# Prep for UI meeting with OGA

| **#** | **Steps** | **Changes needed on the page** | **Data** | **Related questions** | **Answers** |
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| Scenario => Specialist navigates to a questionnaire (gs) from GPMATS or eGrants – greensheet-nonWB.htm | | | | | |
| 1 | Show page header | Change page header to be consistent with greensheet.htm (workbench, hyperlink Greensheets, welcome…) |  |  |  |
| 2 | Show page footer | IMPAC II link should open the page in a separate browser window |  |  |  |
| 3 | Open Grant Number section | * hyperlink all names * Initial status should be Not Started * Change the type of the gs to “SPECIALIST” (currently it’s PROGRAM) |  | * “**Last Changed by:”** – currently it displays user\_id. Should it be this way or do we need to display a name? * What should be a format for the name (<First Name Last Name> or <Last Name> comma <First Name> as on the hit list)? |  |
| 4 | Mention that we will have a discussion about IMS/FCOI/FACTS later |  |  |  |  |
| 5 | Show that when Spec initially comes to a gs, everything is blank | * Delete checkmarks and related data for comments and attachments * Enable Submit button |  |  |  |
| 6 | Click on Question #2 Attachment icon |  | * Add New Attachment Modal appears – explain uploader (you cannot upload file –pretend you have and note that attachment appears in the Attachment File List * Hit Show previously saved attachments button * Hit Copy button on first row * Point out how file has now been added to the Attachment File List |  |  |
| 7 | Click comment icon and enter comment. Show how comment icon changed to checked.  Leave comments on number 1, 3 and 11.1.1 | * Fix character counter in the comment box * Fix “Collapse All – currently it’s not collapsing the comment for question 1 |  |  |  |
| 8 | Click View All Comment and show this functionality  It works as it should it is because you are adding comments in order and none have been saved yet –  For demo close up each comment after you enter it by clicking on the comment image again – then Hit the View All Comments button | Looks like now it works in reverse (collapse on View and open on Hide), please fix it |  |  |  |
| 9 | Show question #13 and explain that “+” appears only if sub-questions exist |  |  | **\*\*\*\*\*Big question is about conditional questions where sub-questions appear based on answer – do we have a + sign before they answer the conditional question – or does it only appear if they select the answer where the sub question comes up? Example is #2 – right now has + sign – goes away if they hit the conditional answer that does not require the sub-question.** |  |
| 10 | Enter some answers and comment.  Show how character counter works.  Click Save. Show success message | Show that on Save the status changes from Not Started to Saved | Which questions/answers and comments should I use?  You’ll already have comments on 1, 3 and 11.1.1  Answer 1 Changed and Not Approved –do not give explanation  Answer 8 Changed and Not Approved - do not give explanation  Answer 12.2.1.1 No – do not answer anything else under 12 |  |  |
| 11 | Print button |  |  | * Is print functionality needed? * If yes, should functionality be kept as-is (configurable PDF)? * If yes, is it a right location for the button? |  |
| 12 | **Click TOP Submit BUTTOM ONLY** and show validations (Error message in specific fields) |  | See notes for 9 |  |  |
| 13 | **Fill in errors and Hit BOTTOM Submit button** |  | Will show successful submission page |  |  |
| Show successful submission page (success message). Janene, can you create a page similar to greensheet-submitted.htm, but without “Back to Search” to simulate submission in a separate window? --- yes – it is called: nonWBgreensheet-submitted.htm | | | | | |

