Plan for internal UI meeting 4/25/2017

# Changes requested last time by OGA

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| **Greensheet questionnaire page** |
| **Header:**   * During UAT OGA will decide if page header should be expanded or collapsed by default * Specialist Code and Program Director code should be deleted * Back-up specialist still should be displayed in the header * OGA will have an internal discussion and let CBIIT know what other information (if any) should be displayed in the header * “Last Changed By” should display a name (hypelinked); This label and information should appear in the header only when gs has been saved * ‘Submitter’ and ‘Submitted Date’ should appear only when gs is in Submitted and/or Frozen status. * If gs is unlocked (status is Unsubmitted), ‘Submitter’ and ‘Submitted Date’ should disappear. NOTE: Submitted date should NOT be displayed for this row in the hit list as well (existing functionality) for unsubmitted gs. |
| **Links to IMS/FCOI/FACTS**:  After communication with OGA the links had been removed |
| **Print button**  Moved and renamed |
| **Cancel Changes functionality**  removed |
| **Clear All Answers functionality**   * Should be renamed with ‘Reset Greensheet’ * When user clicks ‘Reset Greensheet’ button, the system should:   + Provide a warning message “Are you sure you want to reset the greensheet? All answers, comments and attachments will be deleted and the Greensheet status will be reset to “NOT STARTED”. Click OK to confirm the reset.”   + Options are “Cancel” (default) and “OK”.   + If user clicks OK, the system will delete answers/comments/attachments, change the status to NOT STARTED and save the changes. |
| **Answer options in the dropdown**  OGA requested to substitute ‘Select an Option” with blank row |
| **Discussion related to expand/collapse questions options**   * New requirement: all saved answered questions should be always expanded (no ability to collapse answered question should be provided). * CBIIT proposed that when a user initially comes to the screen (gs is in NOT STARTED status), there are no icons that indicate existence of sub-questions. Top level question should be answered before expand/collapse icons are displayed for a question with sub-question(s). Crystal mentioned that a sub-question indicator is useful.   The decision has been made to keep proposed approach until the future demo to a bigger OGA group. During the demo, OGA will re-evaluate this functionality. The idea to provide ability to preview ALL sub-questions without entering an answer to a top-level question has been discussed. |
| **Close the gs screen**  User can close the gs screen either by clicking on the back button or “X” in the corner of the browser window or by clicking on Back to Search link. In all cases, a warning should be displayed “You are leaving the current form. Any unsaved changes will be lost. Click OK to continue.”  cid:image002.png@01D2B90A.BF9748A0 |
| **Length of fields and validations**  In Comments field, the field length is 4,000 characters – should be adjusted on the mockup;  Additional validations:  Here are the rules/errors for all answer types, related to the length/format:   |  |  |  | | --- | --- | --- | | Validations on Save  If at least one validation rule did not pass:   * Error message is displayed at the top of the screen “Error! The form cannot be submitted until the errors indicated on the form are corrected.” * Each question/answer with error is highlighted and individual error is displayed | | | | B-004 | Comment field length should not exceed 4000 characters in length | Comment couldn’t exceed 4,000 characters | | B-005 | Multi-line text field in answer should not exceed 2000 characters in length | Multi-line answer couldn’t exceed 2,000 characters | | B-006 | Text string field in answer should not exceed 250 characters in length | n/a (NOTE: after that the message will be cut, existing implementation) | | B-007 | Number value in answer should be in fact numeric. The only non-numeric characters allowed are "+", "-", and "." "+" and "-" can only occur at the beginning of the entered value. | ‘Number’ answer type can only contain numbers and the symbols {‘-‘, ‘+’, ‘.’}.  Note: Either ‘-‘ or ‘+’ can appear only at the beginning of the value. | | B-008 | Date format should be mm/dd/yyyy | Date format should be mm/dd/yyyy |   “Required” error messages come from a different rule:  Every parent question displayed on a greensheet must have an answer on Submission.  Parent question might have a sub-question. Sub-question(s) are displayed or not based on the answer to a parent.  If sub-question(s) are displayed, the answer to each displayed sub-question is required on Submission.  If sub-question(s) are NOT displayed, the answer is NOT required  Special case: A question without any answer options can be promoted from Form Builder. In such case, validations on Submit should skip such question. See example below (last question). |
| **Previously Saved Attachment(s) in the Attachment Modal**  Attachments list expanded when opened |
| **Specialist search and hitlist page** |
| * FY – default to current FY * Break up grant number into components (Type, Mech, Serial Number, etc) * Keep all proposed search criteria * All columns in the way information is displayed has been approved * If user navigates from the hit list to a greensheet and comes back by clicking Back to Search link, all search criteria and search results hit list should be retained. |

