



FEI Systems

Connecting Every Dimension of  
Health and Human Services

# FASAMS Requirements Document

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## OZ Recommendations Enhancement part 3 (11673)

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Created by: Jesse Lindsey

Dated: 11/26/2019

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## GENERAL

### VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
11/26/2019	1.0	Jesse Lindsey	Initial document creation
12/17/2019	1.1	Jesse Lindsey	Update to document after split
12/18/2019	1.2	Jesse Lindsey	Finalize document

### STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
FEI Account Manager	Kory Schnoor
FEI Product Manager	Jessica Knott
DCF SAMH Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Jonathan Hall
DCF Business Analyst	Gregory Nix / Victor Gaines

### TERMS AND DEFINITIONS

Terms	Description

### SUPPORTING DOCUMENTS AND REFERENCES

- [Job Submission Export sample](#)

## SCOPE

### INITIAL REQUEST & ASSUMPTIONS

#### *Business Statement*

FASAMS users would like to be able to see the progress of a file they have uploaded while it is running via a progress bar on the Submission tab. Additionally, FASAMS users would like the ability to export their uploaded jobs from the Submission tab so they can easily identify which files have already been submitted to the system.

#### *Scope Definition*

The following items will be completed with this enhancement:

- Add file processing progress bar to status column on Submission tab
- Add export option to Submission tab to allow users to export submitted jobs based on SE selection

## EXISTING FUNCTIONALITY

FASAMS displays “Running” status when a file is being processed by the system. Currently, there is no way to export the jobs on the submission tab.

## PROPOSED FUNCTIONALITY

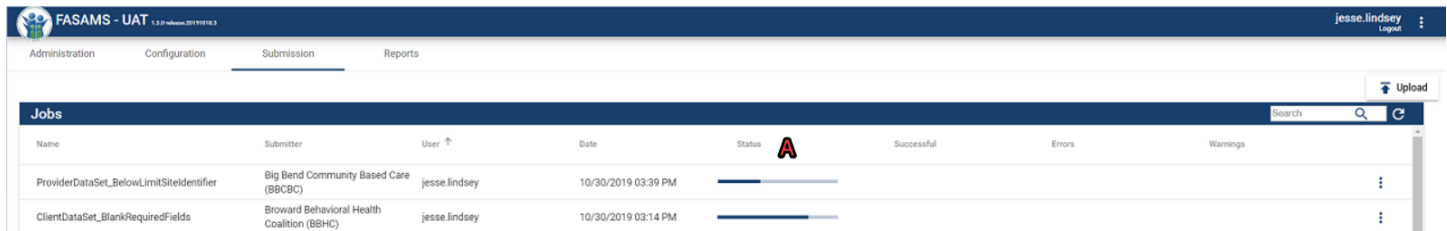
- Add file processing progress bar to status column on Submission tab
  - Replaces “Running” status with progress bar that shows processing progress based on root entity
- Add export option to Submission tab to allow users to export submitted jobs based on SE selection
  - Add clickable vertical elipses to far right side of Jobs bar
    - Elipses opens dropdown with Export button
      - Export button opens popup window
        - Jobs submitted start and end date picker
        - ME dropdown that supports multi-select
        - Export button

## INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
	11673	Initial Estimate	90-180
	11673	Final Estimate	<b>Final Estimate:</b> Analysis - 24 Dev - 105 Test - 60 Acct / Project Management - 16 <b>Total - 205</b>

