Prudential®

**ICM Interface**

**BP013 Aggregation Rules**





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**Table of contents**

1 Use Cases 4

1.1 ARL001 View Aggregation Rules Library 4

1.2 ARL002 Create Aggregation Rule 7

1.3 ARL003 Filter Aggregation Rules 9

1.4 ARL004 Delete Aggregation Rule 10

1.5 ARL005 Copy Aggregation Rule 11

1.6 ARL006 Rename Aggregation Rule 12

1.7 ARL007 Modify Aggregation Rule 13

1.8 ARL008 Validate Aggregation Rule 15

1.9 ARL009 Reject Aggregation Rule 16

1.10 ARL010 Download Validation Report of an Aggregation Rule 17

1.11 ARL012 Download Parameters file of an Aggregation Rule 18

1.12 ARL018 Download Aggregation Rule Events table 18

1.13 ARL019 Create Aggregation Rules through Bulk Upload 19

1.14 ARL020 Modify Aggregation Rules through Bulk Upload 22

1.15 ARL021 Download Results of the Bulk Upload Process 26

2 Appendices 27

I Parameter File 27

II Bulk Upload 29

# Use Cases

## ARL001 View Aggregation Rules Library

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The aggregation rules stored in the library are displayed. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the aggregation rule library dashboard. |

Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-068 The system shall display the aggregation rules summary table in the library dashboard.** | | | |
| The system shall display the following information:  - Name: name of the aggregation rule;  - Calibration Date: calibration date of the displayed version of the aggregation rule;  - Base Date: base date of the displayed version of the aggregation rule;  - Status: status of the displayed version of the aggregation rule;  - Version: version of the aggregation rule;  - Description: description of the displayed version of the aggregation rule;  - Geographical Rights: user group that owns the aggregation rule;  - Last modified local date: timestamp of the last event performed on the aggregation rule (excluding locking events);  - Last modified system date: this column is by default hidden.  - Archive status: archive status of the aggregation rule.  The field ‘Archive status’ is left blank if there is at least one tag assigned to the selected version of the aggregation rule which has the ‘Archive status’ blank.  The Archive status is populated with the following statuses:  - ‘Archive requested’ if all the tags assigned to the selected version of the aggregation rule have the ‘Archive?’ flag set to ‘Yes’ and the archive status set to ‘Archive requested’.  - ‘Restore requested’ if there is at least one tag of the selected version of the aggregation rule that has the ‘Archive?’ flag changed from ‘Yes’ to ‘No’ and the ‘Archive status’ is ‘Restore requested’.  By default, the components are displayed in black.  For the user that has the version of the assumption set locked/marked as being modified the system shall display the component in italics.  For the other users the system shall display the components in grey when locked and with a star in front of the name when marked as being modified.  By default, the aggregation rule summary table is populated with the latest version of the aggregation rules that the user is allowed to access and matches the filters selected by the user.  Each row in the aggregation rule summary table should be expandable and show the previous versions of the aggregation rule (Filter applies to the previous versions as well, so the system will show only those versions that match the filters.)  If an aggregation rule has been automatically shared (shared by version) as assigned to a validated entity set nested in an assumption set, the users belonging to the shared geographies will only have access to the specific validated version of the aggregation rule which is assigned to the nested version of the entity set. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.3.0.0 |
| From | : | lbaldacci |
| **RQ-069 The system shall display the events table in a tab of the details table in the library dashboard.** | | | |
| The system shall display the following information:  - Type: contains type of action that was performed for the aggregation rule  - Version: shows the version of the aggregation rule after the action has been performed.  - User: userid of user who performed action  - Local Date: date and time on which the action was performed in the local time zone of the user.  - System Date.  The system shall show the list of events that have been performed on the aggregation rules from version 1.0 to the selected version.  The system shall show the following events:  - Created (also if it has been created by copying another aggregation rule);  - Renamed;  - Modified;  - Validated;  - Rejected;  - Locked/Marked as being modified (marked for editing is recorded as system comment for the “locked” event);  - Shared;  Each line of the table is expandable, if expanded will show the comments entered when the action has been performed. The system shall display user and system comments. User comments are the comments entered by the user when the action was performed (when available). System comments add more details to the type of action.  This table by default is empty, the system shall populate it when an aggregation rule in the aggregation rule summary table is selected.  The column System Date is by default hidden. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2.8.1 |
| From | : | lbaldacci |
| **RQ-070 The system shall display the AR code base code of the aggregation rule in the library dashboard.** | | | |
| The system shall show the code from the selected AR code base for the selected Aggregation rule version (which has RAFM project and code base associated with it). By default, this table is empty. The system shall populate it when an aggregation rule in the aggregation rule summary table is selected. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |
| **RQ-071 The system shall display the properties summary table in the library dashboard.** | | | |
| This table shows all the properties associated to the aggregation rule selected in the aggregation rule summary table:  - Name;  - Version;  - Parameters file name;  - Last modified Local date: timestamp of `the last event performed on the selected aggregation rule (excluding locking events);  - Last modified System date;  - Last modified by;  - Base date;  - Description;  - RAFM Project;  - Status;  - Code base;  - Allowed geographies: list of user groups that can access the aggregation rule (owner user group and user groups the aggregation rule has been shared with);  -Tag: if more than one, the system shall display them as comma separated.  By default, this table is empty. The system shall populate it when a version of the aggregation rule in the aggregation rule summary table is selected. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |
| **RQ-331 The system shall display the usage table in a tab of the details table in the library dashboard** | | | |
| This table shows in which assumption set the selected version of the aggregation rule has been assigned to.  For each assumption set the system shall show the following information:  - Name;  - Version;  - Type (this field is hidden by default);  - Status;  - Description.  If the selected version of the aggregation rule has been involved in a run of the displayed assumption set, the system shall populate the following fields:  - Last Run Local date;  - Last Run System date;  - Last Run Status;  - Last Triggered by.  By default, this table is empty. The system shall populate it when a version of the aggregation rule in the aggregation rule summary table is selected.  The column Last Run System date is by default hidden. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.2.0.0 |
| From | : | lbaldacci |

