CIS2 Documentation

User manual

Feb 28, 2020

CONTENTS

CHAPTER ONE

INTRODUCTION

This User Guide proposes to describe the way the application should be used and all the functionalities that are available within the application.

Figure 1: *Main application page*

The first page, available at https://cis2.eea.europa.eu/, is the HomePage presented in *Figure 1*. The navigation menu is available on the top of the page and it can be used to navigate to the listing pages of Products, Requirements, Data, Data Providers, to make changes to the user's account or to consult an online help page.

CHAPTER

TWO

DATABASE OBJECTS

The application holds the following main objects: Products, Requirements, Data, Data Provider. Those objects can have multiple relations between one another. Besides those objects, there are many picklists tables which hold various values to be used when defining an object.

2.1 Products

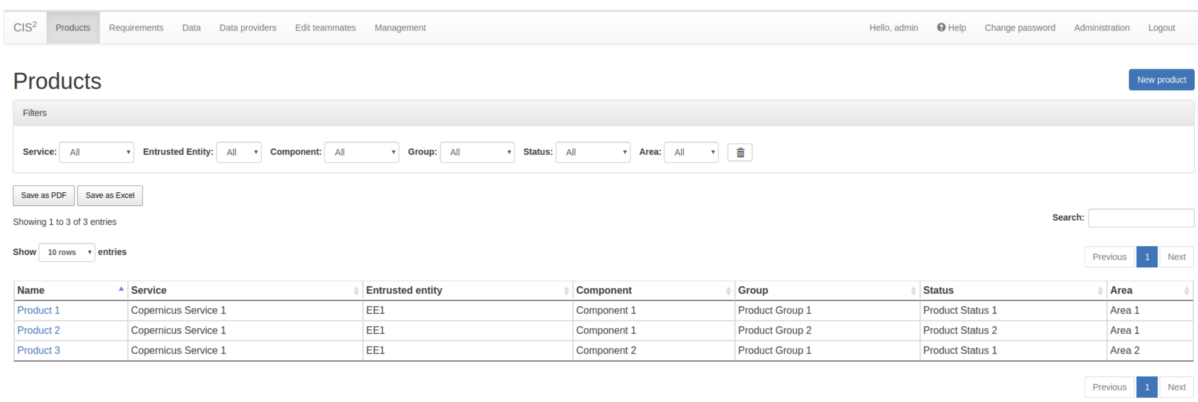


Figure 2: *Products listing page*

2.1.1 Listing products

Products listing page can be accessed from the link in the navigation bar. The listing can be filtered using the dropdown options or by searching the products by their names. The filtered table can be exported then as a PDF or Excel document.

2.1.2 Creating new products

A new product can be created by clicking the button "New product" from the listing page. The form must be completed respecting the validation constraints. A product can be added only by an **user with administration rights**.

2.1.3 Detail page of a product

A product's detail page can be accessed by clicking on the product's name in the listing table. All information concerning the product is displayed on this page. The table at the bottom of the page presents the requirements that product has a relation with. By clicking on the requirement name, the requirement detail page can be seen. This table can be filtered by searching the requirement's name. It can also be exported as either PDF or Excel document.

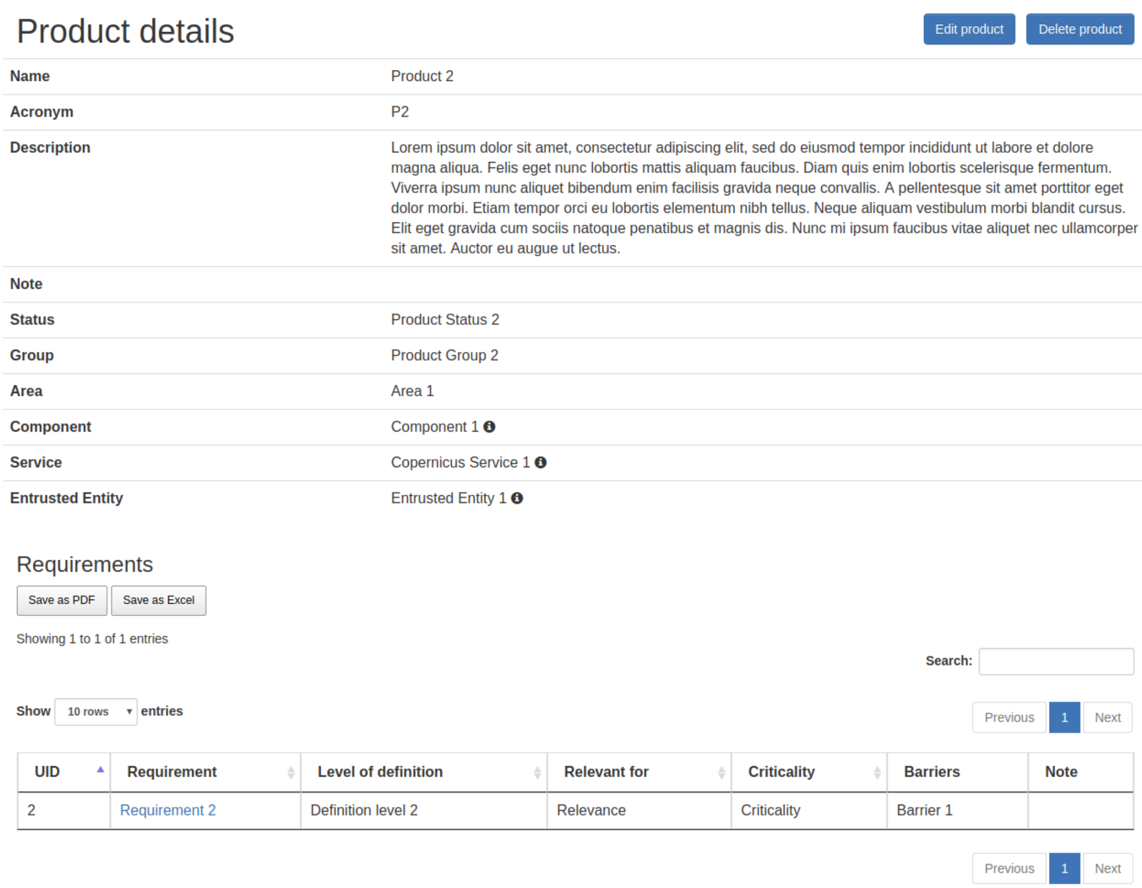


Figure 3: *A product's detail page*

2.1.4 Updating an existing product

A product can be edited by clicking on the “Edit Product” button from a product’s detail page. The form must again respect all validation constraints. A product can be updated only by an **user with administration rights**.

2.1.5 Deleting a product

A product can be deleted by clicking on the “Delete Product” button from a product’s detail page. Another button must be clicked then to accept this change. A product can be deleted only by an user with administration rights.

2.2 Requirement

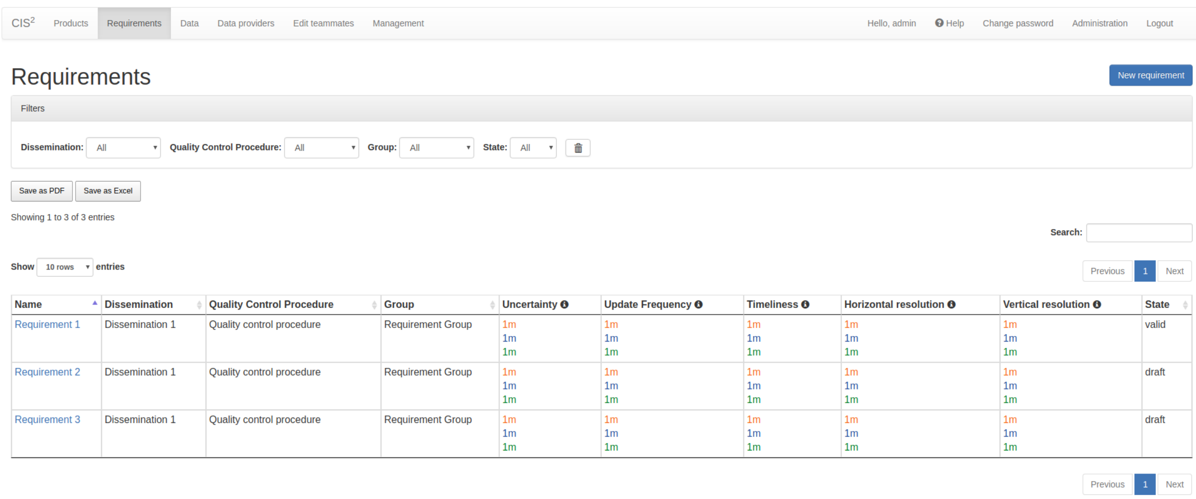


Figure 4: *Requirements listing page*

2.2.1 Listing requirements

Requirements listing page can be accessed from the link in the navigation bar. The listing can be filtered using the dropdown options or by searching the requirements by their names. The filtered table can be exported then as a PDF or Excel document. For metrics columns a legend explaining the values meaning can be accessed by hovering over the information button.

