# Basic Flow of Events

## Manage Document Library - Basic Flow

|  |  |  |  |
| --- | --- | --- | --- |
| **Brief Description:** This flow describes the process of Viewing the existing list of **reference library document entries** in the system and allows the users to manage them. | | | |
| **Precondition:** Program data was loaded | | | |
| **Post condition:** A list of reference library documents displayed. | | | |
| **Flow** | **Step** | **User Actions** | **System Actions** |
| B | 1 | Clicks “Document Library” link on the left navigation bar under the “Maintenance” tab menu | Displays the Document Library Screen with the following details  **List of documents:**   * Check box to select * Country * Year * Program Code * Resource Type * Category * Document Title * Revision Date * Revision Status * Document Status * Document – File Name * Task   **Buttons:**   * Add New * Export * Edit Selected   By default, the country will be Users Country and Year will be current Year |
|  | 2 | If desires, can use dropdowns and search item box to filter the list of documents displayed | Accepts filter criteria and search item value entered and limit the search results based on criteria. |
|  | 3 | If desires can open the document by clicking on the file name | Opens the corresponding document |
|  | 4 | If desires can export the list of document details to excel | Opens a download window to download the excel file with the list of documents details |
|  | 5 | If desires, can delete the document by clicking on the Delete icon in Actions column | Displays a confirmation box and deletes the document from the list |
|  | 6 | If desires, can change the number of records per page by selecting the ‘number of records’ dropdown above the search results table | Displays selected number of records per page |
|  | 7 | If desires, can select one or more records and clicks on Edit selected to edit parameters for the documents | Allows user to edit following parameters   * Country * Section * Resource Type * Year * Category * Review Status |

**Acceptance Criteria:**

**General Criteria**

Administrator and Audit Manager alone should have the permission to Manage Document Library. All Users are allowed to view the Document Library.

**Search**

* By Default, the page should load Documents related to User’s Country and current year and show 10 entries per page.
* Ability to filter the result set as per the selected Country, Year, Document Name and Program Code.
* Ability to sort by clicking on the ‘Sort’ button next to header
* Ability to Export or Print the result set.
* Filter results should appear in descending order from current to oldest based upon revision date

**View Document**

* Ability to View the Reference Library Document information.
* Ability to print document attachments

**New Document**

* Ability to select or enter data in all fields Country, Section, Category, Resource Type, Document title, Attachment, Status, Year, Brief Description.
* Ability to cancel the Document Library Creation.
* Successful creation of Document Library.

**Edit Document**

* Ability to edit or enter data in all fields Country, Section, Category, Resource Type, Document title, Attachment, Status, Year, Brief Description.
* Ability to cancel the edit Document Library.
* Successful edit of Document Library.
* Only Managers and Administrators have edit capabilities

## Alternate Flow (A1) – New Document

|  |  |  |  |
| --- | --- | --- | --- |
| **Brief Description:** User can create new reference library document entry by clicking on the ‘New’ button on the screen | | | |
| **Precondition:** The user should be logged in and should be authorized to perform this flow. | | | |
| **Post condition:** New Reference Library document entry is created in the database. | | | |
| **Flow** | **Step** | **User Actions** | **System Actions** |
| A1 | 1 | After Step 1 of the basic flow, user clicks the Add **New** button | Displays “New Document” screen with the following information:   * Country * Section * Resource Type * Category * Program Code * Revision Date * Document Title * Brief Description * Attachment * Year   Buttons:   * Save * Clear * Cancel |
|  | 2 | Enters the necessary information related to the new entry and attaches documents.  Clicks Save button. | Stores the new reference library document information in the database and displays the Document Library screen |
|  | 3 | If desires, can cancel the process by clicking on “Cancel” button | Cancels the New document creation and  Flow will start from Base flow step 1 |
|  | 4 | If desires, can clear the fields after entering values by clicking on the clear button | Clears all the values entered and  Flow will start from A1 flow step 1 |

