

iConnect 170425 Design Approach

Project Overview

Add logic to automatically notify a user if a Rule Set has been modified and saved by another user. Currently more than one person can simultaneously work on the same rule set if they are not using the “Lock” functionality and overwrite each other’s changes without any type of notification.

Features/Requirements

- When saving changes to a rule set, Firelight will check if another user has opened it and saved changes to the same rule set.
- If no changes have made, the save will proceed as usual.
- If another user has made changes to the same open rule set, the current user will receive a prompt asking if they want to discard their changes or write over the previous changes.

Use Cases / Workflow Changes

When more than one user has the same rule set unlocked and open and a user attempts to save their changes after another user has saved changes, a dialog will appear alerting the user that it is not the latest saved version of the rule set. The user will then be able to decide if they want to discard their changes or overwrite the previously saved changes by the other user.

Admin Changes

Changes are required in the Form Designer and Rule Sets view. Use the “timestamp” to determine whether a rule set has changed or not. Any time a user saves a rule set, the “timestamp” is updated in the database. Whenever a user opens a rule set, the timestamp data is also stored in session/memory. When a user tries to save the rule set, a comparison is made of the session timestamp to the database timestamp. If the database timestamp is greater than the timestamp in memory, this indicates another user has updated the rule set.

If another user has modified and saved the rule set, a dialog appears with the following text and three options:

[USER FULLNAME] has changed this rule set since you began your work. How would you like to proceed?

Overwrite Changes will overwrite all changes made by [USER FULLNAME]. Discard Changes will discard your changes and open the previous version saved by [USER FULLNAME]. Cancel Save will return you to the last active location in the rule set.

[Overwrite Changes] [Discard Changes] [Cancel Save]

If the user clicks “Overwrite Changes”, FireLight will ignore pervious changes made by another user and update the rule set with the latest changes.

If the user clicks “Discard Changes”, FireLight will discard all changes made by the current user and open the last saved version of the rule set.

If the user clicks “Cancel Save”, the dialog will be dismissed and return to the last active page in the rule set.

App Changes

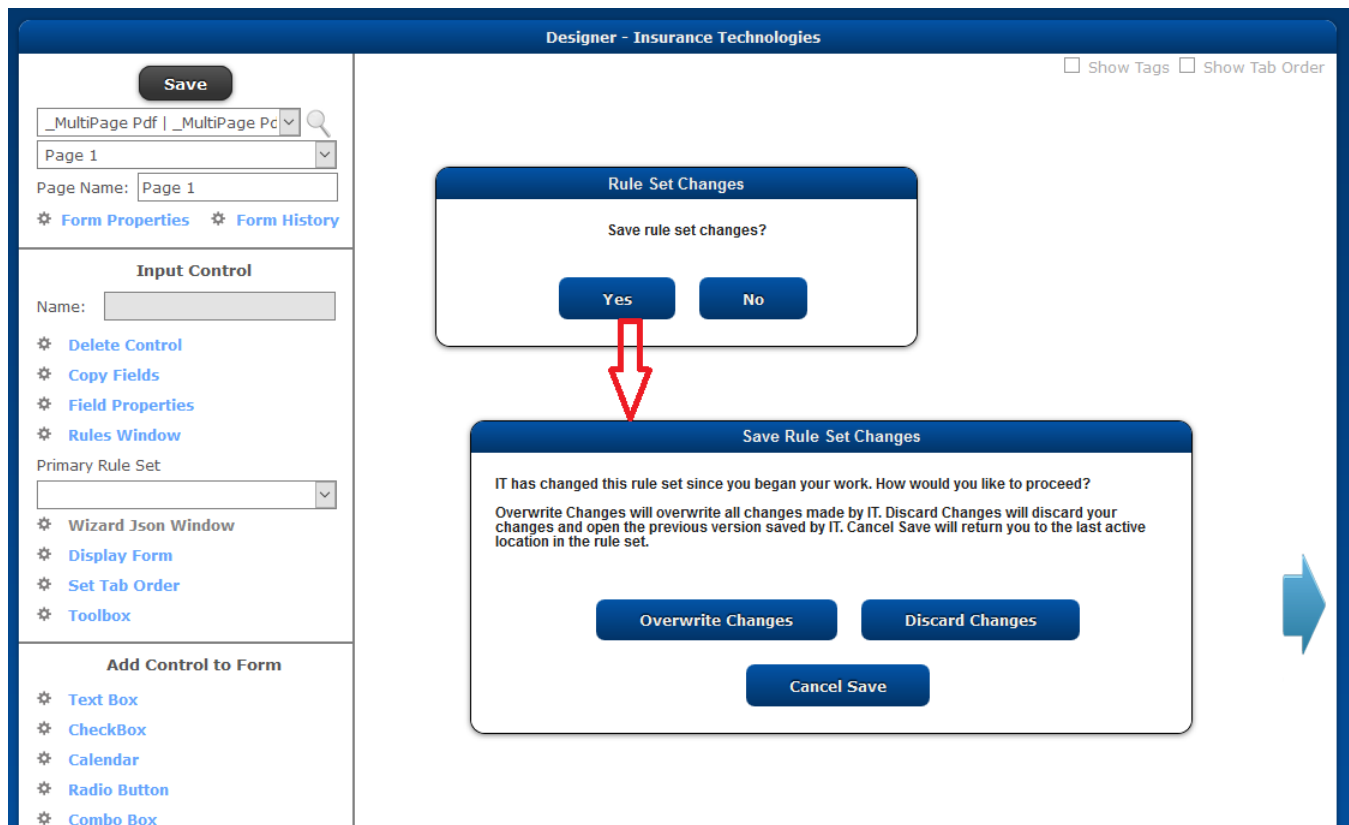
There are no changes in FireLight App.