## REQUIREMENTS

### 1. FILE PROCESSING PROGRESS BAR

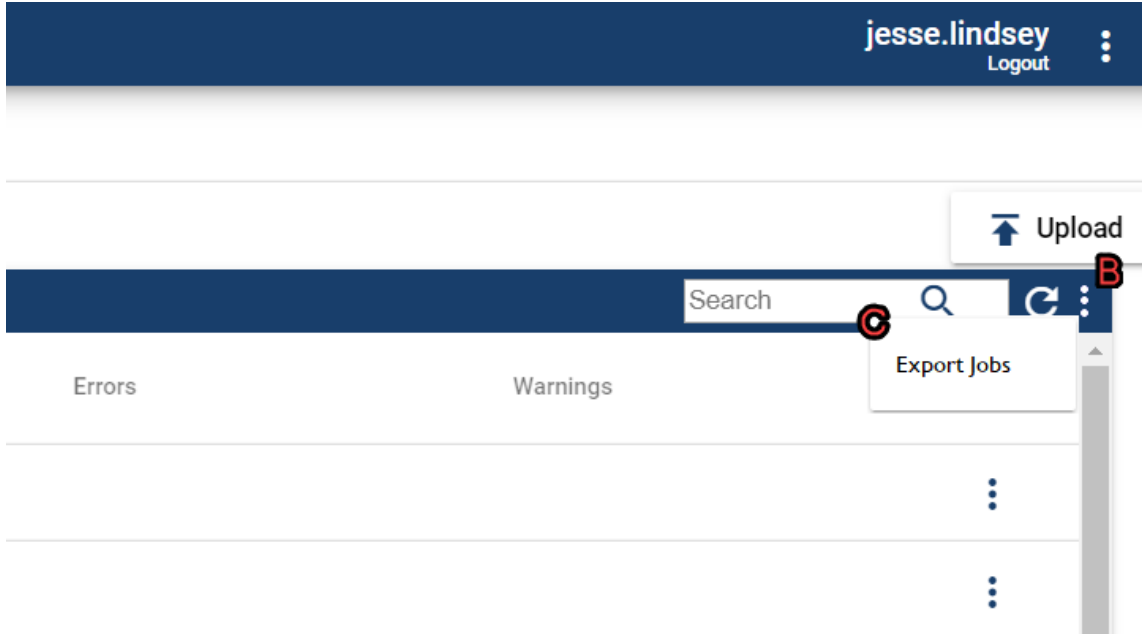


The screenshot shows the FASAMS - UAT interface. The top navigation bar includes 'Administration', 'Configuration', 'Submission', and 'Reports'. The 'Submission' tab is active, displaying a table of jobs. The table has columns for Name, Submitter, User, Date, Status, Successful, Errors, and Warnings. Two jobs are listed: 'ProviderDataSet\_BelowLimitSiteIdentifier' and 'ClientDataSet\_BlankRequiredFields', both submitted by 'jesse.lindsey' on 10/30/2019. Each job has a progress bar indicating its status.

Req. ID	Requirement	Ref. ID	Dev	QA
1.1	Update “Running” status to display a file progress bar instead	A	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Progress Bar		<input type="checkbox"/>	<input type="checkbox"/>
1.2.1	The progress bar will fill, incrementally, based on root entities processed in the file submitted <ul style="list-style-type: none"> <li>• Example: if there are 10 Root entities in a file and 5 have processed, the progress bar will be filled halfway</li> </ul>			

Req. ID	Requirement	Ref. ID	Dev	QA
1.3	Columns added Job Table based on Eric's analysis <ul style="list-style-type: none"> <li># of Root entities?</li> <li># of Root entities processed?</li> </ul>			

## 2. ALLOW EXPORT OF JOBS ON SUBMISSION TAB



FASAMS - UAT 1.3.0-release.20191018.3 jesse.lindsey Logout

Administration    Configuration    Submission    Reports

Jobs								Search	Upload
Name	Submitter	<b>D</b> Selection Criteria: Start Date: 11/19/2019    End Date: 11/20/2019 Submitting Entity: ABC Testing Entity, Big Bend Comm					Warnings		
ProviderDataSet_TestFile	FEi Test Subn						0	⋮	
ProviderDataSet_BeyondLimitDirect orPrefixName	FEi Test Subn						0	⋮	
ProviderDataSet_BeyondLimitDirect orMiddleInitial	FEi Test Submitter	jesse.lindsey	11/20/2019 12:19 PM	Complete	1	1	0	⋮	
ProviderDataSet_BeyondLimitDirect orLastName	FEi Test Submitter	jesse.lindsey	11/20/2019 12:19 PM	Complete	0	2	0	⋮	
ProviderDataSet_BeyondLimitDirect orFirstName	FEi Test Submitter	jesse.lindsey	11/20/2019 12:19 PM	Complete	1	1	0	⋮	

AutoSave Off Job Submission Export\_20191120 sample.xlsx

File Home Insert Page Layout Formulas Data Review View Help Team Tell me what you want to do

