
Add Ability to Duplicate a Rule Set

FIRELIGHT BASE



Platform

ADD ABILITY TO DUPLICATE A RULE SET

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Insurance Technologies, LLC

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iConnect 245046 Design Approach - Add Ability to Duplicate a Rule Set

Project Overview

Clients have requested a copy button on the Rule Set Admin that will copy all the Rule Set rules and properties. Selecting the copy button would create a new Rule Set but would require a new name. By default, the naming convention will be, "Ruleset original name - Copy". The user can then rename if desired. If the user copies the same Rule Set again, the default naming convention would be, "- Copy - Copy," suffixed to the ruleset original name.

Impact: Admin -> Product Configuration -> Rule Sets: A new link 'Duplicate Rule Set' will be added to create a duplicate copy of the selected ruleset.

1 Admin - Duplicate Rule Set

To add ability to duplicate an existing ruleset, a new link "Duplicate Rule Set" will be added on page Admin -> Product Config -> Rule Sets. Clicking on this link will create a duplicate copy of the selected Rule Set with its name suffixed with "- Copy" as the name of the new duplicated ruleset.

Highlighted elements in below mockups shows changes that will be implemented on above screen.

Rule Sets - FL Access Carrier - Test

Clear

Add New Rule Set

Needs-Questionnaire	🔒	✖
Needs-Questionnaire-copy1	🔒	✖
NonNatural Ownership	🔒	✖
NW Agent Data_10/18	🔒	✖
NYL - Address Change Form_5/17	🔒	✖
NYL Cover Sheet - Service Form Portal_5/17	🔒	✖
NYL OwnerBene Form_5/17	🔒	✖
NYL Tele-Web Form_5/17	🔒	✖
Placeholder Rules	🔒	✖
Post Issue Rule Set	🔒	✖

☐ Exclude Expired
 Total: 87

Rule Set Detail
Rule Set History
Search Rules in Package

Rule Set Name

Description

Rule Set Type:

This Rule Set Begins On

This Rule Set Expires On

Effective Time Zone

Last Updated

Placeholder Rules

Placeholder Rules

User Interface

3/23/2021 12:50 PM UTC

[Rules Window](#)

[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

Once link "Duplicate Rule Set" is clicked, duplicate copy of selected ruleset will be created with text " - Copy" suffixed to the original ruleset name.

Also, in this case, all selected states will be duplicated from the original ruleset.


[Add New Rule Set](#)



Rule Sets - FL Access Carrier - Test	
NYL - Address Change Form_5/17	
NYL Cover Sheet - Service Form Portal_5/17	
NYL OwnerBene Form_5/17	
NYL Tele-Web Form_5/17	
Placeholder Rules	Placeholder Rules
Placeholder Rules - Copy	Placeholder Rules
Post Issue Rule Set	
Post Issue Rule Set - Copy	
Presale Demo	
Print Forms Rule Set	Print Forms Rule Set

☐ Exclude Expired
 Total: 88

[Rule Set Detail](#)
[Rule Set History](#)
[Search Rules in Package](#)

Rule Set Name

Placeholder Rules - Copy

Description

Placeholder Rules

Rule Set Type:

User Interface

This Rule Set Begins On

This Rule Set Expires On

Effective Time Zone

Last Updated

5/13/2021 12:19 PM UTC

[Rules Window](#)
[View All Rule Definitions](#)
[Export Rule Set XML](#)
[Copy Rules](#)
[Templates Window](#)
[Duplicate Rule Set](#)

State	Approved
Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>
Arizona	<input checked="" type="checkbox"/>
Arkansas	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>
Colorado	<input checked="" type="checkbox"/>
Connecticut	<input checked="" type="checkbox"/>
Costa Rica	<input checked="" type="checkbox"/>
Delaware	<input checked="" type="checkbox"/>
District of Columbia	<input checked="" type="checkbox"/>
Florida	<input checked="" type="checkbox"/>
Georgia	<input checked="" type="checkbox"/>
Guam	<input checked="" type="checkbox"/>
Hawaii	<input checked="" type="checkbox"/>

☒ Check/Uncheck All

If the user duplicates the same Rule Set again, the default naming convention would be, "Selected Ruleset Name + " - Copy"" etc.

When "Add New Rule Set" is selected or no Rule Sets are available for duplication, the "Duplicate Rule Set" link will be hidden/not available to the user.

Acceptance Criteria

- Able to create a duplicate copy of an existing Rule Set.
- Duplicate/copied Rule Sets have all the rules and state selection duplicated from the original ruleset.
- Duplicated rule set features, " - Copy" suffixed to the original Rule Set name.
- Users can rename the duplicated Rule Set.
- When a Rule Set is duplicated more than once, each duplicate copy displays an additional "Copy" indication in the name. Example: A Rule Set is named "Owner Rules". If the Rule Set is duplicated, the first duplicated Rule Set is named by default, "Owner Rules - Copy". If the same Rule Set is duplicated again, the Rule Set name by default is, "Owner Rules - Copy - Copy".
- "Duplicate Rule Set" link is disabled when selecting "Add New Rule Set".
- "Duplicate Rule Set" link is disabled if no rule sets are available for duplication.
- "Duplicate Rule Set" link is disabled if the Rule Sets are in a read-only state.
- A duplicated rule set is unlocked even if the original rule set is locked.
- The history of the duplicated rule set does not contain the history of the original. It contains a statement about its creation and an entry for duplication: "Rule set was duplicated from *"original rule set name"*."
- Duplicating the rule set retains the state of the page, such as the current search string and filtering.