](#)
There are a number of extension classes that can be coded, with the generator providing a default skeleton implementation for each in your source code directory. Additionally each of these classes is automatically modeled by the generator, so all follow the standard factory, interface, implementation pattern used in the application.

Customizing a product

While a default evidence solution is provided with some of the Cúram solutions, the customer can extend and customize the default evidence solution to match the customer's business requirements.

Custom evidence properties

The default product is configured with an *evidence.properties* file. For more information about creating and configuring an *evidence.properties* file, see the *Configuring an existing product* related link. To override a default product, the custom product requires its own, thin version of *evidence.properties*.

> **Note:** The *override.product* property must be set to *product.name*. Otherwise, the evidence generator treats the evidence product as new. For more information about evidence properties, see the *evidence.properties: explanation and sample file* related link.

```
# Unique name (product.name) of the OOTB product to override
override.product=SampleEGProduct

# Prefix used to specify where all metadata files are copied to
product.prefix=SEG

# Other Mandatory Properties in an Overriding Product

product.build.option=true

evidence.properties.dir
  = %SERVER_DIR%/components/custom/EvGenComponents/SEG/evidence

properties.home=${evidence.properties.dir}/properties/

server.metadata=${evidence.properties.dir}/server/metadata

caseType.integratedCase.metadata
  = ${evidence.properties.dir}/integrated/metadata

caseType.product.metadata
  = ${evidence.properties.dir}/product/metadata
```

Figure 2: Sample custom evidence.properties

> **Note:** The `evidence.properties` must be located in a directory that is named `evidence` within any subdirectory of:
>
> `EJBServer/components/custom`
>
> As the custom directory can contain many of the overridden products and the `evidence` directories, use a naming scheme. For example:
>
> `EJBServer/components/custom`
> `    /EvGenComponents/<ProductName>/evidence`

Build process and generated files: an overview

The evidence generator build process identifies evidence sub directories in all the components that are listed in the *SERVER_COMPONENT_ORDER*. During the build process:

1. The product's metadata and display properties are gathered to the build directory.
2. A search of the custom directory finds any *evidence.properties* that override the queued product.

Where overriding in the build is required, the customized metadata, and the display properties, are gathered and copied over the queued product's metadata in the build directory. The customized metadata, and the display properties, are not merged. The product's evidence is then generated from the super-set of metadata.

> **Note:** Most artefacts generated by a default product are not modifiable. Likewise, most artefacts generated by a default product are added to source control.

The only artefacts that are modifiable are the handcrafted Java® classes that are provided for customizable hook points that are called throughout the non-modifiable generated codebase. The

handcrafted Java® classes are only generated where they did not exist. Then, the handcrafted Java® classes must be maintained as part of source control.

Therefore, by overwriting the metadata before the build all the generated custom artefacts are generated as if they belonged to the default product, that is, the product's directories. The only exception is handcrafted Java® classes.

Overriding display text

Display text is defined in the properties files that are associated with:

- An EUIM
- The general properties file
- The employment properties file

The preceding files can be overridden in the custom directory.

Related concepts
evidence.properties: explanation and sample file on page 68
The *evidence.properties* file is used to configure the generator options.

Related tasks
Configuring an existing product on page 93
By configuring an existing product for use with the Evidence Generator, the product is ready for its first generatable evidence implementations.

### Overriding a default evidence entity: example
To meet business requirements, customers can override the default evidence entity by, for example, editing the server-side metadata and client-side metadata.

In the proceeding example, it is assumed that the expense entity was provided as part of a Social Program Management evidence solution. The customer decided that the entity does not provide the fields that are required to fully meet the business requirements. To meet their requirements, the customer added two extra attributes to the entity:

1. The user name of the user who creates or modifies the record.
2. The number, if any, of children that the case participant has.

Modeling

By conforming with the requisite guidelines, an extension class is created and the class is linked to the provided expense entity. For more information about modeling guidelines, see the *Modeling for the Evidence Generator* related link and the *Cúram modeling reference* related link.
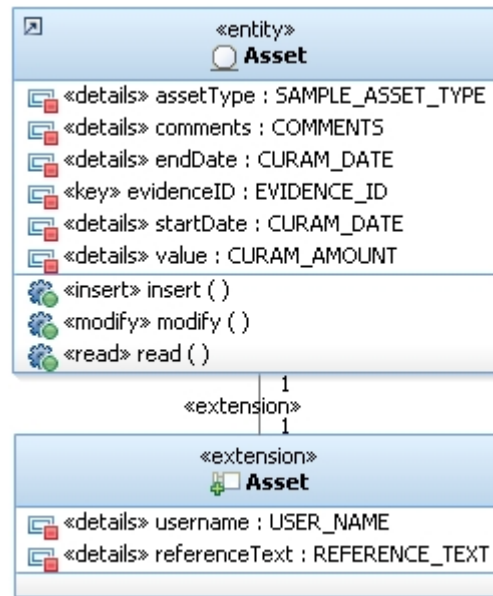
Metadata

The metadata for a customized entity is almost identical to the standard metadata. The metadata for a customized entity is captured in two files:

- `<Entity-Name>.xml`
- `<Entity-Name>.euim`

To start customizing an entity, copy all the default entity's metadata and then make the required changes. The two types of metadata are:

- Server-side metadata
- Client-side metadata

Server-side metadata

The asset changes apply only to extra fields. So, with one exception the server-side metadata is identical to the metadata of the entity that you are overriding. The exception is that an extra node `Override` is required. The extra node specifies:

- Whether the entity is new
- The custom handcrafted classes to generate.

For more information about overriding nodes, see the *Server metadata: document structure* related link.

The proceeding is the custom server XML metadata file for asset:

```
        <EvidenceEntity>
  <Entity logicalName="Asset"
    relateEvidenceParticipantID="">
        <Override newEntity="No" customize="No" hook="Yes"
     relatedAttribute="No" validation="No" />
        <RelatedEntityAttributes exposeOperation="No"
     relatedEntityAttributes="No" />
    <Relationships/>
    <BusinessDates
```

```
        startDate="startDate"
        endDate="endDate"
    />
  </Entity>
</EvidenceEntity>
```

Client-side metadata

Except for including any extra required fields, the client-side metadata is identical to the metadata of the entity that you are overriding. In the proceeding example, you must include the **reference text** field on the user interface so the user can populate the field. Do not display the user name on the user interface.

