
Replace Rule Set and Primary Rule Set in multiple Packages

FIRELIGHT BASE



Platform

REPLACE RULE SET AND PRIMARY RULE SET IN MULTIPLE PACKAGES

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iConnect 250572 Design Approach - Replace Rule Set in multiple Packages

Project Overview

Primary Rule Sets are required in a Forms or Wizards when there are rules with Form Index. Today, replacing a Rule Set in the package breaks the linkage between Form Index fields on the form/wizard and the rules written using Form Index fields. Rule Sets are intended to be swapped in and out of packages for product changes but the current breakage when there are Form Index makes the swapping more difficult. With this enhancement, when swapping rule sets in a package, the swap window will present a list of packages that have the original primary rule set and provide a checkbox swap the Primary Rule Sets in the Forms and Wizards that have the original Rule Set. This swap will occur in the Package level to reduce the chances of missing a location where the Rule Set swap would break the Form/Wizard Form Index.

Currently, replacing a Primary Rule Set breaks the linkage between Form Index fields and the rules written using Form Index fields. Primary Rule Sets are ideally added to Forms or Wizards when there are Form Index fields added. Clients will have the ability to replace Primary Rule Sets in Forms and Wizards at the Package level to reduce the chances of missing replacement of the appropriate Rule Set for Form/Wizard.

Impacts:

- Product Configuration -> Packages -> Replace Form/Wizard in Package (link)
- The existing link "Replace Form/Wizard in Package" on below Package page will be updated to accommodate this new feature.
- A new tab will be added to window "Replace Form/Wizard in Package" to replace Rule Sets in Packages. From this tab, with the event of replacing Rule Set in the selected Packages, Primary Rule Set in the Forms/Wizards present in those Packages will also be replaced.
- Product Configuration -> Packages -> Replace Form/Wizard/Rule Set in Package (link) - Within "Packages to Replace" box, column "Primary Rule Set" will be displayed to indicate a "Yes" or "No" value for packages in case the forms/wizards present in those packages have the selected Rule Set as a Primary Rule Set. When replacing the Rule Set for the selected Package(s), Primary Rule Set will also be replaced for the Forms/Wizards under the Package(s) that has a "Yes" value.

1 Replace Rule Set in Packages

To allow replacing Rule Set in Package(s), there will be changes done on screen FL Admin -> Product Config -> Packages.

Current link "Replace Form/Wizard in Package" will be renamed to "Replace Form/Wizard/Rule Set in Package". Clicking on this link will show a dialogue with two tabs as:

1. "Form/Wizard in Package": Tab "Form/Wizard in Package" will have same content as currently present when link "Replace Form/Wizard in Package" is clicked.
2. "Rule Set in Package": Tab "Rule Set in Package" will function like the first tab but allowing to replace a Rule Set with another Rule Set in selected Packages. This action will also replace the same Rule Set into the Form or Wizard present in the selected Packages if that Rule Set is set as a Primary Rule Set.