## ARL002 Create Aggregation Rule

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The newly created aggregation rule is stored in the system and available to further use for the allowed users. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1.The system displays the aggregation rules dashboard.  2. The user selects the option “Create”.  3. The system displays a pop up window containing:  - Name: free text field  - Base date;  - Version;  - Description: free text field  - RAFM Project: 2 drop-down fields (1st for RAFM Project, 2nd for its versions) can be populated by RAFM project versions which have the status “Validated” or “in-review” (optional field);  - AR code base: drop-down field (optional field);  - Parameters file: browse feature to allow the user to navigate the local drive (optional field);  4. The user fills in the requested fields.  5. The user selects the button “Save”.  6. The system stores the aggregation rule and updates the aggregation rule summary screen. |
| **Alternate 4.1** |  |
| Alternate | If the user selects the option "Clear" next to the parameters file, the system removes the contents of the respective parameters field. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button cancel the system will stop processing. |
| **Alternate 6.1** |  |
| Alternate | The system will show an error message if the name entered is not unique and/or the name length exceeds the maximum number of characters set for the name length or if the file is not in the correct format. |
| **Alternate 6.2** |  |
| Alternate | The system will show an error message if the parameter file does not include valid values for the mandatory fields. (Refer to appendix for the validation of the mandatory fields.) |
| **Alternate 6.4** |  |
| Alternate | The system will show an error message if the header names of the vectors (tab vectors\*) and matrices (tab matrices) are not unique. |
| **Alternate 6.5** |  |
| Alternate | The system will show an error message if a Parameter file has a wrong extension (allowed file extensions are xls,xlsx,xlsm,xlsb) |

Requirements

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| --- | --- | --- | --- | --- |
| **Requirements** | | | | |
| **RQ-076 The system shall accept the aggregation parameters in Excel format** | | | | |
| The Parameter file includes mandatory and optional fields. The system shall check for mandatory parameters and the default types and values of Optional parameters. Refer to appendix for the validation of the mandatory and optional fields.  System shall also validate file extension. If the file extension is different from xls, xlsx, xlsm or xlsb the system shall generate a "Wrong file extension for file %file\_name, expected is {xls,xlsx,xlsm,xlsb}" error. | Status | | : | Implemented |
| Priority | | : | Medium |
| Phase | | : | PoC |
| From | | : | lbaldacci |
| **RQ-072 The system shall allow a user to create an aggregation rule** | | | | |
| The system shall allow the user to define:  - Name: name to be assigned to the aggregation rule. It is a mandatory field and it must be unique.  - Base date: Date picker feature. It is a mandatory field.  Version: protected field auto-populated with version 1.0.  -RAFM Project: These 2 drop-down fields are optional.   * RAFM project drop-down field shall be populated with Standard ICM RAFM project names which belongs to user’s owning user-group (Geography) or those shared with the user’s user group (Geography).   Version field shall be populated with the all versions of the selected Standard ICM RAFM project which are in status ‘Validated’ or ‘In-Review’. In case of shared RAFM Project, only version numbers (in status ‘Validated’ or ‘In-Review’) which are shared with the user’s user group (Geography) shall be populated.  - AR code base: it is an optional field as long as RAFM Project and version drop-down fields are blank. Selecting value in this field shall be mandatory if RAFM Project/Version is selected by user.  - Parameters file: File picker feature for Excel files on the local drive. It is an optional field;  - Description: free text field. It is a mandatory field; | | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | lbaldacci |
| **RQ-074 The system shall assign the version number to the aggregation rule** | | | | |
| The version number assign to a new created aggregation rule in 1.0. | Status | | : | Implemented |
| Priority | | : | Medium |
| Phase | | : | PoC |
| From | | : | lbaldacci |
| **RQ-075 The system shall assign the status to the aggregation rule** | | | | |
| The status assigned to a new created aggregation rule is “In Review”. | Status | | : | Implemented |
| Priority | | : | Medium |
| Phase | | : | PoC |
| From | | : | lbaldacci |
| **RQ-332 The system shall assign the owner user group to the aggregation rule** | | | | |
| The user group assigned to a new created aggregation rule is the user group associated with the current user login. | Status | | : | Implemented |
| Priority | | : | Medium |
| Phase | | : | 1.0 |
| From | | : | lbaldacci |
| **RQ-791 The system shall assign the default tag to the aggregation rule** | | | | |
| The default tag for a new aggregation rule is “New”. | Status | | : | Proposed |
| Priority | | : | Medium |
| Phase | | : | 5.1.0.0 |
| From | | : | smagdalina |

## ARL003 Filter Aggregation Rules

Aggregation Rule

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The library of the aggregation rules is populated with at least one aggregation rule. |
| Pre-condition | The filter is enabled |
| Post-condition | Only the versions of the aggregation rules that match the filters applied are displayed in the aggregation rules summary table. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the aggregation rule dashboard.  2. The user selects the option “filter”.  3. The system displays a popup window containing the applicable filters.  4. The user enters the requested filters.  5. The user selects the button “Save”  6. The system applies the filters to the aggregation rules in the library and displays only those that match the selected filters. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button “Clear” the selected filters are deleted, and the system shows the complete sample of aggregation rules available for the user. |
| **Alternate 5.2** |  |
| Alternate | If the user selects the button “Cancel” the use case is aborted. |

Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-077 The system shall allow the user to filter the aggregation rules entity by name.** | | | |
| The system shall allow the following filters:  - Includes: free text. The system will search for the exact string to be included in the aggregation rule name.  - Excludes: free text box. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-078 The system shall allow the user to filter the aggregation rules by status** | | | |
| The system shall allow the user to select among the list of statuses available in the system. The available statuses are “In Review”, “Validated” and “Rejected”. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-079 The system shall allow the user to filter the aggregation rule by AR Code base name** | | | |
| The system shall allow the following filters:  - Includes: free text. The system will search for the exact string to be included in the code base name.  - Excludes: free text box. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.7.0.0** |
| From | : | lbaldacci |
| **RQ-080 The system shall allow the user to filter the aggregation rule by last modification date** | | | |
| The system shall show the following:  - Start date.  - End Date. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-081 The system shall allow the user to filter the aggregation rule by last modified by** | | | |
| The system shall show the list of users grouped per user groups.  The user will be able to select a complete user group or some users within a user group. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-082 The system shall allow the user to filter the aggregation rule by parameters file name** | | | |
| The system shall allow the following filters:  - Includes: free text. The system will search for the exact string to be included in the parameters file name.  - Excludes: free text box. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-083 The system shall allow the user to filter the aggregation rules by version number** | | | |
| The system shall show allow the user to enter a version number or to select the "latest version" or to select the "most recently created version. The latest version of an aggregation rule is considered the version with the highest version number. The most recently created version is the version with the latest date created. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-084 The system shall allow the user to filter the aggregation rules by calibration date** | | | |
| The system shall show the following:  - Start date  - End Date | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-560 The system shall allow the user to filter the aggregation rules by base date** | | | |
| The system shall show the following:  - Start date  - End date | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | smagdalina |

## ARL004 Delete Aggregation Rule

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | None of the versions of the selected Aggregation Rule has been included in a run of a assumption set. |
| Pre-condition | None of the versions of the selected Aggregation Rule is locked or marked as being modified. |
| Post-condition | The selected Aggregation Rule (all its versions) is not visible to users in the library |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. Select a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “Delete”.  3. The system displays a confirmation message.  4. The user selects the button “Delete”.  5. The system removes all versions of the selected Aggregation Rule from the library and updates the Aggregation Rule summary and events table. |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |

Requirements

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| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-085 The system shall allow the user to delete an aggregation rule** | | | |
| The system shall allow the user to delete an aggregation rule if  - it has never been used in a run of an Assumption Set, whether or not it is still attached to the entity set involved in that assumption set run.  - none of its versions is locked or marked as being modified. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.3.0.0 |
| From | : | lbaldacci |

## ARL005 Copy Aggregation Rule

Aggregation Rule

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The selected version of the aggregation rule is not locked |
| Post-condition | A copy of the selected aggregation rule is created in the library |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “copy”  3. The system shows a popup window containing:  - name: text field to enter the name for the copied aggregation rule.  4. The user selects the “copy” button.  5. The system creates a copy of the selected aggregation rule and assigns to it the name entered by the user. |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |
| **Alternate 5.1** |  |
| Alternate | The system shows an error message if the name assigned to the aggregation rule is not unique and/or the name length exceeds the maximum number of characters set for the name length. |

Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-086 The system shall allow the user to copy an aggregation rule** | | | |
| The system shall allow the user to copy the selected version of the aggregation rule only if it is not locked. The system shall allow the user to enter the name for the copied aggregation rule. The name is mandatory, must be unique and the name length shall not exceed the maximum number of characters set for the name length.The system shall copy all the attributes from the selected version of the aggregation rule except the version number, the status and the geographical user rights. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | lbaldacci |
| **RQ-087 The system shall assign status “In review” to the copied aggregation rule.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-088 The system shall assign the version number to the aggregation rule** | | | |
| The version number assign to the copied aggregation rule is 1.0. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-335 The system shall assign the user group to the aggregation rule** | | | |
| The system shall assign the user group (geography) of the user copying the aggregation rule to the new aggregation rule created upon copy i.e. If user’s owning user group (geography) is ‘GHO’ and user copies aggregation rule owned by 'PCA' geography), then in this case the copy (of Aggregation rule) will be owned by user’s owning geography 'GHO' and not 'PCA'. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 1.0 |
| From | : | lbaldacci |
| **RQ-792 The system shall assign the default tag to the copied aggregation rule** | | | |
| The default tag assigned to the copied aggregation rule is “New”. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.1.0.0 |
| From | : | smagdalina |

## ARL006 Rename Aggregation Rule

Aggregation Rule

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | All of the versions of the selected aggregation rule are unlocked |
| Pre-condition | All of the versions of the selected aggregation rule are in status "In Review" |
| Post-condition | All the versions of the selected aggregation rules are renamed. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “rename”  3. The system shows a popup window containing:  - name: text field to enter the name for the aggregation rule.  4. The user selects the “rename” button.  5. The system updates the library by renaming the selected aggregation rule |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |
| **Alternate 5.1** |  |
| Alternate | The system shows an error message if the name assigned to the aggregation rule is not unique and/or the name length exceeds the maximum number of characters set for the name length. |

Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-089 The system shall allow the user to rename an aggregation rule** | | | |
| The name is mandatory and must be unique and the name length shall not exceed the maximum number of characters set for the name length. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | lbaldacci |
| **RQ-090 The system shall allow the user to rename an aggregation rule if all its versions are in status “In Review” and unlocked.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.0 |
| From | : | lbaldacci |

## ARL007 Modify Aggregation Rule

Aggregation rule

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
|  | The system shall assign the geographical user group of the user copying the aggregation rule to the new aggregation rule |
| Pre-condition | The user belongs to the user group that owns the aggregation rule or to a geography to which the aggregation rule has been manually shared with. |
| Post-condition | If the status of the aggregation rule is “In Review”, the aggregation rule is updated. If it is validated or rejected, a new version is created. |