> **Note:** You cannot remove any attributes from an entity.

The proceeding is the custom client EUIM metadata file for asset:

```
        <Entity name="Asset" displayName="Asset">
  <UserInterface>
    <Clusters>
      <Cluster label="Cluster.Title.AssetDetails"
        numCols="2">
        <Field label="Field.Label.AssetType"
          columnName="assetType" mandatory="Yes"
          use_blank="true"/>
        <Field label="Field.Label.StartDate"
          columnName="startDate" mandatory="No"
          use_default="false"/>
        <Field label="Field.Label.ReferenceText"
          columnName="referenceText" mandatory="No"
          use_default="false"/>
        <Field label="Field.Label.AssetValue"
          columnName="value" mandatory="Yes"
          use_default="false"/>
        <Field label="Field.Label.EndDate"
          columnName="endDate" mandatory="No"
          use_default="false"/>
      </Cluster>
      <Cluster label="Cluster.Title.Comments">
        <Field columnName="comments" mandatory="No"
          metatype="COMMENTS" label=""/>
      </Cluster>
    </Clusters>
  </UserInterface>
</Entity>
```

The proceeding is the associated properties file for *Asset.euim*:

```
        Cluster.Title.AssetDetails=Asset Details
        Field.Label.ReferenceText=Reference Name
Field.Label.ReferenceText.Help=Reference Name to help the user
  differentiate similar records.
        Field.Label.AssetType=Type
Field.Label.AssetType.Help=The type of the asset
```

```
Field.Label.AssetValue=Value
Field.Label.AssetValue.Help=The value of the asset

Field.Label.StartDate=Received
Field.Label.StartDate.Help=The date the asset was received

Field.Label.EndDate=Disposed
Field.Label.EndDate.Help=The date the asset was disposed

Cluster.Title.Comments=Comments
Cluster.Title.Comments.Help=Additional information
```

Generated output

Other than the handcrafted code, everything else is generated in the same way it is when the default entity is defined.

For a custom extension for a default entity, handcrafted implementations pre-exist. The generator creates handcrafted classes in the custom source package. Where the superclass is the existing default implementation, the handcrafted classes are modeled by using the replace superclass option. The superclass contains method stubs only. By default, each of the method stubs begins by calling the superclass implementation.

In the preceding example, you must update the handcrafted preCreate function to assign the value of the user name attribute to the creation struct. Also, you must update the handcrafted validateDetails function to ensure the **reference text** field is not left blank.

Related concepts

Modeling that is required for the evidence patterns on page 49
Specific entity modeling is required when you use the Cúram Evidence Generator as the generator relies on certain, attributes, structs, and aggregations within the generated code. Use this information to learn about entity modeling that is required to use the evidence generator. The evidence generator relies on the existence of certain attributes, structs, and aggregations within the generated code. Various modeling strategies are required for the different metadata patterns available in the generator.

Server metadata: document structure on page 82
The server-side metadata is provided as a well-formed XML document, named <Entity Name>.xml.

Related information

Adding a new custom entity

To add a new custom entity to a custom evidence product that overrides a default product, develop the entity in the same way you develop an entity in any other product but with one exception.

The exception is:

- Use the *Override* node.
- Set the *newEntity* to **Yes**.

> **Note:** Use the same `codepath` as in the default product.

Generated output

In the preceding example, you do not implement the default handcrafted code. To ensure that the code is as simple as possible, a copy of the default handcrafted code is generated inside the build source directory that is under the default's code package. Ensure that the derived custom version is:

- Generated into the custom source directory
- Added to source control

Identifying entities, patterns and relationships
You can use four types of evidence relationships: parent-child, pre-associated, multiple mandatory parents, and related relationships.

Identifying entities

Evidence is data that is collected by an organization to facilitate the delivery of services to the organization's clients. In the application, evidence is typically used to determine clients' eligibility and entitlement. For the Evidence Generator, evidence is:

- Any entity that implements the standard evidence interface AND
- Maintained by the evidence solution.

Identifying patterns

A pattern is any function the evidence entity uses. Examples of functions are:

- Features within a maintenance screen
- Extra code that is specific to an entity

By using metadata that is captured in XML, a function of the Evidence Generator is to specify the patterns that apply to specific entities. During evidence generation, the metadata is read and converted to the appropriate feature. Examples are:

- A button on a client page.
- A callout class stub where you can then implement business logic.

Identifying relationships

In evidence, relationships describe how evidence entities interact and exist in relation to each other. Use a function in the generator to specify the relationships between evidence entities. Then, the generator produces the associated server-side code and client page functions to facilitate the maintenance of the relationships. You can use four types of evidence relationships: parent-child, pre-associated, multiple mandatory parents, and related relationships.

- **Parent-Child relationships**

  Parent-Child is one of the most common logical relationships between evidence entities. Typically, a parent-child relationship is a one-to-many relationship where:

  - The parent can have many children AND
  - Each child must belong to a parent.

  Use parent-child relationships to capture the logical relationship between two entities where:

  - The child entity cannot live without the parent entity AND

- The details on the child are logically related to the details captured on the parent.

An example of a parent-child relationship is where:

- Student details are stored in a student entity AND
- Student expenses are stored in a student expenses entity.

In this example, student expenses cannot exist without the student entity, but the student entity can exist on its own.

- **Pre-Associated relationships**

  Pre-Associated relationships are non-hierarchical relationships between evidence entities that can exist independently of each other. Before you create the evidence, you must know the association between evidence entities so that you can access data from the associated entity as you create the evidence.

- **Multiple mandatory parents relationships**

  Use the multiple mandatory parents relationship pattern where an entity must simultaneously be the child of more than one parent entity.

- **Related relationships**

  Related relationships are non-hierarchical. Use related relationships to associate an evidence record to a non-evidence record. A primary example is the relation of evidence-based employment records to the core employment record. That relationship is found in all evidence-based modules that are built by the application.

  Examples of evidence-based employment entities are:

  - Self-employment
  - Paid employment

  Such examples are a key functional area typical of solutions. For this reason, evidence-based employment entities are categorized as a separate pattern.

