
Common Tag Utility December 2.22

FIRELIGHT BASE

FireLight®

Platform

COMMON TAG UTILITY DECEMBER 2.22

Document Version: 1.x

Published: October 29, 2021

Insurance Technologies, LLC

Copyright © 2021 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

Table of Contents

Design Approach – Common Tags Utility	5
1 Common Tags Utility UI, Views, Columns and Buttons	5
1.1 Create Utility User Interface Shell in React in the Admin	5
1.2 Add two views for the Common Tag Name and Common Tag List Name	6
1.3 Add Action buttons	6
1.4 Add Number of Rows global Dropdown List	6
1.5 Create Global section for Common Tag Name and Common Tag List Name views	7
1.6 Create Detail section for Common Tag Name and Common Tag List Name views	8
1.7 Add Next and Previous buttons to views and sections	10
1.8 Add Column Filter	11
1.9 Add Column Sort	11
1.10 Create Status List Options	12
1.11 Add Spinner when Utility First Loads	13
1.12 Add warning when user switches views/pages/filter/sort/number of rows without update	13
1.13 Add warning closing detail section or opening the detail section changes on global	13
2 Common Tags Utility Functionality	14
2.1 Set up the Data Load Process and Caching	14
2.2 Add Discard Button Functionality	14
2.3 Set the Status on the Field Name rows	14
2.4 Add Update Functionality	16
2.5 Highlight changes on a row-by-row basis	17
2.6 Create count for Field Count and List Count columns in the Global and Detail views	17
2.7 Create combo box with search for Proposed Common Tag	18
2.8 Set the suggested Proposed Common Tag using the search	18
2.9 Update the Existing Common Tag in Common Tag Name View	19
2.10 Create combo box with search for Common Tag List Name	19
2.11 Populate Common Tag List Name list from selected Existing Common Tag	20
2.12 Set Common Tag List Name to value using Rules Override with matching list value	20
2.13 Update the Existing Caption when a Common Tag List Name is selected and Approved	21

2.14	Set Caption Override when Common Tag List Name selected	21
2.15	Set Rules Override in Common Tag List Name View	22
2.16	Add logic for Request New Common Tag and Common Tag List Name	23
2.17	Add Dialog for Common Tag Description	23
2.18	Display only user created rows and selected common tag rows	24
2.19	Merge Rows when Update is Run	25
2.20	State lists Show Caption in Proposed Linked Common List for Abbreviations	27
2.21	Add Admin Group Option	28
2.22	Add Audits	28
2.23	Backend Database changes.	29
2.24	Error Handling.....	29
2.25	Hide old Common Tag Conversion Utilities.....	29
2.26	Provide ability to download and compare application data files.....	29

Design Approach – Common Tags Utility

Create a utility for internal and external use that allows users to view and clean up their data with regards to setting the Common Tag Name and the Common Tag List Name fields for Field Names in all forms and wizards for an organization.

All changes made by this utility cannot impact the existing client rules and provider and the outbound files passed to the client back office systems. To prevent this from occurring, only the common tag and common tag list name can be set. All other values are display-only values.

There will be separate views for setting Common Tag Names and Common Tag List Names. The views were separated to simplify updating the lists when a common tag name is changed. A user must set the common tag in one view, then open the list name view to update the list.

Each view will have a global section, which will represent all unique instances, and a detail section, which will be broken down by the combination of the form/wizard name and page name. To prevent syncing issues, the global section cannot be updated while the detail section is open.

Statuses will be used for all data items to show the current status and to set the next logical step in the workflow, such as changing the status from Proposed to Approved.

1 Common Tags Utility UI, Views, Columns and Buttons

1.1 Create Utility User Interface Shell in React in the Admin

Create a user interface shell in React in the Admin that will be used internally and by clients.

Title the utility Common Tag Utility.

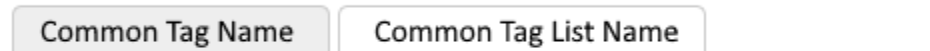
Clients will only be able to see their organization. The selection of the organization for internal users will be done on the Home page as it is today, no changes.

Acceptance Criteria

- The title at the top will be Common Tag Utility.
- Clients will only be able to see their organization.
- Internal users will be able to see the organization selected on the home page.

1.2 Add two views for the Common Tag Name and Common Tag List Name

Add two views to the utility, Common Tag Name and Common Tag List Name.



Acceptance Criteria

- There will be two view tabs, Common Tag Name and Common Tag List Name.

1.3 Add Action buttons

Add action buttons to the UI.

1. UPDATE - Applies to the Common Tag Name and Common Tag List Name views in both the global and detail sections.
2. DISCARD - Applies to the active page in the Common Tag Name and Common Tag List Name views in both the global and detail sections.

Acceptance Criteria

- Action buttons are always visible.
- Correct buttons appear.
- Applies to the global section and detail section in both views.

1.4 Add Number of Rows global Dropdown List

Add a dropdown list for the user to set the number of rows. This is a global setting for the utility. The maximum number of rows will be 25.

Minimum 5 rows, maximum 100 rows.

Acceptance Criteria

- Number of rows that appear in each section on both views is limited to the number of rows selection.

