Greensheets re-design (8/11/2016)

## **Goals:**

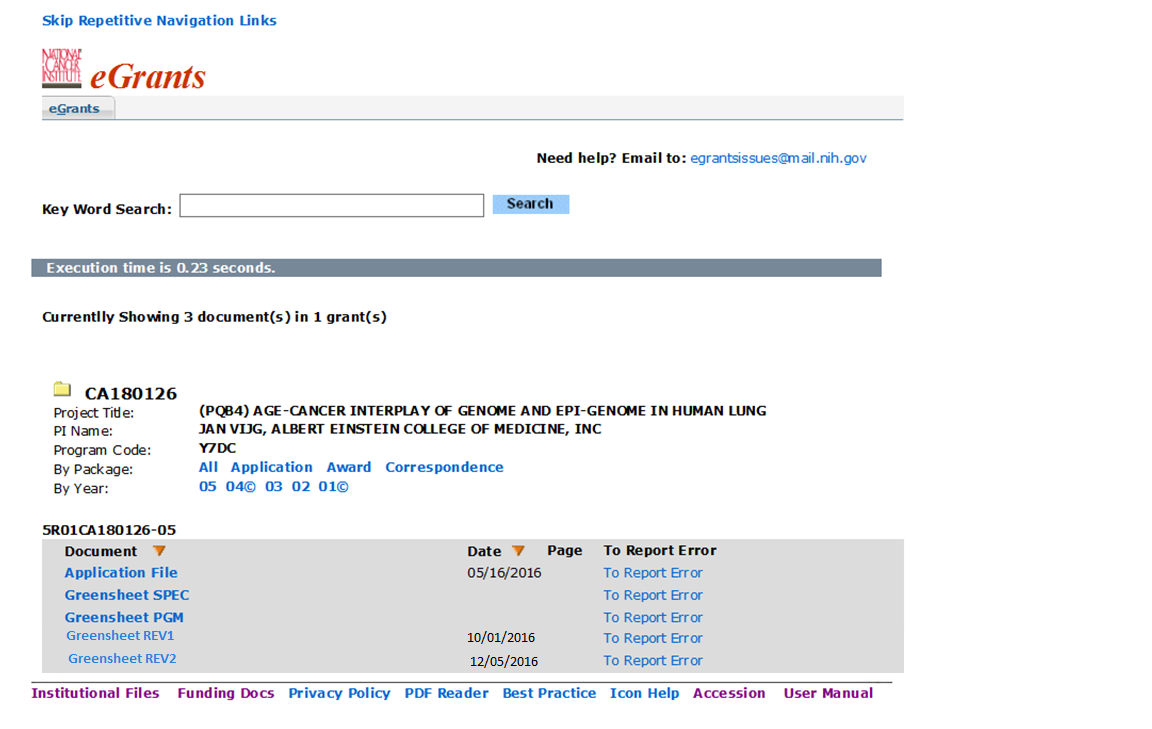
* Follow up on revised awards (Additional questions and clarifications)
* On conceptual level discuss greensheets versioning and select reconciliation method (if needed).

**Additional questions and clarifications for revised awards discussion:**

1. Please clarify CBIIT understanding of the requirement that “*revisions greensheets (forms) must be part of official document file*”

