

IConnect 136217 Admin/App : Additional data needed to identify application copies

Project Overview

When a user copies an application, certain dataitems may need to be changed or reset/cleared to ensure they are elected again or to prevent validation errors if the values aren't visible for the new state/product.

So just like <isnewapp/> rule node, need to create <copyappstatus/> node.

Features/Requirements

- Create a new rule node <copyappstatus/>
- If copy as is was used it returns “copyas”
- If copy with changes it returns “copychanges”
- If neither was used the node returns “none”
- Set its value in edit application controller
- Use in rules to sets dataitems value

Use Cases / Workflow Changes

There are no changes to the normal workflow of the system. We are adding new rule node to help user to reset/cleared dataitems value when application is copied.

Admin/Shared Changes

First we will create a new rule node “<copyappstatus/>” in “InsTech.EverGreen.Rules”. Add a new property “CopyAppStatus” in RuleIO.cs. Set its value in “RunScript” method of ScriptRulesEngine.cs.

User needs to use this node in rule to changed or reset/cleared dataitems value, based on its node value.

App Changes

When user copies app with “Copy as it is”, in “CopyApp” method of “ApplicationController” set “CopyAs” in newly added parameter, while redirecting to “EditController”.

When user copy app with “Copy with changes“, in “CopyApp” method of “ApplicationController” set “CopyChanges” in newly added parameter, while redirecting to “EditController”.

When user opens application to edit or create new, set “None” in newly added parameter, while redirecting to “EditController”.

In “EditController” Index method add new parameter “CopyAppStatus”. In “EditApplicationModel.cs” constructor pass its value. In InitTriggerHandler method of “EditApplicationModel.cs”. Pass its value to ProcessRules method of ServerTriggerHandler of “InsTech.EverGreen.Business”. which will call scriptEngine.ProcessRule method which finally calls (InsTech.EverGreen.Rules) RunScript method of

ScriptEngine , which will set “CopyAppStatus” property of RuleIO. Which now can be used by user to check on forms.

Integration Changes

There is no change in Integration Process.

UI Mock Ups

[Provide cropped screen shots with IT branding focusing on the new feature]

How to Enable and Use This Feature

Create a rule in design forms using <copyappstatus/> and changed or reset/cleared dataitems value, based on its node value.

```
<block>
  <if>
    <condition>
      <compare op="==">
        <const value="copyas" />
        <copyappstatus/>
      </compare>
    </condition>
    <diset dataitemid="txtFirstName">
      <const value=" " />
    </diset>
  </if>
</block>
```

Areas Impacted

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

- Profile Administration		[List subsections affected]
- Reports		
- Deployment		
FireLight App		
- New Application	yes	Set copyappstatus property value
- Edit Application	Yes	Pass copyappstatus property value to scriptEngine
- 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		