1.5 Create Global section for Common Tag Name and Common Tag List Name views

Wizard:

1. Applies to the following control types: Text Box, Date Picker, Radio Button, Check Box, Dropdown List, Slider
2. Excluded from the following control types: Group, Panel, Text, Navigation Link, Divider, Increment Button, Image, Custom Action, Data Grid, Schedule, Address Autocomplete

Forms:

1. Applies to the following control types: Text Box, Check Box, Calendar, Radio Button, Combo Box, Signature Box, Signature Initials
2. Excluded from the following control types: Label, Bar Code, Button, Address Autocomplete

The following Columns will appear in the Common Tag Name Global body section:

1. Status – dropdown list. Set based on the Field Name, Existing Common Tag, and Proposed Common Tag fields. See status story.
2. Field Name – display only, cannot be changed. Contain an active link to open the detail view.
3. Existing Common Tag – display only, cannot be changed directly by a user, can be set from the Proposed Common Tag or it may be blank. Contains a value if previously set, else blank.
4. Group – display only. Based on the Existing Common Tag if set, else blank.
5. Proposed Common Tag – dropdown list; if the status is Proposed, contains the proposed common tag.
6. Field Count – display only. displays unique rolled-up field count for field names and existing common tag, where a common tag may be blank.
7. Request New - link appears when it applies to the row with specific statuses.

The following Columns will appear in the Common Tag List Name Global body section:

1. Status – dropdown list. Initially set to Proposed, Unassigned, or Valid on all rows. See status story.
2. Field Name – display only, cannot be changed. Contains an active link to open the detail view.
3. Existing Common Tag – display only, cannot be changed. It will always have a value; do not display if the value is blank.
4. Group – display only. Based on the Existing Common Tag if set, else blank.
5. Existing Caption – display only, contains a value unless the original was a forms checkbox/radio, then it is blank.
6. Rules Override – display only, may be blank.
7. Caption Override – display only, may be blank. Contains a value if a user has Approved a row with a Linked Common List Name that differs from the Existing Caption.
8. Linked Common List Name – dropdown list; contains a list of captions from the selected Existing Common Tag in alphabetical order.

9. List Count – display only; displays unique rolled-up list count for all field names, existing common tag, existing caption, and rules override, where rules override may be blank.
10. Request New - link appears when it applies to the row with specific statuses.

Acceptance Criteria

- All unique instances of a Field Name will appear in the global section of the Common Tag Name view if it is a valid field type. See Description for the definition of the unique instances.
- All unique instances of a Field Name will appear in the global section of the Common Tag List Name view if an Existing Common Tag <> NULL and is a valid field type. See Description for the definition of the unique instances.
- Only valid field types will appear in the rows of each view.
- Invalid field types will not appear in the rows of both views.
- Valid columns appear in the global section of the Common Tag Name view as defined in the description.
- Valid columns appear in the global section of the Common Tag List Name view as defined in the description.

1.6 Create Detail section for Common Tag Name and Common Tag List Name views

The detail view is based on the Field Name link that is clicked in a specific row in the global section. It shows a breakdown of the Field Name for each Form/Wizard Name and Page Name combination to allow the user to review how each is set up and to optionally update each row differently.

The common tag name detail view displays all unique instances by Status, Field Name, and Existing Common Tag (common tag can be blank) by Form/Wizard Name and Page Name. The common tag list name detail view displays all unique instances by Status, Field Name, Existing Common Tag, Existing Caption, and Rules Override (rules override can be blank) by Form/Wizard Name and Page Name.

To avoid conflicts, when the detail view is active, the global view cannot be changed, it should be disabled. Updates only apply to the detail section when it is open.

The filter and sort are available in the detail view.

Add a Close button.

Action buttons repeat on the detail views, Update and Request New Common Tag or Request New Common Tag List Name.

Note that a form/wizard page can have more than one Field Name on a page. It should be displayed in the detail sections where it applies. For example, the global section shows a row with a field count of 4 (Invalid/ClientFirst/Annuitant_FirstName). When unrolled it shows it appears on 2 wizards all with page name Page 1. There will be duplicate rows shown.

Row 1: Invalid/ClientFirst/Annuitant_FirstName/AnnuityApp/Page 1
Row 2: Invalid/ClientFirst/Annuitant_FirstName/AnnuityApp/Page 1
Row 3: Invalid/ClientFirst/Annuitant_FirstName/AnnuityAppFL/Page 1
Row 4: Invalid/ClientFirst/Annuitant_FirstName/AnnuityAppFL/Page 1

The following Columns will appear in the Common Tag Name Detail body section:

1. Status – dropdown list. Set based on the Field Name, Existing Common Tag, and Proposed Common Tag fields. See status story.
2. Field Name – display only, cannot be changed.
3. Existing Common Tag – display only, cannot be changed directly by a user, can be set from the Proposed Common Tag or it may be blank. Contains a value if previously set, else blank.
4. Group – display only. Based on the Existing Common Tag if set, else blank.
5. Proposed Common Tag – dropdown list; if the status is Proposed, contains the proposed common tag.
6. Form/Wizard Name – name of the form or wizard for the detail displayed.
7. Page Name – page name for the form or wizard for the detail displayed.

The following Columns will appear in the Common Tag List Name Detail body section:

1. Status – dropdown list. Set based on the Field Name, Existing Common Tag, and Proposed Common Tag fields. See status story.
2. Field Name – display only, cannot be changed.
3. Existing Common Tag – display only, cannot be changed. It will always have a value; do not display if the value is blank.
4. Group – display only. Based on the Existing Common Tag if set, else blank.
5. Existing Caption – display only, contains a value unless the original was a forms checkbox/radio, then it is blank.
6. Rules Override – display only, may be blank.
7. Caption Override – display only, may be blank. Contains a value if a user has Approved a row with a Linked Common List Name that differs from the Existing Caption.
8. Linked Common List Name – dropdown list; contains list of captions from the selected Existing Common Tag in alphabetical order.
9. Form/Wizard Name – name of the form or wizard for the detail displayed.
10. Page Name – page name for the form or wizard for the detail displayed.