Integration Changes

None

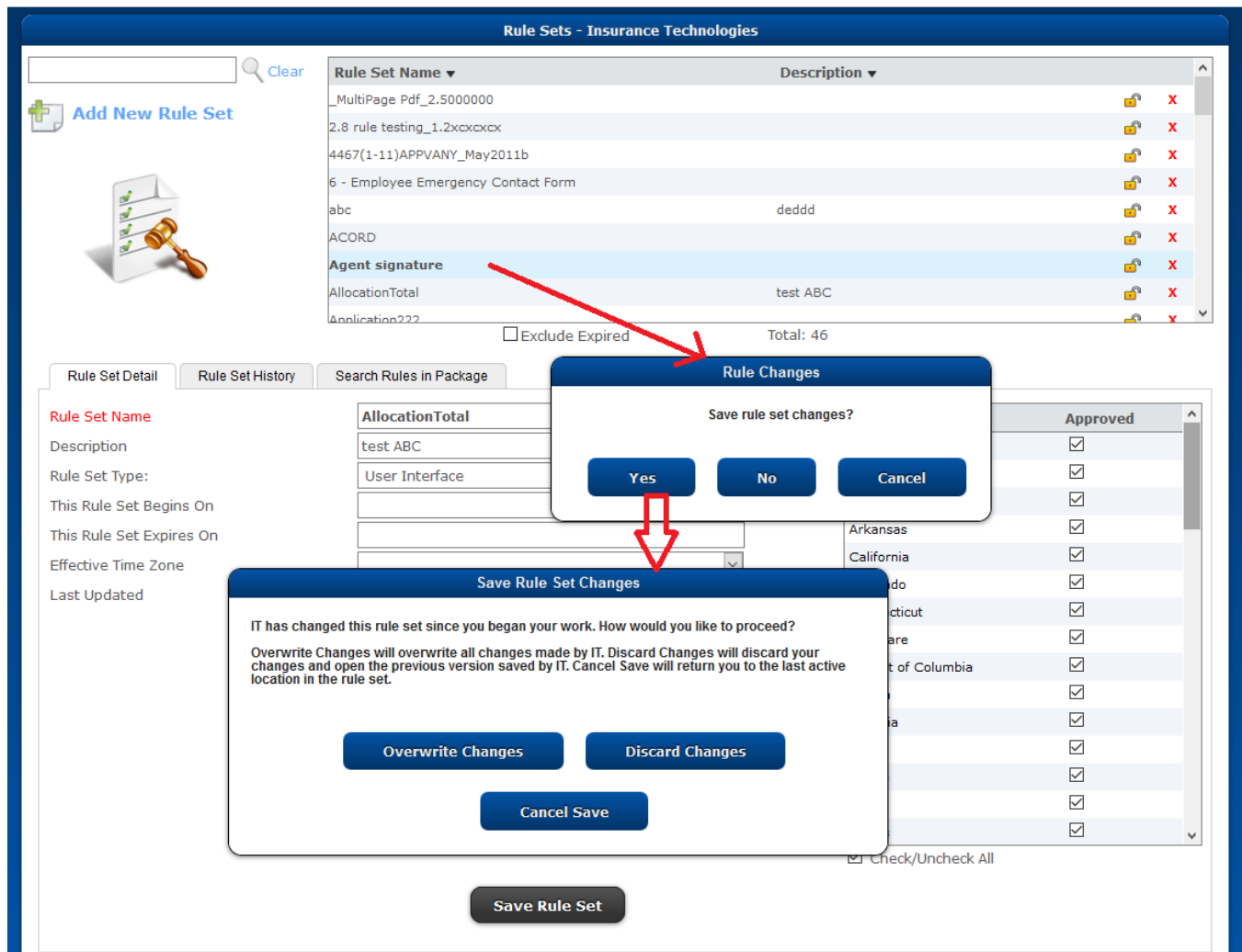
UI Mock Ups

1. When a user closes the rule window in the form designer, Firelight prompts the user to save the rule set changes. After clicking “Yes”, Firelight will show a dialog if the rule set has been modified by another user.



-
- Rule Sets - Insurance Technologies
- Clear
- Add New Rule Set
- Rule Set Name Description
- | | | | |
|-------------------------------------|----------|--|--|
| _MultiPage Pdf_2.5000000 | | | |
| 2.8 rule testing_1.2xcxcxcx | | | |
| 4467(1-11)APPVANY_May2011b | | | |
| 6 - Employee Emergency Contact Form | | | |
| abc | deddd | | |
| ACORD | | | |
| Agent signature | | | |
| AllocationTotal | test ABC | | |
| Application222 | | | |
- ☐ Exclude Expired Total: 46
- Rule Set Detail Rule Set History
- Rule Set Name
- Description
- Rule Set Type:
- This Rule Set Begins On
- This Rule Set Expires On
- Effective Time Zone
- Last Updated
- IT has changed this rule set since you began your work. How would you like to proceed?
- Overwrite Changes will overwrite all changes made by IT. Discard Changes will discard your changes and open the previous version saved by IT. Cancel Save will return you to the last active location in the rule set.
- Overwrite Changes Discard Changes
- Cancel Save
- Rules Window
- View All Rule Definitions
- Export Rule Set XML
- Copy Rules
- Templates Window
- District of Columbia
- Florida
- Georgia
- Guam
- Hawaii
- Idaho
- Illinois
- ☒ Check/Uncheck All
- Save Rule Set

- If a user made changes in rules in Profile->Rule Set and tries to navigate to another rule set without saving, Firelight shows the save changes confirmation dialog. If a user clicks on “Yes”, Firelight will show a dialog if the rule set has modified by another user.



The screenshot displays the 'Rule Sets - Insurance Technologies' interface. A table lists rule sets with columns for 'Rule Set Name' and 'Description'. The 'Agent signature' rule set is highlighted. A red arrow points from this rule set to a 'Rule Changes' dialog box that asks 'Save rule set changes?' with 'Yes', 'No', and 'Cancel' buttons. Another red arrow points from the 'Yes' button to a 'Save Rule Set Changes' dialog box. This second dialog box contains the following text: 'IT has changed this rule set since you began your work. How would you like to proceed? Overwrite Changes will overwrite all changes made by IT. Discard Changes will discard your changes and open the previous version saved by IT. Cancel Save will return you to the last active location in the rule set.' Below the text are three buttons: 'Overwrite Changes', 'Discard Changes', and 'Cancel Save'. At the bottom of the main interface is a 'Save Rule Set' button.

How to Enable and Use This Feature

There are no new Admin options for this feature. To verify this feature, have two users, user 1 and user 2, open the same rule set (do not lock the form). Next, user 1 will make changes and save the rule set. User 2 will follow by changing the rule set and attempting to save it. The dialog should appear with the selections detailed above. We recommend you test this by selecting both options, starting with “Overwrite Changes” to write over the changes made by user 1, thus discarding user 2 changes. Then repeat the test and select “Discard Changes” and verify the rule set with the changes made by user 1 appears and the changes made by user 2 are discarded. Next, run through a scenario where user 1 has saved changes and user 2 selects “Cancel Save” to be sure this dismisses the dialog. A final test may be performed where user 1 and user 2 both open the same rule set and only user 2 changes and saves the rule set without seeing the new dialog.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	Yes	Add a dialog notifying users that another user has modified a rule set when trying save changes for the same rule set.
- Profile Administration	Yes	In Rule Set view – add a dialog notifying users that another user has modified a rule set when trying save changes for the same rule set by explicitly clicking “Save Rule Set” button OR clicking “Yes” in save changes confirmation dialog for rule set.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- 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		