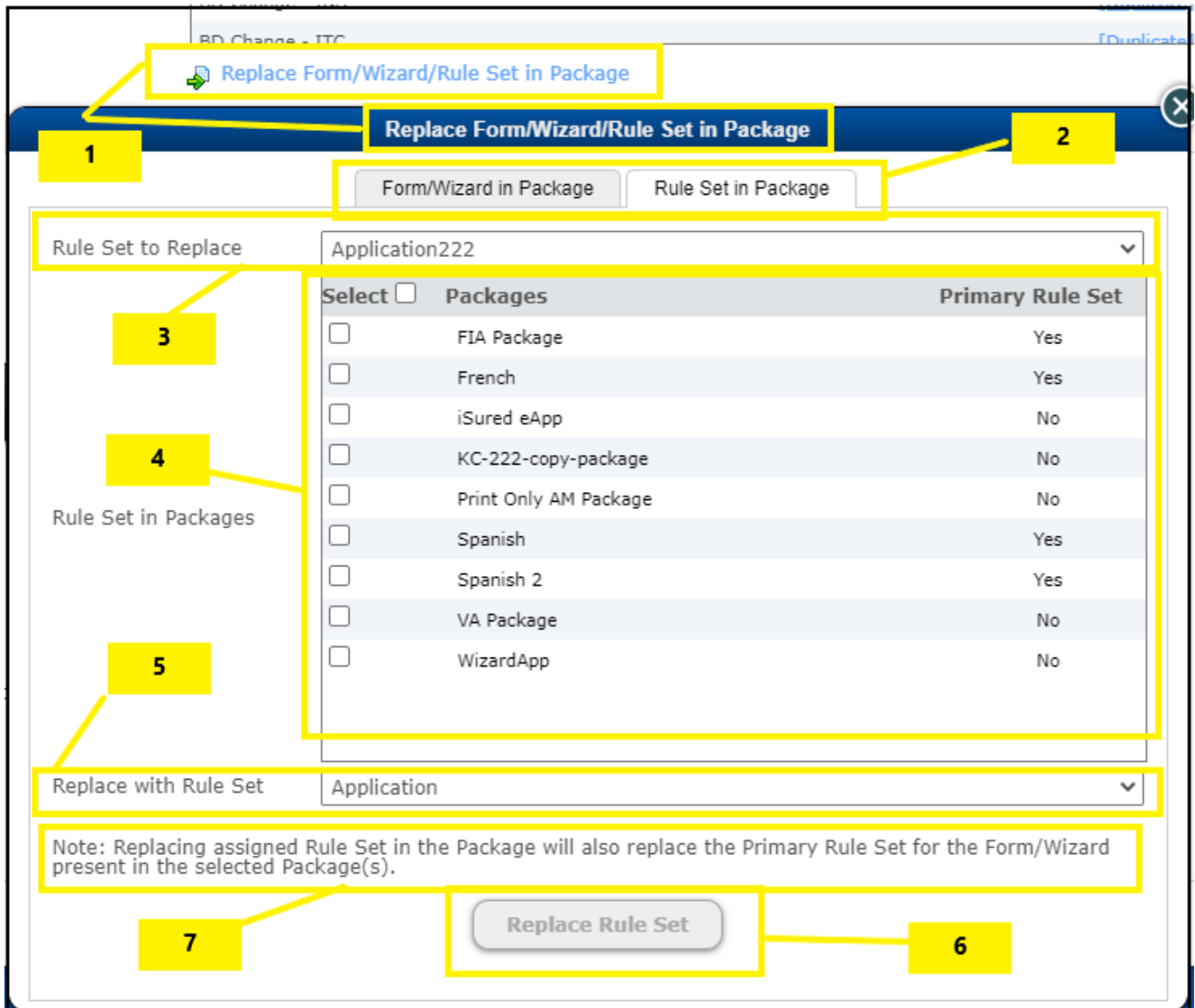
Implementation:

Below mockup shows what elements will be present on tab "Rule Set in Package" and how these will function.

1. Rename window title to "Replace Form/Wizard/Rule Set in Package".
2. Place both the tabs on this new window - "Form/Wizard in Package" & "Rule Set in Package".
3. First element on tab "Rule Set in Package" is a drop down labeled as "Rule Set to Replace" that will list all the available rule sets.
4. Next element is a selection box in which selecting a Rule Set from the first drop down box will list all the packages to which that rule set is assigned to. This selection box will show check boxes beside each of the package names to allow selecting them and a user can also "Select All" the packages by clicking a single check box. There will be a third column on this selection box that will show a Boolean value beside Package name as "Yes" or "No". These values will be based on criteria, if the selected rule set is set as Primary Rule Set for the Form or Wizard present in the Packages listed.
5. Third element will be a drop down labeled as "Replace with Rule Set" that will list all the available rule sets except the one selected in the first drop down box.
6. Button "Replace Rule Set" will replace the Rule Set selected in the first drop down with the Rule Set selected in the second drop down for the selected Package(s).

