NCI/CBIIT

Form Builder System

High Level Scope of changes related to GreenSheets re-design

Version 1.0

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/***[Form Builder - Scope of changes.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 | 09/12/2016 | G. Tulchinskaya | Initial version | |
|  |  |  |  | |
|  |  |  |  | |

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/Specs/GreenSheets%20Redesign%20Project%20Scope.docx> |
|  |

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 high level overview, dependencies and outlines current and possible future functional and non-functional requirements of the Form Builder System, related to GreenSheets re-design project

# Creation of the Revision form in FB and promotion of the Revision module

Related to GSFB - 122

Ultimately, completed greensheet forms are needed for award of the grant. In reality, grant can be awarded only via ‘actions’ in GPMATS.

GPMATS actions can be of two types: AWARD or REVISION; during GreenSheets re-design project, OGA indicated the need to have a separate form (template), related to REVISION type of the action in GPMATS.

To accommodate this need, FB and GreenSheets systems should be modified as follow (high level):

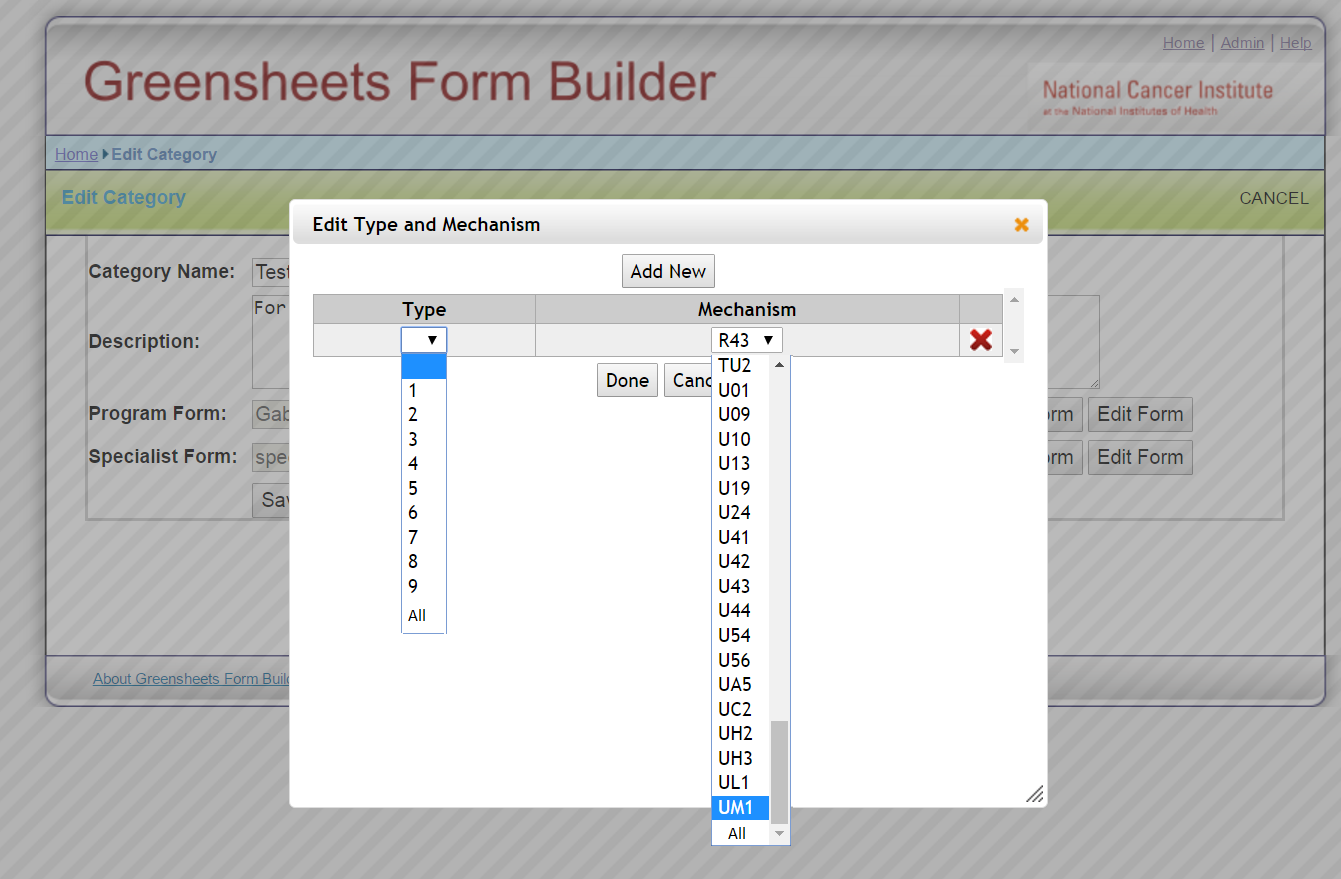
* User will create a new module in FB (user can call it “Revision module”, but this is “as-is” functionality, no changes)
* User will create a form (user can call it “Revision form”, but this is “as-is” functionality, no changes)
* Change => FB should add CATEGORY Type (AWARD and REVISION)