Acceptance Criteria

- When a Field Name link is clicked in a row in the Common Tag Name global section, all unique instances will appear in the detail view broken down by Field Name, existing common tag, and form/wizard name and page name.

- When a Field Name link is clicked in a row in the Common Tag List Name global section, all unique instances will appear in the detail view broken down by Field Name, existing common tag, existing caption, rules override, and form/wizard name and page name.
- Only valid field types will appear in the rows of each view.
- Invalid field types will not appear in the rows of both views.
- Valid columns appear in the detail section of the Common Tag Name view as defined in the description.
- Valid columns appear in the detail section of the Common Tag List Name view as defined in the description.
- Action buttons appear in both detail views.
- The global section cannot be changed on both views when the detail section is open.
- Duplicate rows are shown in the detail section when shown on the same page.
- The filter is active in the detail section.

1.7 Add Next and Previous buttons to views and sections

To help manage the data that is loaded at one time and limit the performance impact, add Next and Previous buttons.

A user will be able to page back and forth between pages as long as no changes are made on a page. Once a change is made, the user must click the UPDATE option to process the changes.

Options that will not be allowed once changes are made on a page are:

1. Next and Previous buttons
2. Column sort
3. Column filter

Add a warning if any of these options are selected:

1. You cannot navigate to a different page unless all changes are processed using the UPDATE button.
2. Add Close button.

Acceptance Criteria

- Next/Previous paging works when no changes are made on any page.
- Column filter works when no changes are made on any page.
- Column search works when no changes are made on any page.
- Column sort works when no changes are made on any page.
- A warning is displayed if Next/Previous paging is selected on a page with changes made and UPDATE has not been selected.
- A warning is displayed if column filter is selected on a page with changes made and UPDATE has not been selected.

- A warning is displayed if column search is selected on a page with changes made and UPDATE has not been selected.
- A warning is displayed if column sort is selected on a page with changes made and UPDATE has not been selected.

1.8 Add Column Filter

Add the ability to filter columns. This applies to all columns but the Request New column.

When the filter is selected, it resets the section back to page 1. Multiple filters are allowed.

The user cannot change the filter after changes are made on a page. Add a warning message: You cannot change the filter until all changes are updated with the UPDATE button.

The filter applies to the global and the detail views.

Acceptance Criteria

- Column filter works when no changes are made on any page.
- Multiple column filters are allowed.
- A warning is displayed if a column filter is selected on a page with changes made and UPDATE has not been selected.
- The filter applies to the global section and is not allowed in the detail section.
- The filter can be changed when the detail section is active/expanded.
- Changing the filter resets the page back to page 1.

1.9 Add Column Sort

Add the ability to sort columns in ascending or descending order. This applies to all columns but the Request New column.

When the sort is selected, it resets the section back to page 1.

When a user sorts a column, the secondary sort will be the Field Name if it is not the primary sort (except on Form/Wizard Name). On Field Name, the secondary sort of the Existing Common Tag.

The user cannot change the sort after changes are made on a page. Add a warning message: You cannot change the column sort until all changes are updated with the UPDATE button.

The sort applies to the global and detail views only.

Default sort is Field Name, Status (enum), Existing Common Tag, Caption, Caption Override

Acceptance Criteria

- The specified columns can be sorted in ascending and descending order.
- The secondary sort is the Field Name when it applies.
- Column sort works when no changes are made on any page.

- A warning is displayed if a column sort is selected on a page with changes made and UPDATE has not been selected.
- The column sort applies to the global section and is not allowed in the detail section.
- The sort can be changed when the detail section is active/expanded.
- Changing the sort resets the page back to page 1.

1.10 Create Status List Options

The status definitions are as follows:

1. Invalid – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Field Name and Common Tag Name differ and Common Tag Name <> NULL.
Common Tag List Name views: Status does not apply
2. Proposed – Users cannot select this status from the list to apply it to a row; it is only set initially based on the rules and results of the search.

Common Tag Name views: Common Tag Name = NULL and the search returns a Proposed Common Tag. Note that there will only be one proposed common tag, it is based on the search.
Common Tag List Name views: Search returns a value from the search in the Common Tag List Name. Existing Caption can be <> NULL and = NULL.
3. Valid – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Field Name and Common Tag Name are an exact match.
Common Tag List Name views: Existing Caption matches a list name from the selected Existing Common Tag Name.
4. Unassigned – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Search does not return a proposed value and the existing common tag = NULL.
Common Tag List Name views: Search does not return a value in the Common Tag List Name. Existing Caption can be <> NULL and = NULL.
5. In Review – Set to In Review after a user requests a new common tag or common tag list name by clicking on the NEW button. Once it is set to In Review, only a Governance Team member can confirm or deny the new common tag.
6. Approved – Selected by a user on Invalid, Proposed, Unassigned, or Valid status row, and the Existing Common Tag is <> NULL or a Proposed Common Tag is selected.

7. Rejected – Selected by a user on Invalid, Proposed, or Unassigned status row, and the Existing Common Tag and Proposed Common Tag are blank.
8. Confirmed - Used by governance team only to confirm an In Review common tag.
9. Denied - Used by governance team only to confirm an In Review common tag.