## Alternate Flow (A2) – Edit Document

|  |  |  |  |
| --- | --- | --- | --- |
| **Brief Description:** User can edit reference library document entry information by clicking on edit icon against a document in Tasks column. | | | |
| **Precondition:** The user should be logged in and should be authorized to perform this flow. | | | |
| **Post condition:** The modified record is displayed in the Manage Reference Library Documents Screen. | | | |
| **Flow** | **Step** | **User Actions** | **System Actions** |
| A2 | 1 | After Step 1 of the basic flow, clicks on edit icon against a document title | Displays “Edit Document” screen with the following information prepopulated for the selected document title:   * Country * Section * Resource Type * Category * Program Code * Revision Date * Document Title * Brief Description * Attachment * Year * Status   Buttons:   * Save * Cancel |
|  | 2 | If desires, can cancel the Edit Document process | Edit document process will be cancelled and  Flow will start from Base flow step 1 |
|  | 3 | Modifies the details and clicks the Save button | Updates the modified information in the database and displays the Manage Reference Library Documents screen |

## Alternate Flow (A3) – Update Document Categorization

|  |  |  |  |
| --- | --- | --- | --- |
| **Brief Description:** User can edit reference library document category information by clicking on edit selected button on top of the result list | | | |
| **Precondition:** The user should be logged in and should be authorized to perform this flow. | | | |
| **Post condition:** The modified category is applied for the documents | | | |
| **Flow** | **Step** | **User Actions** | **System Actions** |
| A2 | 1 | After Step 1 of the basic flow, selects one or more records and clicks on edit selected button | Displays “Edit Documents Category” popup-screen with the following information:   * Country * Section * Resource Type * Year * Category * Review Status   Buttons:   * Save * Cancel |
|  | 2 | If desires, can cancel the Edit process | Edit process will be cancelled and  Flow will start from Base flow step 1 |
|  | 3 | Modifies the details and clicks the Save button | Updates the modified information in the database and displays the Manage Reference Library Documents screen |

# UI Prototype

## Document Library

A screenshot of a computer

Description automatically generated

### **Manage Reference Library Documents Screen Definition**

| **Field/Attribute Name** | **Field Type** | **Length/ Constraints** | **Description** | **Rules/Error Messages** |
| --- | --- | --- | --- | --- |
| **Document Library** | Page Heading |  |  |  |
|  | | | | |
| **Results Table – Display records for matching criteria**  Audit manager can sort the search results by clicking on sort button next to column label  All column headers will have search/ filter option | | | | |
| Country | NA | Text | Country from FDAS Table (Loaded from UPIC or Added by user) |  |
| Year | NA | 4  Number | Year from FDAS Table (Loaded from UPIC or Added by user) |  |
| Program Code | NA | 10  Text | Program Code from FDAS tables (Loaded from UPIC or Added by user) |  |
| Resource Type | NA | 20  Text | Resource Type from FDAS tables (Loaded from UPIC or Added by user) |  |
| Document Title | NA | 150 Text | Document Title from FDAS tables (Loaded from UPIC or Added by user) |  |
| Category | NA | 20  Text | Category from FDAS tables (Loaded from UPIC or Added by user) |  |
| Document | NA | 150 Text | Document File Name from FDAS tables (Loaded from UPIC or Added by user) | Clickable Link. On clicking the link, the corresponding document will be opened |
| Revision Date | NA | 10  Date in MM/DD/YYYY | Revision Date from FDAS tables (Loaded from UPIC or Added by user) |  |
| Revision Status | NA |  |  |  |
| Document Status | NA |  |  |  |
| Task | NA | Icon | Edit Icon | On Clicking the Icon, open Edit Document page |
| Number of Rows | NA | Dropdown | Number of Pages User want to display per page | Default value is 10.  Values can be 10, 25, 50 & 100 |
| **Buttons** | | | | |
| Sort Button next to header labels |  |  | Sort the search results in ascending order.  In next click the results will be displayed on descending order |  |
| Edit Selected |  |  | User can select multiple records on the list and can update the document categorization | Following Fields can be changed:   * Country * Section * Resource Type * Year * Category * Review Status |
| Add New |  |  | Create New Document |  |
| Export |  |  | Export Search Results to excel |  |
| Delete |  |  | Delete document permanently | Hard delete of the document record |