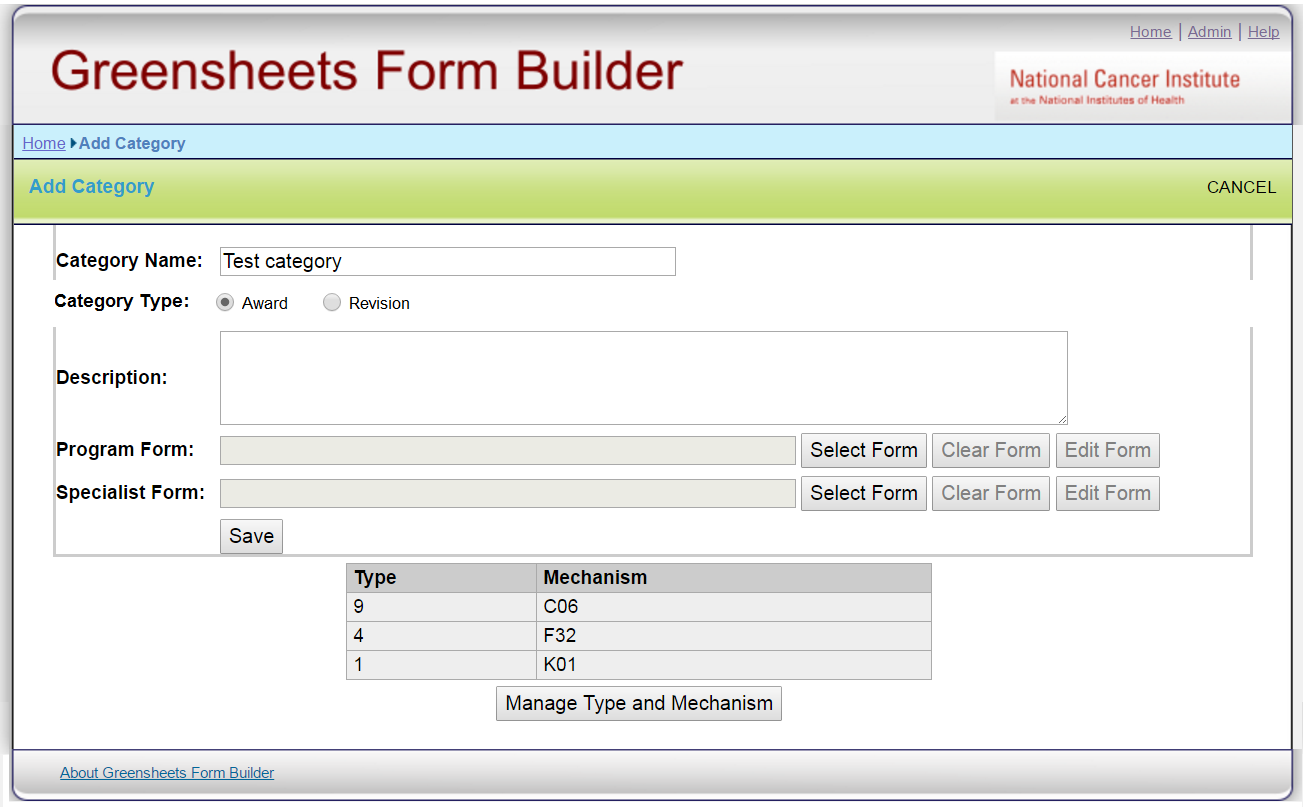
|  |  |
| --- | --- |
| **Category** **type** | **Related FB forms** |
| AWARD | Program and Specialist forms are needed |
| REVISION | * Only one revision form is needed for all type/mechs * Revision form will be used by Specialist only |

* User will add Revision form to Revision module (no changes)
* Change => User will export/deploy the Revision module; the name of the module will be the same as in GreenSheets in order to export/promote this module

**Details for changes to create a category process**

The system will allow to select ALL types and mechanisms while creating a category.

