Linking Objects

Business Requirements: 🔗

1. There needs to be dotted lines displayed on the Collateral Visualization Canvas that visually shows which objects are linked together. These links will visually represent the Collateral Web of Liability Canvas for the customer or relationship the user is viewing.
2. Links between objects can be manually created by clicking a link icon and dragging it to another object, or by dragging a new object from the side navigation menu onto an existing object. (Restricted to linking rules)
3. Links between objects need to be editable (updated/deleted).

Functional Requirements: 🔗

Must Have's (Basic Linking Functionality): 🔗

1. To link an object to another object, click on the 🔗 link icon and drag it to the other object.
2. When user is dragging the link to an object, highlight valid choices with an outline around the objects that can be linked to.
3. What objects can be linked to each other:
   a. Loan > Security Document and Collateral
   b. Security Document > Loan and Collateral (UCC's are on backlog list)
   c. Collateral Object > Loan, Security Document, Collateral Detail and Customer
   d. Collateral Detail > Collateral and (Customer??) (**NOTE:** This link will be created automatically based on underlying data and will not be user created)
   e. Customer > Loan and (Collateral Detail??) (**NOTE:** This link will be created automatically based on underlying data and will not be user created)
4. There are invalid choices that users cannot link objects to. Trying to link to an invalid object will result in a 🚫 sign letting the users know that they cannot link those two objects together.
5. Unperfected Collateral - Loans must be linked to a Security Document AND a piece of collateral. When a user links a loan directly to a piece of collateral without also linking to a security document, the line linking the two objects will appear as a red dotted line. (See screenshot below)

Must Have's (Deleting Links): 🔗

6. Users need to be able to delete a link between objects. To delete a link, users should click on the link to select it which will turn the black dotted line to a red line. Users will then right click on the red line/link and a pop-up menu will then appear allowing you to choose to "Delete" or "Update Relationship". Users would select "Delete" and the link will disappear.
   a. User can delete a line between Loan, Security Document, and Collateral.

Must Have's (Updating Links Lien and AOC designation): 🔗

7. Users should be able to update or delete the link relationship using the "Update Relationship" function. Users would follow steps in FR5 above and select the "Update Relationship" button. Once there, eligible relationship updates will be:
   NOTE: Lien position is ONLY editable between the Security Document and Collateral Objects
   a. Abundance of Caution (AOC) flag checkbox
      i. If this is selected, a white icon with the designated "A" will be displayed on that link.
   b. Lien Positions

  i. Users have the ability to manually change the lien position on a link between the Collateral and Security Document object.

  ii. If a lien designation other than First Position is entered, such as 2nd, a white icon with the designation "2" will be displayed on that link.

  iii. NOTE: The link between the Collateral object and Security Document object will always default to "First Lien" position as long as the Collateral is NOT tied to another existing Security Document object. If the Collateral is already being secured under a First Lien position, then the system will assume a Second Lien Position on this new Security Document. but the user can change that also.

 c. Lien Position and Abundance of Caution designations can be combined. When this happens, a white circle will be displayed on that link such as "2A", which stands for 2nd lien position AND Abundance of Caution.
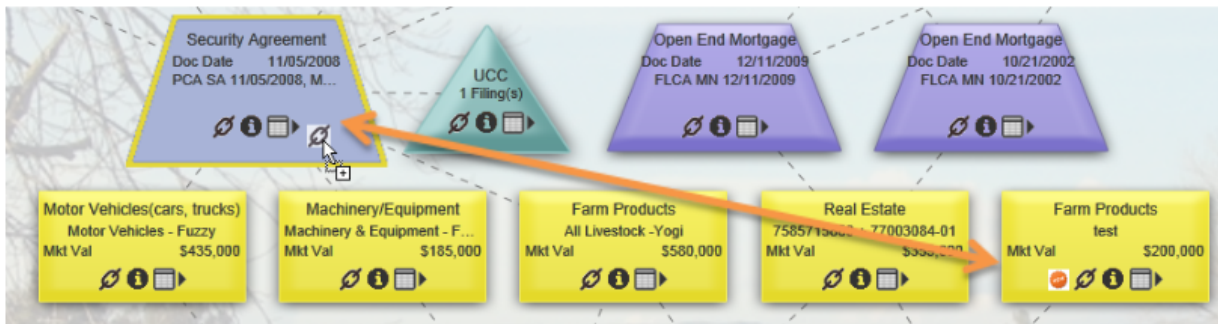
Nice to Have's: 🔗

1. Pinning an object to focus only on related items. Dotted lines will appear as solid lines connecting the linked objects.

