iConnect 170426 Design Approach

Project Overview

Add logic to automatically notify a user if a form has been modified and saved by another user. Currently more than one person can simultaneously work on the same form if they are not using the "Lock" functionality and overwrite each other's changes without any type of notification.

Features/Requirements

- When saving changes to the form, FireLight will check if another user has opened it and saved changes to the same form.
- If no changes have been made, the save will proceed as usual.
- If another user has made changes to the same open form, 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 form 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 form. 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 Form Designer and the Form Library pages. Use the "timestamp" to determine whether a form has changed or not. Any time a user saves a form, the "timestamp" is updated in the database. Whenever a user opens a form, the timestamp data is also stored in session/memory. When a user tries to save the form, 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 form.

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

[USER FULLNAME] has changed this form 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 form.

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

If the user clicks "Overwrite Changes", FireLight will ignore pervious changes made by another user and update the form 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 form.

If the user clicks "Cancel Save", the dialog will be dismissed and return to the last active page in the form.
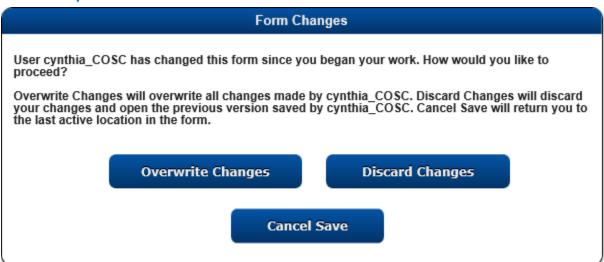
App Changes

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 form (do not lock the form). Next, user 1 will make changes and save the form. User 2 will follow by changing the form and attempting to save the form. 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 form 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 form and only user 2 changes and saves the form without seeing the new dialog.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	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		