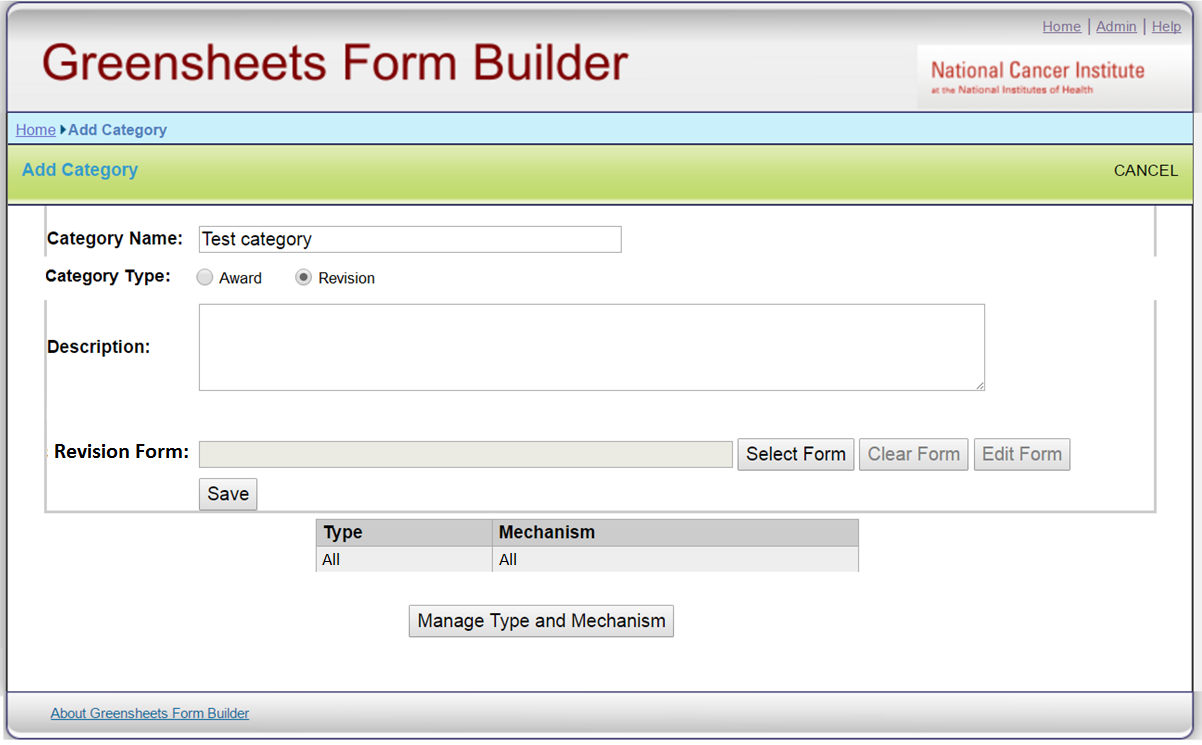




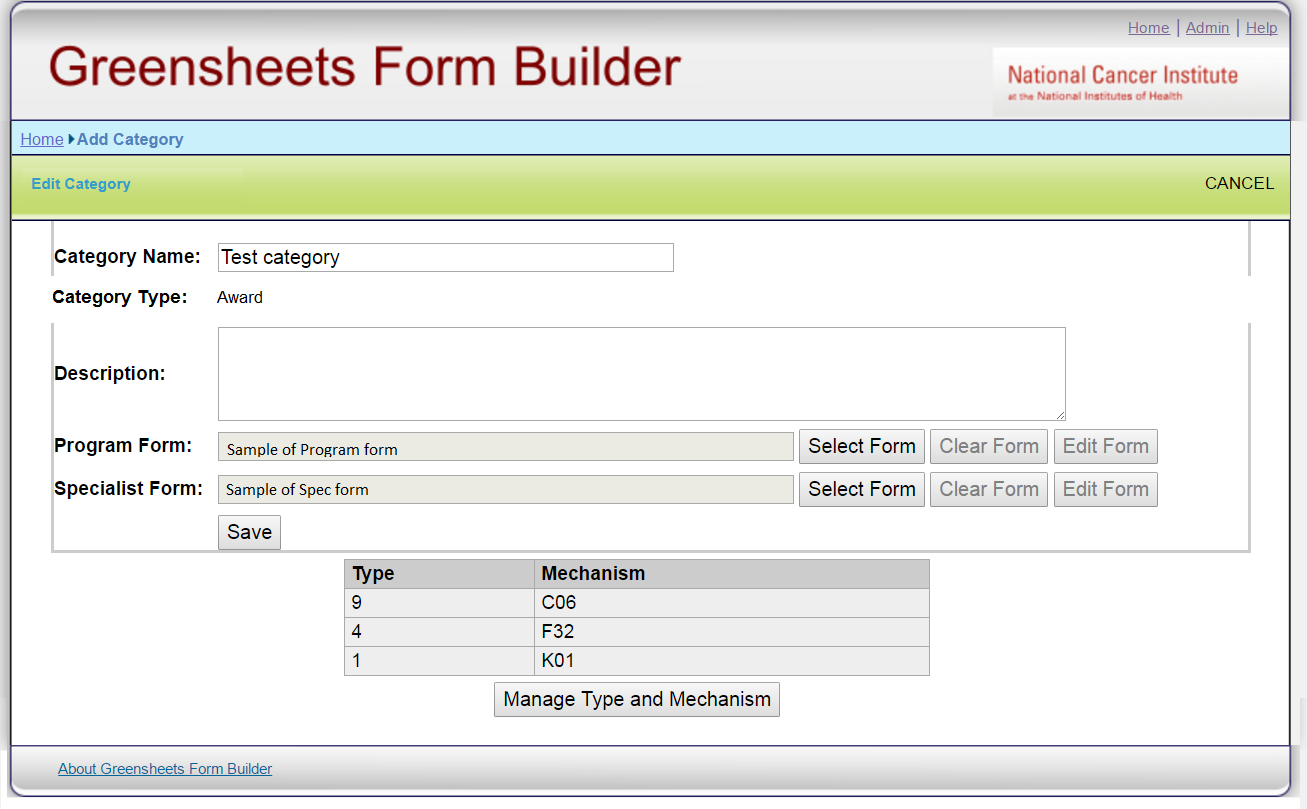
When OGA user adds a category, s/he may choose a category type (Award or Revision)

On the screen category type will be defaulted to ‘Award’ (OGA mentioned that after Revision form is created and deployed, it will never change).

* If ‘Award’ type is chosen, the process is as usual
* If “Revision” type is chosen:
  + The screen will allow adding only Revision form
  + User will select ALL types/mechanisms (no validation for ALL/ALL combination, it will be responsibility of the user, it will allow more flexibility in the future)



**C**ategory type will become read-only when editing existing category.



# Reporting

[GREENSHEET-521](https://tracker.nci.nih.gov/browse/GREENSHEET-521) - [SCOPE] - Create new FB report to validate mechanisms selected for each question set.

Requirements provided by OGA:

“When a question is modified in Form Builder it is not easy now to find out what it will affect. It would be nice to have a report which displays the following elements:  
a. Question text  
b. Question id (since the same question cannot be used in sections of the same form they end up creating tons of “Please Explain” or “Additional Comments”, it is a pain point finding these particular questions for future re-use. Maybe we need to take a look at the reason why the same Comments box cannot be used in several sections of the same form in FB)  
c. Created date of the question  
d. Creator user id  
e. Last\_upd\_date  
f. Last\_upd\_id  
g. Section name/identifier  
h. Form name/identifier  
i. Module  
j. Note: Module deployment date is not a strong preference as it does not give us idea of “life span” of the question.

Additional requirement for the report:

1) It would be nice to have excel version for markup. Online version may work too.  
2) Users of the report: Sean, Shane and Crystal (all OGA staff), and maybe some people from OGA Operations team.  
3) Explore a possibility to display question id with the questions in the FB screens (library, and possibly others, mostly where the questions are being picked to be used on the section)

Note: There is a desire to get a group of users together (Sean, Shane, Crystal, Stacey, Eugenia, Rob Jones, Kevin Johnson), possibly with CBIIT representatives at the beginning of October 2016 to define the SOPs for creating questions and making edits to them. OGA users want to understand the downstream effect of these modifications and put together a guidance for OGA on creating clean data. Clean up of the existing data may become part of this group discussion.”