Acceptance Criteria

- Verify the status list.

1.11 Add Spinner when Utility First Loads

Add a spinner or something similar (Loading...) to let users know when the utility first opens that it is loading data. There can be a lag on the organizations with numerous forms and wizards since it loads and caches all the data when it opens.

Acceptance Criteria

- See Loading... or spinner when utility first opens and is loading the data.

1.12 Add warning when user switches views/pages/filter/sort/number of rows without update

OK discards all changes and navigates to the selected global view.

Cancel remains on the active global view and allows the user to select the UPDATE button to process the changes.

Acceptance Criteria

- A warning message appears when the user switches views and the update has not been processed.

1.13 Add warning closing detail section or opening the detail section changes on global

OK discards all changes and returns to the global view.

Cancel returns to the detail view and allows the user to select the UPDATE button to process the changes.

Acceptance Criteria

- A warning message appears when the user selects the Close button on the detail section dialog and the UPDATE has not been processed.
- A warning message appears when the user clicks a link on a Field Name to open the detail section and any changes have been made to the global section that has not been processed.

2 Common Tags Utility Functionality

2.1 Set up the Data Load Process and Caching

Set up the data loading process for the data that will be displayed on the view and sections and cache the data. This includes refreshing the data on the active view/section when the update process is run. This also includes updating the global section when the open detail section is updated and closed.

Acceptance Criteria

- Data is loaded correctly in both views and the global and detail sections.
- Data is correctly refreshed after the update process runs.
- Data is refreshed correctly on the global section after the detail section is updated and closed.

2.2 Add Discard Button Functionality

The DISCARD button is visible and enabled on both the global and detail section of the Common Tag Name and Common Tag List Name views when any change has been made on the active page and an update has not been selected.

Disable the discard button when no changes have been made on the active page.

Acceptance Criteria

- Discard button is visible and enabled when a change has been made on the active page.
- Discard button is disabled when no changes have been made on the active page.

2.3 Set the Status on the Field Name rows

The status definitions are set based on the following rules.

User can go back to the server set status and remove the highlighting and disable/enable the discard button.

1. Invalid – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Field Name and Common Tag Name differ and Common Tag Name <> NULL.

Common Tag List Name views: Status does not apply

2. Proposed – Users cannot select this status from the list to apply it to a row; it is only set initially based on the rules and results of the search.

Common Tag Name views: Common Tag Name = NULL and the search returns a Proposed Common Tag. Note that there will only be one proposed common tag, it is based on the search.

Common Tag List Name views: Search returns a value from the search in the Common Tag List Name. Existing Caption can be <> NULL and = NULL.

3. Valid – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Field Name and Common Tag Name are an exact match.

Common Tag List Name views: Existing Caption matches a list name from the selected Existing Common Tag Name.

4. Unassigned – Users cannot select this status from the list to apply it to a row it is set initially based on the rules below.

Common Tag Name views: Search does not return a proposed value and the existing common tag = NULL.

Common Tag List Name views: Search does not return a value in the Common Tag List Name. Existing Caption can be <> NULL and = NULL.

5. In Review – Set to In Review after a user requests a new common tag or common tag list name by clicking on the NEW button. Once it is set to In Review, only a Governance Team member can confirm or deny the new common tag.
6. Approved – Selected by a user on Invalid, Proposed, Unassigned, or Valid status row, and the Existing Common Tag is <> NULL or a Proposed Common Tag is selected.
7. Rejected – Selected by a user on Invalid, Proposed, or Unassigned status row, and the Existing Common Tag and Proposed Common Tag are blank.
8. Confirmed - Used by governance team only to confirm an In Review common tag.
9. Denied - Used by governance team only to confirm an In Review common tag.

Acceptance Criteria

Acceptance Criteria is separate by the view.

Common Tag Name Views:

- Verify the correct status appears in each row on all views when the utility is first opened.
- Verify an Invalid status appears in all rows when the Field Name and Common Tag Name differ and Common Tag Name <> NULL.
- Verify a Proposed status appears in all rows when:
- Verify a Proposed status appears in all rows when:
- Common Tag Name = NULL and the search returns a Proposed Common Tag.

- Common Tag List Name contains a value from the search.
- Verify a Valid status appears in all rows when the Field Name and Common Tag Name are an exact match.
- Verify an Unassigned status appears in all rows when the search does not return a proposed value and the existing common tag = NULL.
- Verify In Review appears in the list when the existing status is Request New Common Tag and the user is a governance team member. This is set when a user clicks the Request New Common Tag button or Request New Common Tag List Name button.
- Verify the Approved status appears in the list when the existing status in a row is Invalid, Proposed, Valid, Unassigned, Rejected, AND Proposed Common Tag <> NULL.
- Verify the Rejected status appears in the list when the existing status in a row is Invalid, or Unassigned, or Approved AND Proposed Common Tag = NULL.
- Verify only the governance role can apply Confirmed and Denied to In Review status rows, and that all non-governance roles cannot change In Review status rows.