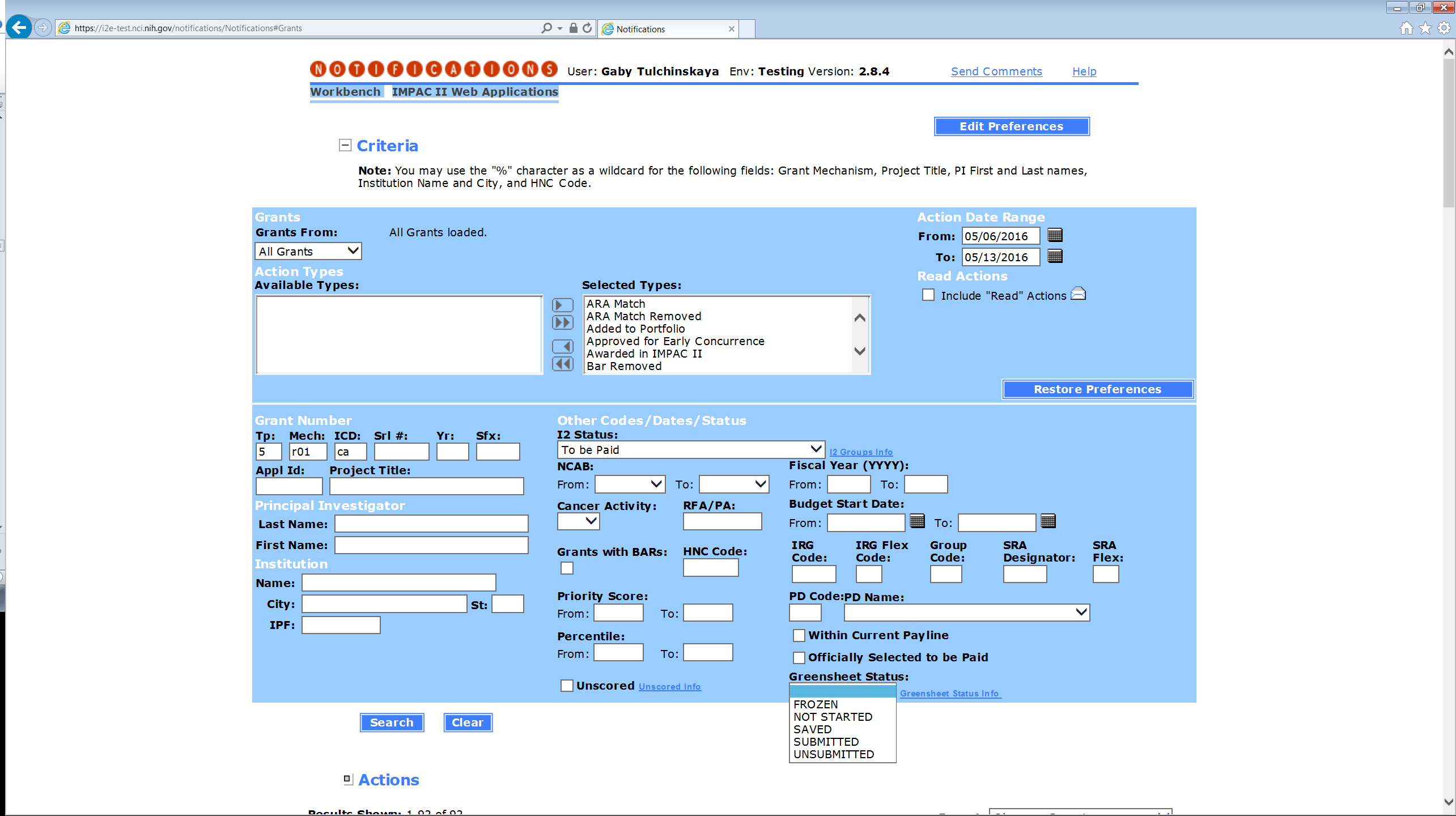
That means:

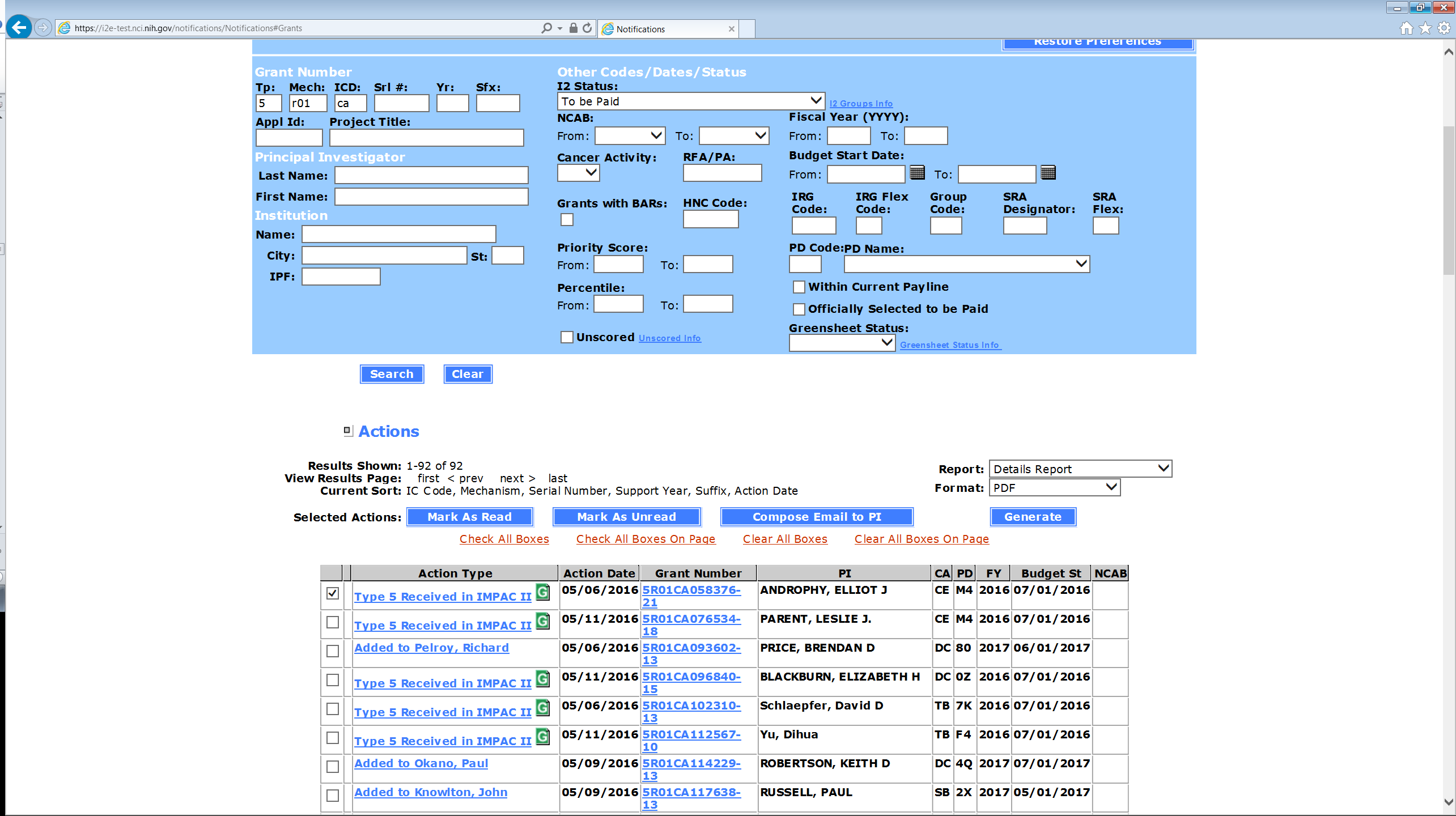
1. eGrants will provide a link to revision greensheet next to award greensheets links. Link in eGrants will appear when revision greensheet is frozen (Status is ‘Frozen”). **That means revision greensheet will NOT be editable accessing via eGRANTS (please confirm - confirmed).**
2. Should the link in eGrants disappear if greensheet has been un-submitted (status is “Unsubmitted”)? – n/a
3. CBIIT task will be to test integration point; coordination is needed between CBIIT and eGrants dev teams. - yes