2.2.2 Creating new requirements

A new requirement can be created by clicking the button “New requirement” from the listing page. The form must be completed respecting the validation constraints. For requirement, a special validation is implemented. There must be no duplicated requirement. This means that in order to create a new requirement, it must have at least one field(except for its name) which is different from another requirement already in the database.

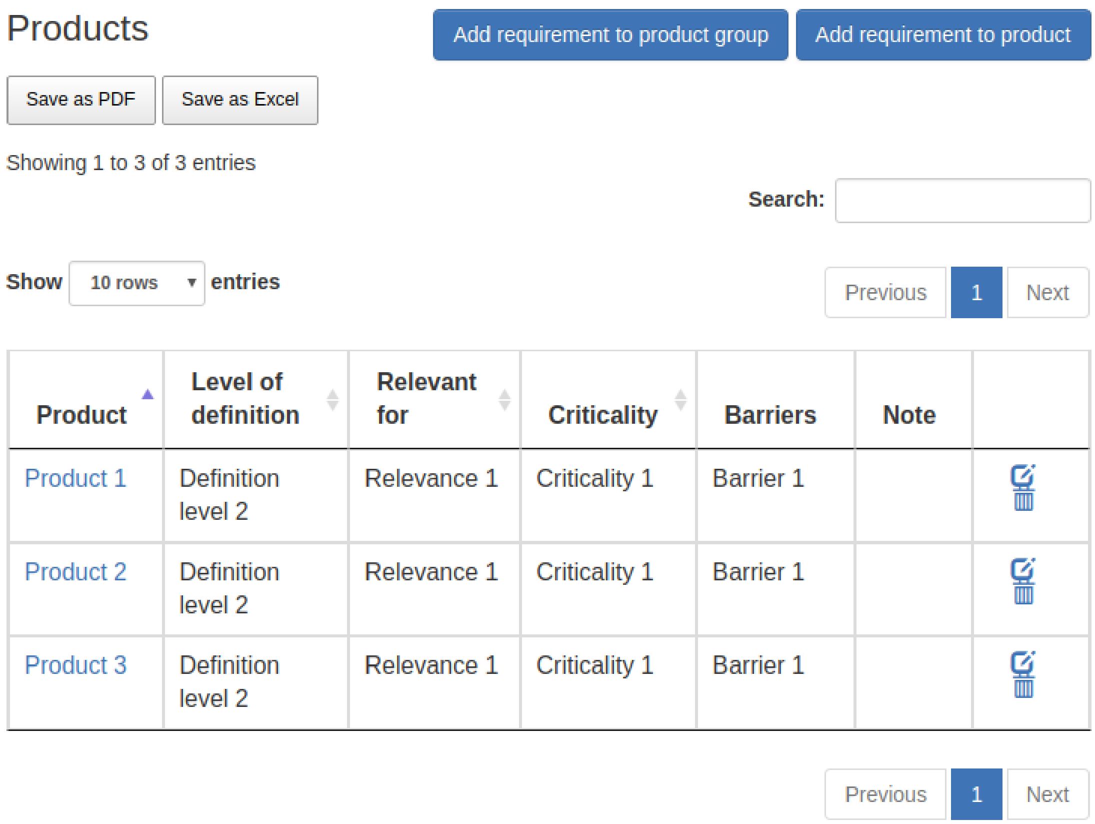
2.2.3 Cloning a requirement

The clone option can be used if a new requirement to be created is very similar to one existing already in the application. The cloning form can be accessed by going to the detail page of the similar requirement and clicking on the Clone button. The form will be completed with data from the similar requirement. However, in order to save the new requirement, at least one field must be changed (except the name field).

2.2.4 Detail page of a requirement

A requirement' s detail page can be accessed by clicking on the requirement's name in the listing table. All information concerning the requirement is displayed on this page. The metrics information is explained when hovering over the values. There are two tables at the bottom of the page. Both tables can be filtered by name and then exported as PDF or as Excel.

The first table concerns the relation with products. All products with which the requirement has a relation with are listed in this table.



Product	Level of definition	Relevant for	Criticality	Barriers	Note	
Product 1	Definition level 2	Relevance 1	Criticality 1	Barrier 1		
Product 2	Definition level 2	Relevance 1	Criticality 1	Barrier 1		
Product 3	Definition level 2	Relevance 1	Criticality 1	Barrier 1		

Figure 5: *Requirement Products relation table*

Those relations must be unique, so between Product A and Requirement B there can be only a relation. There is an exception to this rule in case the Relevance parameter is different. There are two ways to add a new relation to products. First method is to click on the "Add requirement to product" button and then complete a form in which you select the product you want to use in that relation. The second method is to click on the "Add requirement to product group" button. In the form a product group can be selected. After form submission, relations will be created between the requirement and all the products that are in that product group. A relation will be created only if a relation does not exist between that product and that requirement, following the Relevance rule presented above. The relations can also be edited or deleted using the buttons attached to each row in the table.

The second table concerns the relation with data. All data with which the requirement has a relation with is listed in this table.

Similar to the products, new relations between the requirement and data can be created. There must be a unique relation between a requirement and a data. The relation can be edited or deleted using the buttons from the table.

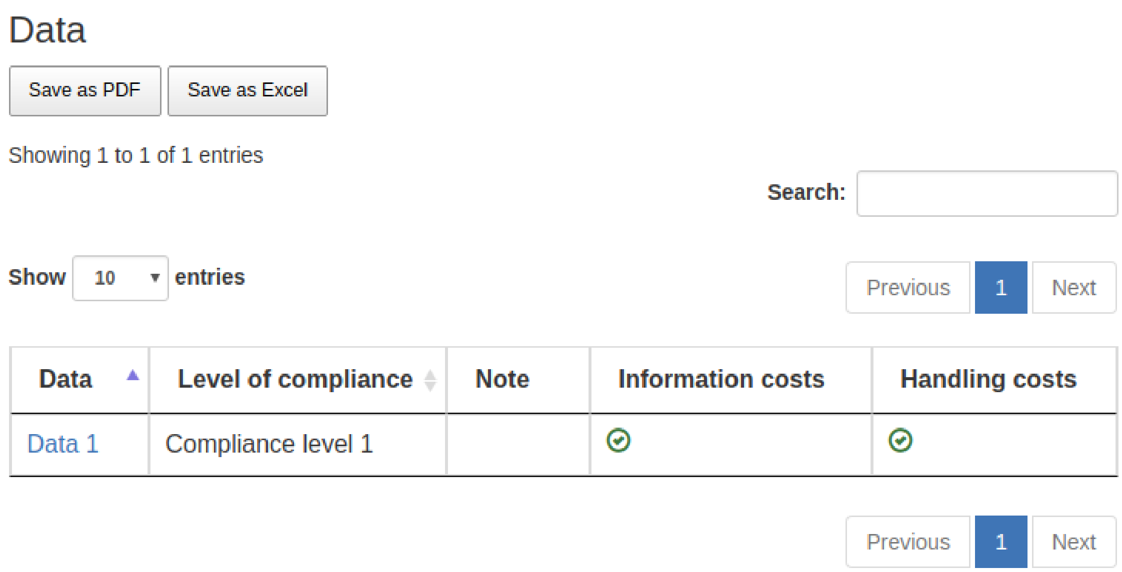


Figure 6: *Requirement Data relation table*

2.2.5 Updating an existing requirement

A requirement can be edited by clicking on the “Edit Requirement” button from a requirement’ s detail page. The form must again respect all validation constraints, including the uniqueness of the requirements discussed in the Creating new requirements section.