Common Tag List Name views:

- Verify the correct status appears in each row on all views when the utility is first opened.
- Verify a Proposed status appears in all rows when Common Tag List Name returns a value from the search and Existing Caption <> NULL OR = NULL.
- Verify a Valid status appears when Existing Caption matches a list name from the selected Existing Common Tag Name.
- Verify an Unassigned status appears in all rows when the search does not return a value in the Common Tag List Name and the Existing Caption = NULL.
- Verify In Review appears in the list when the existing status is Request New Common Tag and the user is a governance team member. This is set when a user clicks the Request New Common Tag button or Request New Common Tag List Name button.
- Verify the Approved status appears in the list when the existing status in a row is Proposed, Valid, Unassigned, Rejected, AND Linked Common List Name <> NULL.
- Verify the Rejected status appears in the list when the existing status in a row is Unassigned or Approved AND Linked Common List Name = NULL.
- Verify only the governance role can apply Confirmed and Denied to In Review status rows, and that all non-governance roles cannot change In Review status rows.

2.4 Add Update Functionality

When a row is saved with the In Review status, store the description entered in the dialog with the Field Name.

Acceptance Criteria

- When UPDATE is selected and the UI is refreshed, the statuses are changed in the applicable rows to Approved or Rejected.
- When UPDATE is selected and the UI is refreshed, and the status was proposed, the Proposed Common Tag is cleared.
- When UPDATE is selected and the UI is refreshed, and the status was proposed, the Common Tag List Name is cleared.
- When a Proposed Common Tag is selected and the UPDATE is selected and the UI is refreshed, the Existing Common Tag is set to the Proposed Common Tag.
- When a Common Tag List Name is selected and the UPDATE is selected and the UI is refreshed, the Existing Caption is set to the Common Tag List Name. In the Admin, the previous Existing Caption is set to the Caption Override if it applies.
- Verify changes in both views in the global sections.
- Verify changes in both views in the detail sections.
- After an update is processed, verify you see a few of the changes in a wizard and form field properties - common tag name.
- After an update is processed, verify you see a few of the changes in a wizard and form field properties - common tag list.

2.5 Highlight changes on a row-by-row basis.

Add highlight on all changed cells in each row.

Acceptance Criteria

- As changes are made in a row, highlight appears in the specific cells.

2.6 Create count for Field Count and List Count columns in the Global and Detail views

The count fields only apply to the global views.

The Field Count will appear in the Common Tag Name view only. This is a rolled-up count of all the fields on the wizards and forms with a matching Field Name.

The List Count will only appear on the Common Tag List Name view. This is a rolled-up count of all the fields on the wizards and forms with a matching Field Name, Existing Common Tag, Existing Caption, and Rules Override.

Acceptance Criteria

- Verify the Field Count is accurate in rows shown on the Common Tag Name view global section.
- Verify the List Count is accurate in rows shown on the Common Tag List Name view global section.
- Verify the count is changed after an update is processed.

2.7 Create combo box with search for Proposed Common Tag

Leverage the React combo box field built in the Admin for the Proposed Common Tag field - story 23120, developer Mo.

It will allow the user to:

1. Select a common tag from the full list of common tags.
2. Type in part of the common tag name to search this list and select a common tag from the filtered list.

Acceptance Criteria

- Can drop down the common tag list when the Proposed Common Tag name is blank to select a common tag from the full list of common tags.
- Can drop down the common tag list when the Proposed Common Tag name \neq NULL, but only the predetermined proposed common tag appears in the list.
- When type in part of a common tag name to search for a common tag, a filtered list is returned with the matching common tags found by the search to select from.

2.8 Set the suggested Proposed Common Tag using the search

Appears only in the Global Common Tag Name view.

Proposed Common Tag is initially set based on the results of the search. It will only be set to a single value. The user can then change it to something else in the list, or type in the text to filter the search.

The only time a row will contain a Proposed Common Tag is when the Field Name matches a common tag. The reason is the search always returns values and if the tool defaults to the first in the list, it will often not make sense.

If the status is set to rejected on the server then the proposed common tag is initially set to empty.

Acceptance Criteria

- The Proposed Common Tag is set based on the results of the search.
- Users can select a different common tag from the list.
- Users can type in the text to filter the list of common tags and pick a common tag from the list.
- If status is rejected, then Proposed Common Tag initial value is empty.

2.9 Update the Existing Common Tag in Common Tag Name View

If the Existing Common Tag value is blank and the Proposed Common Tag contains a value, the Existing Common Tag will be set to the Proposed Common Tag when the status is changed to Approved and the UPDATE button is selected. The Proposed Common Tag will be cleared when the Existing Common Tag is set.

Note if the status is set to Proposed and the user selects Rejected and then UPDATE, the Proposed Common Tag is cleared and the Existing Common tag remains blank.

Acceptance Criteria

- Existing Common Tag is displayed if it has been previously set.
- The Proposed Common Tag appears in the Existing Common Tag after it has been set from the proposed common tag by changing the status to Approved and selecting UPDATE.
- The Proposed Common Tag is cleared after the row was approved and UPDATE was selected.
- The Proposed Common Tag is cleared after the row is rejected and UPDATE was selected.

2.10 Create combo box with search for Common Tag List Name

Leverage the React combo box field built in the Admin for the Common Tag List Name field for Proposed Common Tag.

It will allow the user to:

1. Select a common tag list name from the full list of list names for the associated common tag.
2. Type in part of the common tag list name to search this list and select a list name from the filtered list.

Acceptance Criteria

- Can drop down the common tag list name list when the Common Tag List Name is blank to select a list name from the full list of list names.
- Can drop down the common tag list name list when the Common Tag List Name <> NULL, but only the predetermined list name values appear in the list.
- When type in part of a common tag list name to search for a list name, a filtered list is returned with the matching list names found by the search to select from, which may be blank.

2.11 Populate Common Tag List Name list from selected Existing Common Tag

The Common Tag List Name field on the Common Tag List Name view, global and detail, will need to link the common tag list from the Existing Common Tag for the Field Name row.