The evidence controller

The evidence controller is responsible for most of business processing that is required to maintain evidence.

The evidence controller balances the common infrastructure that is applied across all evidence types for maintaining evidence and any parts of evidence maintenance that were customized to meet business requirements.

Common logic is provided in the evidence controller for enacting the steps in the processes that form part of the overall evidence pattern, which prevents repeating the logic across all evidence types in a custom evidence solution.

To provide a balance, the evidence controller also orchestrates the logic specific to an evidence type. The evidence controller contains methods that call evidence interface methods for the evidence types. Therefore, each custom evidence entity must implement this interface to take part in the evidence pattern.

Evidence hooks and registrar

Evidence hooks provide extension points where customized business logic can be added to an evidence processing. The registrar process works along with evidence hooks.

Evidence hooks

When evidence is being removed, the evidence controller calls an evidence hook where extended functionality can be added.

Evidence registrar

The purpose of the evidence registrar is to permit the business logic to be customized on a per product basis. Each product can register with an evidence subpattern its own hook. When a product is registered, the evidence controller enacts the extended processing for the process specific to that product.

List evidence

The list evidence process presents the user with relevant information about an evidence in the evidence list.

There are a few different list methods. One list method provides a view of all the evidence objects of a type. There are separate methods to provide lists of active objects of all types, and in edit objects of all types.

Insert evidence

The insert evidence process is used to capture evidence information for an evidence type. The result is a new evidence record with an in edit status.

Step 1

Insert a new evidence record that specifies the evidence type and pass control to the evidence controller. A user that wants to insert new evidence is presented with an insert screen that is unique to the evidence type.

Step 2

When the evidence controller creates an evidence descriptor record, the evidence descriptor record includes five characteristics for the participant to whom the evidence applies:

- The correction set ID
- The succession ID
- The status (in edit)
- The case ID
- The participant ID

For information about the evidence descriptor entity, see the *Evidence descriptor* related link.

Step 3

Step 3 occurs only if the new evidence record is a child of a parent evidence record. The evidence controller creates an evidence relationship record to acknowledge the relationship between the parent evidence record and its new child.

Step 4

Step 4 is the insertion of an entry into the evidence change history table. This is the first entry in the evidence change history as it captures the actual creation of the evidence.

Step 5

The final step is to callout to an evidence hook. The hook enacts any extra steps steps that are required to insert a new evidence record based on business requirements for an evidence type.

Modify evidence

The modify evidence process allows a user to update evidence information for an active or in edit evidence record.

As with the insert evidence process, the modify evidence process specifies the evidence type and passes control to the evidence controller. The evidence controller retrieves evidence information for the evidence record from both the custom evidence entity table and the evidence descriptor table. The information is displayed to the user who wants to modify it. While most of the information retrieved from the custom evidence entity table is modifiable, the information retrieved from the evidence descriptor table cannot be modified. The exception is the evidence received date, change received date, and effective date.

When the user saves the evidence changes, the evidence controller validates the evidence that can result in warnings, errors, or both. The evidence solution provides two validations to support the approval check process that are called during an enactment of the modify evidence process. One validation is used to warn users that their modifications are being made to a piece of evidence that is awaiting approval. The second validation is used to stop a user from changing evidence that is approved and is ready for activation.

The modify evidence process continues in one of two directions. If the changes apply to active evidence, the evidence controller inserts a new evidence record that contains the modified evidence. The evidence controller labels the modified evidence as either an evidence correction or an evidence succession. For more information about evidence correction, see the *Evidence correction and succession* related link. Alternatively, if the changes apply to in edit evidence, the existing evidence record is updated and no new evidence record is created.

The evidence controller then adds an entry to the evidence changes history table. This entry captures information about the modifications that are made to the evidence record. The evidence controller completes the process of modifying evidence by calling out to an evidence hook. The hook enacts any additional steps that are required to modify the evidence based on business requirements.

Related concepts

Evidence correction and succession on page 111
The evidence pattern supports two types of evidence change: evidence correction and evidence succession.

Evidence correction and succession

The evidence pattern supports two types of evidence change: evidence correction and evidence succession.

An evidence correction is the replacement of an existing evidence record with a new evidence record to correct an incorrect piece of data. For example, an active bank account evidence record that contains an incorrect bank account number can be updated such that the new bank account number supersedes the incorrect one.

An evidence succession is the set of evidence records that collectively represents a piece of evidence as it changes over time. For example, a bank account evidence record can include a bank account balance. This bank account balance is likely to change over time and the succession of bank account balances collectively represent the changes to the bank account.

The evidence controller uses the correction ID, succession ID, and effective date attributes to manage evidence changes.

A correction set ID and succession ID are assigned to all new evidence records. The correction set ID is used to track corrections that are made to evidence; the succession ID is used to track changes in circumstance.

When a user is updating an active evidence record, the user can modify the effective date of change or else leave it the same. The effective date of change is the field that determines whether a modification to an active evidence record is a succession or a correction.

When a user is modifying evidence, if no change is made to the effective date of change field, the modification is a correction. For all evidence corrections, the system assigns the in-edit evidence record the same correction ID as the active evidence record. This ensures that the evidence corrections supersede the existing active evidence. Also, it allows for all evidence corrections to be tracked in a single evidence change history.

If the effective date of change is changed as part of modifying evidence, the modification is a change during the lifetime of the evidence and as such is a succession. To monitor a succession of updates that are made to an active evidence record, the system assigns each in edit evidence record the same succession ID, but a different correction set ID. When activated, the succession of updates does not supersede any existing active evidence.

> **Important:** The effective date of change can be updated only for active evidence records. The evidence pattern provides validation that prevents a user from modifying the effective date of change for in edit evidence. If the user enters an incorrect effective date of change when the user is updating active evidence, the user must discard the incorrect in edit record and restart the update process.

View evidence

The view evidence process displays evidence information for an evidence record. The view evidence process is initiated when a user selects to view an evidence record in the evidence list.

The evidence controller retrieves evidence information for the evidence record from both the custom evidence entity table and the evidence descriptor table. The evidence controller also retrieves the name of the user responsible for the last modification from the evidence change history table. The evidence information is presented to the user on the view evidence screen unique to the evidence type.