This will also replace the Primary Rule Set for the Form(s) and Wizard(s) of the selected Package(s) in case Rule Set in first drop down is a Primary Rule Set for those Forms and Wizards. If the Rule Set in the first drop down is not the Primary Rule set for the Form(s) and Wizard(s) present in the selected Package(s), no change will happen to those Form(s) and Wizard(s).

7. To inform user that Primary Rule set might also be replaced in the selected Packages, a Note will be displayed on the screen as "Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s)."



BD Change - ITC [Duplicate]

Replace Form/Wizard/Rule Set in Package

1

2

Form/Wizard in Package Rule Set in Package

Rule Set to Replace Application222

3

4

Rule Set in Packages

Select <input type="checkbox"/>	Packages	Primary Rule Set
<input type="checkbox"/>	FIA Package	Yes
<input type="checkbox"/>	French	Yes
<input type="checkbox"/>	iSured eApp	No
<input type="checkbox"/>	KC-222-copy-package	No
<input type="checkbox"/>	Print Only AM Package	No
<input type="checkbox"/>	Spanish	Yes
<input type="checkbox"/>	Spanish 2	Yes
<input type="checkbox"/>	VA Package	No
<input type="checkbox"/>	WizardApp	No

5

Replace with Rule Set Application

Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s).

7

Replace Rule Set

6

Validations:

1. Drop down "Rule Set to Replace" - This is a mandatory field and default value (when the window loads) will be the first rule set in the list in alphabetical order.
2. List box "Rule Set in Packages" - Selecting at least one Package will be mandatory. If no Package is selected, "Replace Rule Set" button will be disabled. When a Package is selected from the list, button "Replace Rule Set" will be enabled for click.
3. Drop down "Replace with Rule Set" - This is a mandatory field and default value (when the window loads) will be the first rule set in the list in alphabetical order (after excluding from the list the rule set selected in the first drop down).
4. Button "Replace Rule Set" -
 - (a) When the window/tab loads, "Replace Rule Set" button is disabled. It only enables when at least one package from the list is selected.
 - (b) Clicking on this button will prompt a confirm box to continue replacing rule set in the selected package(s). Note message will also be shown on this confirm box.

Confirmation Dialog Message: "Do you confirm to replace "<Rule Set selected in first drop down>" with "<Rule Set selected in second drop down>" in the selected Package(s)?"

Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s)."

Acceptance Criteria

- Link "Replace Form/Wizard in Package" on 'Packages' page is renamed to "Replace Form/Wizard/Rule Set in Package".
- Window "Replace Form/Wizard/Rule Set in Package" has two tabs as "Form/Wizard in Package" and "Rule Set in Package".
- Tab "Form/Wizard in Package" allows replacing form/wizards in selected packages.
- Tab "Rule Set in Package" allows replacing rule set in selected packages.
- The old rule set in selected packages get replaced with the new rule set.
- Replacing rule set in selected packages also replaces primary rule set in the form/wizards of those packages with the new rule set.

- Default values show in the first and second drop down of rule sets.
- On tab "Rule Set in Package", selecting rule set in the first drop down lists all packages in the next box to which selected rule set is assigned.
- When Package is not selected, "Replace Rule Set" button remains disable.
- After selecting Package(s), Confirmation Dialog shows with the Note displayed on it.

2 Save changes in Package History

To keep record of the replacement of Rule Set done for a Package, the changes will be recorded under that selected Package history also.

Below will be the update messages saved into Package History tab.

A. All the changes happening on replace screen will be recorded in Package History upon Save. For all the packages that are updated, Package History will record below Action text along with the Action Date and Login info:

1. "<First Rule Set Name> rule set removed via Replace Tool"
2. "<Second Rule Set Name> rule set added via Replace Tool"
3. "Package saved and updated"

B. When the Primary Rule Set is replaced for the form in selected Package, changes will be recorded for those forms along with the Action Date and Login info. Below entries (Action Text) that will go into the Form History will also include old and new values for reference.