# Draft Area

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| Two types of users for test area:   * People who can access Admin screen (all who has access to Form Builder) => they see 2 tabs (Search and Admin); from Admin screen they can navigate to particular form and test or not it * Regular testers => PD and Spec staff, who will get email with a link to a particular form (no role needed). |
| ***Admin functionality***  file:///D:/Greensheets/Presentations/demo/review.htm |
| Navigation to Admin: Admin will always see 2 screens (Search [can be Guest or Specialist] and Admin) |
| Roles:  If Viewer => No buttons (Promote/Reject);  If Admin => we provide buttons (Promote/Reject) |
| If any module is exported from FB, it will appear as a sub-tab;  If none => message file:///D:/Greensheets/Presentations/demo/reviewNoDrafts.htm |
| Functionality, provided on Review and Test Module screen:   * Ability to see form type, name and related type/mechs * Ability to view what changed in the module (type/mechs added/deleted and forms changed) * Ability to select forms and send email to tester(s), requesting to test selected forms. The system should capture the date when such email has been send * Ability to see the name of who marked the form as ‘tested’ * Ability to navigate to “Review and Test Greensheet” page for a form * Ability to promote/reject a module should be provided to Draft Admin only. NOTE: When Draft Admin requests to promote/reject a module, the system should NOT provide a warning, if form(s) are not tested.   Note: Separate “Review and Test module” screen is still need for Revision module. User will send email to a tester who will test revision form. |
| ***Tester functionality*** |
| Functionality, provided on “Review and Test Greensheet” screen:   * Fill the form * Ability to test submission. Note: all validations on Save are repeated on submission, thus there is no need to have separate Save functionality; if submission test passed, the system should display success message * Ability to manually mark the form as tested (click “Test Completed” button). No validations are needed for completion of the test. User can never fill the form or submit, the system will still allow mark the form as tested. The system should capture the name of the user, who marked the form as tested * The SAME user can return and click “Test Completed” button multiple times. UI proposal is to display an alert connected to the user name as follow:   + If the SAME user returns to the page that s/he already tested, an alert should be displayed to him/her: “This questionnaire has been tested on <date/time when this user clicked “Test Completed” button the last time>”.   + If a DIFFERENT user comes to this questionnaire, this alert should NOT be displayed * Ability to view all dependent questions is needed. UI proposal is to add “Show/Hide dependent questions” button. When Actor requests to see all dependent questions, the system expands ALL questions in the questionnaire (without answers). If Actor selects any answer option, the dependent questions for not-selected options for this questions will be hidden. * Reset Greensheet * View All Comments * User will be able to click URL in question instructions, it should open in the separate browser window   “Back to Review & Test Module” – user will be taken to a prior screen, where s/he can test other combinations and/or Promote or Reject the module. No warnings are needed because we are not saving anything |

# Program search (cont.)

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| Program Search and Hitlist search.htm |
| Jen asked to add a legend to Program hitlist screen that would describe asterisk and thumb up icon |
| Updates for Grant number |
| Gerald’s stats for Search screen usage  Hi Gaby,  I cannot get how many people access these pages without manually processing the log files to find out the usage.  However, we can get the number of times the pages was accessed through a tool without much effort.  I got the stats for all of calendar year 2016 for greensheets below.  Please let me know if need more information.  It may require manual digging through the log files.  cid:image001.jpg@01D2AD69.6BB91A30 |
| Discussion about:  Add search by Cancer Activities. But it should work differently from the specialist page. The rules will be:   * If in Grants From dropdown PD selected value is ‘Portfolio’ => CA search should have only values for the grants in Portfolio * If in Grants From dropdown PD selected value is My Cancer Activity (AC) AND this is only one CA => CA search should have only this value, and probably be grayed out * If in Grants From dropdown PD selected value is My Cancer Activity (AC, BE, DI) AND multiple CA => CA search should have only same values (AC, BE, DI) * If in Grants From dropdown PD selected value is All NCI Grants => CA search should have ALL active cancer activities.   Yakov: I think it is doable.  The only objection is that the first rule might have a performance issues  And, this is **additional functionality to our scope** |
| Discussion about Add Export to Excel for the hitlist |
| What happens on Load Search Preferences if they were not set before? Message? |
| Discuss tool tip text for thumb up and \* |
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**Steps for Demo**

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| **Scenario 1:** Specialist navigates to a questionnaire (GS) from GPMATS or eGrants  greensheet-nonWB.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | * Open greensheet-nonWB.htm * Show page header |  |  |
| **2.** | * Show page footer |  |  |
| **3.** | * Demo Grant header section by clicking on the expander |  |  |
| **4.** | * Show that when Spec initially comes to a gs, everything is blank |  |  |
| **5.** | Add New Attachment Demo   * 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 Save * Note that icon has changed to reflect that attachment is present |  |  |
| **6.** | Add a Comment   * Click on comment icons and leave comments under questions 1, 3 and 11.1.1 * Show how character counter Works * Click on icon of each comment to close them up * Note how icons have changed to indicate the presence of a comment |  |  |
| **7.** | Demo View All Comments Button   * Click the View All Comments button * Note how the text changes on button and how comment boxes show/hide |  |  |
| **8.** | Answer Questions   * Answer Q1 by selecting Changed and Not Approved but do not give and Explanation * Answer 8 Changed and Not Approved - do not give explanation * Answer 12.2.1.1 No – do not answer anything else under 12 |  |  |
| **9.** | Demo View All Sub Questions Button   * Note how sub questions that have not already been answered appear in gray but ones that have been answered are black * End by clicking button again to Close All Sub Questions and note that questions that have been answered remain open |  |  |
| **10.** | Save GS   * Click on Save and Success message appears * Note that status has changed from Not Started to Saved |  |  |
| **11.** | Demo Validation   * Click TOP Submit button only to make validation messages appear * Fill in the errors * Click BOTTOM Submit button to bring you to the Submitted version of the GS (nonWBgreensheet-submitted) |  |  |
| **12** | Submit State of GS   * Note that state has changed to submitted and * Expand Grant Info box to show Submitter Info * Note that questions answered are expanded | Do we need the functionality to see sub questions on this page? |  |