## New/Edit Document:

Graphical user interface

Description automatically generated

| **Field/Attribute Name** | **Field Type** | **Length/ Constraints** | **Description** | **Rules/Error Messages** |
| --- | --- | --- | --- | --- |
| **New/ Edit Document** | Page Heading |  |  | Use New or Edit based on the operation |
| **Fields**  Pre-populate all the fields for Edit functionality | | | | |
| Country | Dropdown |  | Country | Mandatary; Default Blank  Get Values from User Defined Fields table |
| Section | Dropdown |  | Section | Mandatary; Default Blank  Get Values from User Defined Fields table |
| Resource Type | Dropdown |  | Resource Type (Sales, Warranty, etc.) | Mandatary; Default Blank  Get Values from User Defined Fields table |
| Program Code | Text | 10  Text | Program Code | Optional; Default Blank  User enters the value |
| Category | Dropdown |  | Category | Mandatary; Default Blank  Get Values from User Defined Fields table |
| Document Title | Text | 150  Text | Document Title | Mandatary; Default Blank  User enters the value |
| Attachment | NA | 150 Text | Attachment | Mandatary; Default Blank  User enters the value |
| Brief Description | Text Box | 250  Text | Brief Description | Optional; Default Blank  User enters the value |
| Year | Drop Down | 4  Current Year, Last 10 Years,  Next year | Year | Mandatary; Default Current year  User enters the value |
| Revision Date | Date | 10  Date  MM/DD/YYYY format | Revision Date  Date the file / Program applicable | Mandatary; Default Current date  User enters the value |
| Document Status | Dropdown | Values will be “Active”, “Inactive” | Status | Visible Only for Edit.  Mandatary; Pre Populated for Edit  User enters the value  Default “Active” for ‘New’ document |
| Review Status | Dropdown | Values will be Reviewed and Not Reviewed | Review Status | Visible Only for Edit.  Mandatary; Pre Populated for Edit  User enters the value  Default “Reviewed” for ‘New’ document |
| **Buttons** | | | | |
| Save |  |  | Save | Save Changes / New Document |
| Cancel |  |  | Cancel | Cancel the changes or New and go back to Documents Library Screen |
| Select File |  |  | Select File | Allows user to select a file from computer |
| Clear |  |  | Clear | Only for New  Clears the values entered in all the fields |

## Edit Selected:

Graphical user interface, text, application

Description automatically generated

| **Field/Attribute Name** | **Field Type** | **Length/ Constraints** | **Description** | **Rules/Error Messages** |
| --- | --- | --- | --- | --- |
| **Edit Document Attributes** | Page Heading |  |  | Use New or Edit based on the operation |
| **Fields** | | | | |
| Country | Dropdown |  | Country | Optional; Default Blank  Get Values from User Defined Fields table |
| Section | Dropdown |  | Section | Optional; Default Blank  Get Values from User Defined Fields table |
| Resource Type | Dropdown |  | Resource Type | Optional; Default Blank  Get Values from User Defined Fields table |
| Year | Dropdown |  | Year | Optional; Default Blank  Get Values from User Defined Fields table |
| Category | Dropdown |  | Category | Optional; Default Blank  Get Values from User Defined Fields table |
| Review Status | Dropdown |  | Review Status | Optional; Values Will be “Reviewed” or “Not Reviewed” |
| **Buttons** | | | | |
| Save |  |  | Save | Save Changes / New Document |
| Cancel |  |  | Cancel | Cancel the changes or New and go back to Documents Library Screen |
| Select File |  |  | Select File | Allows user to select a file from computer |
| Clear |  |  | Clear | Only for New  Clears the values entered in all the fields |