For example:

Field Name ClientGender

Existing Common Tag Name Owner_Gender

Common Tag List Name Values will be:

Male

Female

Unisex

Intersex

None

Other

None

Other

Acceptance Criteria

- Common Tag List Name values match the selected Common Tag Name

2.12 Set Common Tag List Name to value using Rules Override with matching list value

Set the default value in the Common Tag List Name dropdown.

Applies to status Proposed.

If the Existing Caption is NULL or the Existing Caption does not match a value in the list, and the Rules Override contains a valid List Value for the common tag, the search will return the matching caption in the Common Tag List Name by default.

Example 1:

The existing common tag is set to Owner_MailingAddress_State, the Existing Caption is NULL and the Rules Override is 4. The search will return a value of Arizona.

OR if the Existing Caption is AZ and the Rules Override is 4, the search will return a value of Arizona.

Example 2:

The existing common tag is set to Owner_Gender, the Existing Caption = Man, and the Rules Override = 1. The search will return a value of Male.

Acceptance Criteria

- Common Tag List Name contains a search value from the rules override which is equal to a List Value for the Existing Common Tag and the existing caption is NULL.
- Common Tag List Name contains a search value from the rules override which is equal to a List Value for the Existing Common Tag and the existing caption does not equal a Caption in the List.
- Common Tag List Name is blank when the search does not find a value.

2.13 Update the Existing Caption when a Common Tag List Name is selected and Approved

Applies to the Common Tag List Name view, global and detail sections.

When a Common Tag List Name is selected in a row and the status is changed to Approved and the UPDATE button is selected, add the Common Tag List Name to the Existing Caption and clear the Common Tag List Name.

Note, if the status is set to Proposed and the user selects Rejected and then UPDATE, the Common Tag List Name is cleared, and the Existing Caption is unchanged.

Acceptance Criteria

- Verify the Common Tag List Name is added to the Existing Caption when Approved and UPDATE is selected.
- Verify the Common Tag List Name is cleared after bullet one is processed.

2.14 Set Caption Override when Common Tag List Name selected

When the Common Tag List Name is selected and it differs from the Existing Caption, when the status is changed to Approved and the update is processed, add the Existing Caption to the Caption Override and add the Common Tag List Name to the Existing Caption. The Common Tag List Name is cleared.

Note that if the Existing Caption is NULL when the Common Tag List Name is added to the Existing Caption, then the Caption Override will be NULL after the change is processed.

This applies to Wizard dropdown List, Forms Combo Box, Wizard Checkbox, and Radio Button. It does not apply to Forms Checkbox and Radio Button because there is no caption override.

Acceptance Criteria

Utility:

- Existing Caption is set to Common Tag List Name after Approved and updated.
- Common Tag List Name is cleared after Approved and updated.
- Caption Override is set in the defined fields-types in wizards.
- Caption Override is set in the defined fields-types in forms.
- Caption Override is not set in the defined fields-types in forms.
- Caption is set to value from Common Tag List Name in the utility.

2.15 Set Rules Override in Common Tag List Name View

When the utility is opened the first time in 2.22 with the 2.21 data, the rules override field will be set as follows:

1. If Pipe|Value: Insert the export value in the Rules Override field (example Binary|B)
2. If Pipe|No Value: Rules Override will be set to {blank} (example Binary|)
3. If No Pipe|Value: Set the Rules Override field to NULL or empty (example Binary)
4. If No Caption|Value: Set the Caption to {blank} and the Rules Override to the value (example |B)

This applies to all field types with a list: Dropdown list/combo box.

The checkbox, radio button field types will contain an export value. This export value can contain the same combinations shown above.

Acceptance Criteria

- Rules override is set with correct value on dropdown list wizard
- Set to |export value, else Caption, else blank
- Rules override is set with correct value on combo box forms
- Set to |export value, else Caption, else blank
- Rules override is set with correct value on checkbox/radio button wizard
- Set to export value, else caption, else blank
- Rules override is set with correct value on checkbox/radio button forms
- Set to export value, else caption, else blank

2.16 Add logic for Request New Common Tag and Common Tag List Name

Add logic to set the status In Review when a new common tag or common tag list name is requested in the utility.

The links should be hidden unless a valid status appears in the row. Applies to the Common Tag Name and Common Tag List Name views in both the global and detail sections.

Only rows with a status of Proposed or Unassigned can request a new common tag/list name.

If a Proposed Common Tag is selected, clear it when the update is selected.

Acceptance Criteria

- Status is set to In Review when the user clicks the Request Name Common Tag button.
- Status is set to In Review when the user clicks the Request Name Common Tag List Name button.
- Buttons are disabled unless a valid row is checked.
- Proposed Common Tag is cleared when a Proposed status is changed to In Review.

2.17 Add Dialog for Common Tag Description

When a new common tag is requested, open a dialog to enter the description of the new common tag name or common tag list name. This will be stored with the common tag and used by the governance team to understand why the user thinks it should be added to the list.

Add [OK] [Cancel] buttons. OK will save the data entered, cancel will discard the data entered.

Users can open the dialog with the new button and enter data until UPDATE is selected.

Acceptance Criteria

- Dialog opens when NEW button is selected.
- User can type in a description and change it until UPDATE is selected.
- OK saves the typed data and closes the dialog.
- Cancel discards the data types since the dialog was opened and closes the dialog.

