NCI/CBIIT

GreenSheets System

Draft Area Scope

Version 2.2

Document History

Document Location

Ensure that this document is current. Printed documents and locally copied files may become obsolete due to changes to the master document. The source of this document is located in the SVN documentation repository at: ***https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/***[Draft Area - Scope.docx](https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20-%20Scope.docx)

Revision History

[Provide a summary of changes for a new version or revision of this document.]

| Version Number | Revision Date | Author | | Summary of Changes |
| --- | --- | --- | --- | --- |
| 1.0 | 10/25/2016 | G. Tulchinskaya | Initial version | |
| 1.1 | 2/13/2017 | G. Tulchinskaya | Added notes for UI specialist throughout of the document | |
| 1.2 | 2/15/2017 | G. Tulchinskaya | Added after the meeting with UI specialist:  Sec. Promote or Reject the module functionality Sec. Overall business flow description => For a Tester | |
| 1.3 | 3/10/2017 | G. Tulchinskaya | Added section “Non-functional requirements” | |
| 1.4 | 5/12/2017 | G. Tulchinskaya | Reworked with new UI | |
| 1.5 | 6/01/2017 | G. Tulchinskaya | After the meeting with OGA:  -Modified “Email to testers” flow  -Removed Print form test page  - Removed Preview mode  - Added references to Expand/collapse rules  - Modified tool tips texts | |
| 1.6 | 6/09/2017 | G. Tulchinskaya | Updated with new mockups | |
| 1.7 | 6/27/2017 | G. Tulchinskaya | Modified the text for e-mail boilerplate to testers after it was provided by OGA. | |
| 1.8 | 7/21/2017 | G. Tulchinskaya | Added req to sec. Non-functional requirements | |
| 1.9 | 7/31/2017 | G. Tulchinskaya | Added success messages text to sec. “For a user with Draft Viewer and/or Draft Administrator role”  Added the rule to sec. Review & Test Draft Module Screen Data elements | |
| 2.0 | 8/01/2017 | G. Tulchinskaya | Updated after the demo to OGA:  - sec. Review and Test Greensheet Screen Data elements | |
| 2.1 | 8/10/2017 | G. Tulchinskaya | Updated sec. “Review & Test Draft Module Screen Data elements” (disabling Promote and Reject buttons) | |
| 2.2 | 8/16/2017 | G. Tulchinskaya | Added sec. Type/Mech combinations for each section on Review & Test Draft Module screen | |

Reference Documents

[Provide a complete list of all documents referenced within, or in the formulation of this document.]

|  | Document Name |
| --- | --- |
| <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Meeting%20Minutes/Draft%20area%20_%20meeting%20with%20OGA%20meeting%20minutes.docx> | |
| <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20Redesign%20Project%20Scope.docx> | |
| <https://i2e-test.nci.nih.gov/documentation/application/GSFB_User_guide.pdf> | |
| <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc> | |

Key Terms

Please refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20Redesign%20Project%20Scope.docx>

[This information may be provided by reference to the eRA Global Glossary (or the project- or system-specific glossary), and in such cases, simply reference those documents and leave the table below blank.]

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# Document scope

[Outline the scope of what has been captured in this version of the document. For example, “This Supplementary Specification document describes the functional and non-functional requirements that span Use cases for the ABC system, Release 4”.]

This document provides functional and non-functional requirements for Draft Area in the GreenSheets System.

# Business Need Description

Form Builder system allows grants administration personnel to directly specify, modify and deploy greensheets questionnaires. Within Form Builder system the questionnaires (forms) are grouped in modules (sets of forms). Export of new forms from Form Builder to Greensheets is always at the level of a Module.



When a new module is exported, all forms are available in the draft area that serves two major purposes:

* Proving ability to test forms before promoting them into production
* Proving ability to promote/reject all forms in the module into production

For more information about Form Builder see <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20Redesign%20Project%20Scope.docx>, sec. Dependencies with other systems => Significant dependencies => Form Builder – changes for re-design

# User roles

## Before re-design:

Before re-design similar, much more limited functionality existed in Greensheets system. Two roles had access to the draft area:

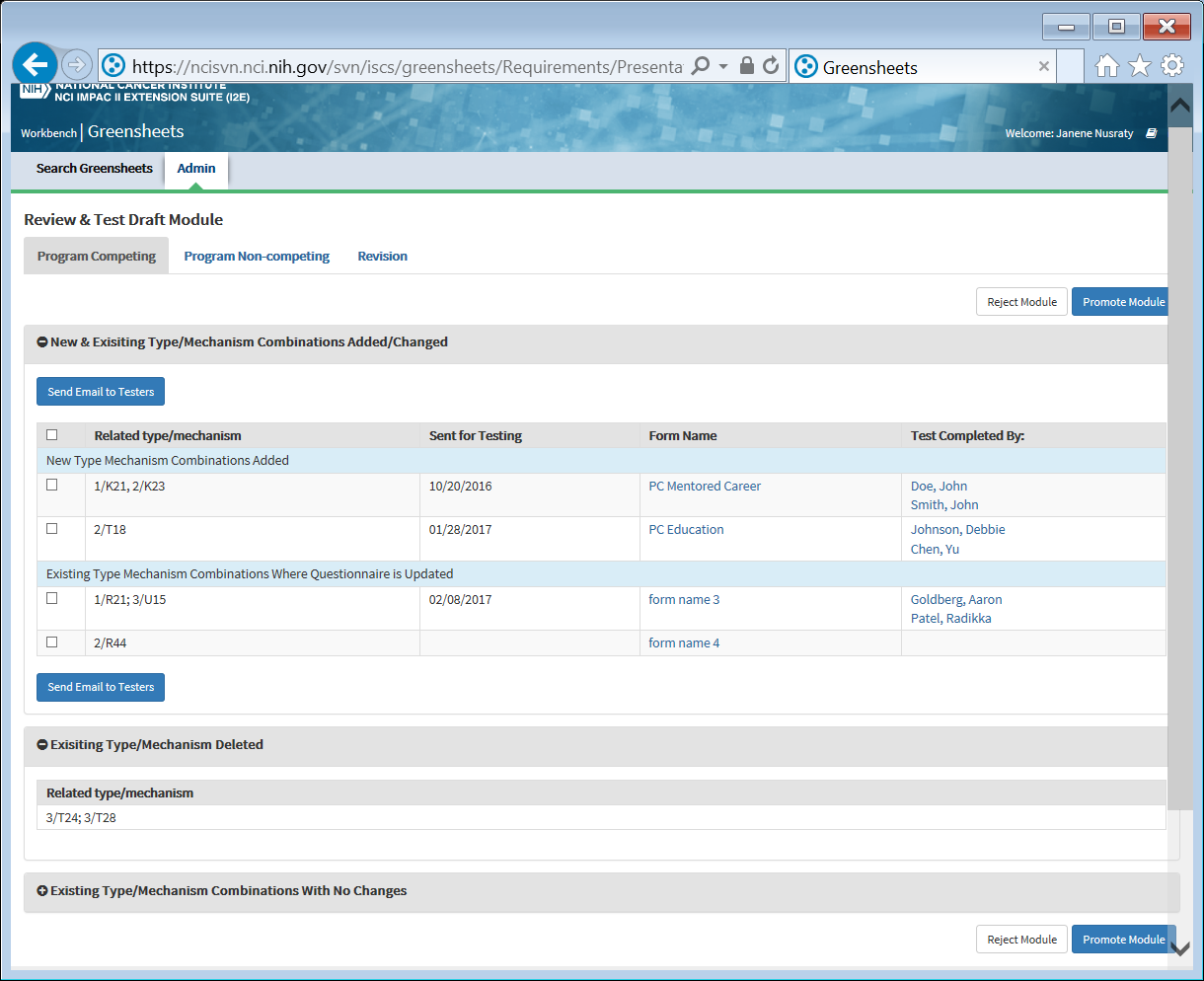
**Draft Viewer** (GS\_DV role) – had ability to review draft greensheets in the module, exported from Form Builder