1. "Primary Rule Set updated via Replace tool"
2. "Form saved and updated"

C. When the Primary Rule Set is replaced for the wizard in selected Package, changes will be recorded for those wizards along with the Action Date and Login info. Below entries (Action Text) that will go into the Wizard History will also include old and new values for reference.

1. "Primary Rule Set updated via Replace tool"
2. "Wizard saved and updated"

Below are the replacement texts within "<>" referenced in above Action Text:

- <First Rule Set Name>: Rule set selected in the first drop down in above screen.
- <Second Rule Set Name>: Rule set selected in the second drop down in above screen.

Acceptance Criteria

- When Rule Set is replaced in the selected Package(s), this change gets updated into the Package History tab for all those Packages.
- Package History mentions that update is done via Replace Tool.

3 Replace Primary Rule Sets in Forms & Wizards

To allow replacing primary rule sets into the forms and wizards, new tab on Package screen (Refer Pt 1 above) will be used. Admin user will be able to swap primary rule sets into forms and wizards when replacing rule set in the package(s).

New link "Replace Form/Wizard/Rule Set in Package" on Packages screen will show a new tab to list and replace Primary Rule set for selected Packages. Beside the Package names, a flag will be shown to indicate if the Rule Set to be replaced is set as a Primary Rule Set for the Form and/or Wizard present in that Package. "Yes" will indicate that the Form and/or Wizard assigned to the Package has the selected Rule Set as Primary Rule Set. "No" will indicate the reverse case.

Below mockup shows specific elements required to replace rule set for forms/wizards on tab "Rule Set in Package" and how these will function.

1. When a Rule Set is selected from the drop down "Rule Set to Replace", all the packages to which that rule set is assigned to will be listed in list box "Rule Set in Packages". This list box will also show a Boolean value beside Package name as "Yes" or "No", to indicate if the selected rule set is set as Primary Rule Set for the Form or Wizard present in the Packages listed.

2. To inform that Primary Rule set might also be replaced in the selected Packages, a Note will be displayed on the screen as "Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s)."

Clicking on button "Replace Rule Set" will also replace the Primary Rule Set for the Form(s) and Wizard(s) of the selected Package(s) in case Rule Set in first drop down was a Primary Rule Set for those Forms and Wizards. If the Rule Set in the first drop down is not the Primary Rule set for the Form(s) and Wizard(s) present in the selected Package(s), no change will happen to those Form(s) and Wizard(s).

Replace Form/Wizard/Rule Set in Package

Form/Wizard in Package

Rule Set in Package

Rule Set to Replace

Application222

Select <input type="checkbox"/>	Packages	Primary Rule Set
<input type="checkbox"/>	FIA Package	Yes
<input type="checkbox"/>	French	Yes
<input type="checkbox"/>	iSured eApp	No
<input type="checkbox"/>	KC-222-copy-package	No
<input type="checkbox"/>	Print Only AM Package	No
<input type="checkbox"/>	Spanish	Yes
<input type="checkbox"/>	Spanish 2	Yes
<input type="checkbox"/>	VA Package	No
<input type="checkbox"/>	WizardApp	No

Rule Set in Packages

Application

Application

Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s).

Replace Rule Set

When button "Replace Rule Set" is clicked, a prompt will appear to confirm replacing the Rule Set in selected packages along with below note about replacing Primary Rule Set in Forms/Wizards of the selected Packages.

Confirmation Dialog Message: "Do you confirm to replace "<Rule Set selected in first drop down>" with "<Rule Set selected in second drop down>" in the selected Package(s)?

Note: Replacing assigned Rule Set in the Package will also replace the Primary Rule Set for the Form/Wizard present in the selected Package(s)."

Acceptance Criteria

- In "Packages to Replace" box, column "Primary Rule Set" shows value "Yes" or "No" value based on the case the forms/wizards present in those packages have the selected Rule Set as a Primary Rule Set.
- For Packages that has "Yes" value, Primary Rule Set in the forms/wizards of those Packages will also be replaced.
- The tab "Rule Set in Package" shows a note about mandatory replacement of the Primary Rule Set for the Packages that has a "Yes" value.
- Confirmation Dialog also shows Note about replacing Primary Rule Set in Forms/Wizards of selected Packages.

