

# Data Wizards for data entry - Collateral Object

## Business Requirements:

1. Create smart data wizards to help guide users when they are entering data on objects. These wizards will be used when a user is adding/editing new or existing objects to the collateral canvas.

The end goal is that this will make entering data easier by providing a functional flow of entering data fields that makes sense to the user. This feature is basically a “smart walk through” indicating which fields of information are required to complete, and which fields are optional. It should be easy and straightforward for the user, and should NOT make things more difficult or confusing.

## Functional Requirements:

### Must Have's:

1. Data wizards will open when a user selects to create a new object, or when editing an existing object. Objects that should have smart data wizards:
  - a. Collateral
  - b. Security Document (Covered in a separate BRD here (insert link))
2. The data wizard modal/screen will have different panels on the top left indicating key groups of information that are required for creation on an object. (NOTE: these will be different for each different object, and ACA specific as well).
3. Panel Colors and Fields Behavior:
  - a. Panels will be color coded to show which are required, which are optional, and what has been completed or is incomplete. If you click INTO a field on a required panel, you will then be forced to fill out all the required fields or exit the wizard. Even if the fields are not filled out immediately, the system will fire an error if a scenario is submitted without all the required fields completed.
  - b. Data fields that are REQUIRED will be highlighted in RED. Panel colors descriptions are below:
    - i. Orange - Required (Incomplete)
    - ii. Green - Required (Completed)
    - iii. Black - Optional
4. Collateral Object Panel Names and Fields: (**Configurable based on if the ACA or outside customer wants this ability**)
  - a. Panel 1 - **Collateral**
    - i. Fields needed to save the object and display:
      1. Collateral Type (display the collateral type selected and pulled onto the canvas e.g. Real Estate, Machinery & Equipment, Inventory, etal.)
      2. Description (text field to label the collateral with a meaningful name to the end user)
      3. Market Value (money)
      4. NRV % (percent)
    - ii. Other fields that can be entered and may be required
      1. Non-FCS Prior Lien (Money)
    - iii. Added fields when Collateral Type is Real Estate
      1. MV Improvements (Money)
      2. FEMA (checkbox)
      3. Land in Transition (checkbox)
  - b. Panel 2 (for all Collateral) - **Owners**
    - i. Collateral Owner

- ii. Primary Owner (checkbox)
- iii. Percentage Owned
- c. Panel 3 (for all Collateral ) - **Appraisal Information**
  - i. Assessed Method
  - ii. Assessment Name
  - iii. Appraiser
  - iv. Assessment Date
  - v. Assessment Comments
- d. Panel 4 (Real Estate Collateral Only) - **Acres, Income, Debt**
  - i. Acres
  - ii. Income
  - iii. Debt

**NOTE:** The above list is subject to change based on the FPI ACA or outside company using the Collateral App.

5. Navigating between tabs - There will be multiple ways for users to navigate between tabs:

- a. User can click the “Next” button on the bottom right of the modal/screen and that will move them to the next numerical tab in the modal.
- b. User can click the “Back” button on the bottom right of the modal/screen and that will move them to the previous numerical tab in the modal.
- c. User can manually click on another tab to switch to it.
- d. User can click the “Continue Later” button. This button will save existing information entered and exit out of the Data Wizard completely. (Ignores validation rules)
- e. NOTE: If you click INTO a field on a required panel, you will then be forced to fill out all the required fields or exit the wizard. Even if the fields are not filled out immediately, the system will fire an error if a scenario is submitted without all the required fields completed.

6. Saving Behavior

- a. A “Save” on the Data Wizard modal will be triggered every time a user selects the “Next” OR “Back” button, AND if they manually click on another tab to navigate to.
- b. A “Save” will also happen when a user clicks the “Continue Later” button. (This will save entered information and also completely exit the Data Wizard while ignoring validation rules.)

7. Validation Rules

- a. Validation rules for required fields will run every time a “Save” is completed. (“Save” functionality is discussed in section 7 above). A “Save” will be anytime a user clicks the “Next”, “Back” or “Done” buttons, or manually clicks on another tab to navigate to.
  - i. This means that every time a user tries to move to another tab, a “Validation **then** Save” happens. If the required fields were not filled out, an error message will pop up saying “All required fields are not completed”.
    - 1. Required fields are discussed above in section 5. All required fields should already be highlighted or have a red border around them when the user views a tab.
    - 2. The red border/highlight around required fields will be removed once the user has successfully entered information.
- b. NOTE: The “Done” button will run ALL validation rules for the entire Data Wizard tabs, not just the final tab’s fields.


8. How to Exit the Data Wizard

- a. User can navigate through all the available tabs and enter the required information. Upon completion of required fields in final tab, the user can click the “Done” button. If all required fields are filled out successfully, the Data Wizard will close.
- b. After clicking the “Done” button, if validation does NOT pass for all the required fields, an error message will pop up saying “All required fields are not completed”. The user must complete the required highlighted fields and click the “Done” button again. If all validation rules are satisfied, the Data Wizard will close.

- c. User can click the “Continue Later” button. This will save any field information already entered, and close out of the Data Wizard.
- i. As stated above, this function will Save any information entered, ignoring validation rules, and will completely exit the Data Wizard.

## Non-Functional Requirements:

1. TBD

**Screenshots of old functionality: (NOTE: These screenshots are of the older version. The new functionality may look similar to this, but will not be exact. This is just for example only.)** 

Panel numbers can be clicked to navigate through the wizard and are color coded for reference:

- Orange – Required (Incomplete)
- Green – Required (Complete)
- Black – Optional

**Modify Collateral - Training**

1 Add Real Estate  
2 Owners  
3 Acres, Income & Debt  
4 Appraisal Info  
5 Location(s)

Overall  
Training RE Detail 1  
Training RE Detail 2  
Add Another Detail Item(s)

Collateral Type  
Market Value Total 575,000.00  
Market Value 500,000  
MV Improvements 75,000  
NRV % 100  
Non FCS Prior Liens  
FEMA  
Land in Transition

Real Estate  
Description

Required fields are shown in red and must be completed before leaving the panel.

Continue Later Next

**Modify Collateral - Description**

1 Add Real Estate  
2 Owners  
3 Acres, Income & Debt  
4 Appraisal Info  
5 Location(s)

Collateral Type  
Description  
NRV %  
FEMA  
Land in Transition  
Does this Real Estate contain multiple Detail Item(s) ?

Real Estate  
Description

Required: Completed  
Required: Incomplete  
Required: Incomplete

Optional information to add