**Draft Administrator** (GS\_DA role) – had ability to:

* Review draft greensheets in the module, exported from Form Builder
* Promote module from Form Builder
* Reject module from Form Builder

## Changes for re-design:

There is no connection between Form Builder roles and Greensheet roles. OGA requested that access to Greensheets Draft Area should be provided to all users who have Author or Approver role in Form Builder. OGA will provide the list of people and CBIIT will assign Greensheet **Draft Viewer** and/or **Draft Administrator** role(s) to them. These users will have access to the “Review and Test Draft Module” screen.



Provided functionality (high level):

|  |  |  |
| --- | --- | --- |
|  | Draft Viewer | Draft Administrator |
| View changes to the module (just view the screen) | Y | Y |
| Test any form(s) | Y | Y |
| Select form(s) and send email to testers | Y | Y |
| Promote/reject module |  | Y (buttons are displayed only for the user with this role) |

Users, who can access “Review and Test Draft Module” screen, will send email to testers. Any user of GS (Program staff or Specialists) can be a Tester. For detailed description of Program and Specialist roles refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20Redesign%20Project%20Scope.docx>, sec. GreenSheets users => User roles

The system should NOT impose any restrictions on testing (e.g. Program Director can test Specialist greensheet and Specialist can test Program greensheet and Draft Viewer/Administratior can test any greensheet). OGA staff will be responsible for preventing such situations, but no system restrictions are needed.

Tester will receive email with a link(s) to a specific from(s), and get access only to greensheet test page for a corresponding from (no access to “Review and Test Draft Module” screen):





# Overall business flow description

## For a user with Draft Viewer and/or Draft Administrator role

User with Draft Viewer and/or Draft Administrator role can have access to Draft Area. There is no guarantee that users with these roles wouldn’t have other GS roles (PD or Specialist). Therefore, if a user is:

* I2E User (without PD or Spec role) => I2E User screen + “Review and Test Draft Module”
* Spec => Spec screen + “Review and Test Draft Module”
* PD/PS => PD/PS screen + “Review and Test Draft Module”

Figure: Access to Draft Area mockup



**Functionality, provided on Review & Test Draft Module screen:**

* Ability to see module name and switch to a different module (if any)
* Ability to see form 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: Success messages for Promote and Reject module:

**Success:** <Insert module name> has been PROMOTED

**Success:** <Insert module name> has been REJECTED

### Email to testers

When Draft Viewer or Draft Admin select form(s) on “Review and Test Module” screen and click “Send email to Testers” button, the system will:

1. Check if Actor selected any checkboxes for the form(s)
   1. If selected checkbox is NOT found, the system will provide an error message: “*Please select at least one form to send email to testers*”
   2. If selected checkbox(s) are found, the system will:
      1. Generate URL(s) to “Review and Test Greensheet” screen for each selected form
      2. Record the date when user clicked “Send email to Testers” button and display it on the screen
      3. Wipe up all name(s) in “Test Completed By:” column (if any)
      4. Open user’s email client with pre-populated email. Below is the boilerplate:

**TO:**

**FROM:** <Name of the Sender>

**SUBJECT:** Request to review draft Greensheet forms

**BODY:**

Dear [ ],

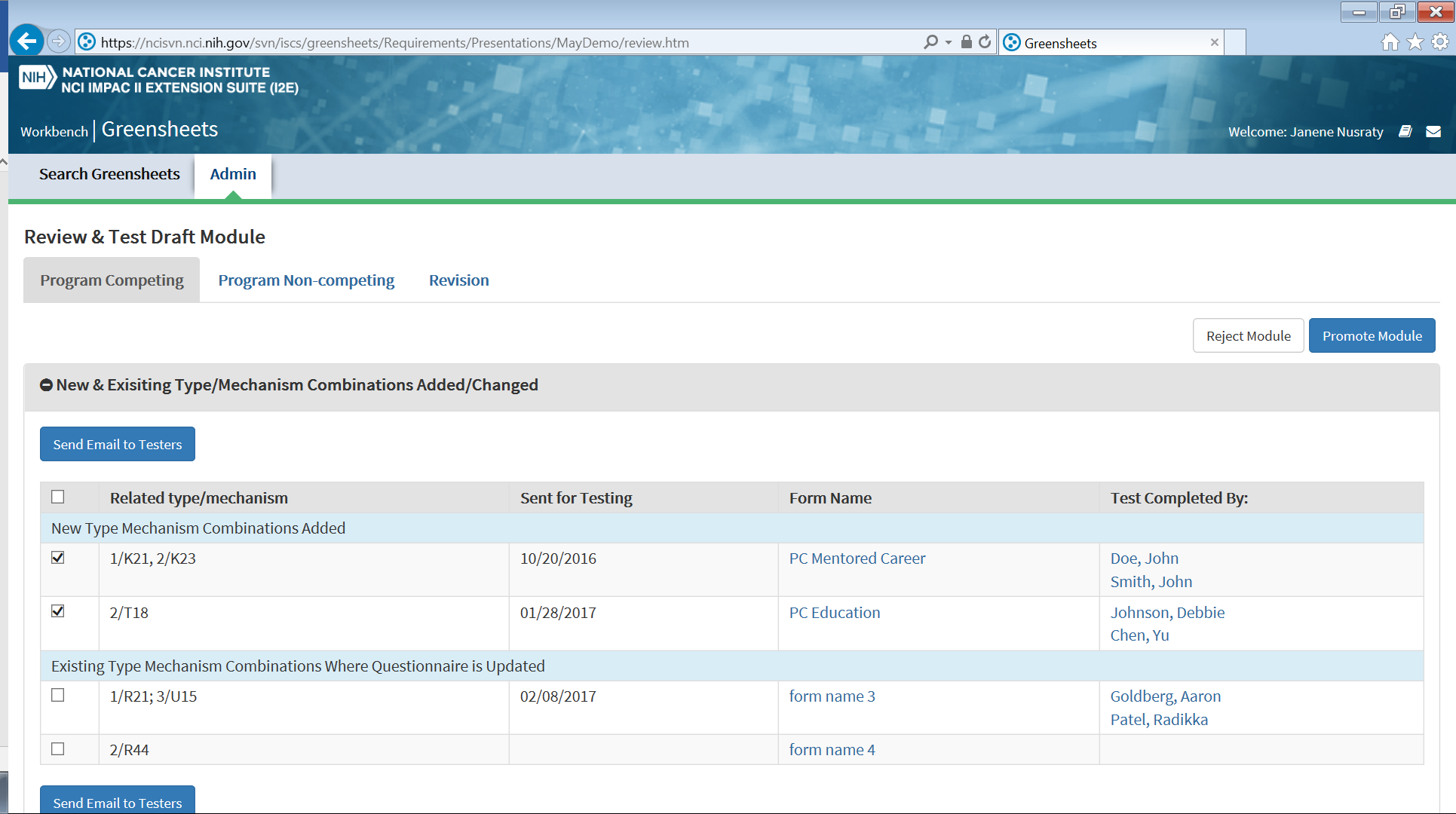
You are being requested to review draft Greensheet forms and provide feedback, if any.  Please do so within 7 days from the date of this e-mail.