2.2.6 Deleting a requirement

A requirement can be deleted by clicking on the “Delete Requirement” button from a requirement’ s detail page. Another button must be clicked then to accept this change.

2.3 Data

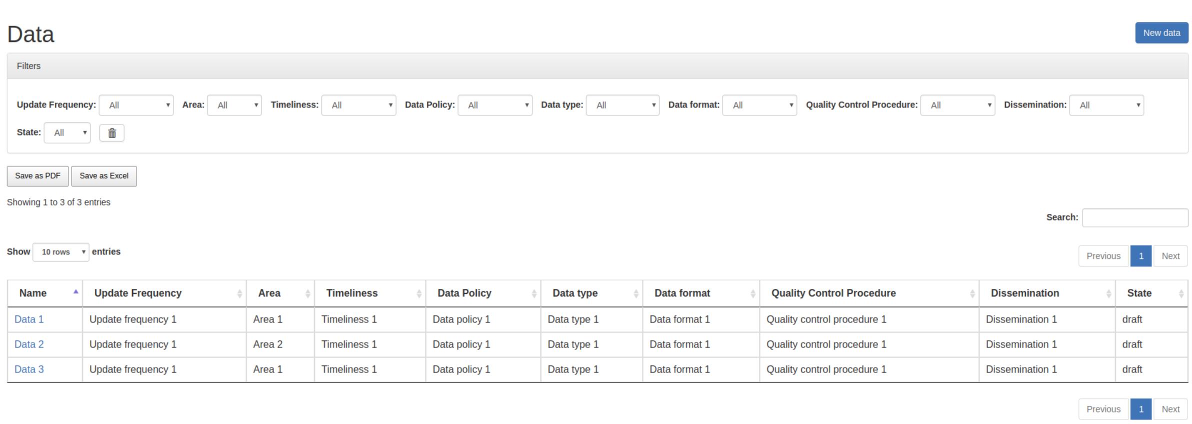


Figure 7: *Data Provider listing page*

2.3.1 Listing data

Data listing page can be accessed from the link in the navigation bar. The listing can be filtered using the dropdown options or by searching data by its name. The filtered table can be exported then as a PDF or Excel document.

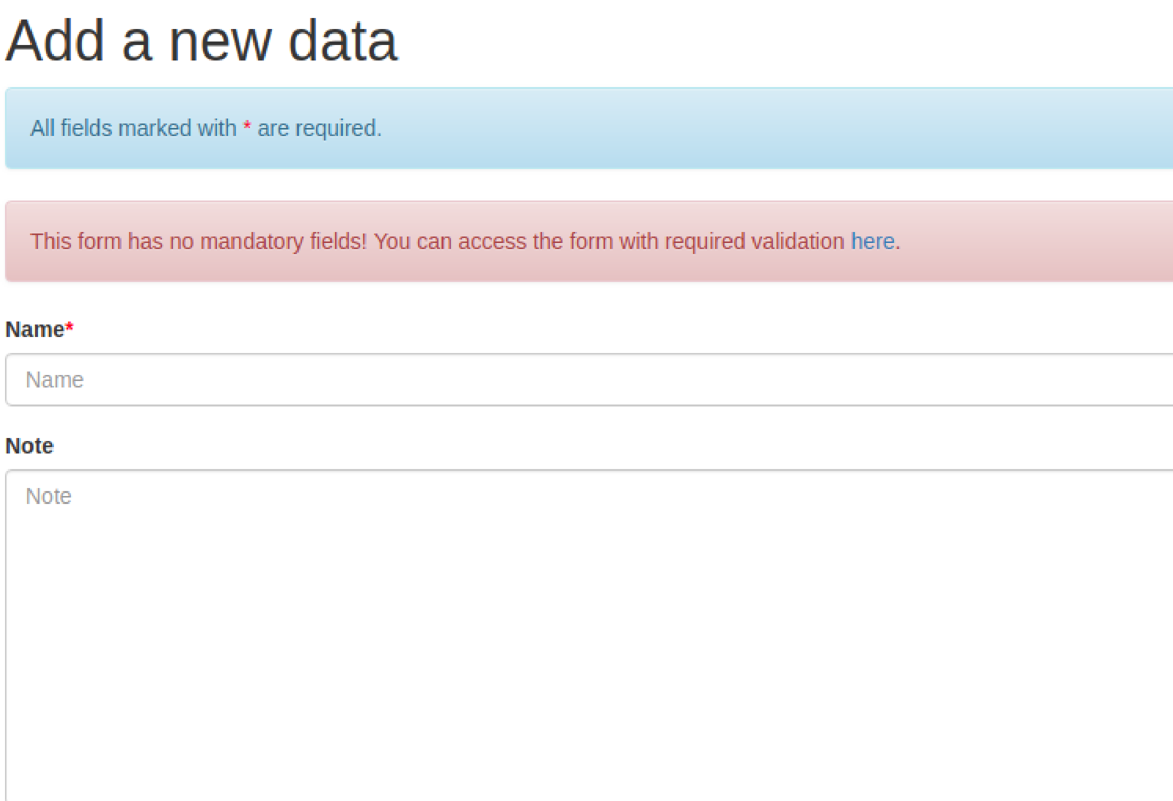


Figure 8: *Datalisting page*

2.3.2 Creating new data

A new data can be created by clicking the button "New data" from the listing page. The form which is initially accessed has no validation. This was decided in order to allow partial data to be created in the application. However, if the user is sure about the data that he wants to introduce, he should use the form provided in *Figure 8*. There is a special validation rule for this form: at least an inspire theme or an essential variable.

2.3.3 Cloning a data

The clone option can be used if the new data is very similar to one existing already in the application. The cloning form can be accessed by going to the detail page of the similar data and clicking on the Clone button. The form will be completed with data from the similar data.

Detail page of data A data' s detail page can be accessed by clicking on the data's name in the listing table. All information concerning the data is displayed on this page. If that data is just partially completed, a warning message will be displayed on the top of the page with a link to the editing page with full validation(*Figure 9*).

There are two tables at the bottom of the page. Both tables can be filtered by name and then exported as PDF or as Excel.

The first table concerns the relation with data provider. All data providers with which the data has a relation with are listed in this table. Those relations must be unique, so between Data A and DataProvider B there can be only one

