# Overview

CTRP provides a source of record for Persons, Organizations, Protocol Abstractions, and the Correlations between these entities. caTissue will be enhanced to allow users to search for these entities, pull them into caTissue, and refer to them when performing activities within caTissue. The latest data will be fetched from CTRP NCI Enterprise Services (NES) whenever appropriate for business workflows. At a high level the mappings from CTRP to caTissue are:

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| --- | --- |
| **CTRP** | **caTissue** |
| Persons | Users |
| Organizations | Institutions |
| Protocol Abstractions | Collection Protocols |

The following sections describe the use cases and requirements for CTRP integration in more detail.

# Use Cases

## CTRP-integrated Search

Searches for Users, Institutions, and Collection Protocols within caTissue will return results both from the caTissue local database, as well as the CTRP NES. These results will be displayed together in the results table, but results from CTRP will be displayed with a visual indicator (e.g. NCI icon) that the entity is remotely managed. Collection Protocol searches will allow for searching by title, PI, and (if available) IRB identifier. When a user selects a remote entity, he is given the option to cache it locally with a reference to the remote entity.

## Save Remotely Managed Entities

Data from remote entities will be cached in the local caTissue instance with a reference to the remote entity. Whenever that entity is displayed in the caTissue application, the locally cached data will be displayed. The data will be updated on a per-case basis depending on whether display of the latest data is of critical importance to the current workflow.

## Edit Remotely Managed Entities

Remotely managed entities will not be editable by regular users of the system. Fields that are managed remotely will be grayed out, and the caTissue client API will not allow the editing of these fields by regular users. However, because the functioning of caTissue is mission critical to users, caTissue administrators will be allowed to edit the local cache. The data will be flagged as “dirty” and will not be overridden by local cache refreshes until the administrator releases his changes by toggling the dirty flag.

## Synchronize with CTRP

caTissue is already an operational system with production data. An option will be provided for Users, Institutions, and Collection Protocols to synchronize with the CTRP NES. A search will be made against CTRP for existing data, and the results will be displayed to the user. The user will have the option of selecting a remote entity to overwrite the locally managed entity. Once overwritten, the local entity will be a remotely managed entity and follow all of the business logic described above.

# Requirements

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| --- | --- |
| **ID** | **Requirement** |
| caTissue-v20-ctrp-1 | caTissue MUST support integration with CTRP |
| caTissue-v20-ctrp-2 | caTissue MUST support reading of data from CTRP |
| caTissue-v20-ctrp-3 | caTissue MAY support writing of data to CTRP |
| caTissue-v20-ctrp-4 | caTissue MUST leverage CTRP NES |
| caTissue-v20-ctrp-5 | caTissue MUST search CTRP for remote entities |
| caTissue-v20-ctrp-6 | caTissue SHOULD integrate remote search results with local search results |
| caTissue-v20-ctrp-7 | caTissue MUST clearly indicate to users those entities that are remotely managed |
| caTissue-v20-ctrp-8 | caTissue MUST show the latest data from CTRP NES during critical business workflows |
| caTissue-v20-ctrp-9 | caTissue MAY show stale, cached data from CTRP NES on non-critical pages |
| caTissue-v20-ctrp-10 | caTissue MUST NOT allow regular users to edit remotely managed entities |
| caTissue-v20-ctrp-11 | caTissue SHOULD allow administrators to edit remotely managed entities |
| caTissue-v20-ctrp-12 | caTissue MUST NOT overwrite locally edited remotely managed entities unless given express permission by the administrator |
| caTissue-v20-ctrp-13 | caTissue SHOULD allow administrators to mark a locally edited remote entity for automatic refreshing (per caTissue-v20-ctrp-8) |
| caTissue-v20-ctrp-14 | caTissue SHOULD allow locally managed entities to be marked as remotely managed |
| caTissue-v20-ctrp-15 | caTissue SHOULD convert locally managed entities marked as remotely managed completely to remotely managed to be updated automatically (per caTissue-v20-ctrp-8) |