To access the draft forms, please click the following link(s):

To test <New form name X> - (form type) for <list of type/mech combinations>

To test <New form name Y> - (form type) for <list of type/mech combinations>

Any feedback should be sent to [NCI OGA Greensheets](mailto:ncigabgreensheets@mail.nih.gov?subject=Feedback%20on%20draft%20Greensheet%20forms).  If you have no concerns, please complete the test by selecting “Testing Completed” button on the form screen.  Thank you for your time and contributions



## For a Tester

The system provides ability to test to:

* Draft Viewer – accesses testing page by clicking a hyperlinked form name on “Review and Test Module” screen
* Draft Admin – accesses testing page by clicking a hyperlinked form name on “Review and Test Module” screen
* Any Specialist, who received an email with the link to the page – accesses testing page by clicking a hyperlinked form name in email
* Any Program staff, who received an email with the link to the page – accesses testing page by clicking a hyperlinked form name in email

When user clicks the link, the system displays Review and Test Greensheet screen:



**Functionality, provided on “Review and Test Greensheet” screen:**

* Ability to 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. Even if the user never filled the form or validated submission functionality, 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.
* Expand/collapse sub-questions. For business rules please refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc>

Sec. BUSINESS RULES and Corresponding Errors => Display rules => Expand/Collapse questions

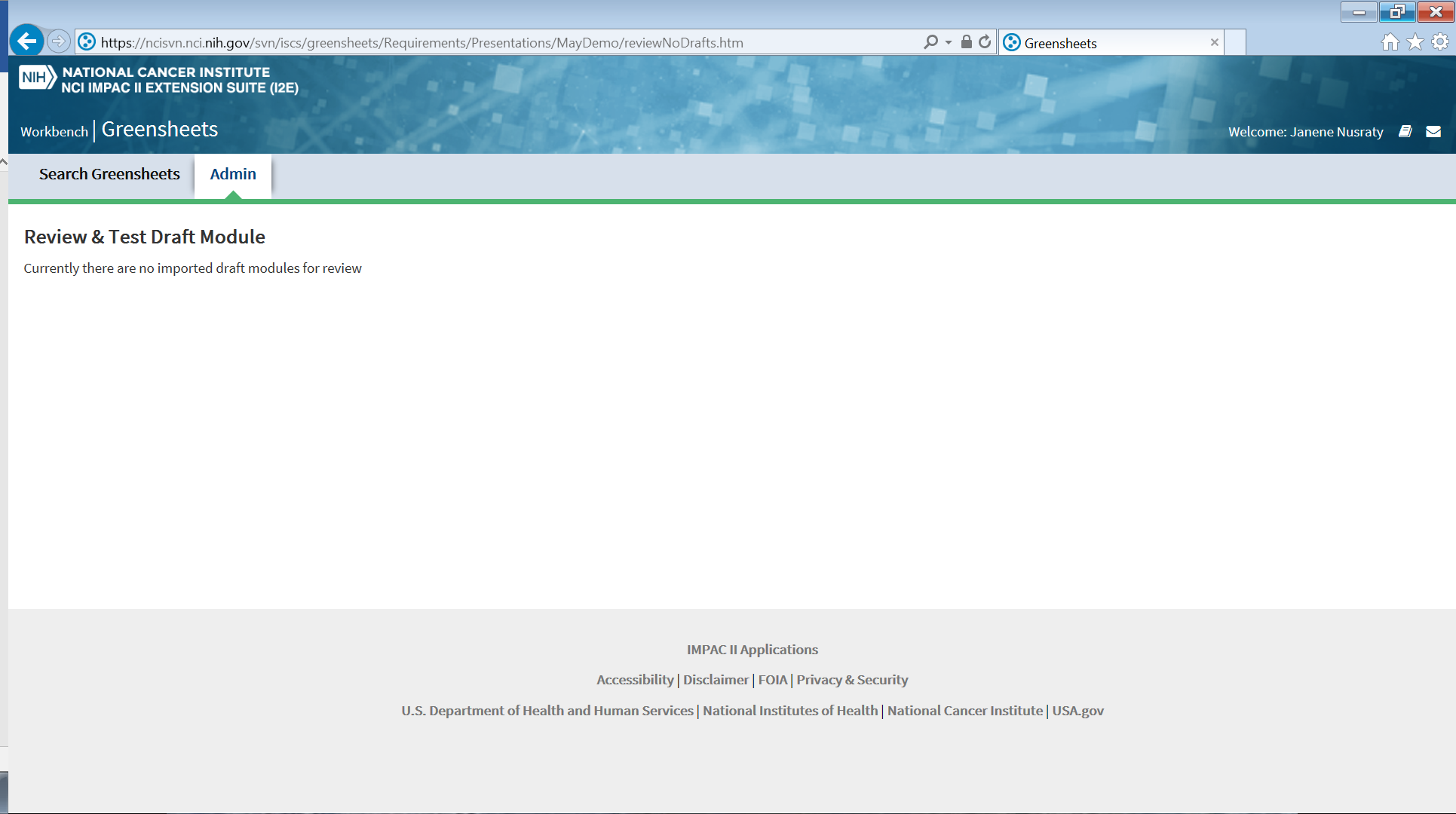
* Ability to Reset Grensheet
* User will be able to click URL in the question; it should open in the separate browser window
* Ability to “Close” or (if applicable, to a user with Draft Viewer and/or Draft Admin role) to return to Review and Test Module screen.

# Review & Test Draft Module functionality

Actor with Draft Viewer and/or Draft Administrator role navigates to DRAFT area by clicking Admin navigation tab.

1. The system displays “Review & Test Draft Module” screen
2. The system checks if there are module(s) that have been imported from the Form Builder, but not yet processed (promoted or rejected) in Greensheets (draft modules):

* If there are NO draft module(s) that have been imported from the Form Builder, but not yet processed (promoted or rejected) in Greensheets, then the system displays the message “Currently there are no imported draft modules for review”



* If there ARE draft module(s) that have been imported from the Form Builder, but not yet processed (promoted or rejected) in Greensheets, then the screen provides access to the imported module(s). The system provides with ability to switch to other not yet processed module (if any).