Remove evidence

The remove evidence process marks an active evidence record as pending removal.

> **Note:** Enacting the remove evidence process does not remove an active evidence record. The evidence record remains active after it is flagged as pending removal. To initiate the pending removal, the apply evidence changes process must be run.

The remove evidence process involves two steps:

1. Specifying the evidence ID to the evidence controller. The evidence controller retrieves the evidence record and sets the active evidence to pending removal. While the evidence record status remains active, the evidence record's pending removal indicator is flagged. An entry is also added to the evidence changes history table.
2. Specifying the evidence type to the evidence controller. The evidence controller calls out to an evidence hook. This hook enacts any additional steps that are required to mark the evidence as pending removal based on business requirements.

Apply evidence changes

The apply evidence changes process serves two purposes: to activate new and updated evidence, and to remove active evidence that is flagged as pending removal.

A user can start the apply evidence change process in three different ways:

*   The user applies all outstanding changes.
*   The user applies only their own changes.
*   The user selects the specific changes that apply from the complete list of pending changes.

Both the calculate attribution period and the submit for approval process are called as part of applying evidence changes. The purpose of the calculate attribution period process is to calculate and store the period during which the newly activated evidence is used in eligibility and entitlement determination. The purpose of the submit for approval process is to determine whether an evidence change requires approval from the case supervisor and to start the processing that is approved.

At a high level, the process of applying evidence changes can be divided into stages. In the first stage, the evidence controller validates the pending evidence changes. In the second stage, the evidence controller determines whether the evidence changes require approval from the case supervisor. In the third stage, the evidence controller activates the in-edit evidence and calculates the attribution periods for the newly activated evidence. In the fourth stage, it cancels any active evidence that is pending removal. In the final stage, the eligibility and entitlement engine is called.

1. Validating evidence changes

During the first stage of applying evidence changes, the evidence controller validates the pending evidence changes.

The evidence controller uses the following three steps to validate the pending evidence changes:

1. The evidence controller calls out to a hook that checks for evidence requirements at the case level such as the minimum set of evidence records that must exist for a case. This hook can call custom validations that apply at the case level rather than at the evidence type level.
2. The evidence controller then calls all validations that are associated with applying evidence changes for the specific evidence type.
3. If any of the validations fail, an exception is thrown and the user must make the appropriate updates before the user tries to apply the changes again.

2. Checking whether evidence requires approval

During the second stage of applying evidence changes, the evidence controller checks whether the pending evidence changes require approval from the case supervisor.

To determine whether the pending evidence changes require approval from the case supervisor, the evidence controller performs five steps:

1. The evidence controller checks if manual approvals are already outstanding for the evidence by checking whether the approval status is submitted. The evidence controller does not add the evidence to the list of pending updates because it still requires approval. However, the evidence is not be sent for manual approval a second time because the case supervisor is already informed.
2. The evidence controller checks if the evidence was previously rejected. If so, the evidence controller submits the evidence for approval.
3. The evidence controller checks if the evidence was previously approved. If so, the evidence does not require approval and is thus added to the list of pending updates (ready for the next steps that are required to apply evidence changes).
4. The evidence controller checks if the evidence was previously automatically approved. If so, the evidence does not require manual approval again, so the evidence controller adds it to the list of pending updates.
5. For all other evidence, the evidence controller calls the Check for Evidence Approval API that reads the evidence approval checks table and determines whether the evidence must be manually approved. Evidence that requires approval is submitted for approval; evidence not requiring approval is added to the list of pending updates.

To set an evidence's approval status to submitted, the evidence controller performs five steps:

1. The evidence controller creates an approval request record and an evidence descriptor approval request record with the current approval request indicator set to true.
2. The evidence controller updates any previous evidence descriptor approval request records for the same evidence descriptor record by setting the current approval request indicator to false.
3. The evidence controller updates the evidence descriptor record by setting the approval request indicator to true and the approval status to submitted.
4. The evidence controller adds an entry to the evidence change history to acknowledge that the evidence is submitted for approval.
5. The evidence controller enacts the evidence approval workflow. For more information about the evidence approval workflow, see the *Submit evidence for approval workflow* related link.

Related concepts
Submit evidence for approval workflow on page 116
When the case supervisor approves or rejects a manual activity, the workflow splits and continues in one of two directions.

3. Activating evidence and calculating attribution periods
During the third stage of applying evidence changes, the evidence controller activates in edit evidence and calculates the attribution periods for the newly activated evidence.

To activate in edit evidence and calculate the attribution periods for the newly activated evidence, the evidence controller performs six steps:

1. The evidence controller changes the status of the new and updated evidence records from in edit to active and populates the evidence activation date with the current date on the system. It also searches for existing active evidence records with the same correction set ID as the newly active evidence records. If found, the evidence controller changes the status of the existing active evidence records to superseded.
2. To create attribution periods for the newly active evidence, the evidence controller initiates the calculate attribution period process by calling out to a hook. This hook retrieves the list of case IDs that require an attribution period for the active evidence. If the evidence is maintained for a stand-alone product delivery, only one case ID is returned. If evidence is

maintained at the integrated case level, each product delivery case that shares the evidence must have its own attribution period. So, the case IDs for each of these product deliveries are returned.

3. The evidence controller creates a new attribution period for each of the case IDs.

4. The evidence controller searches for existing active evidence records that have the same succession ID as the newly activated evidence records. If found, the evidence controller reattributes all evidence records in the succession.

5. The evidence controller continues applying evidence changes to in edit evidence by calling out to another hook. This hook enacts any additional steps that are required to activate the in edit evidence.

6. The evidence controller adds an entry to the evidence change history table for each evidence record that is activated.

4. Removing active evidence

The fourth stage of applying evidence changes is to apply pending removal changes to active evidence.

To apply pending removal changes to active evidence, activate in edit evidence and calculate the attribution periods for the newly activated evidence, the evidence controller performs four steps:

1. The evidence controller applies the evidence changes to active evidence that is pending removal by changing the status of this evidence to canceled.

2. The evidence controller searches for existing active evidence records that have the same succession ID as the newly canceled evidence records. If found, the evidence controller reattributes all evidence records in the succession.