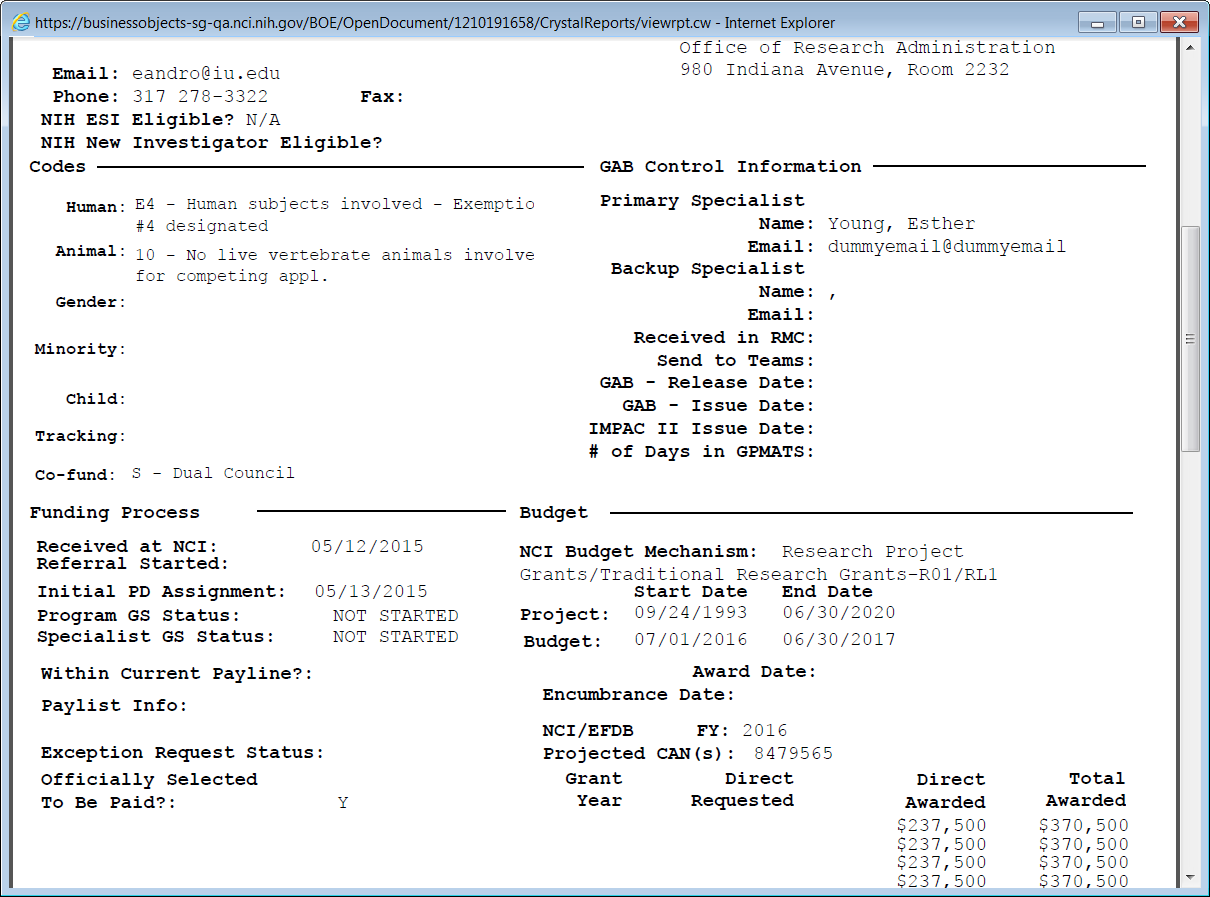


Revision link(s) will be displayed when revision GS is in status “Frozen”

1. CBIIT is not planning to make any modifications to YourGrants and Notification systems related to revised awards since the users of YourGrants and Notification systems are program staff. – Acknowledged by OGA
   * There is a search by GS status in these systems => not affected, keep search for AWARD greensheets statuses only
   * Keep displaying only AWARD greensheets according to existing rules
   * No need to modify Details report => keep displaying statuses for AWARD greensheets only