* 1. If this is a Revision module, then refer to sec. Review & Test Draft Module screens mockups => Revision module mockup
  2. If this is any module, except Revision, then refer to sec. Review & Test Draft Module screens mockups => “General mockup for all modules, except Revision” and “Existing Type/Mechanism combinations with no changes” section mockup”

Also, refer to sec. “Type/Mech combinations for each section on Review & Test Draft Module screen”

1. Review & Test Draft Module screen provides ability to:
   1. Select form(s) and send email to tester(s), requesting to test selected forms. For details see this document, sec. Overall business flow description => For user with Draft Viewer or Draft Administrator role => Email to testers. The system should capture the date when user clicked “Send Email to Testers” button for selected form(s). The latest date for each form (if any) should be displayed on Review & Test Draft Module screen
   2. Navigate to “Review and Test Greensheet” screen for a form. If Actor selects this option, refer to this document, sec. “Test Greensheet functionality”
   3. Promote/reject a module (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. For details see this document, sec. Promote or Reject the module functionality
2. Use-case ends.

## Type/Mech combinations for each section on Review & Test Draft Module screen

**What constitutes the change of the question?**

Change of the any of the following part(s) of the question:

* Question text
* Question type
* Learn more
* Answer type
* Answer options
* Question’s attributes changed:
  + Skip added/removed/modified
  + Required/Visibility/Read-only enabled/disabled (note, OGA doesn’t use them)

**What constitutes the change of the form?**

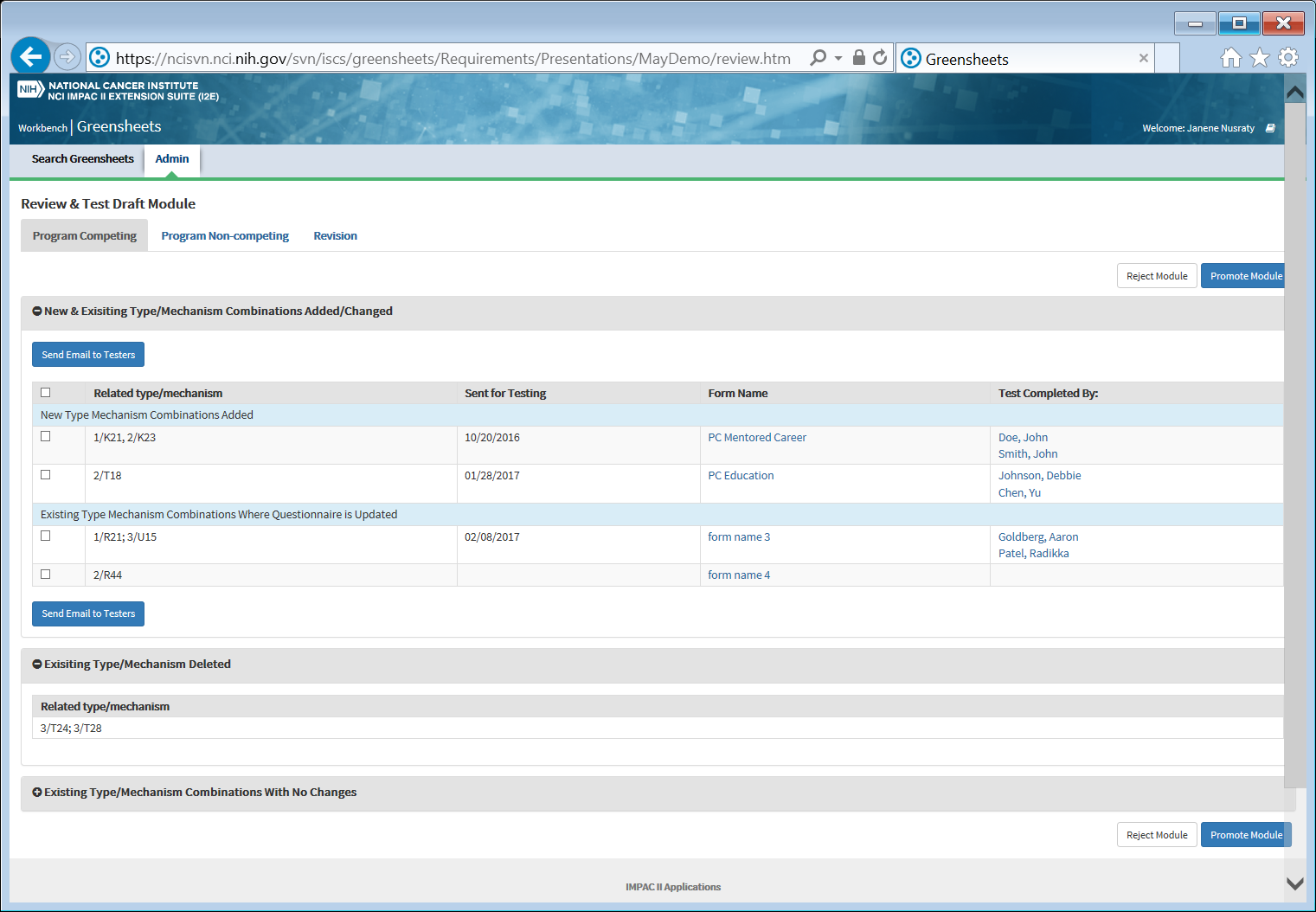
Change of the any of the following part(s) of the form:

* Form Name
* Form type
* Form description ---- we be deleted in the future
* Addition of the question
* Deletion of the question
* Addition of the section
* Deletion of the section
* Braking section into separate questions ---- we be deleted in the future
* Moving the question
* Moving the section

|  |  |
| --- | --- |
| Name of the section | Conditions/scenarios when type/mech and form is shown in the section |
| New Type/Mech Combination Added | New type/mech is added to the module  Possible scenarios:   1. New Form is added to the module. This form is related to a category that has type/mechs that were not used in this module before.   Example:  Start: Form 1 => Cat 1 (9/P01, 7/P01) Result: 7/P01, 9/P01 in “New Type/Mech Combination Added” Section;   1. Existing form is still in the module, but related category composition has changed in a way that some type/mechs were added to this category. Added type/mechs will be shown here   Example:  Start: Form 1 => Cat 1 (9/K01, 7/K01) Modifications:3/K12, 3/K14 added to the category Cat 1 Result: 3/K12, 3/K14 in New Section; (9/K01, 7/K01) in Without Changes  *NOTE: There are some issues with the current implementation. Basically, right now in this example 9/K01 and 7/K01 will show up in "Updated section" instead of "Existing Type/Mech Combinations with No Changes” section".*   1. Existing form reassigned to a different category that has type/mechs that were not used in this module before   Example:  Start: Form 1 => Cat 1 (9/Z01, 7/Z01) Modifications: Form 1 => reassigned to Cat 2 (3/Z01, 3/Z02)  Result: (3/Z01, 3/Z02) in “New Type/Mech Combination Added” Section; (9/Z01, 7/Z01) in “Existing Type/Mech Deleted” section |
| Existing Type/Mech Combinations Where Questionnaire is Updated | * Form has been changed and/or question(s) on the form were changed (see definitions above) for the same type/mech   Example:  Please refer to “**What constitutes the change of the question?” and “What constitutes the change of the form?”**   * New form has been associated with existing type/mech   Example:  Start: Form 1 => Cat 1 (9/R01, 7/R01)  Change: Form 2 => associated with existing Cat 1 (9/R01, 7/R01)  Result: (9/R01, 7/R01) in sec. “Existing Type/Mech Combinations Where Questionnaire is Updated” with Form 2     * *will be covered only after October release:* Type/mech from one category, moved to another category, which has a different form within the same module.   Example:  Start:  Form 1 => Cat 1 (9/R01, 7/R01)  Form 2 => Cat 2 (9/T01, 7/T01)  Move:  Form 1 => Cat 1 (9/R01)  Form 2 => Cat 2 (9/T01, 7/T01, 7/R01)  Result:  7/R01 in Updated section;  9/R01, 9/T01, 7/T01 in “Existing Type/Mech Combinations with No Changes” section |
| Existing Type/Mech Deleted | Type/mech is no longer in this module  Possible scenarios:   * Form is deleted from the module. This form was for a specific category. Type/mechs stayed in this category. All type/mechs from this category will be shown here   Example:  Start: Form 1 => Cat 1 (9/T01, 7/T01)  Change: Form 1 is deleted from the module  Result: (9/T01, 7/T01) in sec. “Existing Type/Mech Deleted”   * *will be covered only after October release*: Form is still in the module, but related category composition has changed in a way that some type/mechs were deleted from this category. Deleted type/mechs will be shown here   Example:  Start: Form 1 => Cat 1 (9/T01, 7/T01, 5/T21)  Change: 5/T21 is deleted from the Cat 1  Result: 5/T21 in sec. “Existing Type/Mech Deleted”;  (9/T01, 7/T01) in “Existing Type/Mech Combinations with No Changes” section |
| Existing Type/Mech Combinations with No Changes | If type/mech did not get in any of the sections above, it should be displayed in this category. |