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| Scenario => Specialist navigates via Workbench | | | | | |
| 1 | Go to specialist.htm | Initially we need to display only search parameters |  |  |  |
| 2 | Enter search parameters and display the hit list | * Delete thumbnails and \* * Change status to words * All submitted (locked) gs should have submission date * Add submission date for F * If grant has F, it should be for both Program and Spec gs * Change budget start date to 2017 for S and NS * IMPAC II link should open the page in a separate browser window | (Janene, is it PI name = smith?) PI Name = Smith | Is it better to have status as words or as symbols?  What default sort should be (By budget start date?). |  |
| 3 | Click on Spec GS and navigate to greensheet.htm | On greensheet.htm:   * Change the type of the gs to “SPECIALIST” (currently it’s PROGRAM) * Same changes to grant header * Status should be saved (just keep it) * Keep icons for 1 attachment and 2 comments (and comment text) * Add answers to 3 question * Disable Submit button * Do tool tip for Submit button, it should say “You cannot submit because AWARD action is Cancelled” | What grant should I use?  The one with the PI of Meghan Smith – you can demo a search for her |  |  |
| 4 | I’ll add 2 more answers and click “Cancel Changes” button;  Added answers should disappear; status doesn’t change (still Saved) |  |  | Is it a useful feature? |  |
| 5 | Click “Clear All Answers” button;  All answers and comments should disappear; attachments stay |  | Model pops up. You can demo Cancel – which returns you to current state. Click Clear All Answers again and select OK. This must be the last thing you do in this part of the demo as it will bring you to another page that shows all answers cleared (greensheet-cleared.htm) | Currently if user clicks “Clear All Answers” button, attachment stay. Should we keep an existing implementation OR should we make it conditional (e.g. if gs in NOT Started status => attachments will be deleted as well; if gs in SAVED status => attachments will stay)? |  |
| 6. | Demo that back to Search buttons goes back to the hitlist with the search results and search criteria already filled out |  | Click back to Search button brings you to specialist-searched.htm – Stop this part of the demo |  |  |
| Scenario => Program staff navigates via Workbench | | | | | |
| 1 | Go to search.htm  Note that we are no longer displaying results list automatically as it currently does – user will have to hit Search to see results – this is more consistent for the UI | * Separate thumbnail and \* into a separate column; it should be tentatively called “Ready for submission” –   Changes to columns have been made as per our discussion.    * Sort thumbnails to the top, \* second, and everything else after that * Change status to words * Change the tool tip for \* to “Greensheets In Control” * IMPAC II link should open the page in a separate browser window |  | * Can we have a separate column for thumbnail and \*? What should be the title of this column? * Do we need to sort thumbnails to the top, \* second, and everything else after that? Tertiary sort by ???? (budget start date? PI name?) * Should Program staff be able to view Spec gs? (currently they cannot, only the status) * Can we change the \* tool tip from “Greensheets In Control” to something else? To what? * Do we need a legend for thumbnail and \* icons (they appear only on PD screen)? Or is tool tip enough? * Should Program staff be able to see Specialist name? * Names are hyperlinked (Outlook). Is it OK? * Is the column order OK (it’s different from Specialist screen)? |  |
| 2 | Discuss Search criteria section  Click “Clear” button  From old requirements: “*if user selects this button, system retrieves the user's preferred values for controls (if he or she has them saved; otherwise, it assumes default values), assigns those values to controls on the panel, and resets the sort column and order of grants list to defaults. System does not rebuild the list of grants*.” – okay so the way the search here should operate is that the results should not display UNLESS user hits Search – so no rebuilding is seen on the fly |  | Demo Clear Button & Mechs pick list   * Change ANY search criteria * Demo ability to add multiple Mechs | Main question: do we need search criteria section for PG to be different from Specialist search?  If yes:   * Should the default be expanded or collapsed for Search Criteria? * Grant type: do we need existing options or should we simply provide 1-9? * Need clarifications about “Competing grants within the Payline” (Subashini) * Do we need any additional search parameters for PD (e.g. gs status)? |  |
| 3 | **Search preferences functionality vs. Load Default Search Criteria**  I’ll change search parameters, hit “Save Search preferences” button. Success message should appear. Can we indicate somehow on the screen that saved search preferences exist?  Talk about differences between Default Search Criteria (system default based on their role) vs. **Load Search Preferences** |  | Demo Save Search Preferences by picking the following:   * Grants form: **My Cancer Activity**; * Grant Type: **Competing Grants** * Mechanism: **do not pick any** * Select **PI Name** and type in **Smith** * **Hit Save Search Preferences -** “Save Search preferences” appears * **Now Hit Load Default Search Criteria** * **You can toggle between Load Search Preferences and Load Default Search Criteria and discuss differences** | Main question: do we need Search preferences and Load Search Preferences functionality?  Do we need “Restore Preferences” button/functionality?  From old requirements: **"*Restore Preferences"*** *button – if user selects this button, system retrieves the user's preferred values for controls (if he or she has them saved; otherwise, it assumes default values), assigns those values to controls on the panel, and refreshes the grants list based on those values*.”  Yakov would need to clarify – but from the back end usually the system defaults for the search criteria would be saved in one dbase Table and their Saved Search Preferences saved in another dbase table – if this is the case then it is logical to offer the end user the ability to load their default search criteria – thus the third button of Load Default Search Criteria  If this is not the case – they would not ever be able to reset it to the system default – and the Load Default Search Criteria button would not be needed. |  |
|  | Search on Saved Preferences. | Propose and develop this functionality | * Hit Load Search Preferences * Now Hit Search * Program Hit List appears |  |  |
| 4 | Discuss differences between columns in Program hitlist/Specialist hitlist |  | Icons next to greensheet can be made sortable with some effort – which would come first in value – the asterisk or the thumbs up – this is a bit of work on my side so it has not been made – but would be asked if needed   * Can navigate to David Smith’s Program GS (programGS-submitted.htm) * Use the Back to Search button will go back to the Program search page with the search results and criteria already displayed (programGS-submitted.htm) | Do we have the right info – should they be able to see Specialist Name and GS, etc. |  |

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| Scenario => Guest user navigates via Workbench | | | | | |
| 1 | Navigate to guest.htm | * Add existing text above search parameters * Initially there is no hit list |  | Main question: should anybody with I2E role (who is NOT PD/PA/Spec) have read-only access to GS? |  |
| 2 | Enter search parameters and Search; Hit list will appear | * Delete thumbnails and \* * Change status to words * All submitted (locked) gs should have submission date * Add submission date for F * If grant has F, it should be for both Program and Spec gs * Change budget start date to 2017 for S and NS * Sort by budget start date, latest to the top * Link one of the “G” icons to read-only page * IMPAC II link should open the page in a separate browser window | * Janene, what search parameters do you want me to use? - Smith * Which “G” icons will be linked to read-only page? – Smith, David – Program GS icon -- this is a Submitted GS (programGS-guest-submitted.htm) | * What should be a default sort? Currently it’s by Budget Start Date, but oldest to the top (from 2004) * Are all columns OK (they are the same as for Specialist)? |  |
| 3 | Click on G icon. Read-only page should be displayed in the same browser window. Similar to greensheet-submitted.htm, but without success message. Back to Search is still displayed. |  | Can also hit Back to Search Button to go back to Guest Search Results (guest-searched.htm) | * Do we need print functionality for a guest? |  |
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