|  |  |
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| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “modify”.  3. If the selected version of the Aggregation Rule has the status “In Review”, the version is locked for editing. If it is in status “Rejected” or “Validated”, it is marked as being edited.  4. The system shows a pop up window containing:  - Name: not modifiable;  - Base date;  - Description: free text field. The field is mandatory.  -RAFM Project and Version: 2 optional Drop-down fields.  - AR code base: it is an optional field as long as RAFM Project and Version drop-down fields are blank. Selecting value in this field shall be mandatory if RAFM Project version is selected by user.  - Parameters: browse feature to allow the user to navigate the local drive.  - Comment: free text for comments.  5. The user fills in the requested fields.  6. The user selects the “Save” button.  7. The system updates the Aggregation Rule if it has status “In Review” or creates a new version of the Aggregation Rule  8. The system updates the Aggregation Rule summary screen  9. The selected version of the Aggregation Rule is unlocked if the status is “In Review” or unmarked as being edited if the status is “Rejected” or “Validated” |
| **Alternate 2.1** |  |
| Alternate | The system will show a warning message if the selected version of the Aggregation Rule is marked as being edited. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the option "Clear" next tothe parameters file, the system removes the contents of the respective parameters field. |
| **Alternate 6.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |
| **Alternate 6.2** |  |
| Alternate | If the selected version of the aggregation rule is in status “In Review”, the system shows a warning message informing the user that if he will proceed with his action, the system will invalidate the assumption set runs that are using the selected version of the aggregation rule. |
| **Alternate 6.3** |  |
| Alternate | If the combination of calibration date, RAFM project (name/version) AR code base (name/version), parameters (in parameter file) has been chosen in an existing version of the aggregation rule, the system displays a warning message asking the user if a new version should be created. |
| **Alternate 6.4** |  |
| Alternate | The system will show an error message if the parameter file does not include valid values for the mandatory fields. (Refer to Appendix for the validation of the mandatory fields.) |
| **Alternate 6.5** |  |
| Alternate | The system will show an error message if the header names of the vectors (tab vectors\*) and matrices (tab matrices) are not unique. |

Requirements

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| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-091 The system shall allow the user to modify any version of an aggregation rule** | | | |
| The system shall allow the user to modify:  - Base date;  -RAFM Project;  - AR code base;  - Parameters: the system shall allow the user to view all the previously uploaded files for that specific aggregation rule (and select one) or to upload a new file;  - Description;  The system shall allow the user to enter a comment (not mandatory). | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |
| **RQ-092 The system shall create a new version of the aggregation rule or update the current version.** | | | |
| If the selected version of the aggregation rule is in status “In Review” the system should not update the version number.  If the selected version of the aggregation rule is validated or rejected the system shall create a new version and increase the version number according to the following rules:  - If the base date is modified and/or RAFM Project version /AR code base is changed, increment the principal digit to the next natural number.  - Any other change: increment to next point digit. Example: 1.1 -> 1.2, 1.10 -> 1.11  If the version number that should be created already exists, the system shall create use the next available number.  (Example: versions 1.0, 1.1, 1.2, 1.3, 1.4, 2.0, 2.1, 3.0 exist in the system and the user modifies version 1.1. The system will create version 1.5 or 4.0 depending of what is modified).  When a new version is created by modifying a validated aggregation rule, the system shall assign the default ‘New’ tag to the new version created. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.1.0.0 |
| From | : | lbaldacci |
| **RQ-093 The system shall assign status “In Review” to the new version of the aggregation rule** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-686 The system shall invalidate the run results of the assumption sets that use the selected version of the aggregation rule** | | | |
| The system shall change to “Invalidated” the runs triggered from the nodes that use te modified aggregation rule and the runs triggered from the direct parents and grandparents nodes.  The system shall:  -cancel the runs before processing and remove them from the queue, if the modification occurs while the run is queued and the status of the selected runs is “Queued”.  -invalidate the run only after the run is completed, if the modification occurs during the “Processing” status of the run.  -change the status from “Completed” to “Invalidated” for completed runs.  If the run to be invalidated was triggered through the ‘Batch Run’ sub-option under the Run menu item, the system shall invalidate also the associated Critical Scenario run which was triggered as part of the same batch run.  Saving with the same attributes, modifying the description or adding comments will not change the status of the runs. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.2.0.0 |
| From | : | smagdalina |

## ARL008 Validate Aggregation Rule

Aggregation Rule

Use Case

|  |  |
| --- | --- |
| Constraints | |
| Pre-condition | The selected version of the aggregation rule has the status "In Review" |
| Pre-condition | The RAFM Project associated with the aggregation rule has the status ‘Validated’. |
| Pre-condition | The selected version of the aggregation rule is unlocked. |
| Pre-condition | The logged in user is different from the “last modified by” user |
|  |  |
| Pre-condition | The selected version of the aggregation rule has RAFM Project version AR code base and parameter file selected in it.. |
| Pre-condition | The selected version of the Aggregation Rule has been submitted to an Assumption Set which has valid run results. |
| Post-condition | A selected aggregation rule is in status "Validated" |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “validate”.  3. The system displays a popup window containing:  - Comments: free text format field  - Upload file: browse feature  4. The user fills in the requested fields.  5. The user selects the “validate” button.  6. The system changes the status of the selected aggregation rule in “validated” and updates the summary table. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |

Requirements

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| --- | --- | --- | --- |
| **RQ-094 The system shall allow the user to validate an aggregation rule in status "In review"** | | | |
| The system shall change the status of the aggregation rule from “In Review” to “Validated”.  It should be noted that Aggregation Rules can also be automatically validated upon validation of the entity set under specific conditions. Refer to the Use case ESM011 ”Validate Entity Set” for more details. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |
| **RQ-095 The system shall allow the user to enter a comment and/or to upload a file.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.4.6 |
| From | : | lbaldacci |
| **RQ-337 The system shall not allow the last user who has modified the version of the aggregation rule to validate it.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 1.0 |
| From | : | lbaldacci |
| **RQ-338 The system shall not allow the user to validate a Aggregation Rule that is locked.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 1.0 |
| From | : | lbaldacci |
| **RQ-340 The system shall not allow the user to validate a version of an aggregation rule if it does not have AR code base entered in the version.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |
| **RQ-342 The system shall not allow the user to validate a version of an aggregation rule if it does not exist in an assumption set with valid run results.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.1.0.0 |
| From | : | lbaldacci |
| **RQ-2247 The system shall not allow the user to validate an Aggregation rule if the associated RAFM Project of aggregation rule has the status ‘In-Review’.** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | lbaldacci |