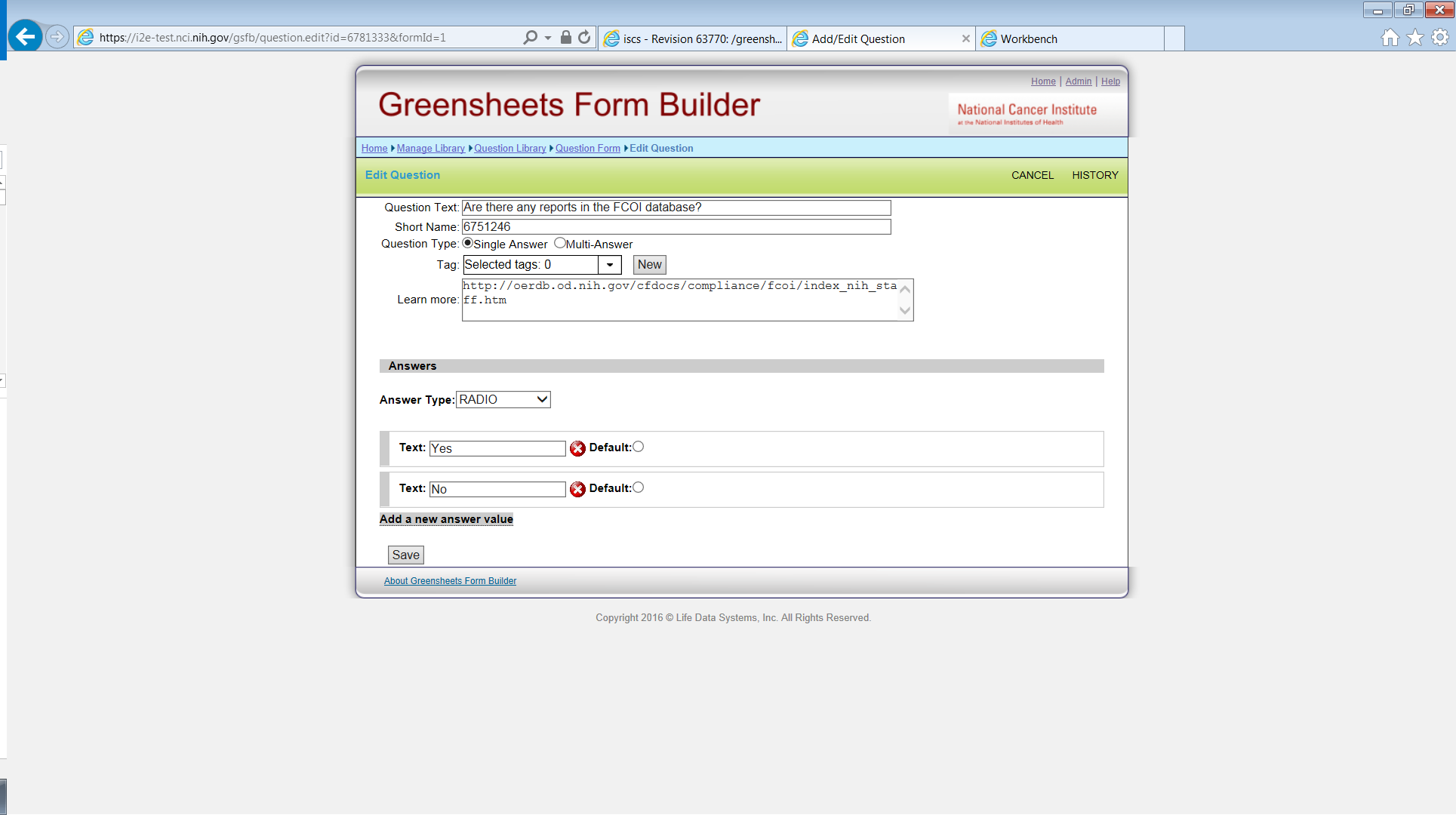
# User-friendly interface for active hyperlinks

