
Enhancements to the Wizard Data Grid

FIRELIGHT BASE

FireLight®

Platform

ENHANCEMENTS TO THE WIZARD DATA GRID

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Insurance Technologies, LLC

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iConnect Design Approach - Enhancements to the Wizard Data Grid

Project Overview

The Wizard Data Grid is in need of enhancement to allow users to customize both rows and columns within the Data grid more effectively. To accomplish this we will need to address several areas of the grid:

- Updates to the data grid column to allow the column to dynamically adjust the width based on the information that is entered.
- The ability to dynamically hide data grid rows with rules the user will add.
- The addition of a Navigation link to the data grid column type to allow the user to enter an external URL.
- The addition of footnotes to the Data grid columns to allow for a more specific description of information the user is imputing within the grid.
- Updates to the Data grid properties to allow the user more flexibility and customization on how the Data grid is presented within Firelight.

These updates will offer the user more flexibility not only in development of the data grid but also in the visual appeal of how the Data grid is presented to the user.

Impacts:

Wizard UI - Data Grid controls and function

1 1-Updates to Wizard Grid Field Properties

Current functionality of the wizard data grid properties will need to be updated. To give the user more options, the Data Grid Properties will be broken out into two sections.

Grid Options will keep the same functionality that is currently in place for the Data grid properties.

Column options will allow the user more options to customize each data column as needed. As seen below in the Data grid mockup, we will be utilizing many of the same properties that are currently in Firelight.

These additions will include:

Text alignment- Left, Center and Right allows the user to set where the text will be placed in the field.

Multi Line option- Number of lines the field will include

Max Length-Maximum number of characters allowed in the field

Font Size-Size of the font in the field

Class Name- Will allow the user the ability to adjust, font color, background color and font family ie bold, italic etc.

Below is an example of how the Data Grid properties will look:

ADD COLUMN	< >	< >	< >	< >	< >
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Key (Not Displayed) ▾	Text Box ▾	Text ▾	Text ▾	Text Box ▾
Text Mask:	None ▾	None ▾	None ▾	None ▾	Custom ▾
Multi Line:	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4
Max Length:	Maximum Length 100	Maximum Length 100	Maximum Length 100	Maximum Length 100	Maximum Length 100
Text Alignment:	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾
Class Name:	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value
Font Size:	Font Size Default	Font Size Default	Font Size Default	Font Size Default	Font Size Default

With these additions we will also need to implement a scroll bar to allow the user to scroll up and down to view all options available.

Acceptance Criteria

- Reconfiguration of the Data Grid Properties will now include:
-
- Text alignment- Left, Center and Right
- Multi Line option
- Max Length
- Font Size
- Class Name which will be used for:

- Font Family
- Font Color
- Background Color

2 2-Dynamically hide rows within the Data Grid

Add the ability to hide rows within the Data grids using rules. For this, we need to add the ability to dynamically hide rows with rules that will set the row to 'invisible'. For example, include/exclude funds based on a firm ID or product features such as a living benefit.

Example: Depending on what I select in the wizard data collection (not in the grid), the options will dynamically display. So, in this example, I select All asset options and I prefilled via SSO the firm name. So, the data grid will use the rules that say to hide fund ABC when the firm name is XYZ. This allows the clients to manage one massive list of funds in the custom list and use rules to control the appearance.

Example of Rule:

```
<setrowvisibility dataitemid="FIELD_37" key="LabelKey" value="Enum_AccessRights_Carrier">
    <const value="false" />
</setrowvisibility>
```

Acceptance Criteria

- Verify the ability to hide Rows dynamically using rules.
- If the rule indicates the row is hidden, validate it is hidden in the grid.
- If the rule indicates the row is visible, validate it is visible in the grid.

3 3-Dynamic Column Width

The ability for a column width to adjust according to the data entered has been requested. Therefore we will need the ability to dynamically size conditional columns within a grid to fulfill this request. The thought process on this enhancement would be to take the width of the excluded columns within the data grid and remove that from the total width when calculating each column's width.

In the example the user will be able to adjust the column width within the wizard designer.

-If the user clicks on the desired column then the orange width box will enable for the highlighted column and allow the user to adjust the width.

-The orange width field will allow the user to select there desired width of the column

-If the user selects no then then no adjustments will be made in the data grid properties. The columns will remain the same width as when the Data grid was created.

UPDATE:

-It has been determined that an update is need for the column width. Therefor when the user clicks on a blue column bar we will want that column to be highlighted orange. This will help the user identify better which column is being adjusted.

Example of this update:

The screenshot displays a data grid designer interface. At the top, there is a toolbar with icons for undo, redo, and delete, along with a text field showing 'Width: 12 of 12'. Below the toolbar, a table is shown with the title 'FIELD_94'. The table has two columns: 'Key Column' and 'Column 3'. The 'Key Column' is highlighted in blue, and its width is shown as 'Width: 3' in an orange box. The 'Column 3' is also highlighted in blue. Below the table, there is a text input field labeled 'Text'.

The example below will include the addition of the column width on the Data grid properties page. As highlighted, the column width will show the user what width the column was adjusted to on the designer page.