## ARL009 Reject Aggregation Rule

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The selected version of the aggregation rule has the status “In Review” |
| Pre-condition | The selected version of the aggregation rule is not locked |
| Post-condition | The selected version of the aggregation rule is in status "Rejected" |

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| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1.The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “Reject”.  3. The system displays a popup window containing:  - Comments: free text format field  4. The user fills in the requested fields.  5. The user selects the “Reject” button.  6. The system changes the status of the selected version of the aggregation rule in “Rejected” status and updates the summary table. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |

Requirements

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| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-096 The system shall allow the user to reject an aggregation rule in status "In Review"** | | | |
| The system shall change the status of the aggregation rule from “In Review” to “Rejected”. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | PoC |
| From | : | lbaldacci |
| **RQ-097 The system shall allow the user to enter a comment.** | | | |
| The comments are mandatory. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.0 |
| From | : | lbaldacci |
| **RQ-470 The system shall not allow the user to reject a version of an aggregation rule that is locked** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.0 |
| From | : | lbaldacci |

## ARL010 Download Validation Report of an Aggregation Rule

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The selected version of the aggregation rule has the status “Validated”. |
| Post-condition | The validation report is available for the user |

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| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “Download validation Report”.  3. The system displays a confirmation message.  4. The user select the button “Download”  5. The browser takes over. |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |

Requirements

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| **Requirements** | | | |
| **RQ-343 The system shall allow the user to download the validation report uploaded for a validated version of an aggregation rule** | | | |
| The system shall provide the user with the file in the same format it has been uploaded. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | lbaldacci |

## ARL012 Download Parameters file of an Aggregation Rule

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The selected version of the aggregation rule has a parameter file attached |
| Post-condition | The parameter file is available for the user |

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| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option “Download Parameter File”.  3. The system displays a confirmation message.  4. The user select the button “Download”  5. The browser takes over. |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “cancel” the user case is aborted. |

Requirements

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| **Requirements** | | | |
| **RQ-345 The system shall allow the user to download the parameter file uploaded for any version of an aggregation rule if it exists** | | | |
| The system shall provide the user with the file in the same format it has been uploaded. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 1.0 |
| From | : | lbaldacci |

## ARL018 Download Aggregation Rule Events table

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The event table is available for the user in the requested file format. |

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| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a version of an aggregation rule in the aggregation rule summary table.  2. The user selects the option "Download" in the event table.  3. The system displays a popup window with the available file format.  4. The user selects the file format.  5. The user selects the button "Download".  6. The browser takes over. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button "cancel" the use case is aborted. |

Requirements

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| **Requirements** | | | |
| **RQ-561 The system shall allow the user to download the event table in excel, csv or .pdf format** | | | |
| The system shall provide the user with a file that has the following tabular format:  - Type of event;  - Version;  - User;  - Local Date;  - System comments;  - User comments.  The order of the first 5 columns and the sorting should reflect the order and sorting defined on screen (if any of the columns is hidden, it should be excluded from the file).  The system shall add a header row to the file with the following information:  <Aggregation Rule> name of the aggregation rule, <V> version number of the aggregation rule. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.2 |
| From | : | smagdalina |

## ARL019 Create Aggregation Rules through Bulk Upload

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | New aggregation rules are created through the bulk upload process and available to further use for the allowed users. |
| Post-condition | The resulting log file of the bulk upload process is available for download. |

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| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the aggregation rule dashboard.  2. The user selects the option “Create” from the “Bulk Upload” drop-down list.  3. The system displays a pop up window containing the following field:  - RAFM project and Version: 2 drop-down fields populating all RAFM project versions in status In-Review and “Validated”. It is an optional field.  - Upload .csv file: browse feature to allow the user to navigate the local drive. It is a mandatory field.  - Upload .zip file: browse feature to allow the user to navigate the local drive. It is an optional field.  4. The user fills in the required field.  5. The user selects the button "Upload".  6. The system processes the uploaded file, creates the aggregation rules and updates the aggregation rule summary screen. |
| **Alternate 3.1** |  |
| Alternate | If a RAFM project and its version is selected, then:   * AR code base name must be present for the aggregation rules (available in csv file).   and   * AR code base name entered in csv file should also exist in selected RAFM Project version.   otherwise line (with non-existing/incorrect code base) in the file will be excluded. |
| **Alternate 3.2** |  |
| Alternate | To create an AR without a RAFM project assigned, user should not select the project or version, in the csv file and set the AR codebase name as ‘none’. |
| **Alternate 5.1** |  |
| Alternate | The system will show an error message if the files to be uploaded are not in .csv format (1st file) and .zip format (2nd file). |
| **Alternate 5.2** |  |
| Alternate | If the user selects the button “Cancel” the use case is aborted. |
| **Alternate 5.3** |  |
| Alternate | The system will show an error message if the header of the uploaded .csv file does not contain all the attributes. |
| **Alternate 5.4** |  |
| Alternate | The system will show an error message if the uploaded .csv file does not contain at least one line of data information. |