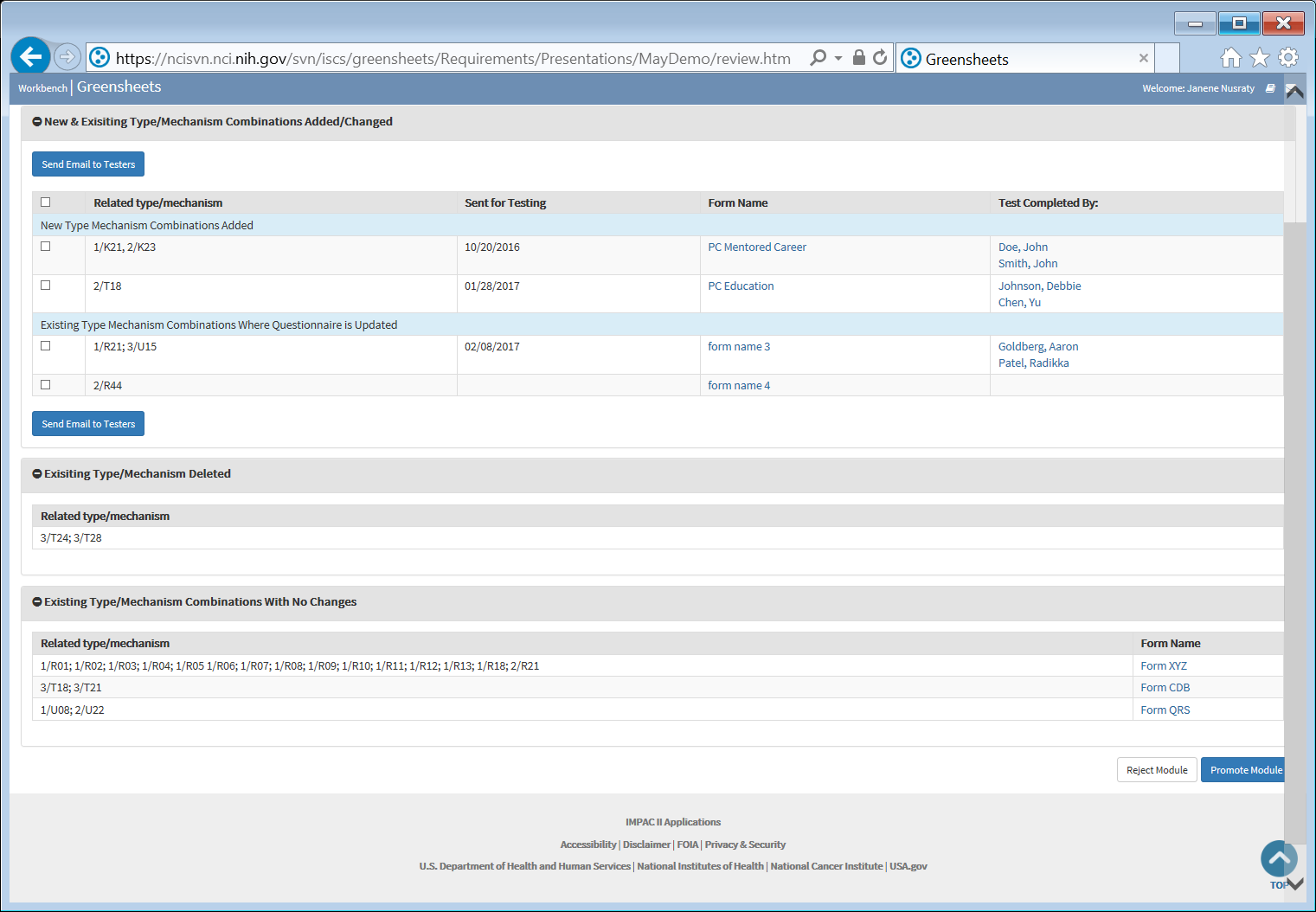
## Review & Test Draft Module screens mockups