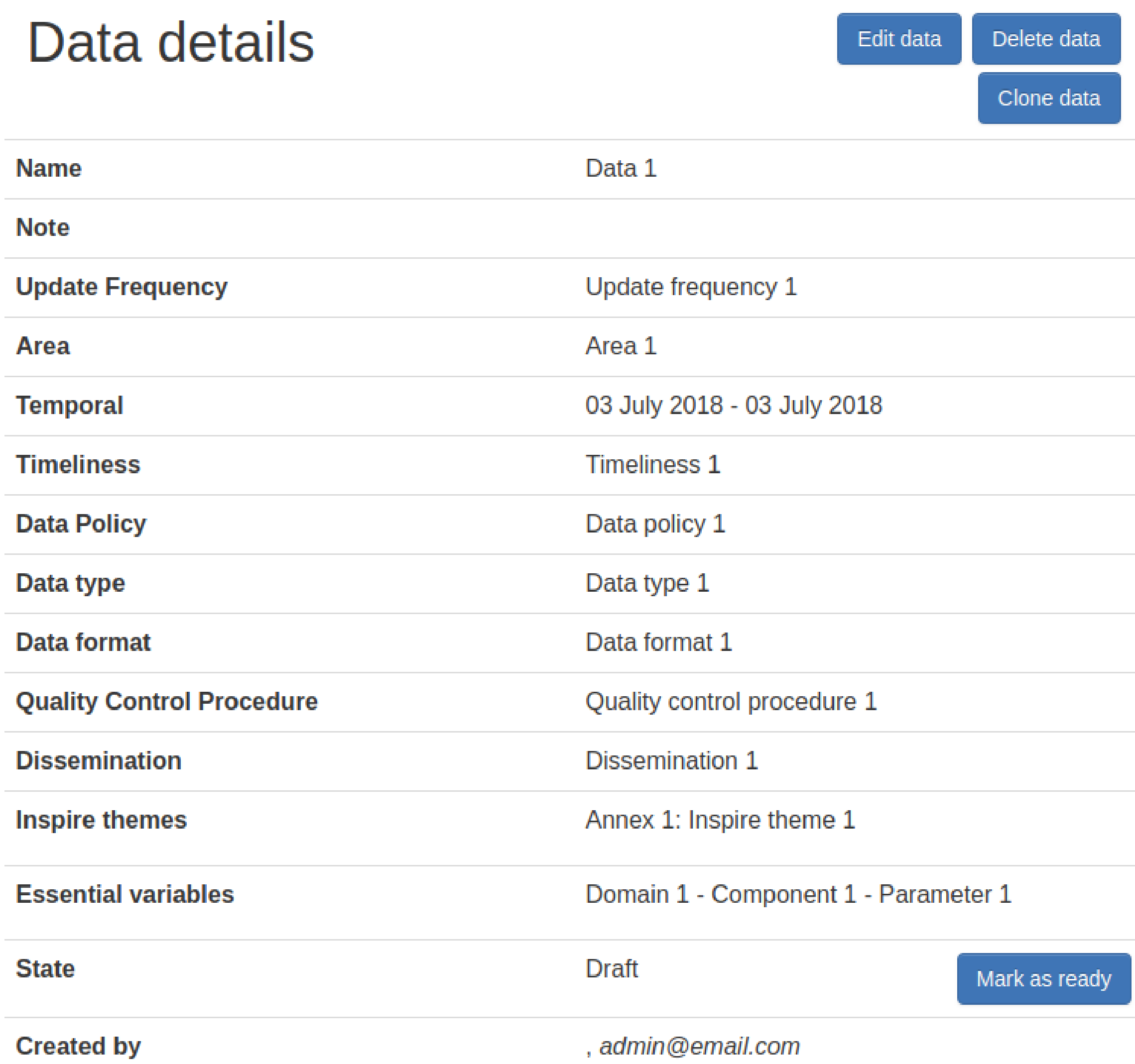


Figure 9: *Data detail page*

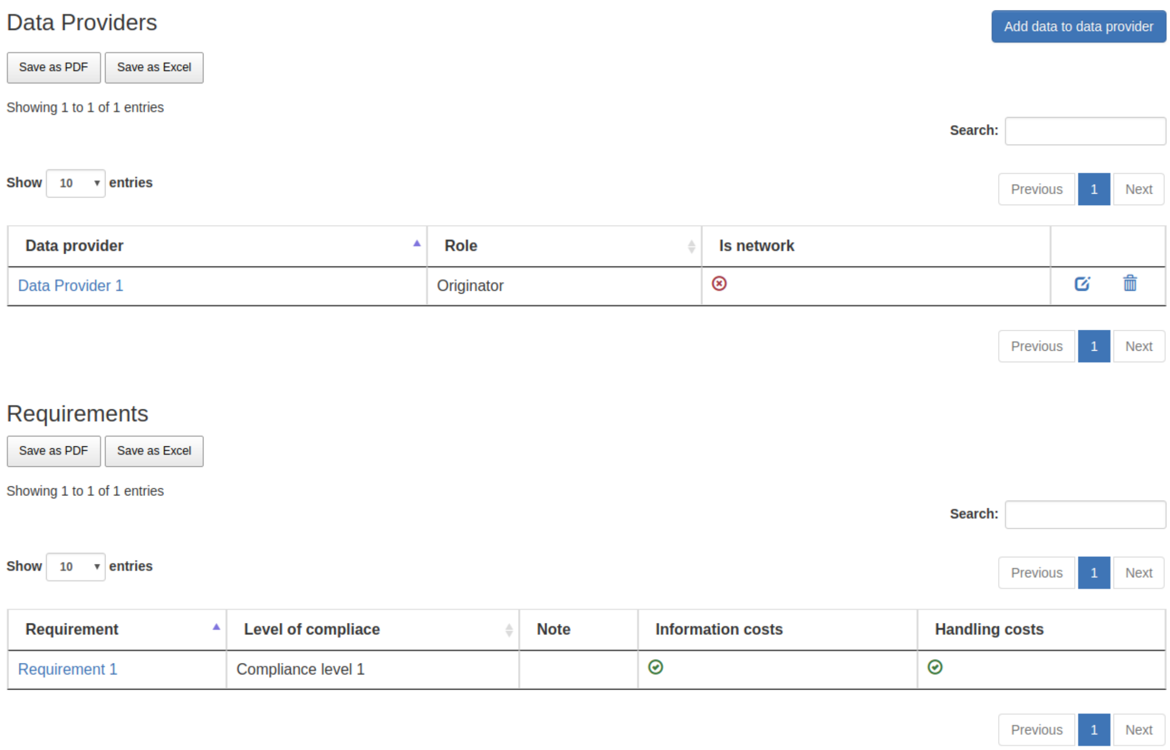


Figure 10: *Data detail page relations*

relation. By clicking on the button “Add data to data provider” and completing the form a new relation is added. The relation can be edited or deleted using the buttons from the table.

The second table concerns the relation with requirement. All requirements with which the data has a relation with is listed in this table. New relations can be created from requirement’ s page.

2.3.4 Updating an existing data

A data can be edited by clicking on the “Edit Data” button from a data’ s detail page. Similar to the creation of new data, there are two forms: one with validation and one without.

2.3.5 Deleting data

Data can be deleted by clicking on the “Delete Requirement” button from a requirement’ s detail page. Another button must be clicked then to accept this change.

2.4 Data provider

There are two types of data providers: data provider network and data provider. The data provider network can have other data providers or data provider networks as its members. This structure is defined as so to maintain a hierarchy between data providers.

2.4.1 Listing data provider

Data provider listing page can be accessed from the link in the navigation bar. The listing can be filtered using the dropdown options or by searching data by its name. The filtered table can be exported then as a PDF or Excel

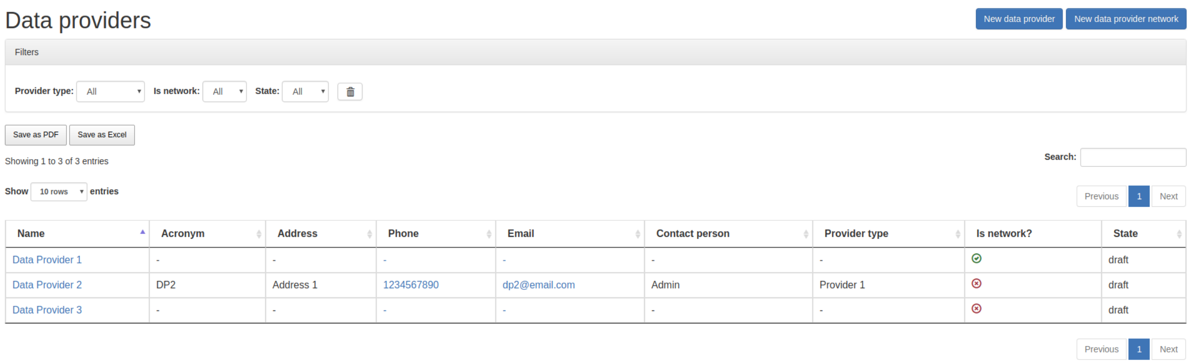


Figure 11: *Data provider listing*

document.

2.4.2 Creating a new data provider

A new data provider can be created by clicking the button "New data provider" from the listing page. A new data provider network can be created by clicking the button "New data provider network" from the listing page.

2.4.3 Detail page of data provider

A data provider's detail page can be accessed by clicking on the data provider's name in the listing table.

All information concerning the data provider is displayed on this page. There is a tables at the bottom of the page.It can be filtered by name and then exported as PDF or as Excel. **The table concerns the relation with data**. All data with which the data provider has a relation with is listed in this table.

2.4.4 Updating an existing data provider

A data provider can be edited by clicking on the "Edit Data Provider" button from a data provider' s detail page. Different forms are used for data provider/data provider network.

2.4.5 Edit network members

A data provider network can have members. Its members can be edited by clicking on the "Edit network members". A network can't be its own member.