## **Greensheet versioning**

Please use mockups below the table for the discussion

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Scenario when new FB module is promoted** | **System behavior when user retrieves greensheet** | **Options** |
| 1 | Greensheet is in status “Not Started” | Latest version of template (latest questions) is displayed - confirmed | n/a |
| 2 | Greensheet is in status “Submitted” and/or “Frozen” | Version of template on the moment of submission is displayed. Read-only mode - confirmed | n/a |
| 3 | Question: what is a desired behavior when greensheet is in status “Saved”? | | **Option 1**: do not display a new version of template. Let user complete and submit the version s/he started to work with.  **Option 2:** User should always complete and submit CURRENT version (latest version that has been promoted). Ability to copy appropriate data from prior version(s) should be provided. – This option has been selected. If this option is selected, see 3a below for details. |
| 3a | Greensheet is in status “Saved” (not yet submitted) | The system:   * Displays newly promoted template * Displays a message that the template has changed and instructions to a user (according to a selected option on the right) * Keeps prior version(s) of greensheet with answers and attachments (it will be displayed in read-only mode; version date will be displayed) until the next version is submitted. User can open this version in a separate browser window. – Not needed * For the next step – see options (OGA needs to select) * After submission of the current version, prior versions will be deleted | **Option 1:**   * All answers should be re-entered again manually from scratch (no automatic matching) * Provide ability to copy attachments from prior version into ANY question in latest (current) version |
| **Option 2:** – This option has been selected.   * Attempt automatic match of the answers (copy from **LATEST** prior version into the current version) and copy attachments. Question: Should we do partial reconciliation (e.g. question text did not change, but answer options changed (from Y/N to multiple dropdown options). We cannot reconcile the answer, but we can copy attachments and comments)? Answer: no partial reconciliation * Provide a warning that matching is approximate and may not be correct. Allow user to edit answers and move attachments around. Provide a message if some answers/attachments don’t match at all. * Still provide ability to copy attachments from prior version into ANY question in latest (current) version |
| 4 | Greensheet is un-submitted after new module is promoted | Same as in scenario “Greensheet is in status “Saved” (not yet submitted)” |  |

Figure1: Proposed functionality for OPTION 1 – Not selected



The greensheet template has been updated and the questions might have changed. Please re-enter the answers and, if necessary, move attachments into this version.

NOTE: after submission of current greensheet, the prior version(s) and all prior attachments will be DELETED.   
To copy attachment (if exists) from prior version, click on attachment icon on this screen for a selected question

