# Line Item Details Testing Guide

August 21, 2024

## Summary

The Line Item Details Panel exists on the Line Item Story to give users more detailed information about each line item presented in its main table.

Currently, the user will be able to use the 3 tabs (General, Contract, and Timing), to display different relevant information to each line item, make changes to that data, and save that data.

## Relevant Tickets

|  |  |
| --- | --- |
| Ticket Link | Related Functionality |
| [USDA 90](https://cbeyondata.atlassian.net/browse/USDA-90) | Validation/Save |
| [USDA 81](https://cbeyondata.atlassian.net/browse/USDA-81) | Validation/Save |
| [USDA 91](https://cbeyondata.atlassian.net/browse/USDA-97) | Validation/Save |
| [USDA 100](https://cbeyondata.atlassian.net/browse/USDA-100) | Validation/Save |
| [USDA 106](https://cbeyondata.atlassian.net/browse/USDA-106) | Error Presentation |
| [USDA 105](https://cbeyondata.atlassian.net/browse/USDA-105) | Error Presentation |
| [USDA 107](https://cbeyondata.atlassian.net/browse/USDA-107) | Error Presentation |
| [USDA 108](https://cbeyondata.atlassian.net/browse/USDA-108) | Error Presentation |
| [USDA 82](https://cbeyondata.atlassian.net/browse/USDA-82) | Error Presentation |
| [USDA 96](https://cbeyondata.atlassian.net/browse/USDA-96) | Error Presentation |

## Overview

The Upload Process consists of a toolbar button, three popup screens, two error messages, and one success message:

### Toolbar button

#### UPLOAD

1. Three Popups
   1. File Browser
   2. File Content Preview
   3. Invalid Rows
2. Two Error Messages
   1. File Format Issue
   2. Invalid Rows
3. Success Message
   1. Process Successful/Complete

Below will be a description of each tab as well as an overview of how the panel should function.

### Tabs

#### General Tab

The General Tab displays information directly related to the line item, and is the default selected tab for the user when the page is opened.

**Line Item Id:** Shows the id of the line item selected. Appears above every tab.

Figure 1: The General Tab

**Amount:** Shows the total budget authority.

**Budget Line:** The associated budget line.

**Fund:** The fund assoc. w/ the Budget Line

**Funds Center:** The funds center assoc. w/ the budget line

**Func. Area:** The functional area assoc. w/ the budget line

**Funded Program:** The funded program assoc. w/ the Line Item

**Commitment Item:** The Commitment Item assoc. w/ the Line Item

**Business Area BLI:** The BLI assoc. w/ the Line Item

**BOC:** The BOC assoc. w/ the Line Item

**CR Eligible:** Indicated if Line Item is CR Eligible

**Save Button:** Saves any user input changes back to the selected Line Item

#### Contract Tab

The Contract Tab displays information related to a singular connected Contract, related to the Line Item. Currently, all fields in this tab are manually entered by the user.

Graphical user interface

Description automatically generated**Req. No.:** The Requisition Number for the contract

Figure 2: The Contract Tab

**Contract ID:** The contract ID

**POP START:** The POP Start Date

**POP END:** The POP End Date

**Supplier:** The Supplier name for the contract

**Contracting Officer:** The name of the CO assoc. w/ the Contract

**Recompete:** Indicated if the Contract is marked for Recompete

**Details:** Any other details assoc. w/ the contract (notes, comment, etc)

#### Timing Tab

The Timing Tab allows users to allocate their total budget authority across the full current fiscal year (CY), and compare to the previous fiscal year allocations (PY). In the current build, we do not have data for PY.

Graphical user interface, application, table

Description automatically generated with medium confidence**Spread Method:** Selectable allocation methods

Figure 3: The Timing Tab

**Commit:** Allocates the amount to the CY COMMIT column

**Obligate:** Allocates to the CY OBLIG column

**Total Amount:** Tracks the total amount of budget

**Remaining:** tracks how much of the total amount has been allocated, and what remains

**Table:** Displays any user selected or manually input values

### Tab Functionality

Upon selecting a row from the Line Item Table, the Details Panel should load, and then populate with any information that already exists for that item, across all 3 tabs.

When the user selects a different item, the process should repeat. Once the user has made changes to Details Panel, and clicks the ‘Save’ button, **all 3 tabs** should submit at once. The page will load while it is processing the form, and then afterwards those changes should be saved to the selected item details.

## Testing Script / Guide

### Brief Functionality Overview

The following is a list of the functionalities that need to be tested by the user for this story:

1. When the user selects a row from the Line Item Table, the Details Panel should enter a loading state, and then populate with relevant information.
2. The following inputs should **NOT** allow for user input, and instead should only display information (read only):
   1. Header > Line Item Id
   2. General > Amount
   3. General > Budget Line
   4. General > Fund
   5. General > Funds Center
   6. General > Functional Area
   7. Timing > PY COMMIT column
   8. Timing > PY OBLIG column
3. All other inputs should allow the user to change their values or input their own value.
4. The Timing Table has the following input interactions:
   1. When the user selects an option from the Commit or Obligate selections, the following behavior is expected:
      1. “Manual” – The User should be able to manually enter any value into the associated “CY” column cells. (I.e if Commit is set to Manual, user will be able to input directly into the CY COMMIT column)
      2. “Spread Evenly” – The Total Amount should be spread equally across all 12 months in the associated column
      3. “[Month]” – When selecting a month, the full Total Amount should be allocated to that month, in the associated column
      4. After any input amount changes, the Remaining amount tracker should update to reflect how much of the Total Amount is left for allocation (negative values are valid and indicated by red)
5. Upon saving, any changes that the user made to the Details Panel should be persistent and remain the next time that the same row is selected.

Testing Guide / Example

To Test the above functionalities, the user should use this guide as a template:

1. Select a line item in the table. The panel should enter a loading state on selection, and load the relevant data to that item (any absence of data will cause the input in question to reset to blank)

Graphical user interface, application, table

Description automatically generated

1. Browse through each tab to determine if any tabs are not loading correctly/not reflecting the correct data
2. Make changes to any / all of the inputs in each tab
3. Submit the changes using the Save Button
4. Select a new Line Item, and repeat Steps 1-4
5. Select a previously selected Line Item, to confirm that the changes made to it were saved
6. Continue repeating Steps 1-6 until satisfied that the behavior is consistent and correct