2.4.6 Deleting data provider

A data provider can be deleted by clicking on the "Delete Data provider" button from a data provider' s detail page. Another button must be clicked then to accept this change.

CHAPTER THREE

USERS

There are multiple types of users in the application:

Administrator

The administrator can modify everything in the application, without restriction. This type of user also has access to an administrative pannel.

Picklists Editor

This user role allows a user to access a filtered version of the administrative pannel, for modifying the picklists. This user is only allowed to add/edit the picklists.

Product Editor

This user role allows a user to add or edit the products, similar to the way requirements, data and data providers are edited.

Regular Users

The user is restricted from accessing the administration section, the management section and create, update or delete any products.

The users have permission to edit or delete an object if they are the owner of it. Being the owner of an object means that the object was created by that specific user.

Read-Only User

The read-only user is a user that is included in the Read-only Group. This type of user can only view the objects and create and download reports, but they cannot add, edit or delete any information in the application.

3.1 User Teams

A user can add other users to his team. Adding a user to one's team gives that user permission to edit or delete all objects created by that user. Once a user A adds another user B to his team, the user B will also have user A in their team. A user can edit their teammates by accessing the edit teammates form from the navigation menu. Once a user sends a teammate request, the other user will receive an email containing a link. Only after the link is clicked, the two users will become teammates. (*Figure 12*)

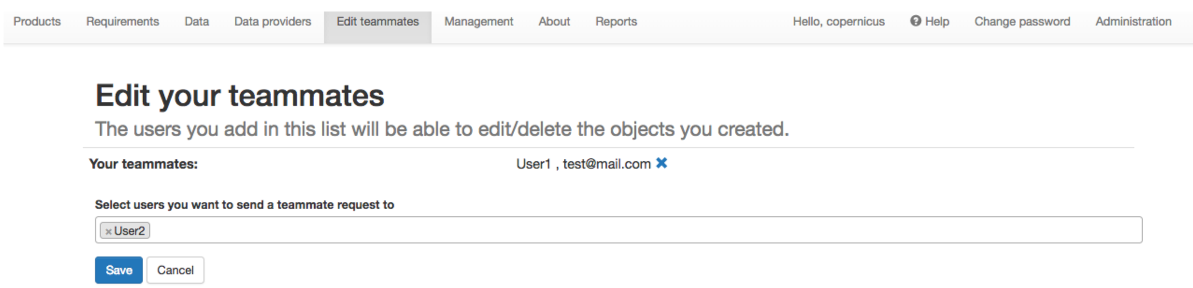


Figure 12: *Teammates editing form*

CHAPTER

FOUR

VALIDATION WORKFLOW

Requirement, Data and Data Provider are all passing through a validation workflow.

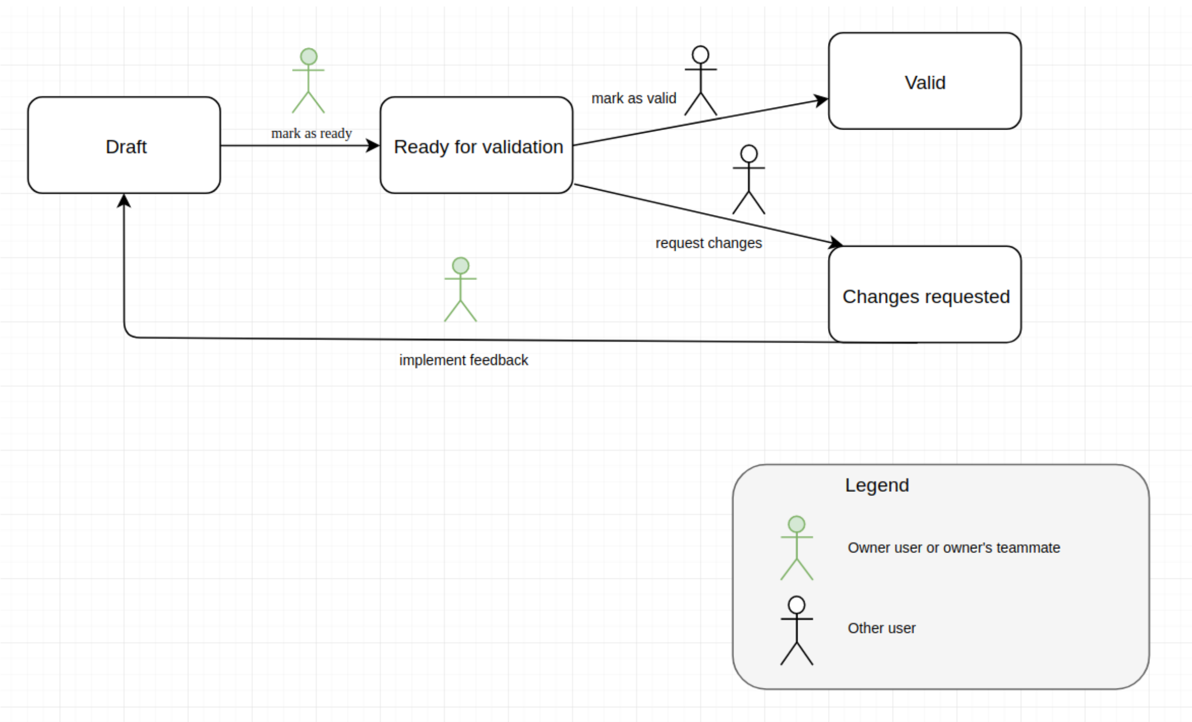


Figure 13: *Workflow for Requirement, Data, Data Provider*

4.1 States

Draft

This is the state that the object has on its creation. In this state the object and its relations are editable. The owner or one of their teammates can mark as ready the object.

Ready for validation

In this state the object and its relations cannot be edited. A user different from the owner or their teammates can either mark as valid the object and end the workflow or request changes if that user considers that there is missing information.

Changes requested

In this state the object and its relations cannot be edited. The owner or one of their teammates can get the object back to the draft state.

When an object's state is changed into "changes requested", the owner of the object receives an e-mail that their object has requests for changes and the user that made those requests.

Valid

In this state the object and its relations cannot be edited. The workflow has ended and the object cannot be modified anymore.

4.2 Requirement validation

A requirement will go through the workflow together with its relations. Its relations the links to products and the links to data. The relations will always be in the same state as the requirement.

4.3 Data validation

Data will go through the workflow together with its relations. Its relations the links to data providers. The relations will always be in the same state as the data.

4.4 Data provider validation

A requirement will go through the workflow together with its relations. Its relations the links to products and the links to data. The relations will always be in the same state as the requirement.

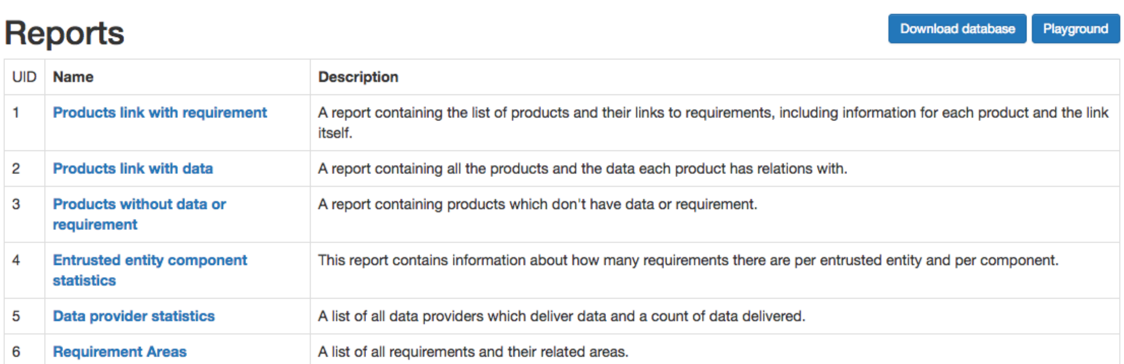
CHAPTER FIVE

REPORTS

For exporting data in various formats, reports have been added to the application. The reports are generated by database queries. Those queries are established and implemented, so for any new report a request to the developing team must be made. The reports can be accessed by clicking on the “Reports” tab from the navigation menu.

