# 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-notWB.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 comment icon and enter comment. Show how comment icon changed to checked. Janene, can we do it (change icon on the screen)? If not leave one comment icon checked from the beginning (for #3), I’ll explain it to OGA | * Fix character counter in the comment box * Fix “Collapse All – currently it’s not collapsing the comment for question 1 |  |  |  |
| 7 | Click View All Comment and show this functionality | Looks like now it works in reverse (collapse on View and open on Hide), please fix it |  |  |  |
| 8 | Show question #13 and explain that “+” appears only if sub-questions exist |  |  |  |  |
| 9 | 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? |  |  |
| 10 | 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? |  |
| 11 | Click Submit and show validations (Error message in specific fields) |  |  |  |  |
| 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? | | | | | |
| 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?) | 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? |  |  |
| 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 |  |  | 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)? |  |
| Scenario => Program staff navigates via Workbench | | | | | |
| 1 | Go to search.htm | * Separate thumbnail and \* into a separate column; it should be tentatively called “Ready for submission” * 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 |  |  | 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:  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? | Propose and develop this functionality | What should I use as search parameters? | Main question: do we need Search preferences and Load Search Preferences functionality? |  |
| 4 | Load Search Preferences.  After I saved search preferences, I will change search parameters and execute another search. Hit list should be updated.  After that I’ll click “Load Search Preferences”. Search criteria section should display my saved preferences.  I click Search and hit list will be updated according to saved preferences. | Propose and develop this 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*.” |  |
| 5 | 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*.” | Make it functional, please ☺ |  |  |  |
| 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? * Which “G” icons will be linked to read-only page? | * 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. |  |  | * Do we need print functionality for a guest? |  |
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