Requirements

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| **Requirements** | | | |
| **RQ-710 The system shall allow a user to create aggregation rules through bulk upload process** | | | |
| The system shall allow the user to upload a .csv file containing fields with the following headers:  - Name: free text field, must be unique. The length name should not exceed 15 characters and should not include special characters.  - Base Date: format of the date is: DD/MM/YYYY.  - Description: free text field. Max 200 characters are allowed.  - ‘Submodel’ or ‘Code base’: Name of the AR code base or “None” when no RAFM Project version is entered for the Aggregation Rules.  *(User can either enter ‘Submodel’ or ‘Code base’ as the column header name for this column.Both the header names shall be accepted by system)*  -Parameters file: full path within the zipped directory where the general parameter file is located or “None” in case no parameters file should be attached to the aggregation rule.  File name is free format.  The target performance is that the creation of a single aggregation rule should not take more than 10 seconds. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.7.0.0** |
| From | : | smagdalina |
| **RQ-711 The system shall perform the following checks/ validations against the uploaded .csv file** | | | |
| The system shall perform the following checks and validations:  -Check that the header of the .csv file contains all the attributes. (Refer to Appendix-Bulk upload section for the format of the file.)  -Check that the .csv file contains data: at least one line of data is available.  -Check that each row in the .csv file contains a valid value and the data of each attribute is in the correct type. (Refer to Appendix - Bulk Upload section for the format of the values)  -Check that the parameters file is in excel format.  - If the AR code base is provided, check AR code base name should be from the AR code bases of the RAFM Project selected (on the Create Bulk Aggregation Rules dialog).  -Check all the mandatory fields of the parameters file provided include valid values.  (Refer to appendix for the validation of the mandatory fields of the general parameter file.)  -Check that the headers names of the vectors (tab vectors\*) and matrices (tab matrices) in the parameters file should be unique. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | smagdalina |
| **RQ-712 The system shall not abort the bulk upload process if any errors are detected during the creation of the aggregation rules** | | | |
| In case an error is raised during the creation of the aggregation rules, the system shall register the errors in the log file.  The log file will include all sets of data provided for the creation of an aggregation rule and the resulting status of the create action though the bulk upload process: possible values: “Created” or “Failed”. In case of a “Failed” record the system will provide the description of the failure. The first error encountered is logged.  When the bulk upload process is finished the log file will be available to be downloaded. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-713 The system shall assign the version number to the new aggregation rule** | | | |
| The version number assigned to a newly created aggregation rule is 1.0 | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-714 The system shall assign the status to the aggregation rule** | | | |
| The status assigned by the system to a new created aggregation rule is "In Review". | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-715 The system shall assign the owner user group to the aggregation rule** | | | |
| The owner user group is the user group of the user that uploads the files for the creation of the aggregation rules. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.1 |
| From | : | smagdalina |
| **RQ-717 The system shall record the create action through bulk upload in the events table** | | | |
| This information will appear in the events table and the system shall record that the creation was done via bulk upload (as system comments). | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-728 The system shall allow the user to upload the support files (parameters files) in a .zip format** | | | |
| The system shall allow the user to upload a parameters file in zip format; | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.1.0.0** |
| From | : | smagdalina |
| **RQ-793 The system shall assign the default tag to the aggregation rule** | | | |
| The default tag for a new aggregation rule is “New”. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.1.0.0 |
| From | : | smagdalina |

## ARL020 Modify Aggregation Rules through Bulk Upload

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The most recent version of aggregation rules is updated (if in status “In Review”) or a new version of the most recent version of aggregation rules is created (for Validated or Rejected versions). |
| Post-condition | The resulting log file of the bulk upload process is available for download. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the aggregation rule dashboard.  2. The user selects the option “Modify” from the “Bulk Upload” drop-down list.  3. The system displays a pop up window containing the following fields:  -Update if “In Review”.  - RAFM Project and Version; 2 dropdown fields populating all RAFM project and versions in status “In-Review” and “Validated”. It is an optional field;  - Upload .csv file: browse feature to allow the user to navigate the local drive. It is a mandatory field.  - Upload .zip file: browse feature to allow the user to navigate the local drive. It is an optional field.  4. The user sets to “Yes” the field ‘Update if “In Review” ’  5. The user uploads the files.  6. The user selects the button "Upload".  7. The system processes the uploaded file.  8. The system locks for editing the most recent versions of the aggregation rules that have the status “In Review”. All the validated or rejected recent versions, are marked as being edited.  9. The system will update the aggregation rules if they have the status “In Review” or will create a new version of the aggregation rules in case of validated and rejected versions.  10. The system will update the aggregation rule summary screen.  11. The versions of the aggregation rules are unlocked (if in status “In Review”) or validated/ rejected versions are unmarked as being edited. |
| **Alternate 3.1** |  |
| Alternate | If a RAFM project and its version is selected, Submodel (AR code base name) in CSV file must be present and code base (AR code base name) should also exists in selected RAFM Project, otherwise wrong records will not be processed. |
| **Alternate 3.2** |  |
| Alternate | If a RAFM project and its version is not selected, Submodel (AR code base name) in CSV file must be set as “None” otherwise wrong records will not be processed. |
| **Alternate 4.1** |  |
| Alternate | If the user sets to “No” the “Update if in Review” field, the system shall not update the most recent version of the aggregation rules that have the status “In Review”. |
| **Alternate 6.1** |  |
| Alternate | The system will show an error message if the files to be uploaded are not in .csv format (1st file) and .zip format (2nd file). |
| **Alternate 6.2** |  |
| Alternate | If the user selects the button “Cancel” the use case is aborted. |
| **Alternate 6.3** |  |
| Alternate | The system will show an error message if the header of the uploaded .csv file does not contain all the attributes. |
| **Alternate 6.4** |  |
| Alternate | The system will show an error message if the uploaded .csv file does not contain at least one line of data information. |
| **Alternate 6.5** |  |
| Alternate | If the user selects the option “Update if In Review” and the version of the aggregation rules to be updated are in status “In Review”, the system shows a warning message informing the user that if he will proceed with his action, the system will invalidate the assumption set runs that are using the selected version of the aggregation rule. |

