
Ability to Import Rule Set Using XML File

FIRELIGHT BASE

FireLight®

Platform

ABILITY TO IMPORT RULE SET USING XML FILE

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Insurance Technologies, LLC

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Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

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iConnect 261168 Design Approach – Ability to Import Rule Set Using XML File

Project Overview

This enhancement will add the functionality to allow for the importing of a Rule Set. We have the option on wizards and forms but not on Rule Sets. Adding this option to aid with speed of implementation and help to reduce errors experienced due to manual copy and paste process.

Impacts:

- On Rule Set admin screen, link "View All Rule Definitions" will be updated to "Import/View All Rule Definitions". FL Admin -> Product Config -> Rule Sets
- Import Rule Set process will be added on Rule Set screen in the admin tool under Rule Definitions Window.

1 Add import option on Rule Definitions Window

On Rule Set admin screen, link "View All Rule Definitions" will be updated to "Import/View All Rule Definitions".

FL Admin -> Product Config -> Rule Sets

Clear

18803 Contract Change Request		🔒 X
Abhi test rule		🔒 X
Abhi test rule - Copy		🔒 X
Account Holder6-3-16		🔒 X
Account Opening		🔒 X
Annuity Ticket		🔒 X
Application		🔒 X
Application222		🔒 X
Application222 Rule Set		🔒 X
BD Change Ruleset		🔒 X

☐ Exclude Expired
Total: 150

Rule Set Detail
Rule Set History
Search Rules in Package

Rule Set Name Account Opening

Description

Rule Set Type: User Interface ▼

This Rule Set Begins On

This Rule Set Expires On

Effective Time Zone ▼

Last Updated 2/15/2022 5:06 AM UTC

[Rules Window](#)

[Import/View All Rule Definitions](#)

[Export Rule Set XML](#)

[Copy Rules](#)

[Templates Window](#)

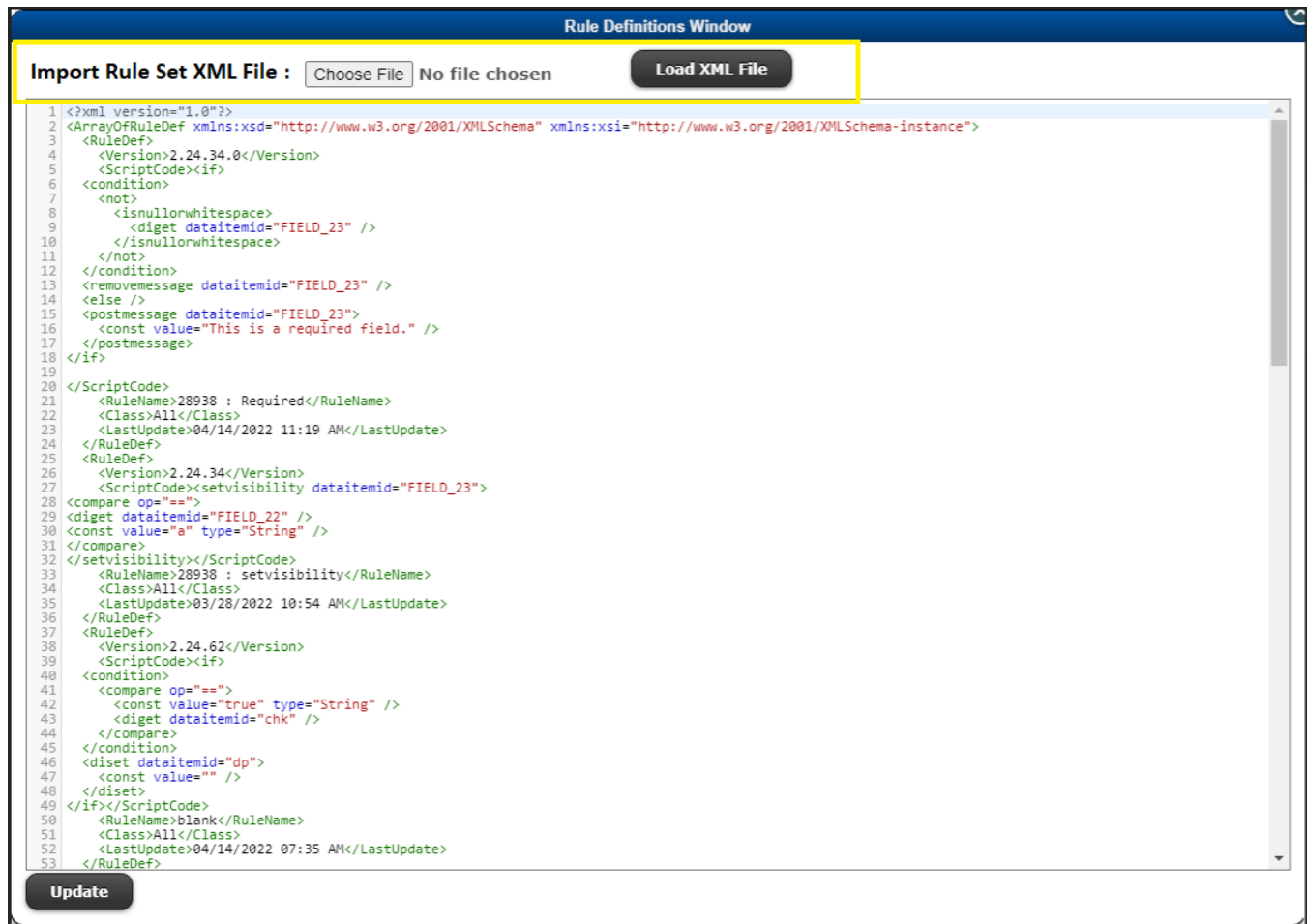
[Duplicate Rule Set](#)