5.1 Reports list

The reports’ list can be accessed by clicking on the “Reports” tab from the navigation menu. This page consists from a list with all the reports defined in the application. Each report is defined by a name and contains a short description which describes what the report contains. An example of this page is available in *Figure 14* .



Reports

Download database | Playground

UID	Name	Description
1	Products link with requirement	A report containing the list of products and their links to requirements, including information for each product and the link itself.
2	Products link with data	A report containing all the products and the data each product has relations with.
3	Products without data or requirement	A report containing products which don't have data or requirement.
4	Entrusted entity component statistics	This report contains information about how many requirements there are per entrusted entity and per component.
5	Data provider statistics	A list of all data providers which deliver data and a count of data delivered.
6	Requirement Areas	A list of all requirements and their related areas.

Figure 14: *Reports list page*

5.2 Database download

A database dump can be downloaded from the Reports’ list page by clicking on the “Database download” button. This dump can than be used to manipulate the data with specialized tools.

5.3 Playground

This can be accessed by clicking on the “Playground” button from the Reports’ detail page. The playground can be used by specialized users to write SQL queries to obtain their own reports. A request must be made to the developers to access this part of the application.

5.4 Report detail page

On the report detail page has the name and description on the top part. After those there is a single tab, named "Pivot".

5.5 Pivot

A loading animation will be displayed until the pivot table loads. The available columns are displayed on the top of this table or on the left side, depending on the report.

Those columns can then be dragged under the "Count" dropdown. The columns will appear in the preview section in the order they were introduced. They can be rearanged to fit the user's need. The data displayed in each column is arranged in alphabetical order. The preview shows the user how the exported PDF/Excel file will look like. The pivot table can be exported in HTML, PDF or Excel format. (*Figure 15* and *Figure 16*) .

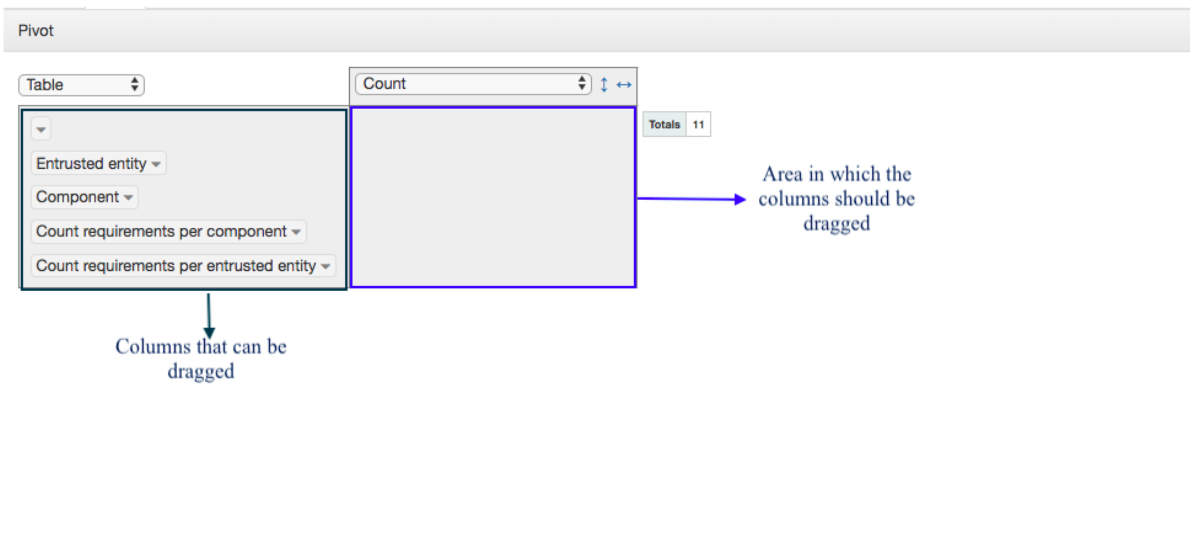


Figure 15: *Report pivot - before dragging columns*

5.6 Filtering data in Pivot

The data in the table can also filtered by clicking on the arrow next to the column name (*Figure 17*).

The aggregator functions available in the application are:

1. Count Unique Values

   This function can be applied on a column of your choice. In the totals section the unique values will be counted relative to the column on the left.

   For example, we dragged the "Entrusted Entity in the drop area and we select count unique values for the "Component" fields.

   In the preview section we see the Entrusted Entity column with its values and in the "Totals" section we see a count per each entrusted entity of the unique components (if there would be 2 components with the same name, they would be counted as one). (*Figure 18*)

2. List Unique Values

   This function can be applied on a column of your choice. In the totals section the unique values will be displayed relative to the column on the left.