2.18 Display only user created rows and selected common tag rows

Display only the user-created rows, both selected and unselected, and the common tag rows, selected only. This will filter out the unselected common tag rows from the utility.

Example and steps to follow:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the abbreviations. Do NOT assign a Common Tag name. The list should be around 50 states.
AL, AK, AZ, CA, CO, etc.
2. Open Utility and locate the same state field on the Common Tag Name global view with no Existing Common Tag Name.
3. Select a common tag, such as Owner_MailingAddress_State (may be suggested in the Proposed Common Tag field).
4. Change status to Approved and select UPDATE. This doubles the list to around 100 list options.
5. Switch to the Common Tag List Name view.
6. In the Field Name field or existing common tag filter for the one you updated on the previous view.
7. Verify you see the same number of rows you saw in the Admin for this field name/existing common tag before the Existing Common Tag was added.

Example 2:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the common tag name list. Do NOT assign a Common Tag name. The list should be around 50 states.
Alabama, Alaska, Arizona, California, Colorado, etc.
2. Open Utility and locate the same state field on the Common Tag Name global view with no Existing Common Tag Name.
3. Select a common tag, such as Owner_MailingAddress_State (may be suggested in the Proposed Common Tag field).
4. Change status to Approved and select UPDATE. This doubles the list to around 100 list options.
5. Switch to the Common Tag List Name view.
6. In the Field Name field or existing common tag filter for the one you updated on the previous view.
7. Verify you see the same number of rows you saw in the Admin for this field name/existing common tag before the Existing Common Tag was added.

Acceptance Criteria

- Verify the selected user-created rows appear.
- Verify the unselected user-created rows appear.
- Verify the unselected Common Tag Name rows do not appear.
- Verify the selected Common Tag Name rows appears.

2.19 Merge Rows when Update is Run

When Update is processed, merge two rows into one.

After selecting a common tag, the user will see duplicate rows on the Common Tag List Name view.

If the caption does NOT match an Existing Caption for the Common Tag:

- a. If export value \neq NULL, then set Caption Override from original Caption and set Existing Caption to Proposed Linked Common List Name.

Before Update: Common Tag = Owner_MailingAddress_State and Existing Caption = AL and Export Value = 1

After Update: Existing Caption = Alabama, Rules Override = 1 (unchanged), Caption Override = AL

When Update is complete, only one row remains with an Existing Caption of Alabama.

- b. If export value = NULL, then set Rules Override and Caption Override to original Caption and set Existing Caption to Proposed Linked Common List Name.

Before Update: Common Tag = Owner_MailingAddress_State and Existing Caption = AL and Export Value = NULL

After Update: Existing Caption = Alabama, *Rules Override = AL*, Caption Override = AL

When Update is complete, only one row remains with an Existing Caption of Alabama.

If the existing Caption matches a value for the Common Tag:

- c. If export value \neq NULL, then *no changes*.

Before Update: Common Tag = Owner_MailingAddress_State and Existing Caption = Alabama and Export Value = AL

After Update: Existing Caption = Alabama (unchanged), Rules Override = AL (unchanged), Caption Override = NULL (unchanged)

When Update is complete, only one row remains with an Existing Caption of Alabama.

- d. If export value = NULL, then *no changes*.

Before Update: Common Tag = Owner_MailingAddress_State and Existing Caption = Alabama and Export Value = NULL

After Update: Existing Caption = Alabama (unchanged), *Rules Override = NULL* (unchanged), Caption Override = NULL (unchanged)

When Update is complete, only one row remains with an Existing Caption of Alabama.

Example and steps to follow:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the abbreviations. Do NOT assign a Common Tag name. The list should be around 50 states.
AL, AK, AZ, CA, CO, etc.
2. Open Utility and locate the same state field on the Common Tag Name global view with no Existing Common Tag Name.
3. Select a common tag, such as Owner_MailingAddress_State (may be suggested in the Proposed Common Tag field).
4. Change status to Approved and select UPDATE. This doubles the list to around 100 list options.
5. Switch to the Common Tag List Name view.
6. In the Field Name field or existing common tag filter for the one you updated on the previous view.
7. Set the Linked Common List Name to the full state names: Alabama, Alaska, Arizona, California, Colorado (they may be listed already).
8. Change the status to Approved on the changed rows and click UPDATE.
9. Next, open the Admin, locate the Form/Wizard with the field that you changed. Edit it, open the list.
10. Verify you see merged rows that you processed and are no longer two separate rows in the list.

Example 2:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the common tag name list. Do NOT assign a Common Tag name. The list should be around 50 states - all are selected.
Alabama, Alaska, Arizona, California, Colorado, etc.
2. Open Utility and locate the same state field on the Common Tag Name global view with no Existing Common Tag Name.
3. Select a common tag, such as Owner_MailingAddress_State (may be suggested in the Proposed Common Tag field).
4. Change status to Approved and select UPDATE. This doubles the list to around 100 list options.
5. Switch to the Common Tag List Name view.
6. In the Field Name field or existing common tag filter for the one you updated on the previous view.
7. The status is set to Valid and the Proposed Common List Name is blank.
8. Change the status to Approved on the changed rows and click UPDATE.
9. Next, open the Admin, locate the Form/Wizard with the field that you changed. Edit it, open the list.
10. Verify you see merged rows that you processed and are no longer two separate rows in the list.

