

## iConnect 178907 Design Approach

### Project Overview

Auto Update of Rule Sets when changing a Field Name – ID. This enhancement will allow you to update a field name contained in multiple rule sets.

### Features/Requirements

- A change in a field name can happen in one of two ways. Either by changing the field name itself, or by changing its “Global Scope” property.
- If a user changes the ‘Name’ or the ‘Global Scope’ property, the user will be prompted with a dialog in the form/wizard designers if there are associated rules. A user can update to the new field name in all associated rule sets or in just the primary rule set.

### Use Cases / Workflow Changes

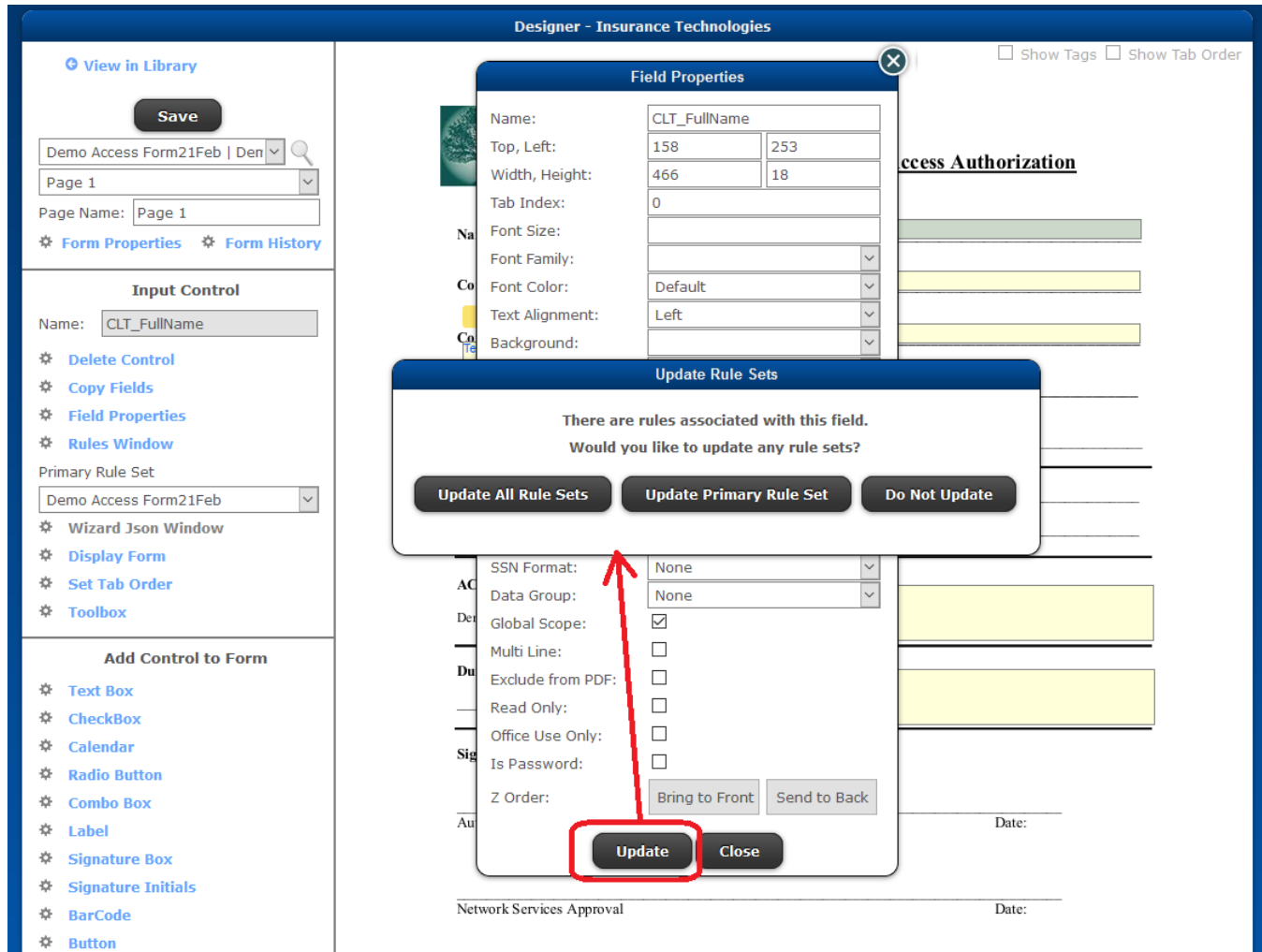
There is no change to the normal workflow of the system.