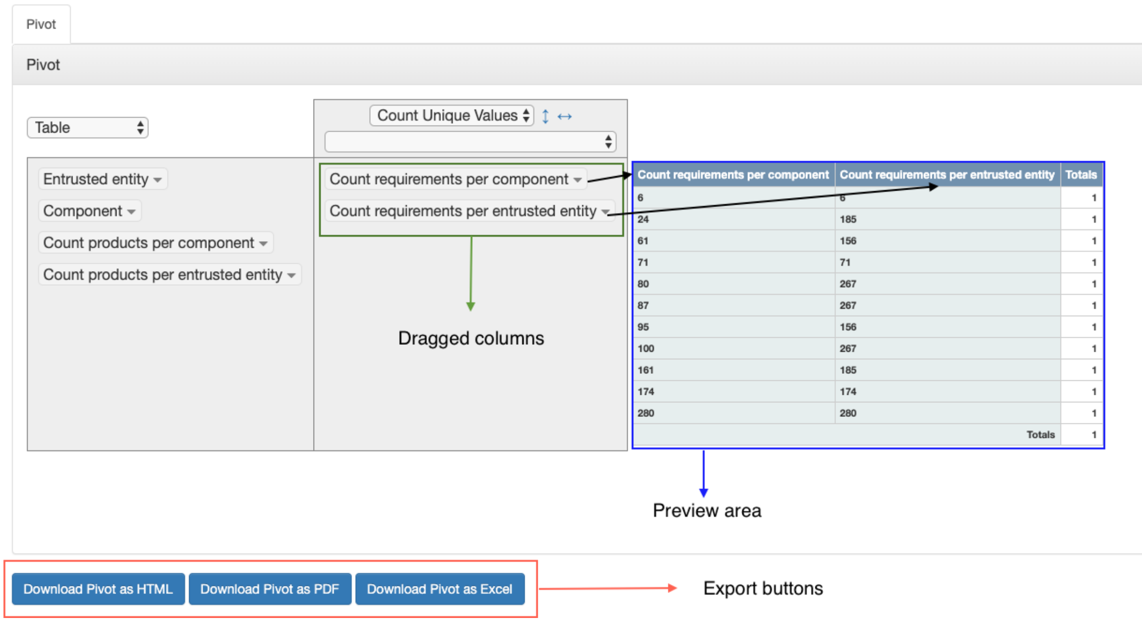


Figure 16: *Report pivot - after dragging columns*

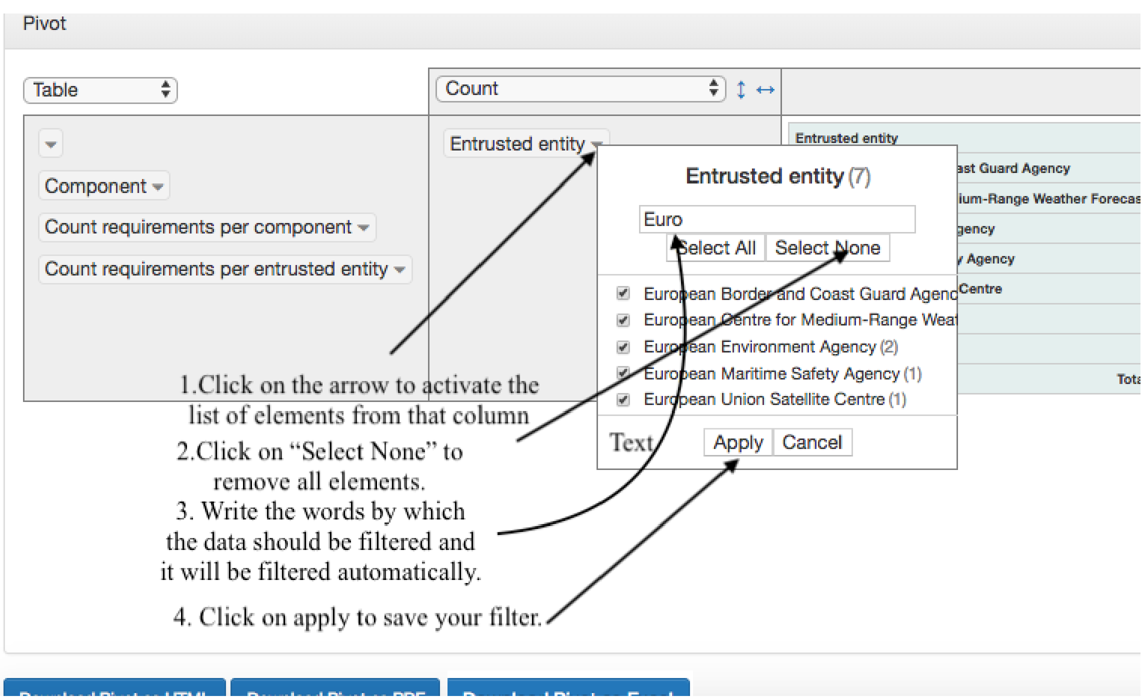


Figure 17: *Report pivot - filter the data in the table*

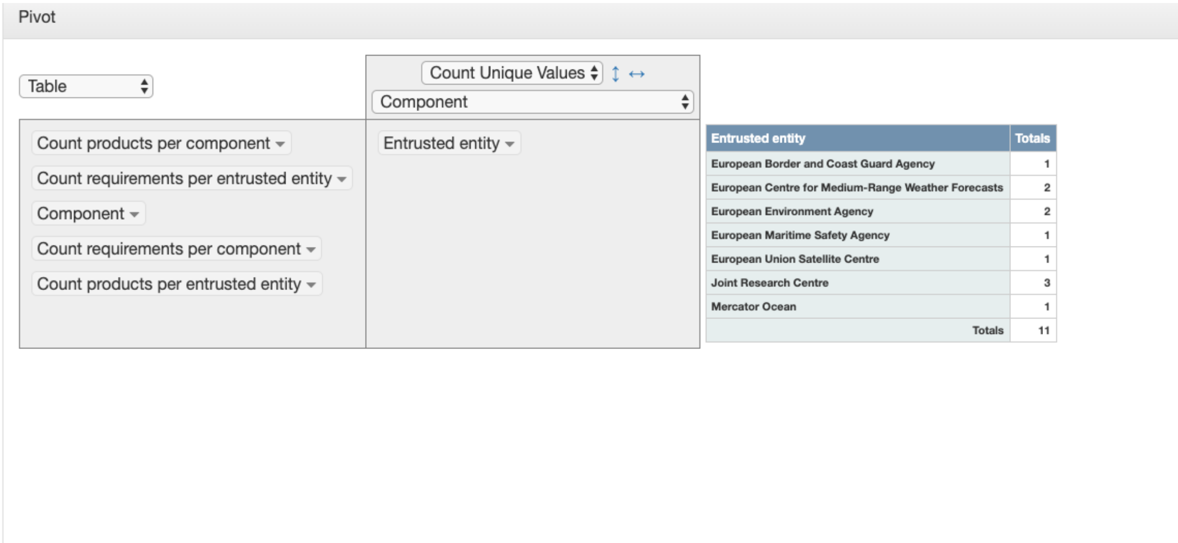


Figure 18: *Report pivot - filter the data in the table with count unique values*

Using the same example as before, now instead of having a count, we will have the values listed. If there is more than one value, the values will be separated with a comma. At the end of the table all the values will be listed in the "Totals" section. (*Figure 19*)

3. First

   This function can be applied on a column of your choice. In the totals section the first value relative to the column on the left will be displayed. At the end of the table the first value for all the rows will be displayed.

4. Last

   This function can be applied on a column of your choice. In the totals section the last value relative to the column on the left will be displayed. At the end of the table the last value for all the rows will be displayed.

5.7 Special reports

The special reports are spreadsheet files that have unmerged cells and can be filtered afterwards with specialized tools. Those reports can be found on the Report's list page, on the top of the page. For each report there is a description explaining what type of data each report contains.

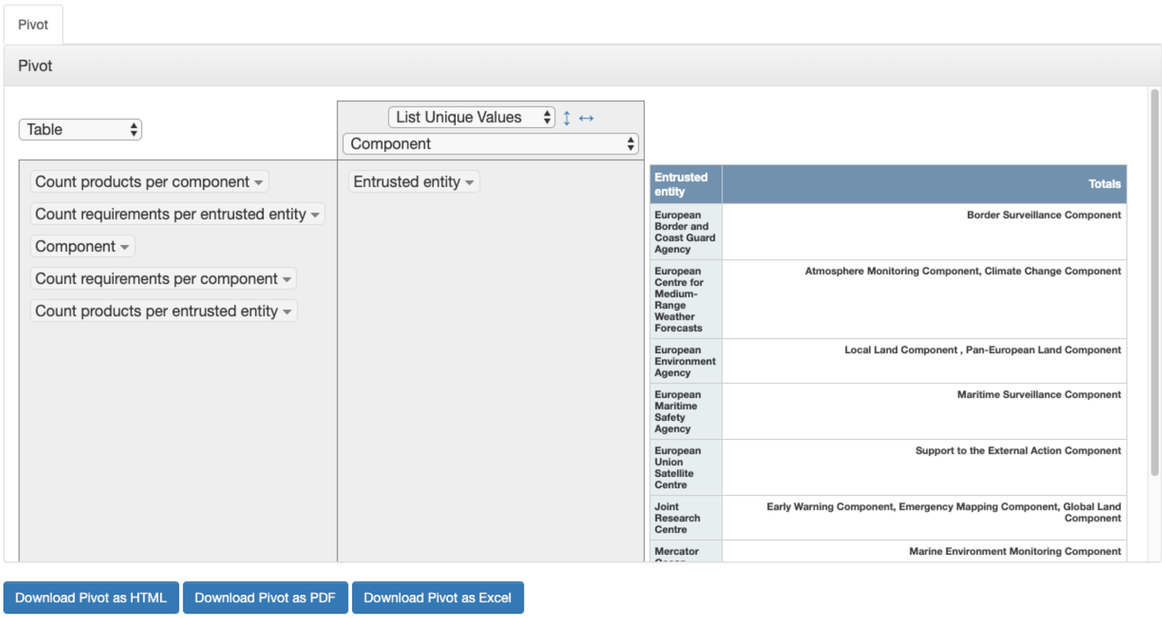


Figure 19: *Report pivot - filter the data in the table with list unique values*

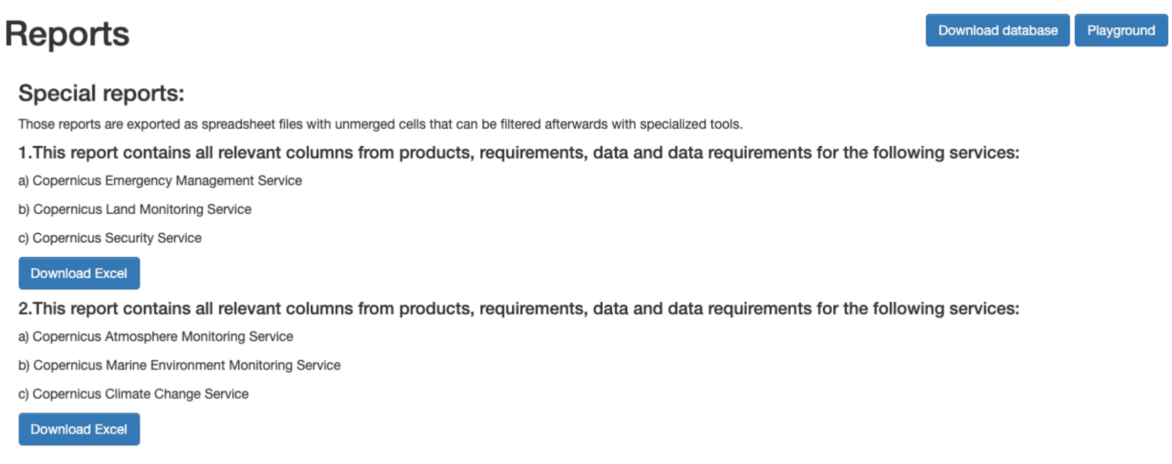


Figure 20: *Special reports*

CHAPTER

SIX

ADMINISTRATION

Requirement, Data and Data Provider are all passing through a validation workflow.

