
Admin Field Property Improvements Common Tags

FIRELIGHT BASE



Platform

ADMIN FIELD PROPERTY IMPROVEMENTS COMMON TAGS

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260226 iConnect Design Approach - Admin Field

Property Improvements - Common Tags

Project Overview

We have added several improvements to the field properties available to the designers through the admin tool. These enhancements will expand the functionality added for common tags.

- Merge an existing list when the Common Tag is added to a field with a list. This will add the common tag list rows to an existing list and merge the applicable rows. All excess common tag rows that do not apply will appear at the bottom of the list unchecked, which may be selected if desired.
- Change the search on the Field Name to align with the search on Common Tag Name so the search works consistently for both fields.
- Add copy/paste to fields with a list. This will allow clients to copy an existing list that has been customized from a form or wizard to another field and retain the original list. If the new field has an existing list, the rows will be merged and the original list will take precedence.
- Remove autofill from Field Name when it matches a common tag name to the Common Tag Name field. This change will allow clients to elect when the common tag should be added to a field.

1 Merge List when Common Tag is Added

Add merge to an existing field with a list. The merge occurs when the Common Tag Name is selected, and the user clicks OK in the warning dialog that the list changed. The list order will be retained from the list prior to the common tag being added. All excess common tag rows that do not apply will be appended to the end of the list and unchecked.

That dialog message needs to be updated - You are changing the list name values and sort order, do you want to proceed?

Change this to - You are changing the saved list name values do you want to proceed?

Acceptance Criteria

- Verify the message text has been updated.
- Verify the below examples.

Example 1:

1. Open the Admin and in the Forms or Wizard, locate a state field that has the list set up with the abbreviations and no common tag name.

AL, AK, AR, AZ, CA, CO, etc.

2. Edit the field properties and select a common tag, such as Owner_MailingAddress_State.

3. Confirmation dialog appears saying you are changing the list. Select OK which will merge the list.

4. Click on the link to edit the list and open the dialog.

5. Verify you see merged rows that you processed and there are not two separate rows in the list for each state and the order is retained.

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 and no common tag name. All are selected.

Alabama, Alaska, Arizona, California, Colorado, etc.

2. Edit the field properties and select a common tag, such as Owner_MailingAddress_State.

3. Confirmation dialog appears saying you are changing the list. Select OK which will merge the list.

4. Click on the link to edit the list and open the dialog.

5. Verify you see merged rows that you processed and there are not two separate rows in the list for each state and the order is retained.

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, Guam, Puerto Rico, Virgin Islands.

Alabama, Alaska, Arizona, California, Colorado, etc.

Next, add a couple of user-created rows at the bottom: AA, AP, AS, and select them. Save and close field properties.

2. Open field properties again, select a common tag, such as Owner_MailingAddress_State.

3. Confirmation dialog appears saying you are changing the list. Select OK which will merge the list for the applicable states.

4. Click on the link to edit the list and open the dialog.

5. Verify you see merged rows that had a selected common tag state such as Alabama, and there are not two separate rows in the list and the order is retained.

Verify that the AA, AP, AS rows are in the same order and are selected.




Also, verify the deselected rows, Guam, Puerto Rico, Virgin Islands, are not selected and are at the bottom of the list.

2 Add ability to copy/paste a list from one field to another

Prior to the introduction of the Common Tag Name field and List dialog, a user could copy a list of choices from the Edit Source Items from one field to another field. This functionality was lost when the edit source text field was replaced with a grid-style dialog. This is causing many hours of work for clients.

To resolve this, add a copy button to the list dialog to copy the entire list. Add a corresponding Paste button in the list dialog. It will only be active when there is something copied to the browser. This applies to both Wizard and Forms.

List Name Values

<input type="checkbox"/>	List Value	Caption/Rules Value 	Caption Override	Rules Override 		
<input checked="" type="checkbox"/>		{blank}		{blank}	▼	
<input checked="" type="checkbox"/>	1	Alabama		AL	^	▼
<input checked="" type="checkbox"/>	2	Alaska		AK	^	▼
<input checked="" type="checkbox"/>	4	Arizona		AZ	^	▼
<input checked="" type="checkbox"/>	5	Arkansas		AR	^	▼
<input checked="" type="checkbox"/>	6	California		CA	^	▼
<input checked="" type="checkbox"/>	7	Colorado		CO	^	▼
<input checked="" type="checkbox"/>	8	Connecticut		CT	^	▼
<input checked="" type="checkbox"/>	9	Delaware		DE	^	▼

COPY

PASTE

CANCEL

OK

When pasting lists, merge list items together if there is an existing list. This applies regardless of if there is a Common Tag Name or not. When the user selects paste, resolve any conflicts between the Rules Override and Caption Override fields. The list that is being copied into the target field will be retained and be in the same order as the original list.

Other requirements:

1. All rows are checked on the paste unless the destination list has a common tag and the originating list does not contain it.

2. Add a warning for any situation with an existing list in the destination field when paste: The originating list will replace the existing list.

OK/Cancel - OK continues with the paste, cancel keeps the existing list with no changes.

3. After originating list is pasted into a new field, the user can Cancel in the list dialog, which exits the list dialog and discards all pasted rows and retains the original list.

Acceptance Criteria

- The entire list is copied.

Scenarios and requirements:

1. Non CT to Non CT without a list in a new field - paste in the entire originating list.

2. Non CT to Non CT with an existing list - replace all, paste in the entire originating list.

3. CT to Non CT - replace all, paste in the entire originating list; delete all list values since there is no CT on a new field.

4. Non CT to CT - if Rules Override match to list value, else match caption.

Append row if no Rules Override or Caption Override

All non-matches are unchecked

Original list order is retained

5. CT to CT - add entire list and overwrite any caption overrides and rules overrides from originating list (new list will match originating list). Merge lists and leave them in the same order as the original list.

Key: CT = Common Tag

3 Add new search to the Field Name Data Item ID to match Common Tag Name search

Change the Field Name search from a 'contains' search to the search implemented on the common tag name field. This will align the two fields with the same search functionality.

Acceptance Criteria

- Field Name search changed from a 'contains' search to a search like the common tag name field. Test by comparing the search results in the Common Tag Name field to the Field Name field.

4 Remove autofill from Common Tag name field when Field Name matches - Forms and Wizard

Clients reported a production issue where the common tag was automatically set on both fields, but the rule is fired after the sync on the distributor side and clears the field.

We concluded that the auto fill needs to be removed from the Common Tag Name field. This occurs when a user enters a Field Name that is a common tag and tabs off the field or clicks in a different field in the properties.

Acceptance Criteria

- Form Designer - Common Tag Name field does not auto-fill when a Field Name that is entered matches a common tag and tabs off the field or clicks in a different field in the properties.
- Wizard Designer - Common Tag Name field does not auto-fill when a Field Name that is entered matches a common tag and tabs off the field or clicks in a different field in the properties.
- Form Designer - Make sure no changes happen when a user has a Common Tag Name entered in a field and changes the Field Name.
- Wizard Designer - Make sure no changes happen when a user has a Common Tag Name entered in a field and changes the Field Name.
- Form Designer - test with the new search functionality.
- Wizard Designer - test with the new search functionality.