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IBM Cúram Social Program Management

Cúram Summary View Developer Guide

Version 6.0.4

Note

Before using this information and the product it supports, read the information in Notices at the back of this guide.

Table of Contents

Chapter 1

Introduction

1.1 Overview of Summary Views

Summary views provide case workers with a simple summary of the outcome of a program eligibility decision. The views provide an overview of the main eligibility factors for which a household's eligibility is checked during the eligibility determination process for various programs. The main factors of program eligibility include

- Non Financial

- Resource

- Income

The views provide both an overview of the outcome of specific rules and rules groups, as well as providing a summary of the calculations performed within the rules. Views provide the overall household summary for each factor, as well as individual member summaries for each factor.

As the information required to be presented varies between programs and factors, this indicated a need to create a large number of custom views per program. As a result the summary view framework was created to enable a user to create and maintain the views, and configure the information to be presented for each view.

1.2 Purpose

The purpose of this document is to provide assistance to developers intending to implement summary views using Cúrams' Summary View solution. It describes how a developer can design / implement this functionality.

1.3 Prerequisites

The readers should be familiar with rules development using the Cúram Rules Engine. They should also refer to the `Cúram Rules Definition Guide`, the `Cúram Rules Codification Guide`, the `Cúram Rules Editor Guide` and the `Cúram Web Client Reference Manual`.

1.4 Audience

This document is targeted at a technical audience, both developers and architects, intending to implement summary views using Cúram's Summary View framework.

Chapter 2

Summary View Components

2.1 Summary View Components

The Summary Views provide a simplified presentation of the outcome of an eligibility decision. Summary views can be defined to show required information from the eligibility decision.

To create a new Summary View it is necessary to configure the view i.e. define the view required, then define the clusters to be presented within the view, and then define the fields to be displayed within the cluster.

The details of an eligibility decision are retrieved from the rules engine in the rules result XML: this information is stored on the Case Decision entity and its related entities. All data items used during rules execution are accessed via RDO attributes.

In order to present the Summary View information, it is necessary to include specific content in the UIM page. Further details are provided in the following chapter.

It is also necessary to define where the Summary View is to be accessed from, as well as the style sheet to be applied at the presentation layer.

The Summary View Framework supports the creation and maintenance of summary views. The Summary View Framework consists of

- Summary View Administration

- Summary View Builder

- Summary View Renderer

2.1.1 Summary View Administrator

The Summary View Administrator component enables the configuration of a summary view page. The name of the view and the content of the view, in-

cluding the clusters, the cluster headings and the fields to be displayed are defined within the administrator. All cluster names and field names are predefined within separate code tables, which are accessed within the administrator when configuring the views. Thus if the name required is not available for selection it is necessary to update the appropriate code table.

Field mappings to RDOs and data items are also defined within the Administrator. Further details are provided in the following chapter.

Screen layout is defined both within the administrator, and within the UIM.

Screen layout details for the Summary Views including defining the number of clusters, and the way the data is displayed within the cluster is defined within the Administrator. Further details are provided in the following chapter.

2.1.2 Summary View Builder

The Summary View Builder generates the content to be displayed on the summary view screen. The Builder reads the eligibility result from the rules result XML and populates the fields as defined by the mappings. The Summary View Builder creates the Summary View screen content in XML format.

2.1.3 Summary View Renderer

The Summary View Renderer uses the Cúram Renderer Framework to build the presentation layer for the summary view. The Renderer transforms the XML received from the Builder and a style sheet is applied to create the summary view screen.

2.1.4 Advantages of Summary View framework

Advantages of the Summary View framework include:

- It is a generic solution that can be used by any application/solution module in Cúram that store rules output as case decisions.

- Summary Views can be created for all case decisions regardless of its state i.e. current and superseded.

- Summary View screens are configurable.

- Summary view framework uses the Cúram Renderer framework which can be extended to support multiple rendering.