3. The evidence controller calls out to a hook that enacts any additional steps that are required to cancel the active evidence.

4. The evidence controller adds an entry to the evidence change history table for each evidence record that is canceled.

5. Assessing evidence changes

The last step in applying changes is to assess affected product delivery cases.

The evidence controller calls the eligibility and entitlement engine by using an eligibility and entitlement determination period that consists of the earliest attributed **From** and latest attributed **To** dates for all applied evidence.

Calculating attribution periods: additional functionality

The evidence framework provides additional functionality for calculating attribution periods. The additional functionality includes support for simulating the activation of in-edit evidence and also includes the automatic calculation of attribution periods for new product delivery cases.

Simulating the activation of in-edit evidence

As part of the manual check eligibility process, users can check eligibility by using in-edit evidence. The system simulates the activation of the in-edit evidence records by calculating virtual attribution periods for the in-edit evidence records. The system also virtually supersedes the existing active evidence records. The result is that the user is able to see the eligibility results that might be achieved by applying evidence changes to all in-edit evidence.

Automatic calculation of attribution periods

The evidence framework includes functionality that automatically reenacts the calculate attribution period process for existing active evidence to create attribution periods for the new product delivery cases. The functionality occurs when these product delivery cases are submitted.

When evidence is activated, the evidence controller creates an attribution period for each product delivery case within an integrated case that shares the evidence.

> **Note:** Additional product delivery cases can get added to the integrated case after the evidence was activated and these new product deliveries require attribution periods for their active evidence.

Submit evidence for approval workflow

When the case supervisor approves or rejects a manual activity, the workflow splits and continues in one of two directions.

The first activity in this workflow is a manual activity. The purpose of this activity is to send a task to the case supervisor with instructions to approve or reject a piece of evidence on a case. The task includes links to the approve and reject evidence pages. The manual activity is completed when the case supervisor approves or rejects the activity.

The workflow splits and continues in one of two directions based on the outcome of the manual activity. If the evidence is approved, the next activity is the evidence approval activity; if rejected, the next activity is the evidence rejection activity. Both of these activities are route activities whose purpose is to send a notification to the user who selected to activate the evidence. The notification informs the user of the evidence approval outcome and includes a link to the relevant evidence list screen.

Participant evidence integration

Participant data is also regarded as evidence.

A concern's date of birth, for example, is regarded as evidence. Even though such data is maintained from the Participant Manager, the date must be accessible to all cases that are required to use it as evidence. The following entities are integrated into the default application for the evidence solution.

- Address
- Alternate ID
- Alternate Name
- Bank Account
- Citizenship
- Concern Role
- Concern Role Relationship
- Education
- Employer
- Employment
- Employment Working Hour
- Foreign Residency
- Person
- Prospect Employer
- Prospect Person

Modifications to these entities automatically applies to all cases using the data and triggers eligibility and entitlement re-determination of all cases using the data.

For more information about participant evidence integration, see the *Participant evidence integration* related link.

Evidence generation

Evidence entities, and the relationships between them, fall into a relatively small number of high level patterns.

As the maintenance overhead on evidence code can be quite considerable, especially if the modules being maintained are large, the idea of generating evidence artefacts was initiated. The evidence generator takes input data about the entity, its relationships to other entities as well as meta-data about how it will be maintained on the client and generates the server-side code and client-side UIM, VIM files, and the associated properties and help.

For more information about the evidence generator, see the related links for *Evidence Generator specification*, *Developing dynamic evidence*, and *Modeling for the Evidence Generator*.

Related concepts

Evidence Generator specification on page 56

Use the Evidence Generator as a rapid way to develop the server side code and client-side screens for evidence entities that integrate fully with the standard Evidence Solution.

Evidence Generator Cookbook on page 91

Use the evidence generator as part of the standard build targets to dynamically create evidence entities that are based on certain criteria that are set for the evidence types. The evidence generator caters for all of the high level, repeatable evidence patterns across a number of large evidence-based solutions.

Modeling that is required for the evidence patterns on page 49

Specific entity modeling is required when you use the Cúram Evidence Generator as the generator relies on certain, attributes, structs, and aggregations within the generated code. Use this information to learn about entity modeling that is required to use the evidence generator. The evidence generator relies on the existence of certain attributes, structs, and aggregations within the generated code. Various modeling strategies are required for the different metadata patterns available in the generator.

Evidence period calculation

The evidence period calculation algorithm completes the dates for the evidence record and its intended period of validity.

The following elements can be contained in an evidence record period:

- A start date and an end date for the evidence record.
- An effective date for the evidence record, when successive end dates are used.
- A case creation date when no other period dates exist for the evidence record.

The period for the evidence record can depend on the type of evidence that is entered and how it is configured. Some evidence types can require a change of state and other evidence types successive periods for the evidence to be recorded.

The following five steps are completed by the algorithm to establish the system-recorded period for the evidence until the valid start or effective date is established for the evidence record:

1. The evidence period start date is set to the evidence effective date.

2. The evidence period start date is set to the evidence business start date when the start date cannot be determined by the previous step.
3. The evidence period start date is set to the case start date when the start date cannot be determined by the previous steps.
4. If there is a succession to the evidence record, then the evidence period end date is set to the day before the effective date of the succeeding record.
5. The evidence period end date is set to the evidence business end date when the end date cannot be determined by the previous step.

The evidence period calculation algorithm uses the `Evidence Controller` class and the `getPeriodForEvidenceRecord` method.

In certain instances, customers might not want to use the default logic. For information about using a customization hook point to override the business start date, see the *Customizing the evidence start and end dates* related link.

Related tasks

Where a business start date or end date is not configured on an evidence record, organizations can use a customization hook point to override the start or end dates.

Customizing the evidence start and end dates
Where a business start date or end date is not configured on an evidence record, organizations can use a customization hook point to override the start or end dates.