ADD COLUMN	< >	< >	< >	< >	< >
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Key (Not Displayed) ▾	Text Box ▾	Text ▾	Text ▾	Text Box ▾
Text Mask:	None ▾	None ▾	None ▾	None ▾	Custom ▾
Multi Line:	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4
Max Length:	Maximum Length 100	Maximum Length 100	Maximum Length 100	Maximum Length 100	Maximum Length 100
Text Alignment:	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾	Text Alignment Left ▾
Class Name:	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value
Font Size:	Font Size Default	Font Size Default	Font Size Default	Font Size Default	Font Size Default
Column Width:	Width 6	Width 6	Width 6	Width 6	Width 6

Acceptance Criteria

- Column width control will enable once the user hovers over the desired column in the Wizard Designer
- Column width will show the width of each column in the data grid properties
- Selected column will highlight orange once selected to allow the user more clarity on which column is being updated.

4 4-Navigation Link-Internal

The Navigation Link will have Internal as an option in the dropdown field. Once Internal is selected, page and form number options will be available and required.

ADD COLUMN	< >	< >	< >	< >	< >
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column <input type="checkbox"/>	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Navigation Link	Text Box	Text	Text	Text Box
Navigation Link Type:	<div> <div>Link Type</div> <div>Internal</div> <div>Page Number</div> <div>Enter a Value</div> <div>Required.</div> <div>Form Number</div> <div>Enter a Value</div> <div>Required.</div> </div>				
Text Mask:		None	None	None	Custom
Multi Line:	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1

Acceptance Criteria

- If the Internal option is selected in the Navigation link both page number and form number are required.

5 5-Add Navigation Link as a Column Type

The addition of a Navigation Link will need to be added to the column type dropdown in the Grid Properties. This will allow the user to enter an external URL and navigate them to that specific URL.

ADD COLUMN	< >	< >	< >	< >	< >
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Key (Not Displayed)	Text Box	Text	Text	Text Box
Text Mask:	Text	None	None	None	Custom
Multi Line:	Text Box	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4	Number Of Lines 4
Max Length:	Check Box	Maximum Length 100	Maximum Length 100	Maximum Length 100	Maximum Length 100
Text Alignment:	Radio Button	Text Alignment Left	Text Alignment Left	Text Alignment Left	Text Alignment Left
Class Name:	Navigation Link	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value	Class Name Enter a Value
Font Size:		Font Size Default	Font Size Default	Font Size Default	Font Size Default

Once the Navigation Link is selected in the column type dropdown, a Navigation Link Type Option will enable allowing the user to select from 3 Navigation Link options. Internal, External and Set in Rules.

Example:

ADD COLUMN	< >	< >	< >	< >	< >
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Navigation Link	Text Box	Text	Text	Text Box
Navigation Link Type:	<div> <div>Link Type</div> <div>Set in Rules</div> <div>Internal</div> <div>External</div> <div>Set in Rules</div> </div>	None	None	None	Custom
Text Mask:	None	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1
Multi Line:	Number Of Lines 1				

Acceptance Criteria

- Addition of Navigation Link option in the Column ID dropdown found in the Data Grid Properties.
- Navigation Link Type will enable if Navigation Link is selected in the column type

6 6-Navigation Link- External

The Navigation Link will have External as an option in the dropdown field. Once External is selected, URL option will be available and required.

ADD COLUMN	< ■ >	< ■ >	< ■ >	< ■ >	< ■
Column ID:	Subaccount ID	Subaccount Name	Asset Class	Inception Date	Allocation
Column Name:	Key Column	Subaccount Name	Asset Class	Inception Date	Allocation
Column Type:	Navigation Link	Text Box	Text	Text	Text Box
Navigation Link Type:	<div> <div>Link Type</div> <div>External</div> <div>URL</div> <div>Enter a Value</div> <div>URL is required.</div> </div>				
Text Mask:		None	None	None	Custom
Multi Line:	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1	Number Of Lines 1

Acceptance Criteria

- If external is selected in the Navigation link then the URL option is required.

7 7-Render superscript text in Custom Lists

Clients need to be able to add superscript to text in a custom list label. For example, a fund name may need to have superscript numbers to use as a reference for a separate table with footnotes.

Data Grid Properties			
Width:	1	1	1
Class Name:			
Text Mask:	None	None	None
Maximum Length:	100	100	100
Number Of Lines:	1	1	1
Text Alignment:	Left	Left	Left
Font Size:	Default	Default	Default
Super Script Column Id:	Super Script		
	Foot Note Custom List Test Foot Notes		
	<small>The Custom List for the footnotes must have 2 columns: Key, and Value. Where Key is the symbol for the footnote and Value is the Description of the footnote.</small>		
	Allocation Column Id Allocation		
	Super Script Class Name TestClass		

CANCEL
OK

Example of how the footnotes would look:

Fund Name	Super Script	Allocation
Dund D ^{1 3}	1 3	<input type="text" value="1"/>
Func C ^{1 2}	1 2	<input type="text" value="1"/>
Fund A ¹	1	<input type="text" value="0"/>
Fund B ²	2	<input type="text" value="0"/>

¹FootNote 1
²Warning: Pirates 2
³My FootNote 3

Acceptance Criteria

- Text with a superscript renders in a custom list.

8 8-Render symbols in Custom Lists

Clients need to add symbols to Custom Lists. Currently, they do not render. For example, a fund name may need to have a trademark symbol or a registered symbol.

1 DATA ENTRY 100%

2 SIGNATURES

3 REVIEW

4 FINALIZE

CONTINUE

page1

gwiz

FLI_REQUIREMANUALREVIEW

FLI_DECLINED_ESIGN

Link

Form 1 Page 1

Form 1 Page 2

Form 2 Page 1

Google

Get er done

Chevron SUPER

Previous

Acceptance Criteria

- Symbols render as part of a label in a custom list.