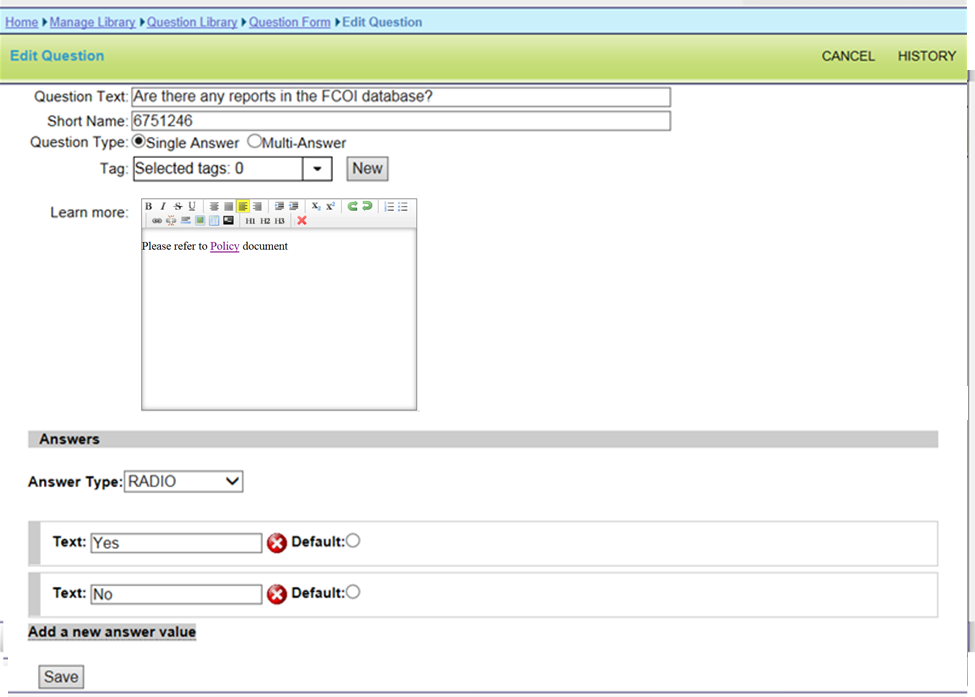
***Please see the diagram below this table***

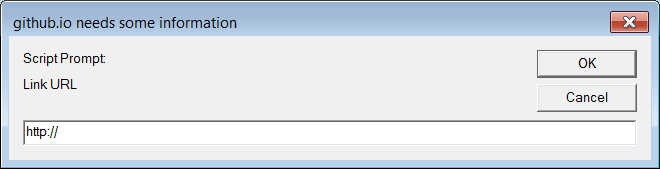
Form Builder functionality will be modified as follow (high level):

* All changes to a question (including Learn More field) in the QUESTIONS library must be propagated to the SECTIONS library and to the form(s), where these section(s) are used
* Edits to any part of the question in the SECTIONS library will be applicable to this section only and to the forms, where this section is used.
* Changes made in the SECTIONS library will NOT be propagated back to QUESTIONS library
* Ability to edit question(s) from the QUESTIONS library is NOT needed on the FORM level
* CBIIT will keep ability to add and edit question on the form level. It can be used when OGA adds a brand new question (that is NOT in the Question library) to the form
* Form Builder will embed WYSIWYG editor instead of enterable field for “Learn More” (in all 3 places: questions library, sections library, form). Something like at <http://jwysiwyg.github.io/jwysiwyg/help/examples/01-basic.html> *NOTE: request is submitted to OGA to define necessary WYSIWYG controls. Requirements will be added as soon as OGA will respond.*

From this:



To this: 



* Form Builder should provide ability to navigate from a question in the SECTIONS library directly to the same question in the QUESTIONS library
* A new report (see this document, sec. “Reporting”) should be readily accessible to a user working on a question in SECTIONS and/or QUESTIONS library

Functionality change is NOT needed for:

* Search in Form Builder (currently “learn more” field is not searchable; we can keep it as-is)
* Usage information when user clicks on the number next to the question in the SECTIONS library and in the QUESTIONS library; keep as-is
* Existing business rules related to an approval process that allow or not editing a question can be kept as-is



# Help system

See GSFB-123

Existing FB user guide should be updated to reflect all functionality changes in this document.

# Non-Functional Requirements

Please refer to

|  |  |  |
| --- | --- | --- |
| # | Ticket # | Ticket title |
| 1 | [GREENSHEET-507](https://tracker.nci.nih.gov/browse/GREENSHEET-507) | For GSFB: allow to export XML into the local computer |
| 2 | GREENSHEET-514 | [SCOPE] - New Greensheets should have NO defaults |
|  |  |  |
|  |  |  |

# Issues

Please refer to TBD

|  |  |  |
| --- | --- | --- |
| # | Ticket # | Ticket title |
| 1 | GSFB-112 | Improve the logging of the application |
| 2 | GSFB - 113 | GSFB startup is unacceptable slow (client issue)  Related to Greensheet- 115 ([SCOPE] - Fix FormBuilder timeout) |
|  |  |  |
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