About this task

For customers who do want to use the default logic where the case creation date is used when no business start date is defined, a customization hook point is available. The following three use cases are examples of where displaying a case start date in the evidence period is not correct:

- An organization might be required to manage the full history of the Names evidence by using a person's date of birth. Currently, the default Names evidence does not contain a business Start Date. As a result, when a person is registered in the system, Names evidence displays the Case Start Date in the **Person Home Evidence List** page. Organizations might require the flexibility to change the date that is displayed on the Names evidence to reflect the participant's date of birth. Consequently, the organization can easily manage changes in a person's name before the person was registered in the system.
- A child evidence that does not contain a business start date. When the caseworker views the **In-Edit** or **Active Evidence** list for the child evidence, the period that is displayed to the caseworker is the Case Start Date.
- An evidence that is related to another entity, for example, an existing evidence type that is named Paid Employment, with no business start and end date. However, the evidence type that is linked to the Employment entity does not contain associated business dates. So, the Paid Employment evidence displays the Case Start Date instead of the employment start dates.

Where a business start date is not configured, the business start date can be overridden by using the `EvidencePeriodHook`. When the `EvidencePeriodHook` is used, anywhere that uses the method `getPeriodForEvidenceRecord` returns the overridden date. For example, the **Evidence List** pages and the **Incoming Evidence List** pages.

The proceeding example illustrates how the `EvidencePeriodHook` works. The example consists of two sample evidences:

- An Income evidence. The evidence is a parent evidence. The Income evidence contains the business start date, the business end date, employer information, and the payment frequency.
- A Tax evidence. The Tax evidence is a child of Income evidence. The Tax evidence captures a tax amount and a tax band. The Tax evidence does not capture start and end dates. Start and end dates are captured per income.

When a caseworker views the tax records from the **Evidence List** page, the tax records display the Case Start Date even though the start of the tax payment is based on the Income evidence. For the caseworkers to easily understand when the tax records start from, the Income evidence start date can be displayed when the caseworker is viewing the list of tax records. The proceeding example shows how the Case Start Date can be overridden to be the Income evidence start date.

Procedure

1. An implementation of `EvidencePeriodHook` class must be provided with the `getStartDate()` and `getEndDates()` methods implemented.
2. If either the `getStartDate()` or the `getEndDates()` functions are not required in the new implementation, the function must return null to preserve the default application behavior.
3. Add a Guice binding of the new implementation to a module class that is bound to the required evidence type. The module class can be a new or existing class.

Example

The following code is a sample module class with a binding for Income-Tax:

```
public class EvidencePeriodHookTestModule extends AbstractModule {

    public EvidencePeriodHookTestModule() {
      super();
    }

    @Override
    public void configure() {

      final MapBinder<String, EvidencePeriodHook> mapBinder
        = MapBinder.newMapBinder(binder(),
            String.class, EvidencePeriodHook.class);
      mapBinder.addBinding("taxEvidenceType").
        to(IncomeTaxEvidencePeriodHookImpls.class);
    }
  }
```

The following code is a sample hook implementation:

```
public class IncomeTaxEvidencePeriodHookImpl.class implements EvidencePeriodHook{
  /**
   * This implementation returns the income evidence business start date
   */
  @Override
  public Date getStartDate(EvidenceDescriptorDtls dtls)
    throws AppException, InformationalException {

    //Tax evidence object
    TaxEvidence taxEvidenceObj =
       TaxEvidenceFactory.newInstance();

    //Income evidence object
    IncomeEvidence incomeEvidenceObj =
      IncomeEvidenceFactory.newInstance();

    //Read tax evidence details to get income evidence ID
    EvidenceCaseKey key = new EvidenceCaseKey();
    key.caseIDKey.caseID=dtls.caseID;
    key.evidenceKey.evidenceID=dtls.relatedID;
    key.evidenceKey.evType=dtls.evidenceType;
    ReadTaxEvidenceDetails readTaxEvidenceDetails =
      taxEvidenceObj.readTaxEvidence(key);

    //Read and return start date from income evidence
    EIEvidenceKey evKey =  new EIEvidenceKey();
    evKey.evidenceID=readTaxEvidenceDetails.incomeEvidenceID;
    evKey.evidenceType="incomeEvidenceType";

    return  incomeEvidenceObject.getStartDate(evKey);
  }
  /**
   * This implementation returns income evidence business end date
   */
  @Override
  public Date getEndDate(EvidenceDescriptorDtls dtls) throws AppException,
    InformationalException {

    //Tax evidence object
    TaxEvidence taxEvidenceObj =
       TaxEvidenceFactory.newInstance();

    //Income evidence object
    IncomeEvidence incomeEvidenceObj =
      IncomeEvidenceFactory.newInstance();

    //Read tax evidence details to get income evidence ID
    EvidenceCaseKey key = new EvidenceCaseKey();
    key.caseIDKey.caseID=dtls.caseID;
    key.evidenceKey.evidenceID=dtls.relatedID;
    key.evidenceKey.evType=dtls.evidenceType;
    ReadTaxEvidenceDetails readTaxEvidenceDetails =
      taxEvidenceObj.readTaxEvidence(key);

    //Read and return end date from income evidence
    EIEvidenceKey evKey =  new EIEvidenceKey();
    evKey.evidenceID=readTaxEvidenceDetails.incomeEvidenceID;
    evKey.evidenceType="incomeEvidenceType";

    return  incomeEvidenceObject.getEndDate(evKey);
  }
}
```

Identifying problems

When you run the Evidence Generator, problems can occur if the set-up steps are not completed correctly.

Configuration errors: generation

The Evidence Generator produces seven types of generation errors that are associated with configuration (evidence properties).

Generation errors

The seven types of generation errors that are associated with configuration (evidence properties) are:

1. Evidence will not build or evidence will not clean.
2. Evidence not found.
3. '<EntityName>Details' is not present in the model.
4. No source files match the extensions XML.
5. The general properties file was not found.
6. <$server.metadata> was found to contain no source files that match the extensions XML.
7. No EUIM source files.

See the following explanation of the symptom, cause, and solution for each generation error.

1. Evidence will not build or Evidence will not clean

- **Symptom**
  No new evidence is generated when the target is generated. No evidence is deleted when the target is clean.
- **Cause**
  The `product.build.option` is:

  - Set to **False** OR
  - Missing.
- **Solution**
  If the evidence is to be generated, set `product.build.option=true`. If `product.build.option=true` is missing from the `evidence.properties`, add `product.build.option=true` to `evidence.properties`.