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| **Scenario 2:** Specialist navigates to a questionnaire (gs) from GPMATS or eGrants that has been updated – nonWBUpdated.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | * Open nonWBUpdated.htm * Demo Warning Message |  |  |
| **2.** | Demo Previously Attachment Files   * Click on Q2 attachment icon * Click the Add button on the first file in the Previously Saved Attachments |  |  |

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| **Scenario 3:** S Specialist navigates via Workbench - specialist.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | Demo Search by Grant Number   * Open specialist.htm * In Grant Number section enter 193829 into Serial # input box * Hit Search |  |  |
| **2.** | Demo Search by PI Name   * Hit Clear * Type “Smith” into the PI input box * Hit Search |  |  |
| **3.** | Demo Selecting GS   * Find PI of Meghan Smith – you can demo a sort to find her * Click on her specialist GS (greensheet.htm) |  |  |
| **4.** | Demo “Reset Greensheet” button   * Click Reset Greensheet Button * Click Cancel which returns you to current state.   Click it again and hit 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) |  |  |
| **5.** | Demo Back to Seach Button   * Click back to Search button brings you to specialist-searched.htm – Stop this part of the demo |  |  |

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| **Scenario 4:** Program staff navigates via Workbench - search.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | * Open search.htm   Demo Clear Button & Mechs pick list   * Change ANY search criteria * Demo ability to add multiple Mechs |  |  |
| **2.** | 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** |  |  |
| **3.** | Demo on Saved Preferences   * Hit Load Search Preferences * Now Hit Search * Program Hit List appears |  |  |
| **4.** | Demo Searching by PI Name   * Enter “Smith” under PI Name * Hit Search * Click David Smith’s Program GS |  |  |
| **5.** | Go to GS and Demo Back Button   * Click 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 (program-searched.htm) |  |  |

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| **Scenario 5:** Guest user navigates via Workbench – guest.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | * Open guest.htm * Search PI Name “Smith” |  |  |
| **2.** | Go to GS and Demo Back Button   * Click David Smith’s Program GS (programGS-guest-submitted.htm) * Use the Back to Search button will go back to the Program search page with the search results and criteria already displayed (guest-submitted.htm) |  |  |

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| **Scenario 6:** GS Draft area - review.htm | | | |
| **Step** | **Instructions** | **Questions** | **Comments** |
| **1.** | * Open review.htm   Demo Program Competing Tab   * Demo select All box * Demo email (note email does not have hyperlinks – this would be corrected in real version – just not possible for demo) * Expand  Existing Type/Mechanism Combinations With No Changes tab |  |  |
| **2.** | Demo Program Non-competing and Revision Tabs   * Click each one and talk over areas |  |  |
| **3.** | Demo on Reject/Promote buttons   * Navigate to Program Non Competing Tab * Hit Reject Module * Hit Cancel * Hit Promote Module * Hit Ok and note success message and how Program Non Competing table disappears |  |  |
| **4.** | Demo going to Test GS   * On Program Competing Tab select the Form Name “[PC Mentored Career](greensheet-draft.htm)” link * It brings you to greensheet-draft.htm |  |  |
| **5.** | Demo Closing all Sub Questions   * Click Close All Sub Questions |  |  |
| **6.** | Demo Adding Comments to Q1, Q3, & Q11.1.1   * Click on Comment Icon * Add text to comment box * Icon changes state |  |  |
| **7.** | Demo Adding Attachment to Q2   * Click on Attachment Icon * Uploader had file listed as if you just attached something * Hit Save * Icon changes state |  |  |
| **8.** | Demo Validate Submission   * Answer Q1 by selecting Changed and Not Approved but do not give and Explanation * Answer 8 Changed and Not Approved - do not give explanation * Answer 12.2.1.1 No – do not answer anything else under 12 * Click on TOP Validate Submission Button * Fill in Redlined Answers * Click BOTTOM Validate Submission button |  |  |
| **9.** | Demo Testing Complete Button   * Click Testing Complete Button * Success Message appears |  |  |
| **10.** | Demo returning to main Draft area page   * Click on “Back to Review & Test Greensheet” button * Note that the Admin button will bring you to the starter page and not the GS |  |  |