### General mockup for all modules, except Revision



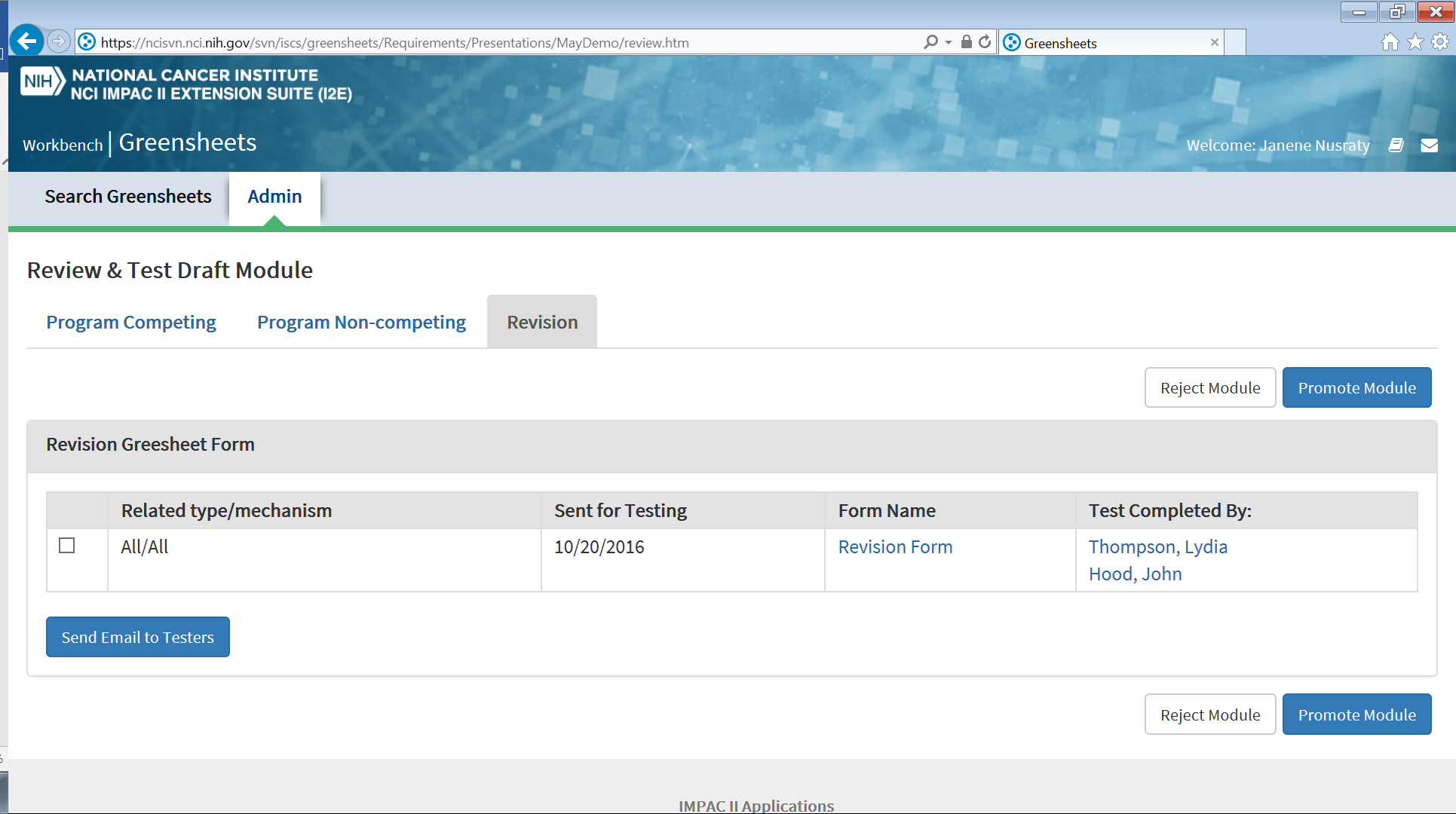
### “Existing Type/Mechanism combinations with no changes” section mockup

When expanded:



NOTE: For the forms in this section, the system will display “Review and Test Greensheet” screen without “Testing Completed” button. All other functionality is the same.

### Revision module mockup



## Review & Test Draft Module Screen Data elements

Rule: Display of Type/Mech list for the form

* Group by mech, within this group sort by type (e.g. 1/R01, 2/R01, 3R01)
* If it’s more than one mech, mech groups should be in alphabetical order. E.g. F…group should preside R..group

### Applicable to all modules, except Revision

|  |  |  |  |
| --- | --- | --- | --- |
| Element Name | Description | Element Type | Comments |
| Review & Test Draft Module | Screen title | Read-only | Module name displayed as a tab at the top of the screen |
| Reject Module | Allow rejecting this module | Button | Enabled only for a user with Draft Admin role;  Displayed at the top and the bottom of the screen  If Disabled, the tooltip says:  "You must have Greensheets Draft Admin role to be able to promote or reject Draft Module" |
| Promote Module | Allow promoting this module | Button | Enabled only for a user with Draft Admin role  Displayed at the top and the bottom of the screen  If Disabled, the tooltip says:  "You must have Greensheets Draft Admin role to be able to promote or reject Draft Module" |
| Section: New & Existing Type/Mechanism Combinations Added/Changed   * Expandable/collapsible * Expanded by Default * Divided into 2 subsections: “New Type Mechanism Combinations Added” and “Existing Type Mechanism Combinations Where Questionnaire is Updated” | | | |
| Send email to Testers | See this doc., sec. Overall business flow description => For user with Draft Viewer or Draft Administrator role => Email to testers | Button | Displayed at the top and the bottom of the hitlist |
| Select | Allows to select form(s) for which email should be send to testers | Checkbox | Ability to select all in both subsections is provided |
| Related type/mechanism | Set of Application type/Application mechanism combinations, that were added or where the form has been changed in Form Builder | Read-only |  |
| Sent for testing | Latest date when Actor selected the checkbox for this form and clicked “Send email to Testers” button | Read-only | Format MM/DD/YYYY |
| Form Name | Form name, imported from Form Builder | Hyperlink | Hyperlinked to Review and Test Greensheet screen for this form |
| Test Completed By: | Display the name of the user, who marked the form as tested | Hyperlink | Hyperlinked to email client, allowing to send email to this tester  Format <Last Name>, <First Name> |
| Section: Existing Type/Mechanism Deleted   * Expandable/collapsible * Expanded by Default | | | |
| Related type/mechanism | Set of Application type/Application mechanism combinations, that were deleted from this module in Form Builder | Read-only |  |
| Section: Existing Type/Mechanism Combinations With No Changes   * Expandable/collapsible * Collapsed by Default | | | |
| Related type/mechanism | Set of Application type/Application mechanism combinations, without any changes in this module in Form Builder | Read-only |  |
| Form Name | Form name, imported from Form Builder | Hyperlink | Hyperlinked to “Review and Test Greensheet” screen for this form; For the forms in this section, the system will display “Review and Test Greensheet” screen in read-only mode (there is no need to test forms without any changes) |

### Applicable to Revision module

Review & Test Draft Module screen for Revision module has only one section.

|  |  |  |  |
| --- | --- | --- | --- |
| Section: Revision Greensheet Form | | | |
| Select | Allows to select revision form; email should be send to testers | Checkbox |  |
| Related type/mechanism | Always display All/All | Read-only |  |
| Sent for testing | Latest date when Actor selected the checkbox for this form and clicked “Send email to Testers” button | Read-only | Format MM/DD/YYYY |
| Form Name | Form name, imported from Form Builder | Hyperlink | Hyperlinked to Review and Test Greensheet screen for this form |
| Test Completed By: | Display the name of the user, who marked the form as tested | Hyperlink | Hyperlinked to email client, allowing to send email to this tester  Format <Last Name>, <First Name> |
| Send email to Testers | See this doc., sec. Overall business flow description => For user with Draft Viewer or Draft Administrator role => Email to testers | Button | Displayed below the section |

# Test Greensheet functionality

## “Test” flow of events

1. Actor navigates to Review and Test Greensheet page.
2. The system determines if this screen should provide ability to mark the form as tested or not:
   1. If Actor navigated from “New & Existing Type/Mechanism Combinations Added/Changed” section, Actor can:
      * Fill the form
      * Test submission. The system performs the same validations as on Save and additional validations on Submit. Refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc>

sec. BUSINESS RULES and Corresponding Errors => Validation rules => Validations on Save/ Validations on Submit

* + - * If submission test passed, the system should display success message: “Successfully Validated! The greensheet has been successfully validated.”
    - Manually mark the form as tested (click “Test Completed” button). No validations are needed for completion of the test. If the user never filled the form or validated submission, 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.