**View prior version(s):** 06/20/16 04/18/2016

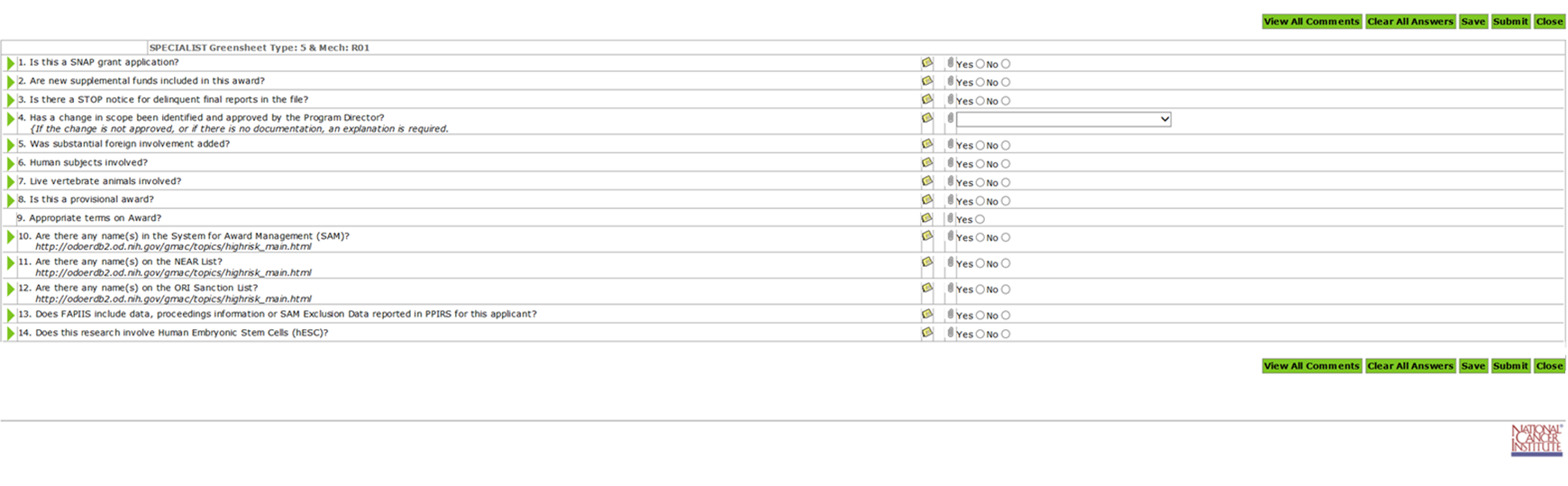
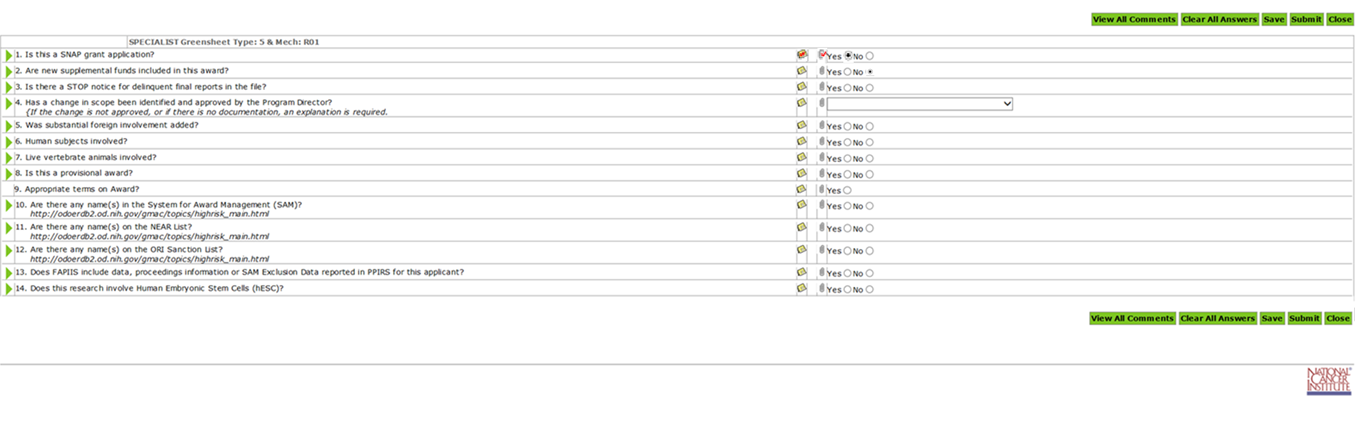


Figure 2: Proposed functionality for Option 2 – Selected option; OGA will provide a text for the message on the screen



**The greensheet template has been updated and the questions might have changed. The system automatically matched the answers and attachments to the questions that did not change (if any). Please check for correctness and enter answers to the updated questions.**

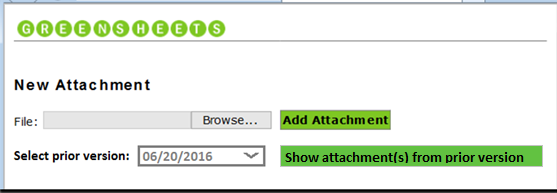
To copy attachment (if exists) that were saved before the template was updated, click on attachment icon on this screen for a selected question. **NOTE: after submission of this greensheet, all prior attachments that were not copied will be DELETED.**



NOTE(s):

1. Decision: the system will provide ability to copy attachments that were saved before the template has been promoted. There is no need to display related questions and ,thus, no need to have saved prior version of questionnaire.
2. Please confirm: Report in FormBuilder that ties the version of template to type/mech should have an “expiration date” (when new version got promoted). It will be easier to query later. - confirmed

* **User flow for Option1:** User clicks attachment icon in CURRENT version window for a specific question.



