INSURANCE TECHNOLOGIES

Custom Action Rule for Wizards

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iConnect 227673 Design Approach - Click Custom Action Rule does not work correctly in Wizards

Project Overview

When utilizing the Wizard UI if you add a custom action box to your Wizard and then build a rule that calls the "clickcustomaction" rule node the Wizard UI will not do anything; the user must manually select the Custom Action. The issue is that the rule initiating the custom action button click is not on the same page as the button control. Wizard works differently than forms in that not all the controls (dataitems) are loaded for all the Wizards; it only loads the ones for the page you are on. This causes the click custom action to not fire.

Click Custom Actions should fire on any Wizard page like forms and should be able to be used in conjunction with set visibility rules to hide the button if you do not want user interaction.

Impacts:

Wizards-Other Actions for Custom Action Rule

1   Custom Action for Wizards-Server

To support the ability to use Custom Actions in wizards, enhancements are required for the server. A button (can be hidden or visible) will exist in the package or application (does not need to be on the page) and run based on rules. When the rules are run the button is located and information is taken from the button to create the payload. This would send the request to REACT for the Custom Action to be processed. Logic can be included in the rules to limit the number of attempts the Custom Action can be requested.

Acceptance Criteria

- Button can be hidden or visible in package or application.
- Button runs Custom Action based on rules (does not require user to click the button).
- Logic can be included in the rules limiting the number of attempts the Custom Action can be requested.
- Information is taken from the button based on rules to create the payload.
- Payload is passed to REACT for Custom Action to be processed.
- All existing Custom Actions work as expected and are not negatively impacted.

2   Custom Action for Wizards-REACT

The payload will be received by REACT from the Server to process the Custom Action requested. REACT will process the Custom Action request and act as if a button was manually triggered.

Acceptance Criteria

- REACT processes the Custom Action request as if a button was manually triggered.
- All existing Custom Actions work as expected and are not negatively impacted.