After the user clicked “Testing Completed” button:

* Success message is displayed on the “Review and Test Greensheet” screen “Testing Completed: <date> <time>
* The system will display this user’s name on the “Review & Test Draft Module” screen for this form
  + - Expand/collapse sub-questions. For business rules please refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc>

Sec. BUSINESS RULES and Corresponding Errors => Display rules => Expand/Collapse questions

* + - Reset Grensheet. In this case the system provides a warning message and, after Actor confirms, deletes all existing answers. Refer to “Reset a greensheet” flow in <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc>. The difference we are not actually deleting a greensheet and not changing statuses, just deleting the answers.
    - User will be able to click URL in the question; it should open in the separate browser window
    - “Close” or (if applicable, to a user with Draft Viewer and/or Draft Admin role) to return to Review & Test Draft Module screen.
  1. If Actor navigated from “Existing Type/Mechanism Combinations With No Changes” section, then the “Testing Completed” button is not displayed. The rest of functionality is the same.

## Review and Test Greensheet screen mockup



## Sub-questions numbering

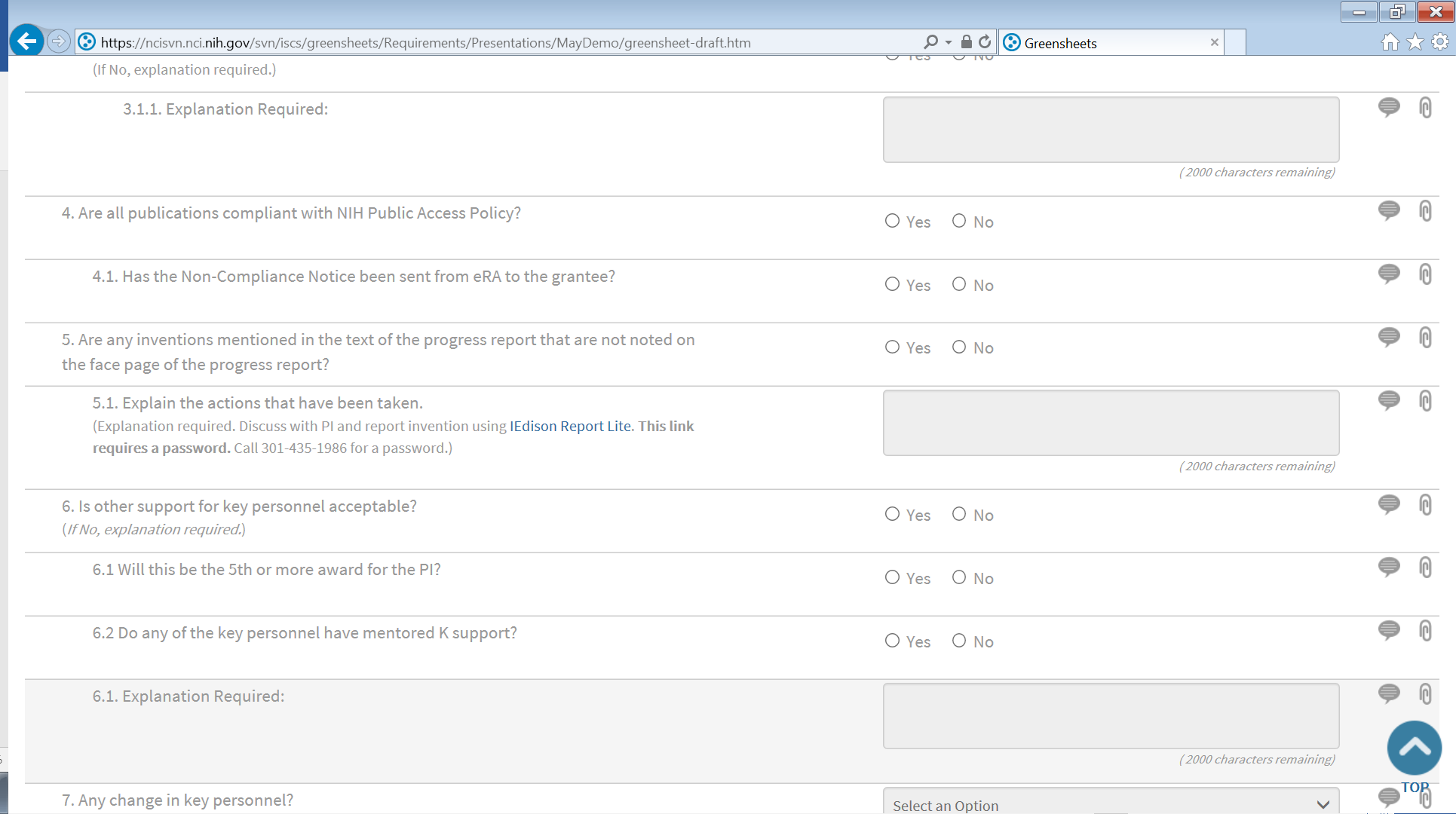
In preview mode, the system displays a question number as follow:

Question #6 with option Yes and No

Question #6.1 – related to Yes answer on #6

Question #6.2 – related to Yes answer on #6

Question #6.1 – related to No answer on #6



## Review and Test Greensheet Screen Data elements

|  |  |  |  |
| --- | --- | --- | --- |
| Element Name | Description | Element Type | Comments |
| Back to Review & Test Module | Allows to return to Review & Test Module screen | Button | Provided only to the users with Draft Viewer and/or Draft Admin role |
| Review and Test Greensheet | Screen title | Read-only |  |
| Static text | “Comments and Attachments are disabled in Test Mode” | Read-only |  |
| Header section: | | | |
| Form Name | Displays form name that is exported from Form Builder | Read-only |  |
| Form Type | Displays form type | Read-only | Possible values:   * Program * Specialist * Revision |
| Applied to | Displays the list of type/mech combinations for which this form is used | Read-only |  |
| Buttons on the screen (could be repeated above and below a questionnaire) | | | |
| Testing Completed | Allows to mark the form as ‘tested’. | Button | The system should save the name of the user, who marked the form as tested and display it on Review & Test Module screen |
| View All Comments | Disabled in DRAFT area. Tool tip is “Comments for Test Mode are disabled” | Button |  |
| Reset Greensheet | Allows to delete all answers. | Button |  |
| Validate Submission | Allows to run all validations on submission. | Button |  |
| Close | Allows to close the page | Button | Displayed to a Tester (Program or Specialist) who clicked on the link in email |
| Questionnaire portion of the screen | | | |
| For description of elements, please refer to <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Use-cases/View%20and%20Manage%20a%20greensheet%20use-case_NEW.doc>  Sec. UI Specifications => Questionnaire  There are **differences** for DRAFT area:   * Questionnare header does NOT display application type/mechanism * Attachments and Comments icons are disabled; always shown as  and . Comments are NOT expandable on the screen | | | |

# Promote or Reject the module functionality

1. Actor requests to Promote or Reject the module
2. The system:

* If Actor requested to Promote module, the system displays a warning: “Are you sure you want to proceed? You are about to PROMOTE the Module for all Types and Mechanisms.”
* If Actor requested to Reject the module, the system displays a warning: “Are you sure you want to proceed? You are about to REJECT the Module for all Types and Mechanisms.”

The choices are Cancel (default) and OK.

1. Actor provides a response.

* If Actor clicks Cancel, the warning pop up is closed; no changes on the page
* If user clicks OK, the system:
* Promotes/rejects a module
* Saves the date when a module has been promoted/rejected
* The system displays a confirmation message:

“Successfully Promoted/Rejected. The <insert module name> module has been <promoted>/<rejected>”

* Tab with the name of promoted/rejected module disappears from the “Review & Test Draft Module” screen

NOTE: If there are no more unprocessed modules, then the system displays a version of the screen with no modules to select from

* The system sends automatic email. See this document, sec. “Email Notifications about greensheets module deployment process”.