4 Save updates to Form History

To keep record of the replacement of Primary Rule Set done for the Form in the selected Package (from Replace Rule Set window), the changes will be recorded under those Form History tab also.

Below will be the update messages saved into Form History tab.

When the Primary Rule Set is replaced for the Form in selected Package, changes will be recorded for those forms along with the Action Date and Login info. Below entries (Action Text) that will go into the

Form History will also include old and new values for reference. *(Currently no entry goes in history when primary rule set is added or removed):*

1. "Primary Rule Set updated via Replace tool"
2. "Form saved and updated"

Form Designer screen:

Currently when Primary Rule Set is added or updated on Form Designer screen, these changes are not recorded in Form History. At the Form Library screen, Form History will start to record if the primary rule set is changed manually from Form Designer screen. Currently no entry goes in history when primary rule set is added or removed. Below entries will be saved to differentiate when ruleset is updated from Replace tool or directly from designer screen.

When the Primary Rule Set is updated from Form Designer screen, changes will be recorded for that form along with the Action Date and Login info. Below entries (Action Text) that will go into the Form History will also include old and new values for reference.

1. "Primary Rule Set updated"
2. "Form saved and updated"

Acceptance Criteria

- When Primary Rule Set is replaced in forms within selected Package(s) via Replace Rule Set window, a record is saved in that Form History tab mentioning the replacement done via Replace Tool along with old and new Rule Set names.
- When Primary Rule Set is added to a Form via Form Designer screen, a record is saved to that Form History tab mentioning that a Primary Rule Set is assigned to the Form with old value as blank and new value being the Rule Set name.
- When Primary Rule Set is swapped to a Form via Form Designer screen, a record is saved to that Form History tab mentioning the Primary Rule Set is updated to the Form, along with old and new Rule Set names.

5 Save updates to Wizard History

To keep record of the replacement of Primary Rule Set done for the Wizard in the selected Package (from Replace Rule Set window), the changes will be recorded under those Wizard History tab also.

Below will be the update messages saved into Wizard History tab.

When the Primary Rule Set is replaced for the Wizard in selected Package, changes will be recorded for those Wizards along with the Action Date and Login info. Below entries (Action Text) that will go into the Wizard History will also include old and new values for reference. *(Currently no entry goes in history when primary rule set is added or removed):*

1. "Primary Rule Set updated via Replace tool"
2. "Wizard saved and updated" *(This need to be corrected, it currently shows "form" instead of "wizard")*

Wizard Designer screen:

Currently when Primary Rule Set is added or updated on Wizard Designer screen, these changes are not recorded in Wizard History. At the Wizard Library screen, Wizard History will start to record if the primary rule set is changed manually from Wizard Designer screen. Currently no entry goes in history when primary rule set is added or removed. Below entries will be saved to differentiate when ruleset is updated from Replace tool or directly from designer screen.

When the Primary Rule Set is updated from Wizard Designer screen, changes will be recorded for those wizards along with the Action Date and Login info. Below entries (Action Text) that will go into the Wizard History will also include old and new values for reference.

1. "Primary Rule Set updated"
2. "Wizard saved and updated" *(This need to be corrected, it currently shows "form" instead of "wizard")*

Acceptance Criteria

- When Primary Rule Set is replaced in wizards within selected Package(s) via Replace Rule Set window, a record is saved in that Wizard History tab mentioning the replacement done via Replace Tool along with old and new Rule Set names.
- When Primary Rule Set is added to a Wizard via Wizard Designer screen, a record is saved to that Wizard History tab mentioning that a Primary Rule Set is assigned to the Wizard with old value as blank and new value being the Rule Set name.
- When Primary Rule Set is swapped to a Wizard via Wizard Designer screen, a record is saved to that Wizard History tab mentioning the Primary Rule Set is updated to the Wizard, along with old and new Rule Set names.