2. Evidence not found

- **Symptom**
  Error when build generated is called on `EJBServer:..\CEF-Core\EJBServer` `\components\<$product.name>\Evidence` not found.
- **Cause**
  The property `product.name` in `evidence.properties` does not match the property in the codebase.
- **Solution**
  Set `product.name=correct Product Name` as it appears under `EJBServer/` `components/ <ProductName>`.

3. '<EntityName>Details' is not present in the model

- **Symptom**
  Error when build generated is called from `EJBServer: Parameter 'dtls' (of operation...)` has type `'<EntityName> EvidenceDetails'`, but `'<EntityName>Details'` is not in the model.
- **Cause**
  The property `product.ejb.package` in `evidence.properties` does not match part of the `CODE_PACKAGE` on the model.
- **Solution**
  Set `product.ejb.package=Model CODE_PACKAGE` up to first "." delimiter. For example:

  `CODE_PACKAGE = seg.evidence.entity`

  `product.ejb.package=seg`

4. No source files match the extensions XML

- **Symptom**
  Error when build generated is called displayed in the XML Digestor output: 'The source location <$server.metadata> was found to contain no source files that match the extensions XML.'
- **Cause**
  `server.metadata` does not match the physical root directory for the product's evidence directory.
- **Solution**
  Set `server.metadata` to point to the correct directory.

5. The general properties file was not found

- **Symptom**
  Error when build generated is called displayed in the XML Digestor output: 'The general properties file was not found at the location `$properties.home\`.'
- **Cause**
  `properties.home` does not match the physical properties directory.
- **Solution**
  Set `properties.home=Directory` where `general.properties` was created.

6. <$server.metadata> was found to contain no source files that match the extensions XML

- **Symptom 1**
  Error when build generated is called on `EJBServer:Error#`. The source location < `$server.metadata>` contains no source files that match the extensions XML.
- **Cause 1**
  The property `server.metadata` in `evidence.properties` does not point to the location of server XML files.
- **Solution 1**
  Set `server.metadata=<correct location of server metadata>`.
- **Symptom 2**
  Error when build client is called on `Webclient: Error #`. The source location < `$server.metadata>` contains no source files that match the extensions XML.
- **Cause 2**
  The property `product.name` in `evidence.properties` does not match the property in the codebase.

- **Solution 2**
  Set *product.name=correct Product Name* as it appears under `EJBServer/` `components/` `<ProductName>`.

7. No EUIM source files

- **Symptom 1**
  Error when build generated is called on `EJBServer:`. No EUIM source files were found within the EUIM source directory *<$caseType.integratedCase.metadata>*.
- **Cause 1**
  The property `caseType.integratedCase.metadata` in `evidence.properties` does not point to the location of integrated EUIM files.
- **Solution 1**
  Set `caseType.integratedCase.metadata=<correct location of integrated` `metadata>`.
- **Symptom 2**
  Error when build generated is called on `EJBServer:`. No EUIM source files were found within the EUIM source directory *<$caseType.product.metadata>*.
- **Cause 2**
  The property `caseType.product.metadata` in `evidence.properties` does not point to the location of product EUIM files.
- **Solution**
  Set `caseType.product.metadata=<correct location of product metadata>`.

Configuration error: runtime

The Evidence Generator produces one runtime error that is associated with configuration (evidence properties): HTTP Status 404 error message.

HTTP Status 404 Error Message

- **Symptom**
  A page not found error when the page tries to access the generated evidence workspace.
- **Cause**
  `product.codetable` is set incorrectly, that is, not pointing at the product codetable directory.
- **Solution**
  Set *product.codetable=<product_Root_CodeTable_directory>*.

Model errors: generation

The Evidence Generator produces one generation model error.

Invalid mandatory field

- **Symptom**
  Error when build generated is called from *EJBServer:*. The mandatory field `'dtls.<fieldName>` specified for parameter 'dtls' of operation `'<EntityName>.create<EntityName>Evidence'` is invalid.
- **Cause**
  The "dtls" association between the `<EvidenceEntity>Details` struct and the `EvidenceEntity` entity is missing. The association is mandatory for all evidence entities.

- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

Related concepts

Step 1: Model evidence entity on page 95
During entity modeling, the defined metadata is used to support and connect to the Evidence Generator by using the service layer, façade layer, or client.

Model errors: compilation

The Evidence Generator produces 11 types of compilation model errors.

Compilation errors

The 11 types of compilation model errors are:

1. '<EntityName>Details' is not present in the model.
2. details.parEvKey cannot be resolved or is not a field.
3. evidenceDetails.parEvKey cannot be resolved or is not a field.
4. dtls.selectedParent cannot be resolved or is not a field.
5. dtls.caseIDKey cannot be resolved or is not a field.
6. evidenceDetails.caseIDKey cannot be resolved or is not a field.
7. readEvidenceDetails.descriptor cannot be resolved or is not a field.
8. details.descriptor cannot be resolved or is not a field.
9. evidenceDetails.descriptor cannot be resolved or is not a field.
10. readEvidenceDetails.dtls cannot be resolved or is not a field.
11. readEvidenceDetails.caseParticipantDetails cannot be resolved or is not a field.

See the following explanation of the symptom, cause, and solution for each compilation error.

1. '<EntityName>Details' is not present in the model

- **Symptom**
  Error when build generated is called `<EntityName>Details'` is not present in the model.
- **Cause 1**

  The first element, that is, up to the first delimiter "." in `CODE_PACKAGE` does not match evidence property `product.ejb.package` in `evidence.properties`.
- **Cause 2**
  The second and third elements in `CODE_PACKAGE` are not `evidence.entity`.
- **Solution 1**
  Set first part of `CODE_PACKAGE=product.ejb.package` or the other way around.

- **Solution 2**
  Set second part of `CODE_PACKAGE=evidence`. Set third part of `CODE_PACKAGE=entity`.

2. details.parEvKey cannot be resolved or is not a field

- **Symptom**
  A compilation error in generated code `evidenceDetails.parEvKey` cannot be resolved or is not a field.
- **Cause**
  The "parEvKey" association between the `<EvidenceEntity>Details` struct and the `EvidenceKey` struct is missing.

- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

3. evidenceDetails.parEvKey cannot be resolved or is not a field

- **Symptom**
  A compilation error in generated code `evidenceDetails.parEvKey` cannot be resolved or is not a field.
- **Cause**
  The "parEvKey" association between the `<EvidenceEntity>Details` struct and the `EvidenceKey` struct is missing.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

4. dtls.selectedParent cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `dtls.selectedParent` cannot be resolved or is not a field.
- **Cause**
  The "selectedParent" association between the `<EvidenceEntity>Details` struct and the `ParentSelectDetails` struct is missing. The `ParentSelectDetails` is present and the association between `ParentSelectDetails` and the entity details struct is required if the entity is a child of another evidence entity.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

5. dtls.caseIDKey cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `dtls.caseIDKey` cannot be resolved or is not a field.
- **Cause**
  The "caseIDKey" association between the `<EvidenceEntity>Details` struct and the `CaseIDKey` struct is missing. This association is mandatory for all evidence entities.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

6. evidenceDetails.caseIDKey cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `evidenceDetails.caseIDKey` cannot be resolved or is not a field.
- **Cause**
  The "caseIDKey" association between the `<EvidenceEntity>Details` struct and the `CaseIDKey` struct is missing. The association is mandatory for all evidence entities.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

7. readEvidenceDetails.descriptor cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `readEvidenceDetails.descriptor` cannot be resolved or is not a field.
- **Cause**
  The "descriptor" association between the `Read<EvidenceEntity>Details` struct and the `EvidenceDescriptorDetails` struct is missing. The association is mandatory for all evidence entities.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

8. details.descriptor cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `details.descriptor` cannot be resolved or is not a field.
- **Cause**
  The "descriptor" association between the `<EvidenceEntity>Details` struct and the `EvidenceDescriptorDetails` struct is missing. The association is mandatory for all evidence entities.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

9. evidenceDetails.descriptor cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `evidenceDetails.descriptor` cannot be resolved or is not a field.
- **Cause**
  The "descriptor" association between the `<EvidenceEntity>Details` struct and the `EvidenceDescriptorDetails` struct is missing.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

10. readEvidenceDetails.dtls cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code `readEvidenceDetails.dtls` cannot be resolved or is not a field.
- **Cause**
  The "dtls" association between the `Read<EvidenceEntity>Details` struct and the `<EvidenceEntity>` entity is missing. The association is mandatory for all evidence entities.
- **Solution**
  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

11. readEvidenceDetails.caseParticipantDetails cannot be resolved or is not a field

- **Symptom**
  A compilation error in the generated code
  `readEvidenceDetails.caseParticipantDetails` cannot be resolved or is not a field.

- **Cause**

  The "caseParticipantDetails" association between the `ReadCaseParticipantDetails` struct and the `<EvidenceEntity>` entity is missing. The association is mandatory for all evidence entities.

- **Solution**

  Create an association between the two structs. For more information about creating an association between two structs, see the *Step 1: Model evidence entity* related link.

Related concepts

During entity modeling, the defined metadata is used to support and connect to the Evidence Generator by using the service layer, façade layer, or client.

Metatype errors: incorrect participant, date, and comments

Specify metatypes on fields to force extra behavior on the field. If you incorrectly specify a metatype, the error typically relates to the metatype participant, date, or comments.

Examples of metatype uses:

- Turn the stored value in a field into a link.
- Display a text area rather than field.

See the following explanation of the symptom, cause, and solution for common metatype errors.

Incorrect participant metatype

- **Symptom**

  On the evidence maintenance screens, the primary case participant's name does not display as a link to the case participant home page.

- **Cause**

  The `CASE_PARTICIPANT_SEARCH` or `PARENT_CASE_PARTICIPANT_ROLE_ID` was not specified as the metatype on the field that stores the case participant role ID.

- **Solution**

  Set the metatype of the field that stores the case participant role ID to either:

  - `CASE_PARTICIPANT_SEARCH` OR
  - `PARENT_CASE_PARTICIPANT_ROLE_ID`.

Incorrect date metatype

- **Symptom**

  The "start" and "end" dates on the evidence workspace screen do not populate.

- **Cause**

  In the metadata for the fields that store the "start" and "end" dates, the metatype of `START_DATE` or `END_DATE` was not specified.

- **Solution**

  Specify the metatype of `START_DATE` or `END_DATE` to the appropriate field.

Incorrect comments metatype

- **Symptom**

  The comments field in an evidence screen has a field height of one row and displays on half the screen only.

- **Cause**
  In the metadata for the field that stores the comments data, the metatype of COMMENTS was not specified.
- **Solution**
  Specify the metatype of COMMENTS to the appropriate field.

Property errors: generation

Three property errors are common during generation.

The general properties file was not found at the location $properties.home\

- **Symptom**
  Error when build generated is called displayed in XML Digestor output: The general properties file was not found at the location $properties.home\.
- **Cause**
  general.properties does not exist.
- **Solution**
  If general.properties does not exist, create and set properties.home to point to general.properties.

The employment properties file was not found at the location $properties.home\

- **Symptom**
  Error when build generated is called displayed in XML Digestor output: The employment properties file was not found at the location $properties.home\.
- **Cause:**
  employment.properties does not exist.
- **Solution**
  If employment.properties does not exist, create and set properties.home to point to employment.properties.

No such property exists

- **Symptom**
  Error when build client is called: The text property <evidence property> used in the file <generated evidence VIM or UIM > could not be resolved as no such property exists in the properties file <generated evidence properties file >.
- **Cause**
  The property key is missing from either the general.properties file or the employment.properties file.
- **Solution**
  The missing key is likely in the general.properties file or the employment.properties file. View the generated properties file. The generated properties file that is required to contain the missing property key might indicate whether the property is from the general or employment properties. For more information about mandatory property keys, see the *general properties* related link and the *employment.properties* related link.

Related concepts

The *general.properties* file contains all generic label values for the product. The generic labels consist of localized label values for all common buttons, page titles, and so on. Some

generic labels permit dynamic values, that is, the name of the evidence entity the page title is describing. All properties within this file must be set.

The *employment.properties* file contains all generic label values for the employment pages generated. The generic label values consist of localized label values for all common buttons, page titles, and so on.

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