# Import templates from GS Form Builder

Specific templates for each module are created and approved in Form Builder. After importing a module from Form Builder, the system parse and creates “draft” templates for review and processing by the user.

|  |  |
| --- | --- |
| Rule name | Description |
| Parsing Questions Definition source files | For extracting forms with elements, questions, and possible answers, the system will be able to parse, and interpret source files with question definitions that meet the following conditions:   1. Source files with question definitions will be stored as regular ASCII text files, editable with any plain-text editor. 2. System will allow for question definitions to be stored in five separate such files – one each for questions applicable to:  * Program greensheets for competing grants, * Program greensheets for non-competing grants, * Specialist greensheets for competing grants, * Specialist greensheets for non-competing grants * Revision greenshets   3.   The content of the files will be represented as well-formed and valid XML. Precise definition of elements, attributes, and other components of the XML schema is left to determination by the technical team as a part of analysis and design activities. However, the XML schema adopted will support the following requirements:         a)  Each question can be marked as required to appear on greensheet forms for grants of more than one type/mechanism. Each type/mechanism combination to which the form is applicable will be specified individually.         b)  Each question definition will include the possible type of response value, which can be any of the following:   * Multi-line text field * File attachment * Text string * Number * Date * Answer options to be shown as a drop-down list * Answer options to be shown as "radio buttons" * Answer options to be shown as check boxes (selecting multiple answer options possible).        c)  When response type is answer options, question definition will include the exact list of those options.       d)  Each question can have "nested" sub-questions. Sub-questions can be associated with specific answer option being chosen for their parent question. (In other words, a sub-question "Was certificate received from grantee organization?" can be associated only with the answer option "Yes" to the parent question "Is a certificate XYZ required?", but not with answer option "No".)      e) Sub-questions will have all the same attributes in the definition file as top-level questions. |
| Output files and database storage | 1. System will save the received XML file from the Form Builder in a backup directory marked with timestamp 2. System will store a greensheet form template for a grant of multiple type/mechanism combinations on a separate row in the database. 3. Reports that the system will produce concerning the questions defined in Question Definition Source files (the XML files) are for internal use of the Development team. Their purpose is to assist the IT professionals maintaining the Greensheets system in validating the XML files and ensuring their quality and accuracy as they try to configure which questions will be asked on greensheet questionnaires for grant of which types/mechanisms.  Business owners and other stakeholders provided no requirements with respect to these reports. Therefore, their content and format are up to the Development team |
| Passing validations to individual questions from Form Builder to Greensheets | Parent question might have a sub-question.  There is ‘Edit Skips’ functionality in Form Builder (used during editing a question) that determines if sub-questions are displayed in a greensheet, depending on the answer to the immediate previous question (not necessarily a parent question).  This relationship is reflected in XML.  (Related to sec. “Submit greensheet”) |
| Active URL | Refer to Greensheet-560 - URL on Form Builder questsion must be active in GreenSheets system  When URL is entered in FB question and the form is exported into GreenSheets, this link must be active |
| No defaults | Refer to Greensheet-519 and Greensheet-559  When XML file is processed, the system should ignore any defaults to the answers.  Requirements: <https://ncisvn.nci.nih.gov/svn/iscs/greensheets/Requirements/Specs/GreenSheets%20Redesign%20Project%20Scope.docx>;  Sec. Form Builder – changes for re-design |

# Email Notifications about greensheets module deployment process.

A notification email will be sent to users each time an action in the deployment process is executed per the table below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Triggering event | To | Which system sends this email? | Subject line | Body: |
| Module was successfully imported into GS | The recipient list for all GS messages is set in a property file.  It is not dynamically generated in the code. It will be send to Draft Admin and Draft Viewer users  To: Looks like NCI\_NOW\_L | GS | [GS - TEST 2017-02-09 11:19:16 AM] Confirmation of Successful Import of Draft Greensheets | Thank you for your request. The <Insert module name> Draft Greensheets Forms are available for you to review and test. Please log into the Greensheets Application using the URL given below and select this module in the Review & Test Draft Module screen. Use Promote Module button to accept the Draft Greensheets and promote them to Production. Alternatively, if they are not ready to be promoted, you may select Reject Module.    Comments for <Module Name> import:  <Insert comments, entered in Form Builder>    Greensheets Application URL: <https://i2e.nci.nih.gov/greensheets/>   (URL should be set in all environments) |
| Unsuccessful Import of the module into GS | The recipient list for all GS messages is set in a property file.  It is not dynamically generated in the code. | GS | Unsuccessful Import of the DRAFT Greensheets | Thank you for your request. The request did not go through and it resulted in errors. Please contact the System administrator for assistance. |
| Module is successfully promoted into production area of GS | The recipient list for all GS messages is set in a property file.  It is not dynamically generated in the code.  To: Looks like NCI\_NOW\_L | GS | [GS - TEST 2017-02-09 10:37:29 AM] Confirmation of Successful Promotion of Draft Greensheets | The <Insert module name> Draft Greensheets are successfully promoted to Production.    Greensheets Application URL: <https://i2e.nci.nih.gov/greensheets/> |
| Module is rejected in DRAFT area in GS | The recipient list for all GS messages is set in a property file.  It is not dynamically generated in the code.  To: Looks like NCI\_NOW\_L | GS | [GS - TEST 2017-02-09 04:47:56 PM] Rejection of the Draft Greensheets | The <Insert module name> Draft Greensheets were rejected.  Greensheets Application URL: <https://i2e.nci.nih.gov/greensheets/> |

Reverse re-engineering notes:

* 1. GS emails are being sent by ProcessNewQuestionDefsServiceImpl. In addition, there is a property called gs\_send\_mail defined in greensheetconfig.properties that can be used to disable email sending (setting its value to false). The messages are being sent to the list of addresses defined in the gs\_error\_email\_to property in greensheetconfig.properties
  2. Question: if we are sending this email, why we are not capturing rejection event and date in FB (OGA asked for this info multiple times)?

Answer:  GS does not have a “back link” to GSFB, therefore, Form Builder cannot get the promote or reject event from GS.  It is doable but is required design and resources.

# Non-functional requirements

During import of ANY module, the system should return an error if:

* Module name is different from one of the hardcoded modules names in GS
* If there are no forms in the module

Additionally:

During import of the **REVISION** module from Form Builder, the system should return an error in the following cases:

* If REVISION module contains more than one form
* If REVISION module contains the form that is NOT of REVISION type
* If the form in REVISION module is NOT tied to any type/mech at all
* If the form in REVISION module is related to any other type/mech than 0/000

During import of the **Program Competing/Program Non-competing/Specialist Competing/ Specialist Non-competing** module from Form Builder, the system should return an error in the following cases:

* If any form in the module is NOT tied to any type/mech at all
* If the module contains duplicate form names
* If any form in the module is tied to type/mech 0/000
* If it’s a Specialist module => error if the forms of any other type, but Specialist
* If it’s a Program module => error if the forms of any other type, but Program

All errors should be captured in the log file.