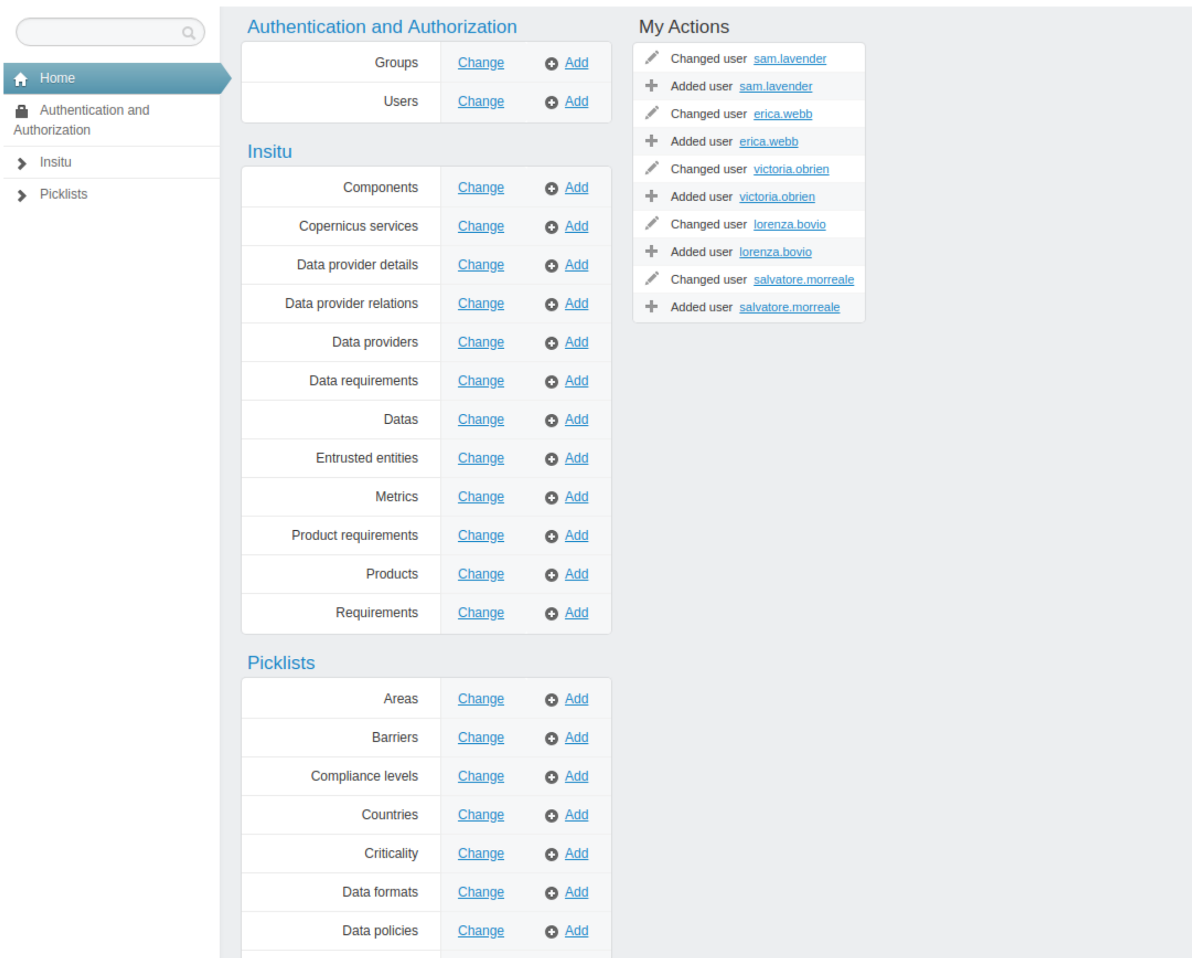


Figure 21: *Administrator panel*

The administration panel can be accessed only by a user who has administration rights. Here, all objects, relations and picklists values can be modified without countraints.

CHAPTER

SEVEN

HELP PAGE

The help page describes each value in the dropdowns used to fill the objects. The help page can be accessed from the navigation menu by clicking “Help”. In the forms, the dropdown fields have attached a question mark. By clicking on that question mark you will access the help page.

Barrier

High level barriers used to illustrate the main reasons why a given in situ data requirement cannot be meet for the product in question.

name	description
Barrier 1	Description.
Barrier 2	Description.
Barrier 3	Description.
Barrier 4	Description
Barrier 5	Description.

Figure 22: *An example table from help page*

For Example, in *Figure 22* is one of the tables available on the Help page. Under the table title there is a small description of that field’ s purpose. In the table there is the name of each value and the description of what that value represents.

CHAPTER

EIGHT

MANAGEMENT

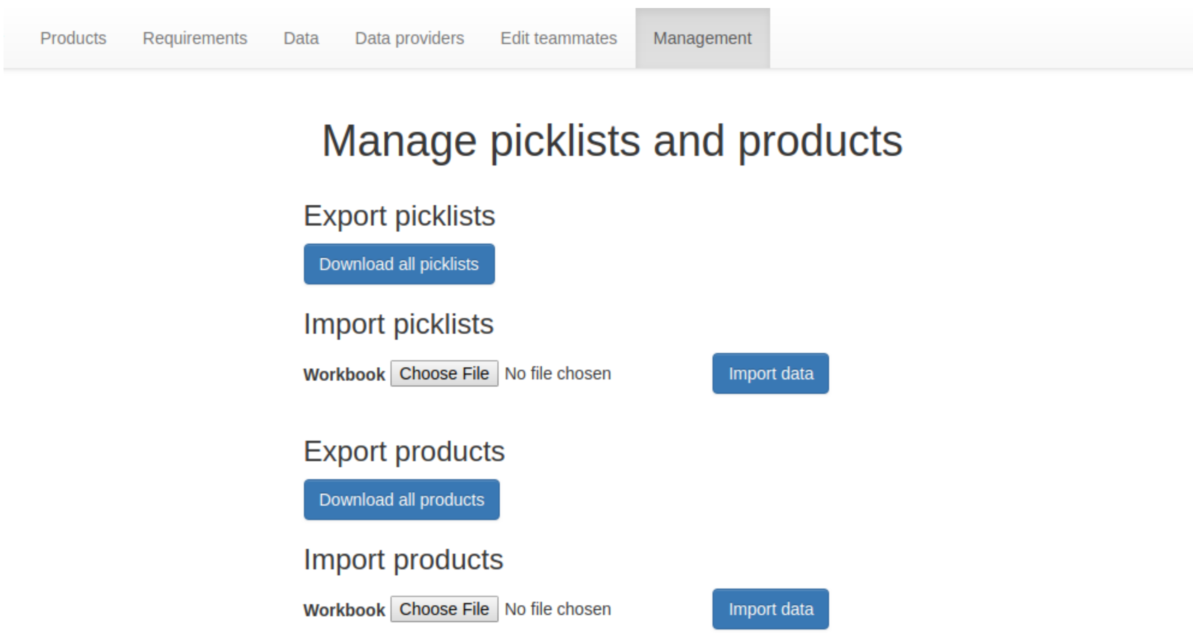


Figure 23: *Management section*

The management section is accessible only to an user with administration rights. This section can be used to export all picklists or all products as an excel document. In order to import picklists or products, the user must first export them, edit the exported spreadsheet and then import it.

CHAPTER

NINE

LOGGING ACTIONS

All editing actions done by users are logged in a log file. That includes: editing, adding or deleting any object from the application will be stored. The log gives informations about the user, the action the user made and the object that was accessed.

CHAPTER

TEN

SOFT DELETION

The objects and relations are never deleted. They are instead marked as “deleted”. The objects can be permanently deleted only by accessing the database directly.