

iConnect 134976 Design Approach

Project Overview

Create a rule that links two DataItems together, so that changes in one DataItem cause changes in the other linked DataItem.

NOTE: This feature is available for Distributors only.

Features/Requirements

- DataItems must be linked to other DataItems and changed when the other changes.
- Rules that affect one DataItem should affect the other.
- There should be a 'DataItem Sync' tab in the Admin Mapping Profile to manage these DataItems. Organizations are not required to fill in these fields if they do not require them.
- These rules need to be deployed to other environments.

Use Cases / Workflow Changes

Rules will be modified to allow new rule to be run recursively (i.e., if this rule affects another rule that affects this field, it will be run again).

Rules will load Linked DataItem Rules from the database (or file for console) when loading rules.

In Admin, a new DataItem Sync tab in the Mapping Profile for defining the linked DataItems. These will be at the organization level, and go across packages and duty types.

Admin Changes

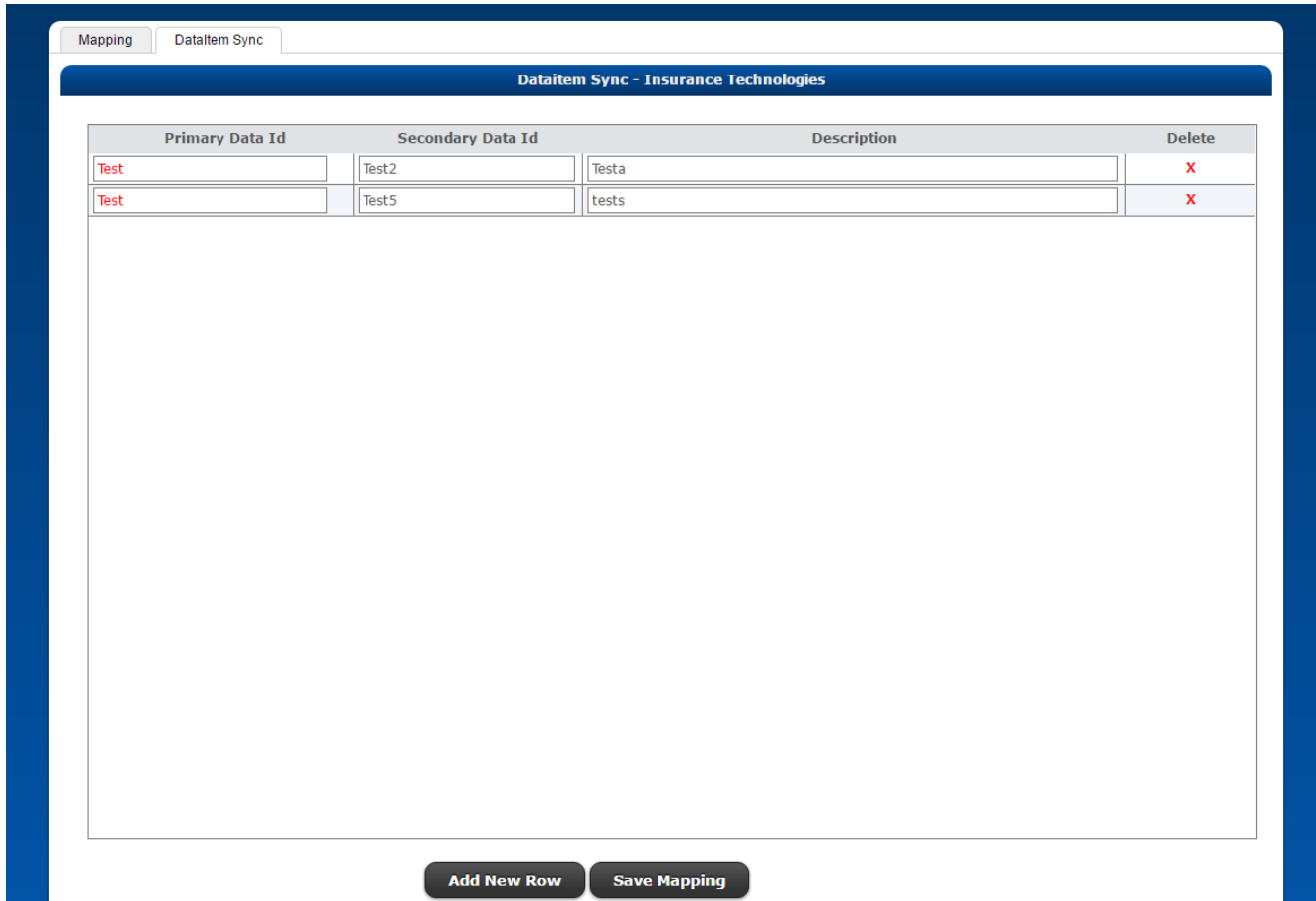
New Admin Tab in the Mapping Profile for creating these rules.

App Changes

Only under the hood changes.

- Changes to the Rule Engine (mainly how it handles recursion).
- New under the cover Rule Node.
- Changes to how the rules are loaded.

UI Mock Ups



Mapping | DataItem Sync

DataItem Sync - Insurance Technologies

Primary Data Id	Secondary Data Id	Description	Delete
Test	Test2	Testa	X
Test	Test5	tests	X

Add New Row | Save Mapping

New DataItem Sync tab in the Mapping Profile.

How to Enable and Use This Feature

Automatically Enabled.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	Y	Mapping Profile has an added tab.
- Reports		

- Deployment	Y	New Deployment Options for Sync Dataitems DB Tables. New Data Item Sync Configuration synchronization scope.
FireLight App		
- New Application		
- Edit Application	Y	Rules are impacted due to new logic that allows for certain rules to run recursively. In addition, Rules will load Linked DataItem Rules from the database.
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console	Y	Load Rules from Database and save to file on console. In Shared Console Code.
- Windows	Y	
- iOS	Y	
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		