Requirements

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| **RQ-718 The system shall allow a user to modify aggregation rules through bulk upload process** | | | |
| The system shall allow the user to upload a .csv file containing fields with the following headers:  - Name: name of the aggregation rule. Not modifiable.  - Base Date: format of the date is: DD/MM/YYYY.  - Description: free text field. Max 200 characters are allowed.  - Submode: Name of the AR code base or “None” when no RAFM Project version /AR code base is selected/entered for Aggregation Rules.  -Parameters file: location on the shared file system where the parameters file is located or “None” if no parameters file should be attached to the aggregation rule.  The value assigned in case no modification of a selected field is required is “N/A”.  File name is free format.  The target performance is that the modification of an aggregation rule should not take more than 10 seconds. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.7.0.0** |
| From | : | smagdalina |
| **RQ-719 The system shall perform the following checks/ validations against the uploaded .csv file** | | | |
| The system shall perform the following checks and validations:  -Check that the header of the .csv file contains all the attributes. (Refer to Appendix-Bulk upload section for the format of the file.)  -Check that the .csv file contains data: at least one line of data is available.  -Check that each row in the .csv file contains a valid value and the data of each attribute is in the correct type. (Refer to Appendix - Bulk Upload section for the format of the values)  -Check that the version of the aggregation rule to be updated belongs to the owner user group of the user that uploads the .csv file.  - If a new AR code base is provided, re-check, if AR code base name is from the AR code bases of the RAFM Project selected on Modify Bulk Aggregation Rules dialog.  -If a new parameters file is provided, re-check that all the mandatory fields of the file provided include valid values.  (Refer to appendix for the validation of the mandatory fields of the parameters file.)  -If a new parameters file is provided, re-check that the headers names of the vectors (tab vectors\*) and matrices (tab matrices) file should be unique. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.7.0.0** |
| From | : | smagdalina |
| **RQ-720 The system shall not abort the bulk upload process if any errors are detected during the modification of the aggregation rules** | | | |
| Incase an error is raised during the modification of the aggregation rules; the system shall register the errors in the log file.  The log file will include all set of data provided for the modification of an aggregation rule and the resulting status of the modification action though bulk upload process: possible values: “Updated” or “Failed”. In case of a “Failed” record the system will provide the description of the failure. The first error encountered is logged.  When the bulk upload process is finished the log file will be available to be downloaded.  If the version of the aggregation rule is “In Review” and it is locked, the system shall not update it and report it the log file.  If the user selects not to update the most recent versions of the aggregation rules that are in “In Review”, the system shall not update them and report it in the log file.  If the aggregation rule does not belong to the owner user group of the user that uploads the .csv file, the system shall not update the selected version and report it in the log file. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.2 |
| From | : | smagdalina |
| **RQ-721 The system shall create a new version of the aggregation rule if the modified version is validated or rejected** | | | |
| If the selected version of the aggregation rule is in status “In Review” the system should not update the version number.  If the selected version of the aggregation rule is validated or rejected the system creates a new version and increase the version number according to the following rules:  - If the base date is modified and/or RAFM Project version /AR code base is changed, increment the principal digit to the next natural number.- Any other change: increment to next point digit. Example: 1.1 -> 1.2, 1.10 -> 1.11  If the version number that should be created already exists, the system shall create use the next available number.  (Example: versions 1.0, 1.1, 1.2, 1.3, 1.4, 2.0, 2.1, 3.0 exist in the system and the user modifies version 1.1. The system will create version 1.5 or 4.0 depending of what is modified).  When a new version is created by modifying a validated aggregation rule, the system shall assign the default ‘New’ tag to the new version created. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.7.0.0** |
| From | : | smagdalina |
| **RQ-722 The system shall assign the status "In Review" to the new version of the aggregation rule** | | | |
|  | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-724 The system shall record the modify action through bulk upload in the events table** | | | |
| This information will appear in the events table and the system shall record that the modification was done via bulk upload (as system comments). | Status | : | Proposed |
| Priority | : | Medium |
| Phase | : | 3.8.2.0 |
| From | : | smagdalina |
| **RQ-729 The system shall allow the user to upload the support files (parameters files) in a zip format** | | | |
| The system shall allow the user to upload zipped parameters files. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | **6.1.0.0** |
| From | : | smagdalina |
| **RQ-731 The system should invalidate the run results of the assumption sets that use the modified version of the aggregation rule** | | | |
| If the user selects the option “Update if In Review” and the “In Review” versions of the aggregation rule to be updated are used in assumption set runs, the system will display a warning message informing the user that if he will proceed with his action, the system will invalidate the assumption set runs.  The warning message will display the complete list of runs that will be invalidated for all the aggregation rules included in the instruction file.  The system shall change to “Invalidated” the runs triggered from the nodes that use the modified “In Review” aggregation rule(s) and the runs triggered from the direct parents and grandparents nodes.  The system shall:  -cancel the runs before processing and remove them from the queue, if the modification occurs while the run is queued and the status of the selected runs is “Queued”.  -invalidate the run only after the run is completed, if the modification occurs during the “Processing” status of the run.  -change the status from “Completed” to “Invalidated” for completed runs.  The system shall record in the log file the runID of the assumption sets that have been affected by the modification.  If a selected version of an aggregation rule is modified with the same attributes or the description is modified, the system shall not invalidate the runs of the assumption sets that use the modified version of the aggregation rule.  The requirement is applicable if the user enables the “Update if ‘In Review’” option. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 5.1.0.0 |
| From | : | smagdalina |

## ARL021 Download Results of the Bulk Upload Process

Aggregation Rules

Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | The bulk upload process is finished. |
| Post-condition | The resulting log file of the bulk upload process is available for the user in Excel format. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the aggregation rule dashboard.  2. The user selects the option “Download results” from the “Bulk Upload” drop-down list.  3. The system displays a popup window listing the available log files available.  4. The user selects one log file.  5. The user selects the button "Download".  6. The browser takes over. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button "Cancel" the use case is aborted. |

Requirements

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| --- | --- | --- | --- |
| **Requirements** | | | |
| **RQ-725 The system shall allow the user to download the result log file of the bulk upload process (both for creation and modification of aggreagation rules)**. | | | |
| The system shall display the list of the log files available.  The system shall provide the user with a file that has the following tabular format:  - Name;  - Base Date;  - Description;  - Code base;  -Parameters file;  All the above fields contain values as entered by the user in the .csv file.  -Version: version number of the newly created/updated aggregation rule. In case of Bulk creation, it will be always 1.0; the field is blank if the result status is “Failed”.  o- Result Status: possible values: “Created” / “Updated” or “Failed”.  - Error Description: In case of a “Failed” record the system will provide the description of the failure. The first error encountered is logged.  - Warnings: assumption set runIDs that were invalidated/cancelled due to the modification of the aggregation rule versions with status “In Review”.  The system shall use the following naming convention for the name of the log file:  <type of action>\_<BU that requested the Bulk upload>\_<Geography that requested the Bulk upload>\_<date/timestamp of when the file was uploaded>.xls , where:  <type of action> refers to the type of action performed upon the bulk upload; values accepted: “Create” or “Modify”. | Status | : | Implemented |
| Priority | : | Medium |
| Phase | : | 6.7.0.0 |
| From | : | smagdalina |

# Appendices

1. Parameter File
2. Standard Inputs Sheet

1.1.1.1 *Validation of mandatory / optional fields*

The Standard Input Sheet, within the Parameter file contains values that are mandatory or optional values.