2.1.5 Limitations of Summary View Framework

Current limitations of the Summary View framework are:

- Requires that a rule is declared as a product rule set. Summary views cannot be defined for other rules. For more information on Product Rule Set, refer to the section "Product Rule Sets" in `'Cúram Adminis- tration Guide'.`

- Currently only one style sheet is supported.

- Summary Views can only display data items that have been used in the rules set after it is loaded or after the data item assignment. The data item must be used at least once.

- Does not support sub-rule sets of local context (scope). Supports rules and rule sets of global context. For more information on sub-rule sets and their contexts, refer to the section "Sub-rule sets" in the `'Cúram Rules Definition Guide'.`

Chapter 3

Defining a Summary View

3.1 Overview

There are three stages in defining a summary view.

- Configure a Summary View for a product.

- Create or update a UIM to display the summary view information.

- Provide a link to open the summary view.

The following chapter provides details of each of these stages.

3.1.1 Configure a Summary View for a product

Summary View screens are configured using the Summary View Administrator component. This component can be accessed from the navigation bar on the Product home page via the "Summary Views" tab.

Configuring a Summary View screen can be broken down into 4 steps

1. Create the Summary View. This is known as creating a Summary View Configuration.

2. Define the Summary View clusters to be presented on the Summary View. This is known as adding Summary View Groups to the Summary View Configuration.

3. Define the fields to be displayed in the clusters (summary view group).

4. Map each field to an RDO attribute.

Create Summary View Configuration

A number of views may be defined for a product to provide more detailed

information about a specific factor of eligibility. E.g. Non Financial, Financial (Income) and Resources. When creating a new Summary View configuration, it is necessary to define the name of the summary view and assign a type. The Summary View Type is defined in the code table "SummaryView-Type". This can be extended to include new summary view types.

Add Summary View Group to Summary View Configuration

Once the view is created, it is necessary to define the Summary View clusters which are to be displayed. Summary View Clusters are known as groups. Only Summary View groups where information is to be provided from the eligibility decision are defined here. Other clusters which are to be presented on the UIM are defined within the UIM, e.g. header clusters.

Summary View Groups are assigned a type to define the display requirements for the group.

The layout of the groups, i.e, the number of columns, label width is defined within the stylesheet.

There are three types of groups:

- Normal - Data is displayed in one or two columns, and the data is sourced from RDO.

- List - Data is displayed in a list style, which may have hyper links. The data is sourced from a List RDO. The hyper link links to a Linked Group.

- Linked - Display further details of a specified item in a List Group. The Linked group is linked from a List group. The data displayed in the Linked group is sourced from a specified item within a previous List group.

  Example of Linked group usage: Select the view link for a household member on a list. This initiates the Participant summary for that Household Member. All groups defined for the Participant Summary are defined as Linked groups. (as they are linked from the previous List Group).

Summary View groups are added by selecting the Add Group action from the Summary View Configuration screen.

The Group Name is defined in the code table "SummaryViewGroupName". This can be extended to include new group names.

> **Note**
>
> The Details cluster is not defined as a Summary View Group within the Summary View Configuration. As mentioned previously this is defined in the UIM.

Summary View Field Definition

It is necessary to define the fields to be displayed within each group. Fields are added by selecting the Add Field link from the Summary View Group.

Fields can be of two types:

- Normal - Normal field which can display a field value from either an RDO or a List RDO

- Linked - A field which can display a field value from either an RDO or a List RDO. The value can be hyperlinked to another summary view.

When adding fields to a Group of type "Normal" or "Linked" the field type is defaulted to normal. When adding fields to a Group of type "List", the user can select the group type.

The Field Name is defined in the code table "SummaryViewFieldName". This can be extended to include new field names.

The RDO Name is populated from a list of available RDOs for the product rule set.

Mapping the Field to an RDO attribute (data item)

Once the field is defined, it is necessary to map the data item to be displayed for that field. The data item is mapped to the field by selecting the "Save and Add Data Item" action on the Add Summary View Field. Select the data item, and select save.