Example 3:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the common tag name list. Do NOT assign a Common Tag name. Deselect some of the states. Alabama, Alaska, Arizona, California, Colorado, etc.
Next, add a couple of user-created rows at the bottom: AA, AP, AS, and select them.
2. Open Utility and locate the same state field on the Common Tag Name global view with no Existing Common Tag Name.
3. Select a common tag, such as Owner_MailingAddress_State (may be suggested in the Proposed Common Tag field).
4. Change status to Approved and select UPDATE. This doubles the list to around 100 list options.
5. Switch to the Common Tag List Name view.
6. In the Field Name field or existing common tag filter for the one you updated on the previous view.
7. The status is set to Valid and the Proposed Common List Name is blank.
8. Change the status to Approved on the changed rows and click UPDATE.
9. Next, open the Admin, locate the Form/Wizard with the field that you changed. Edit it, open the list.
10. Verify you see merged rows that you processed and are no longer two separate rows in the list.
11. Also verify that the deselected rows are in the list unselected. For example, if you deselected Guam, it should not be checked and there should be one Guam row.
12. Additionally verify that the AA, AP, AS rows are at the bottom, and are selected.

Acceptance Criteria

- See the examples under the Description and verify that the processed rows have been merged from two rows into one by opening the Admin.

2.20 State lists Show Caption in Proposed Linked Common List for Abbreviations

When there is an abbreviation in the common tags database, show the corresponding caption in the Linked Common Name as the proposed list name. This mainly applies to all 'state' common tags, such as Owner_MailingAddress_State and a current caption in 2.21 of AL, AK, AZ, CA, etc. Applies only to the Common Tag List Name Views.

For example:

In 2.21 on a form or wizard, with a common tag of Owner_MailingAddress_State (or any state common tag).

The list is set up as:

AL

AK

AZ

CA

CO

etc.

The suggested proposed Linked Common List Name will be:

Alabama

Alaska

Arizona

California

Colorado

etc.

Acceptance Criteria

- Using the example in the description, verify when the form or wizard is opened in the and the common tag has been assigned to the Field Name, that you see the correct values in the Linked Common List Name field, which will be the full state name.

2.21 Add Admin Group Option

Add new Admin Group Option: Disable View Common Tags Utility

When selected, the option does not appear in the Utilities menu/Home page utilities section.

Acceptance Criteria

- Common Tag Utility appears in Home Page/Menu for Utilities when not selected for a group role.
- Common Tag Utility does not appear in Home Page/Menu for Utilities when it is selected for a group role.

2.22 Add Audits

Add audits to the Form and Wizard history.

Updated in Common Tag Utility by [username].

Form Detail Form History Search Fields in Package				
Action	Old Value	New Value	Action Date	Login
Updated in Common Tag Utility by cynthia_flademo_test.			10/8/2021 4:41:10 PM	cynthia_flademo_test
Updated in Common Tag Utility by cynthia_flademo_test.			10/8/2021 4:35:28 PM	cynthia_flademo_test
Updated in Common Tag Utility by cynthia_flademo_test.			10/8/2021 4:31:24 PM	cynthia_flademo_test
Updated in Common Tag Utility by it.			10/7/2021 3:31:12 PM	it
Updated in Common Tag Utility by it.			10/7/2021 3:06:00 PM	it
Wizard Detail Wizard History Search Fields in Wizard Packages				
Action	Old Value	New Value	Action Date	Login
Updated by Common Tag Utility			10/5/2021 1:40:50 PM	abi_flademo_test

Acceptance Criteria

- Verify audit appears in Form Library after the form is updated in the utility. Verify it also contains the correct username.
- Verify audit appears in Wizard Library after the wizard is updated in the utility. Verify it also contains the correct username.

2.23 Backend Database changes.

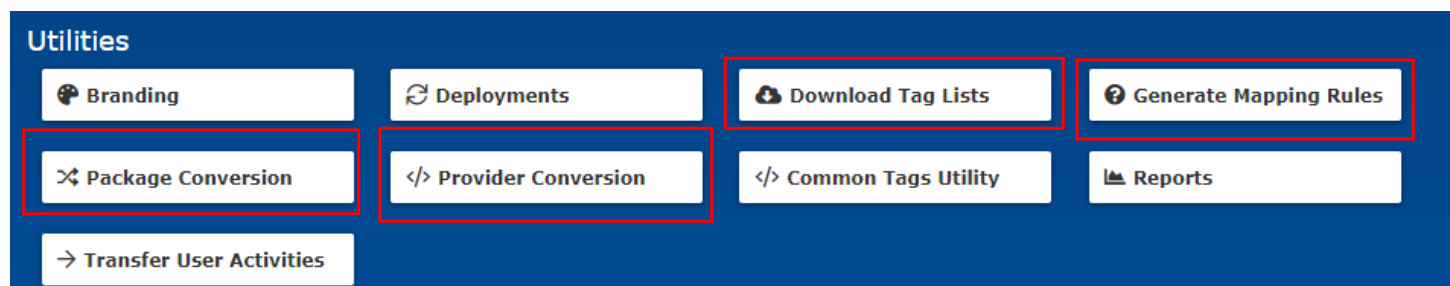
Backend database changes to support the common tags utility.

2.24 Error Handling

1. Server database commit error - server side error
2. Internet connectivity - client side

2.25 Hide old Common Tag Conversion Utilities

Hide old common tag conversion utilities



Acceptance Criteria

- All four old common tag conversion utilities are hidden from the Home page and the Utilities dropdown list.

2.26 Provide ability to download and compare application data files

Add ability to compare activities before and after common tag name changes through the field properties/rules and the utility.