When the Parameter file is uploaded, the system shall check the Standard Input sheet and throw an error if the mandatory fields do not have any value assigned (when specified, the format should be checked as well). Below the list of fields present in the Standard Input sheet grouped by name range:

**Basic Information**

|  |  |  |
| --- | --- | --- |
| **Header** | **Named Range** | **Aggregation Rules – Mapping Rule** |
| **Currency** | Currency | Mandatory: the system will show an error message if the value associated is not present. |
| **CalibDate** | CalibDate | Mandatory: the system will show an error message if the value associated is not present. |
| **CalibYear** | CalibYear | Mandatory  Format: YYYY  The system will show an error message if the value associated is not present. |
| **CalibMonth** | CalibMonth | Mandatory  Format: MM  The system will show an error message if the value associated is not present. |
| **CalibDay** | CalibDay | Mandatory  Format: DD  The system will show an error message if the value associated is not present. |
| **BSRequired** | BSRequired | Mandatory: the system will show an error message if the value associated is not present. |
| **RFFund** | RFFund | Mandatory: the system will show an error message if the value associated is not present. |
| **DAconsolid** | DAconsolid | Optional: if blank assume 0. |
| **FundType** | FundType | Mandatory: the system will show an error message if the value associated is not present. |
| **Ownership** | Ownership | Mandatory: the system will show an error message if the value associated is not present. |
|  |  |  |
| **Int\_reins\_ID** | Int\_reins\_ID | Optional: if blank assume 0. |
| **IM\_Conc\_risk\_P1** | IM\_Conc\_risk | Optional: if blank assume 0. |
| **IM\_Conc\_risk\_P2** | IM\_Conc\_risk | Optional: if blank assume 0. |

**Deferred Tax Inputs**

|  |  |  |
| --- | --- | --- |
| **Header** | **Named Range** | **Aggregation Rules -Mapping Rule** |
| **max\_dta\_inp** | DeferredTax | Optional: if blank assume 0. |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Risk Margin Calculation Inputs**

|  |  |  |
| --- | --- | --- |
| **Header** | **Named Range** | **Aggregation Rules – Mapping Rule** |
| **RMCalc** | RiskMarginCalc | Optional: if blank assume 2. |
| **RMAttr** | RiskMarginCalc | Mandatory: the system will show an error message if the value associated is not present. |
| **Una\_SCRPC\_L3** | RiskMarginCalc | Optional: if blank assume 1. |

**Market Risk Module – Concentration Risk**

|  |  |  |
| --- | --- | --- |
| **Header** | **Named Range** | **Aggregation Rules – Mapping Rule** |
| **SCR\_SF\_conc** | Concentration | Optional: if blank assume 0. |

**Standard Formula Inputs**

|  |  |  |
| --- | --- | --- |
| **Header** | **Named Range** | **Lite Models -Mapping Rule** |
| **LATP** | General | Optional: Assume 0 if the field is left blank.  If a value is associated, the system will show an error message if it is not one of the followings:  True, False, 0, 1 or 2.  The system shall convert the Boolean values into Integer parameters:  -True -> to 1;  -False -> to 0.  Integer parameters 0, 1 and 2 do not require any conversion. |

1. Bulk Upload

The .csv file provided for the Bulk Upload should contain a row with the following headers and underneath that the details for each Aggregation Rule. The same format of the file can be provided to create new aggregation rules and for updating existing aggregation rules

Please note:

- All fields should contain one valid value for the associated header.

-“None” is the default text required in case of optional fields. The system shall convert this value in no selection or blank field.

-“N/A” is the value assigned in case no modification of a selected field is required.(Applicable to Modify use case)

|  |  |  |
| --- | --- | --- |
| **Header Column Name** | **Value for Create Aggregation Rules** | **Value for Modify Aggregation Rules** |
| **Name** | Free text. The name should be unique among all the aggregation rules stored in the system. The name length should not exceed 15 characters and should not include special characters. | Name of the aggregation rule that should be modified.  The value entered should match the aggregation rule’s name already stored in the system.  The name cannot be updated. |
| **Base date** | Format: DD/MM/YYYY | Format: DD/MM/YYYY.  Or “N/A” |
| **Description** | Free text. Maximum characters allowed is 200.  The text should be included between quotes (“”), if any commas are included. | Free text. Maximum characters allowed is 200.  Or “N/A”  The text should be included between quotes (“”), if any commas are included. |
| **‘Submodel’ or ‘Code base’**  *(User can either enter Submodel or Code base as header of this column. Both the header names shall be accepted by system)* | Name of the AR Code base.  (AR Code base name should be from the Code base. of the selected RAFM Project on the Create Bulk Aggregation Rules dialog, or “None” if a RAFM Project is not selected) | Name of the AR Code base..  (AR Code base. name should be from the Code base of the selected RAFM Project on the Modify Bulk Aggregation Rules dialog, or “None” if a RAFM Project is not selected) |
| **Parameters file** | Full path within the zipped directory where the files are located or “None”  Path format: folder/sub-folder/file name | Full path within the zipped directory where the files are located or “None” or “N/A”  Path format: folder/sub-folder/file name |