> **ⓘ Note**
>
> The data item must be initialized by either the loader or by a data item assignment in the rule set, otherwise the field value will display as blank.
>
> Values stored in the data items are displayed as they are stored in the screen. E.g. All Boolean values will display as true or false, if a different display is required (pass or fail instead) it is necessary to override the value by assigning the corresponding data items manually in the rules.

3.1.2 Create/ Update UIM

A widget is provided for displaying summary views. It is not necessary to create a separate UIM for each summary view. A generic UIM could be defined using parameters to configure which summary view to display.

In order to display a summary view, it is necessary to include the following in the UIM:

- Server Interface Definition using

Class - SummaryView, Operation - viewRulesSummary.

The server interface takes the following three parameters.

1. caseDecisionID - Case Decision Id for which the summary view needs to be displayed.

2. summaryViewType - Summary View Type as defined in code table "SummaryViewType".

3. descriptionID - This is internally used by summary view to set the URL for linked summary views. This should be initialized to zero.

- A field source mapping to return the struct attribute "summaryViewData". This attribute uses the domain definition "SUMMARY_VIEW_DATA" to display the widget.

Appendix A

Summary View Entities

A.1 Introduction

This chapter details the entities created for the Cúram Summary View framework.

A.1.1 Summary View Definition

Entity Name: SummaryViewDefinition.

Description: Stores configurations for different types of summary views for a product rule set.

Attribute Name	Description	Domain Definition
summaryViewDefinitionID	Unique identifier for summary view configuration.	INTERNAL_ID
summaryViewName	Name of summary view.	SVR_STRING
productID(FK)	Unique identifier for Product ID.	PRODUCT_ID
ruleSetID	Unique identifier for Rule Set ID.	RULE_SET_ID
summaryType	Unique name given to a summary view type.	SUMMARY_VIEW_TYPE
status	Record status i.e. active or canceled.	RECORD_STATUS_CODE
comments	Comments.	COMMENTS

Table A.1 SummaryViewDefinition

A.1.2 Summary View Group Definition

Entity Name: SummaryViewGroupDefinition.

Description: Stores configurations which define Summary View Group information.

Attribute Name	Description	Domain Definition
summaryViewGroup-DefinitionID	Unique identifier for summary view group.	INTERNAL_ID
summaryViewDefini-tionID(FK)	Foreign Key of Summary View Definition.	INTERNAL_ID
groupType	Group Type i.e. Normal or List.	CODETABLE_CODE: SUMMARY_VIEW_GROUP_TYPE
groupName	Unique identifier for summary group name. Fields are grouped based on the group name.	CODETABLE_CODE: SUMMARY_VIEW_GROUP_NAME

Table A.2 SummaryViewGroupDefinition

A.1.3 Summary View Field Definition

Entity Name: SummaryViewFieldDefinition.

Description: Stores configurations which define Summary Views fields and mapping of fields and RDO attributes or data items.

Attribute Name	Description	Domain Definition
summaryViewField-DefinitionID	Unique identifier for summary view field.	INTERNAL_ID
summaryViewGroup-DefinitionID(FK)	Foreign Key of Summary View Group Definition.	INTERNAL_ID
fieldName	Unique identifier for summary field name.	CODETABLE_CODE: SUMMARY_VIEW_FIELD_NAME
rdoName	Rules Data Object name.	RULES_DATA_OBJECT_NAME
dataItemName	Rules Data Object attribute name.	DATA_ITEM_NAME
dataType	Rules Data Object at-	DATA_ITEM_TYPE

Attribute Name	Description	Domain Definition
	tribute type.	
fieldLinkText	Text for hyper link	SVR_STRING
fieldType	Type of field i.e. Normal or Linked.	CODETABLE_CODE: SummaryViewFieldType
linkedSummaryView	Summary View definition ID.	INTERNAL_ID

Table A.3 SummaryViewFieldDefinition

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