### Admin Changes

1. When you click on the ‘Update’ button in the Field Properties or click the ‘OK’ button in the property dialog in the Form or Wizard, check if the ‘Name’ Or ‘Global Scope’ property changed.
2. If changed, find all associated rule sets with the previous field name.
3. If there are one or more rule sets associated with the previous field name, prompt the user with a dialog. This dialog will have three options – ‘Update All Rule Sets’, ‘Update Primary Rule Set’ or ‘Do Not Update’.
  - Update All Rule Sets – Updates all rules associated with the previous field name to the new field name in all rule sets.
  - Update Primary Rule Set– Updates all rules associated with the previous field name to the new field name in the Primary Rule Set.
  - Do Not Update – No changes are made to rules sets that are associated with the previous field name.
4. The rule sets are updated on the save event of a form or wizard.

## UI Mock Ups

When you click on the 'Update' button in the Form / Wizard Designer, you will be prompted with the below pop-up if you have changed the 'Name' Or 'Global Scope' property and there are rules associated with the previous field name. Otherwise, you will not be prompted.



The screenshot displays the 'Designer - Insurance Technologies' interface. On the left, there is a sidebar with a 'Save' button, a search bar, and a list of controls under 'Add Control to Form'. The main area shows a 'Field Properties' dialog box for a field named 'CLT\_FullName'. The dialog box has tabs for 'Field Properties' and 'Update Rule Sets'. The 'Field Properties' tab is active, showing various properties like Name, Top, Left, Width, Height, Tab Index, Font Size, Font Family, Font Color, Text Alignment, and Background. The 'Update Rule Sets' tab is also visible, showing a message: 'There are rules associated with this field. Would you like to update any rule sets?'. Below this message are three buttons: 'Update All Rule Sets', 'Update Primary Rule Set', and 'Do Not Update'. A red arrow points to the 'Update' button in the 'Update Rule Sets' pop-up. The background shows a form with various fields and a 'Network Services Approval' section.

## How to Enable and Use This Feature

Users will be prompted with a dialog if a change in field name affect any rule sets.

### Important points

1. The 'Update All Rule Sets' functionality will not update all rule sets associated with an organization. It will only update rule sets associated with selected form/wizard. For Example –
  - a. User modifies a field name from Field\_Name1 to Field\_Name2 on Form\_A.
  - b. There are rules associated with Field\_Name1.
  - c. User is prompted with a dialog.
  - d. User clicks on the 'Update All Rule Sets' button.
  - e. User saves the form or wizard.
  - f. System loads all the packages which contain Form\_A.
  - g. System loads all the rule sets from all packages (found in step f).
  - h. Modify the previous field name with the new field name in all rule sets (found in step g).
2. The rule sets are only updated on the save event and not when clicking the 'Update All Rule Sets' / 'Update Primary Rule Set' buttons. If the form/wizard is not saved, this allows the user to exit the Designer without impacting the rule sets, which will ensure data integrity.
3. If you modify the same field name multiple times without saving the form/wizard, you will not be prompted after the first time because the search for the previous field name in any associated rule sets will not be found. For example –
  - a. User modifies a field name from "Field1" to "Field2".
  - b. There are rule sets associated with "Field1". You will be prompted with the dialog because there are existing rules containing "Field1".
  - c. Next, you modify the field name from "Field2" to Field3". In this case, you will not be prompted because the system is not able to find "Field2" in the rule sets because you have not saved the form/wizard after step b.

### Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms/Wizard	X	Users will receive a prompt when changing 'Name' or 'Global Scope' property. Associated rule sets will be modified on save event of form or wizard.
- Profile Administration		
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		