

iConnect 179465 Design Approach

Project Overview

Add logic to automatically notify a user if a wizard has been modified and saved by another user. Currently more than one person can simultaneously work on the same wizard if they are not using the “Lock” functionality and overwrite each other’s changes without any type of notification. Note: this logic was added to forms in 2.12, 170426. We are copying this logic into wizard.

Features/Requirements

- When saving changes to the wizard, FireLight will check if another user has opened it and saved changes to the same wizard.
- If no changes have been made, the save will proceed as usual.
- If another user has made changes to the same open wizard, the current user will receive a prompt asking if they want to discard their changes or write over the previous changes.

Use Cases / Workflow Changes

When more than one user has the same wizard unlocked and open and a user attempts to save their changes after another user has already saved changes, a dialog will appear alerting the user that it is not the latest saved version of the wizard. The user will then be able to decide if they want to discard their changes or overwrite the previously saved changes by another user.

Admin Changes

Changes are required for both the Wizard Designer and the Wizard Library pages. Use the “timestamp” to determine whether a wizard has changed or not. Any time a user saves a wizard, the “timestamp” is updated in the database. Whenever a user opens a wizard, the timestamp data is also stored in session/memory. When a user tries to save the wizard, a comparison is made of the session timestamp to the database timestamp. If the database timestamp is greater than the timestamp in memory, this indicates another user has updated the wizard.

If another user has modified and saved the wizard, a dialog appears with the following text and three options:

[USER FULLNAME] has changed this wizard since you began your work. How would you like to proceed?

Overwrite Changes will overwrite all changes made by [USER FULLNAME]. Discard Changes will discard your changes and open the previous version saved by [USER FULLNAME]. Cancel Save will return you to the last active location in the wizard.

[Overwrite Changes] [Discard Changes] [Cancel Save]

If the user clicks “Overwrite Changes”, FireLight will ignore pervious changes made by another user and update the wizard with the latest changes.

If the user clicks “Discard Changes”, FireLight will discard all changes made by the current user and open the last saved version of the wizard.

If the user clicks “Cancel Save”, the dialog will be dismissed and return to the last active page in the wizard.

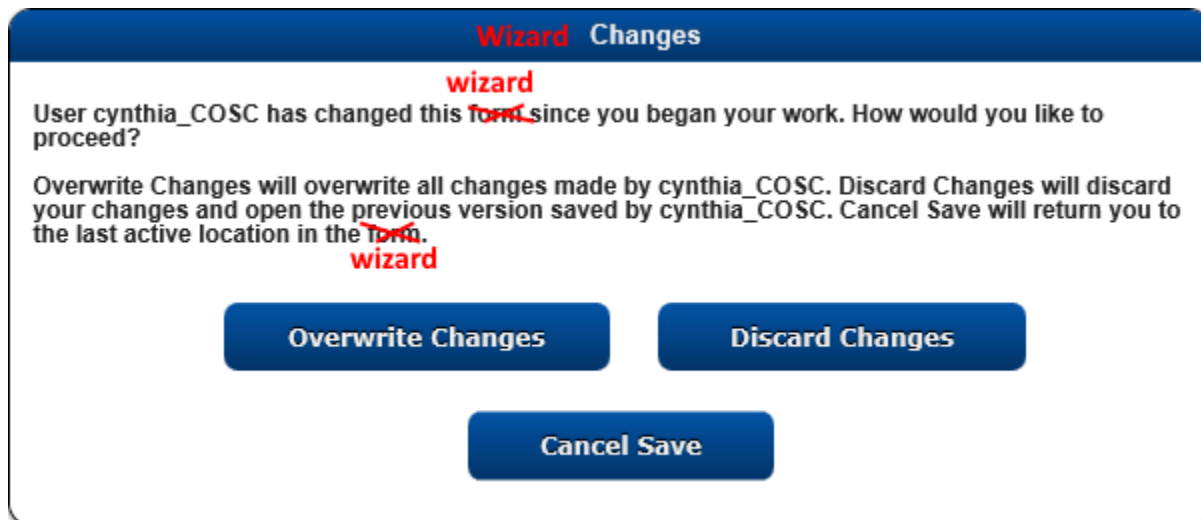
App Changes

No App Changes required.

Integration Changes

None

UI Mock Ups



How to Enable and Use This Feature

There are no new Admin options for this feature. To verify this feature, have two users, user 1 and user 2, open the same wizard (do not lock the wizard). Next, user 1 will make changes and save the wizard. User 2 will follow by changing the wizard and attempting to save the wizard. The dialog should appear with the selections detailed above. We recommend you test this by selecting all options, starting with “Overwrite Changes” to write over the changes made by user 1, thus discarding user 2 changes. Then repeat the test and select “Discard Changes” and verify the wizard with the changes made by user 1 appears and the changes made by user 2 are discarded. Next, run through a scenario where user 1 has saved changes and user 2 selects “Cancel Save” to be sure this dismisses the dialog. A final test may be performed where user 1 and user 2 both open the same wizard and only user 2 changes and saves the wizard without seeing the new dialog.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Wizard Library		
- Design Wizards	Yes	Add new property to model and implement new functionality to notify user if any changes occur after work began.
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		