State	Approved
Alabama	☑
Alaska	☑
Arizona	☑
Arkansas	☑
California	☑
Colorado	☑
Connecticut	☑
Costa Rica	☐
Delaware	☑
District of Columbia	☑
Florida	☑
Georgia	☑
Guam	☑
Hawaii	☑

☐ Check/Uncheck All

Save Rule Set

Clicking on the link "Import/View All Rule Definitions" will load "Rule Definitions Window" where the option to import rule set XML will be implemented. This import option will be available while adding a new Rule Set as well as editing an existing Rule Set.



Option to select an XML file will be placed on Rule Definitions Window. User can select this button to import an XML file containing FL rules into the system. Once the file is chosen, user will click on "Load XML File" button, that will trigger an alert mentioning existing rule definitions will be overwritten. If required, user will be able to edit the Rule Definitions from here and XML import (or if any changes made) will be saved to the selected rule set after "Upload" button is clicked.

Verify below process is working as expected:

At the time Upload button is clicked, FireLight will verify the content of the import XML to ensure there are no formatting errors. In case format is incorrect, an error/alert will be displayed.

Conditions:

- When the Rule Set is locked by another user, admin user cannot import rule sets.
- When a user has "Read Only Access" on rule set window, duplicating rule set will not be allowed.

Acceptance Criteria

- Rule Sets screen in the admin tool has an update link as "Import/View All Rule Definitions".
- Clicking the link "Import/View All Rule Definitions" opens window "Rule Definitions Window" to select and import an XML file containing rules.
- Only an XML file is allowed to be selected for import.
- User can select only one file for import.
- Uploading the XML file will overwrite the existing Rule Set.
- After importing rules XML and clicking Update button, an alert is triggered when there is a discrepancy in the XML file format.
- Import Rule Set option is not available when the Rule Set is locked by another user.
- Import Rule Set option is not available when a user has "Read Only Access" on Rule Set window.
- Verify that an error/alert is thrown when Upload button is clicked when there is a formatting issue in the imported XML.

2 Alert to overwrite rule set

When the user clicks "Load XML File" button for an existing Rule Set that already has rules defined under it, FireLight will provide an alert for the user to confirm if they want to overwrite existing rules. The alert box will show message "The Rule Set XML you are about to import will overwrite an existing Rule Set. Do you want to continue?".

Clicking "OK" on this alert box will overwrite the existing rules with the rules from the XML file.

Clicking "Cancel" on the alert box will cancel loading the XML file content.

Rule definitions from the XML file loaded on the window will only be saved when "Upload" button is clicked.



Acceptance Criteria

- Clicking at "Load XML File" button on Rule Set screen in the admin tool provides confirmation step to overwrite existing rule set with the new rule set being imported.
- User can continue overwriting the rule set with the rules in the imported XML or discard to keep the current rules intact, without importing any XML file.
- Alert message is localized as per client preference.

3 Update Rule Set History

To keep track of the import changes, it will be updated into Rule Set history. Action column will have values shown as "Rule Set XML uploaded" along with Action Date and Login updated into the history.

<div> <div>Rule Set Detail</div> <div>Rule Set History</div> <div>Search Rules in Package</div> </div>				
Action	Old Value	New Value	Action Date	Login
Rule Set XML Uploaded			4/4/2022 5:34:04 AM	FLADEMO_TEST

Acceptance Criteria

- When a Rule Set XML is imported, this change is displayed on the Rule Set History screen.