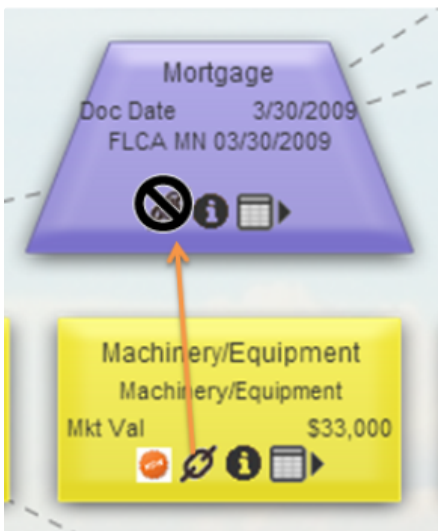## Non-Functional Requirements: 🔗

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.) 🔗

Screenshot of a highlighted valid object when trying to link objects together:

Screenshot of what it looks like trying to link objects that can't be linked:

Editing lien position and Abundance of Caution checkbox on "Update Relationship" screen:
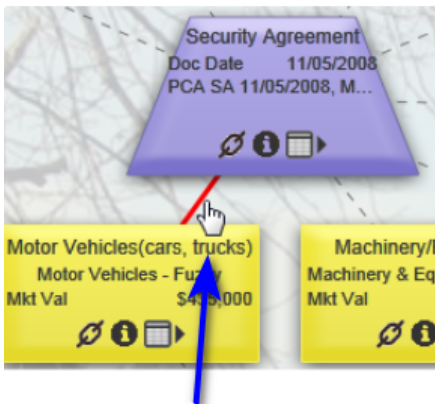
Update Relationship
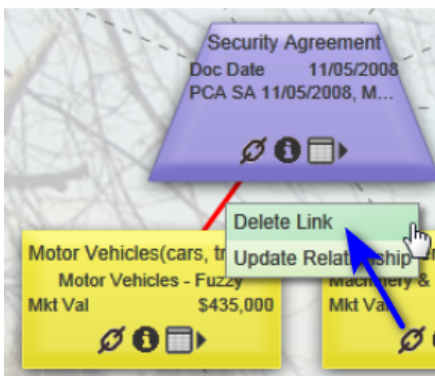
Select Designation:

☐ Abundance of Caution

Edit Position: [   ]

Cancel   Save

Deleting a link between objects. Note the "Red" line currently selected:

Security Agreement
Doc Date   11/05/2008
PCA SA 11/05/2008, M...

Motor Vehicles(cars, trucks)
Motor Vehicles - Fuzzy
Mkt Val $435,000

Machinery/E
Machinery & Equ
Mkt Val

Click on this link which selects it and turns it red

Security Agreement
Doc Date   11/05/2008
PCA SA 11/05/2008, M...

Delete Link

Update Relationship

Motor Vehicles(cars, tr
Motor Vehicles - Fuzzy
Mkt Val $435,000

Machinery & E
Mkt Val

Display indicators on links between Collateral and Security Document objects. This link indicates a 2nd lien position and AOC (Abundance of caution):

Open End Mortgage
Mtg/DOT   10/21/2002
FLCA MN 10/21/2002

(2A)

Securities, Invstmt Prop...
Marketable Securities
Mkt Val $110,000

Machinery/Equipment
Machinery/Equipment
Mkt Val $1,000,000

Real Estate
Yogi Farm
Mkt Val $1,200,000

This is what a loan link looks like that is incorrectly linked directly to a piece of collateral WITHOUT linking to a security document: