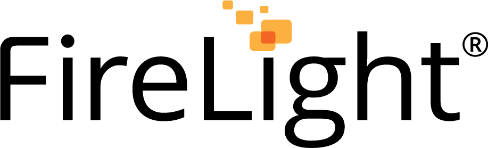


Data Copy Enhancement 2.25 July

Firelight Base

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Platform

Data Copy Enhancement 2.25 July

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Design Approach - Data Copy Enhancement 2.25 July

Firelight Enhancement to provide the ability to "copy" data fields from a Wizard and paste them into a Form and the ability to copy from a Form and paste into a Wizard. Regardless of which copy/paste route is taken, the Field Properties associated with the source data item are to carry over to the destination item, as long as there is a one- to-one relationship for those field properties in both Wizard and Form.

# Enhance Wizard Designer (Support mapping from Form to Wizard)

## Add "Copy Form Fields" option to Wizard "Page Options" section

Add a "Copy Form Fields" option to the Wizard "Page Options" section. Clicking the “Copy Form Fields” option will present the user with the “Copy Fields” dialogue box where they can indicate the form that is to be the source of the data field options available for copying.

## Create / Display the "Copy Fields" Dialogue Box in the Wizard designer

When the "Copy Form Fields" option under the Page Options list in the Wizard Designer is selected, the "Copy Fields" Dialogue Box will be displayed. In the "Copy From” drop down box of the Dialogue Box, display all the Forms available from which data fields can be copied.  *(This will not include Wizard options as copy functionality currently exists for Wizard to Wizard copying and this enhancement did not change that process.)*

Since there is no direct correlation between the coordinates associated with the control on a Form and coordinates available within a Wizard, the mapping of fields from forms (no matter what the page on which a data field might exist on a form) will map to the single Wizard page displayed (one page at a time). As such, the following check boxes located at the bottom of the existing Dialogue box in the current Forms process will not to be presented as options in the Dialogue box created for the Wizard:

-Keep Original Field Coordinates  
-Copy Page Names  
-Delete All Existing Fields Before Copy

The "Copy All Selected Fields To The Active Page" option is to be the default process for mapping from a Form to a Wizard and cannot be changed or edited.

Graphical user interface, application

Description automatically generated

## Controls to be made available for mapping from Forms to a Wizard

There are controls within a Form that are either not available in a Wizard or would not be necessary for copying.  The following controls will be made available for copying from a Form to a Wizard:

Text Box  
Calendar (equates to Date Picker control in Wizard)

Radio Button

Check Box

ComboBox List (equates to DropDown in Wizard)

Custom Action

Address Auto Complete

Label (equates to Text in Wizard)

**Excluded / unavailable for copying from Form to Wizard**:

Signature Box

Signature Initials

Bar Code

## Search functionality in Wizard Dialogue Box

"Search" functionality has been added within the Dialogue Box created for the Wizard that will allow for the selection of form fields for mapping. The Search fields are located under the field header names: “Field Name”, “Page”, “Field Type”, and “DataItemID”.

Search functionality will allow the user, once a form has been selected as the source of the data, to narrow down the fields displayed that are to be available for copying. With the Search functionality in Wizard, there are various options available for Search.

The User will be able to search fields by "Field Name", "Page" number, "Field Type", "DataItemID" or by using a combination of these parameters.

1) User can use the search parameters under the "Field Name" to narrow the list of fields displayed down to only fields that contain the entered search parameter.  For example, the below screen shot shows that a Search using the Field Name area for any data items utilizing "ad" as part of the field name.

Graphical user interface, table

Description automatically generated

2) User can Search utilizing the "Page" field.  User can input the page number of the source form and the display will only show the Data Fields associated with that specific page.  In the below example, the Page 2 is indicated for the Search that the display shows only those data elements associated with that page.

Graphical user interface, application, table

Description automatically generated

3) User can search the forms document utilizing the "Field Type" (type of Control) available on the source form by typing in the leading character(s) of the control type. In the example below, by typing "Combo" in the Field Type search parameter, the only fields showing available for Copy are "ComboBox" (Drop Down box) fields.

Graphical user interface, application, table

Description automatically generated

4)User can search using the "DataItemId" parameter.  In the example below, the user is searching the source form for only those data fields that use "Trust" as part of the "DataItemId".

Graphical user interface, application

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5) User can search combining Search parameters. User can combine more that one (or all) search parameters to drill down in greater detail on a form that is the source of the data fields. In the example below, the user has combined the Page number and Field Type search parameters to drill down to look at items only on page 1 of the source form and only those "Field Types" that are RadioButton(s).

Graphical user interface, application

Description automatically generated

## Field Mapping behavior/ initial display on the Wizard when fields from a Form are mapped to a Wizard page

When a "Copy Fields" process is completed where a Form is the source of the data fields and a Wizard is the destination for these fields, the following behaviors will be employed:

1) No matter the size of the control as it exists on the “source” Form, the Default size of the control in the Wizard environment will be used for the fields/controls upon landing on the “destination” Wizard page. Controls can then be moved and adjusted as necessary to fit Wizard requirements. The default size for each control is listed below:

Combo Box/Drop Down, Text Box, Check Box, Radio Buttons, Button/Custom Action and Address Auto Complete controls will display on the Wizard with the default size of 6

Calendar Control/Date Picker will display on the Wizard with the default size of 3

Text / Label will display on the Wizard with the default size of 12

2) All copied fields are to land on the Wizard beginning at the top left of the Wizard moving left to right across the page and then down to the next line until all fields selected for copying have been listed on the current Wizard Page.

3) Where there is a one-to-one relationship between Wizard data field properties and Form data field properties, the data field is to retain the same field properties on the destination Wizard as they existed on the source data item from the Form.

Destination Wizard Text box fields should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Error Placement

Input Type

Placeholder Text

Text Mask

SSN Format

Data Group

Data Group Property

Max Length

Read Only

Office Use Only

Destination Wizard Drop Down / Combo Boxes should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

List Values

Data Group

Data Group Property

Read Only

Office Use Only

Error Placement

Help Text

Destination Wizard Check Boxes and Radio Buttons should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Export Value

Group Name

Error Placement

Help Text

Display Style / Border Style

Data Group

Data Group Property

Read Only

Office Use Only

Destination Wizard Custom Action / Button controls should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Help Text

Data Group

Custom Action

Custom Action Type

Action Parameter

All custom actions that are available in the form environment are also available in the Wizard environment. However, the reverse is not true as not all custom actions available in the Wizard environment are available in the Forms only environment. *Custom Action of 'External Source' and Custom Action Type of 'Milliman' are not available in Forms environment.*

Destination Wizard Calendar/Date Picker controls should retain the following Field Properties from the Wizard data source:

Field Name

Custom Tag Name

Error Placement

Help Text

Data Group

Data Group Property

Text Mask

Read Only

Destination Wizard Address Auto Complete controls should retain the following Field Properties from the Wizard data source:

Field Name

Common Tag Name

Placeholder Text

Help Text

Data Group

4)When Check box controls are mapped from a Source Form, they are to map to the destination wizard but will show as a "Radio Button" control. This is by design as Check Box controls are Radio Button controls and they will behave the same.

5) When mapping from a form to a wizard page, if a dataitem(s) from the source form are not located anywhere within the Wizard, the check box column adjacent to the "Field Name" will be checked and the check boxes in the "Already Exists" column will not be checked (as shown below).

If a dataitem on the 'Source' form already exists in the Wizard, the check box column adjacent to the "Field Name" will be unchecked and the check boxes in the "Already Exists" column will be checked (as shown below). This will be the case even when a copy from a source form to a wizard has been completed but the wizard has not yet been "Saved". The copy process will see that these fields already exist on the destination wizard.  They can be copied again but the boxes will have to be checked as they will not be auto selected for mapping.

# Enhance "Dialogue Box" in Forms to include Wizard options. (Mapping from Wizard to Form)

## Add Wizards to drop down options for selection

Upon selection of the "Copy Fields" option in forms, a dialogue box is displayed where the user can select the source of the fields that are to be copied and placed on the form.  Wizards will be included as a source of the data fields that are available to be copied.  To readily distinguish a Wizard as a source of the data to be copied, the word "WIZARD" will be added as the leading word for all Wizards. This will automatically shift all Wizard sources down in the list as it is sorted alphabetically.

***Graphical user interface, text, application

Description automatically generated***

## Display Wizard Page Name in Dialogue box

Graphical user interface, application

Description automatically generated

## Controls to be made available for mapping from Wizard to Forms

There are controls within the Wizard that are either not available on Forms or would not be necessary for copying.  The following controls should be made available for copying from a Wizard to a Form:

Include:  
Text Box  
Date Picker (equates to Calendar control in Forms)

Radio Button

Check Box

Dropdown List (equates to ComboBox in Forms)

Custom Action

Address Auto Complete

**Exclude or make unavailable:**

Group

Panel

Text

Slider

Navigation Link

Divider

Increment Buttons

Image

Data Grid

Schedule

## Dialogue Box controls behavior when copying from Wizard to Form

When copying fields from a Wizard to a Form , upon selecting a Wizard from the "Copy From" dropdown as the source of the data fields to be copied, the Check box at the bottom of the dialogue box associated with "Copy all selected fields to the Active Page" will be auto checked and disabled.

Additionally. the check box associated with "Keep Original Field Coordinates" will be unchecked and disabled. Wizard data items do not have coordinates assigned to them.

The current Dialogue box behaviors relating to copy fields from a Form to a Form will remain unchanged.

## Field Mapping behavior/ initial display on the form when fields from a Wizard are mapped to a Form

When a "Copy Fields" process is completed where a Wizard is the source of the data fields and a Form is the destination for these fields, the following behaviors will be employed:

1) No matter the size of the control as it exists in the Wizard, the Default size of the controls in the Form environment will be used for the fields/controls upon landing on the form. Controls can then be moved and adjusted as necessary to fit form requirements. The default size for each control is listed below:

Combo Box/Drop Down, Text Box, Calendar Control/Date Picker and Address Auto Complete controls will display on the form with the default size of 50x18

Check Box and Radio Buttons will display on the form with the default size of 15x15

Button / Custom Action will display on the form with the default size of 20x20

2) All copied fields are to land on the form beginning at the top left of the form, moving left to right across the page and then down to the next line.

Field Name

Common Tag Name

Help Text

Data Group

Custom Action

Custom Action Type

Action Parameter

Calendar /Date Picker controls should retain the following Field Properties from the Wizard data source:

Field Name

Custom Tag Name

Error Placement

Help Text

Data Group

Data Group Property

Text Mask

Read Only

Address Auto Complete controls should retain the following Field Properties from the Wizard data source:

Field Name

Common Tag Name

Placeholder Text

Help Text

Data Group

5) When the fields from the source Wizard are displayed in the 'Copy Fields' dialogue box and if the data items do not exist on the destination form,  the check boxes adjacent to the Field Name/ DataItemId column will be checked and the check boxes under the 'Already Exists' column will be unchecked.

6)  When the fields from the source Wizard are displayed in the 'Copy Fields' dialogue box and if the data items already exist on the destination form, the check boxes adjacent to the Field Name/ DataItemId column will be unchecked for those existing data items and the check boxes under the 'Already Exists' column will be checked for those data items.

## Custom Action Button items to excluded as options to be mapped from Wizard to Form

There are specific Custom Actions that were developed to only be available within a Wizard environment and are not options available within a Forms environment. These options will not be available in the "Copy Fields" dialogue box with the Form copy process.  
  
The Custom Action entitled **'External Source'**is a Wizard only option and any Custom Action button control utilizing this Custom Action will be excluded from the list of data controls available to be copied from a wizard source to a form destination.

Graphical user interface, text, application, email

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With a Wizard, when a Custom Action entitled 'Custom Action' is selected, the list 'Custom Action Type' is presented.  The Custom Action Type entitled **'Milliman'**is a Wizard only option and any Custom Action button control utilizing this Custom Action Type will be excluded from the list of data controls available to be copied from a wizard source to a form destination.

Graphical user interface, text, application

Description automatically generated

## Mask Mapping Behaviors from Wizard to Forms

Any "Masks" that are added in the 'Organization Settings', under the 'Activity' tab are to be available for mapping when a dataitem to be mapped has one of these Mask selected.  
Any 'custom' mask that has been added in Wizard and is not a part of the mask created under the Organization Setting, is not support in Forms. If a data field to be copied from Wizard to Form has such a 'custom' mask, the data field will be available for copying but the 'Mask" setting in the Field Properties will be blank for the copied field.