Don’t show version(s), just give a button to show previously saved attachments

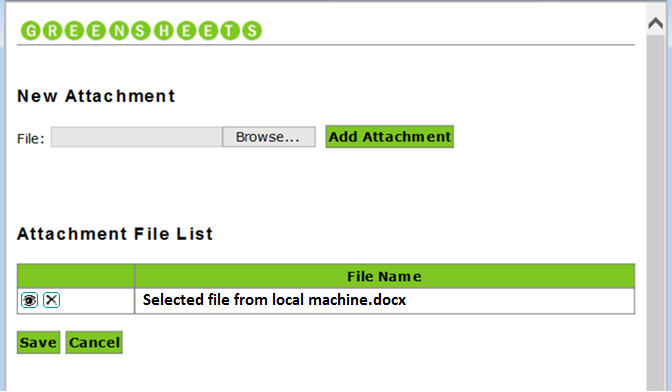
Please choose the option: - n/a, we will just show all existing attachments

* Option 1: Always display “Select prior version” dropdown and corresponding “Show attachments…” button if prior version(s) exist. The dates in the dropdown indicate the date(s) when the prior version(s) become read-only.
* Option 2: Display “Select prior version” dropdown and corresponding “Show attachments…” button **only if non-reconciled questions** from prior version(s) exist (*can be dangerous if partial reconciliation is allowed*).

New Attachment pop up will be modified, allowing to:

* + Add attachment, as we do now
  + In addition, ability to copy previously saved attachments will be provided. User can select a attachment and click Copy.

If user clicks Add Attachment: we will keep existing functionality:

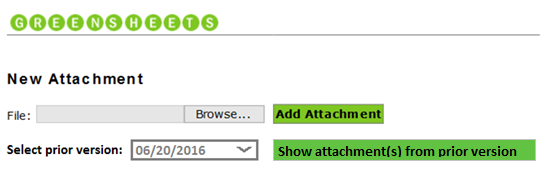


**Attachment File List**

|  |  |
| --- | --- |
| **File Name** |  |
| Attachment name 1.docx | Delete |

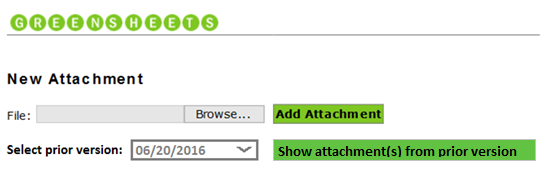


If user clicks “Show attachment(s) from prior version” button, the list of all questions that have attachments from a selected version will appear. Question: Do we need to show ALL questions with attachments from selected version or only non-reconciled questions with attachments? – easiest



|  |  |  |
| --- | --- | --- |
| **Questions with attachments from 06/20/2016** | **File Name** | **Action** |
| Is this a SNAP application? – no needed | Attachment name 1.docx |  |
| Attachment name 22.docx |
| Is this a provisional award? | Email PDF1.pdf |  |
| Is this award over 5 Million Total Cost? | Doc3333.doc |  |

User will request to copy attachments from a selected question; all attachments will be moved into “**Attachment File List”** section. User can delete or view any attachment. User can add attachments from different question into the selected question for a current version.



|  |  |  |
| --- | --- | --- |
|  | **File Name** | **Action** |
|  | Attachment name 1.docx |  |
| Attachment name 22.docx |
|  | Email PDF1.pdf |  |
|  | Doc3333.doc |  |

**Attachment File List**

|  |  |
| --- | --- |
| **File Name** |  |
| Attachment name 1.docx | Delete |
| Attachment name 22.docx | Delete |
| File that user added manually into a current version.doc | Delete |



**User flow for Option2:** same as for option 1, except that initially the system will automatically copy answers/comments/attachment from the **LATEST** version (if any). Ability to view all prior versions will still be provided and user can manually copy attachments and from them.