Clipboard Font Alignment Number Styles Cells

	A	B	C	D	E	F	G	H	I
1	<b>Name</b>	<b>Submitter</b>	<b>User</b>	<b>Date</b>	<b>Status</b>	<b>Successful</b>	<b>Errors</b>	<b>Warnings</b>	
2	ClientDataSet_12345	Fei Test Submitter	User.name	11/20/19 1:27 PM	Initialized	N/A	N/A	N/A	
3	ClientDataSet_12346	Fei Test Submitter	User.name	11/20/19 1:19 PM	Initialized	N/A	N/A	N/A	
4	ClientDataSet_12347	Fei Test Submitter	User.name	11/20/19 12:55 PM	Initialized	N/A	N/A	N/A	
5	ClientDataSet_12348	Fei Test Submitter	User.name	11/20/19 12:45 PM	Initialized	N/A	N/A	N/A	
6	ClientDataSet_12349	Fei Test Submitter	User.name	11/20/19 12:45 PM	Initialized	N/A	N/A	N/A	
7	ClientDataSet_12350	Fei Test Submitter	User.name	11/20/19 12:45 PM	Processing	N/A	N/A	N/A	
8	ProviderDataSet_12345	Fei Test Submitter	User.name	11/19/19 11:19 PM	Processing	N/A	N/A	N/A	
9	ProviderDataSet_12346	Fei Test Submitter	User.name	11/19/19 11:01 PM	Complete	1	3	3	
10	ProviderDataSet_12347	Fei Test Submitter	User.name	11/19/19 10:55 PM	Complete	12	0	3	
11	ProviderDataSet_12348	Fei Test Submitter	User.name	11/19/19 10:19 PM	Complete	13	6	2	
12	ProviderDataSet_12349	Fei Test Submitter	User.name	11/19/19 9:25 PM	Complete	1	0	1	
13	ProviderDataSet_12350	Fei Test Submitter	User.name	11/19/19 9:19 PM	Complete	4	0	1	
14									

Req. ID	Requirement	Ref. ID	Dev	QA
2.1	Create "Export Jobs" permission <ul style="list-style-type: none"> <li>Allows role assigned with this permission to see the new vertical ellipse next to the refresh button on the Jobs table</li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
2.2	Create vertical ellipse on the Jobs table to the right of the refresh button <ul style="list-style-type: none"> <li>Drop down menu will display on screen when the user clicks on the vertical ellipse               <ul style="list-style-type: none"> <li>List items on drop down menu:                   <ul style="list-style-type: none"> <li>"Export Jobs" – clicking this will open the "Job Export Selection Criteria" tile</li> </ul> </li> </ul> </li> </ul>	<b>B</b> <b>C</b>	<input type="checkbox"/>	<input type="checkbox"/>
2.3	Create "Job Export Selection Criteria" tile <ul style="list-style-type: none"> <li>Selection Criteria               <ul style="list-style-type: none"> <li>"Start Date"                   <ul style="list-style-type: none"> <li>Should be a date picker</li> <li>Should pull all records where <b>Date on Submission Tab</b> &gt;= Start date selected</li> <li>The start date will default to one day prior to the current date</li> <li>Includes all jobs including initialized, processing, completed, or deleted during the start and end date</li> </ul> </li> <li>"End Date"                   <ul style="list-style-type: none"> <li>Should be a date picker</li> <li>Should pull all records where <b>Date on Submission Tab</b> &lt;= End Date selected</li> <li>The end date will default to the current date</li> <li>Includes all jobs including initialized, processing, completed, or deleted during the start and end date</li> </ul> </li> </ul> </li> </ul>	<b>D</b> <b>E</b> <b>E</b>		

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> <li>○ “Submitting Entity” dropdown menu               <ul style="list-style-type: none"> <li>▪ The dropdown menu should populate with all SE names associated to the current user</li> <li>▪ The dropdown menu should support multiple selections</li> <li>▪ The dropdown menu will have a “Select All” option that can be selected                   <ul style="list-style-type: none"> <li>• It should be at the top of the drop-down menu</li> </ul> </li> <li>▪ The default selection will be “Select All”</li> </ul> </li> </ul>	F		
2.4	<p>Job Submission Export Excel document</p> <ul style="list-style-type: none"> <li>• The Job Export document will be named “Job Submission Export_YYMMDD”           <ul style="list-style-type: none"> <li>○ The date will default to the date the document was exported</li> <li>○ The date will me in the following format, YYYYMMDD               <ul style="list-style-type: none"> <li>▪ File name example: <a href="#">Job Submission Export_20191120</a></li> </ul> </li> </ul> </li> <li>• The document will contain one tab which will show job submission information from the Submission tab           <ul style="list-style-type: none"> <li>○ The tab will be named “Jobs Export”</li> </ul> </li> <li>• The format of the tab is defined in 2.4.1</li> </ul> <p>Note: See <a href="#">Job Submission Export_20191120</a> link under <a href="#">SUPPORTING DOCUMENTS AND REFERENCES section</a></p>	G	<input type="checkbox"/>	<input type="checkbox"/>
2.4.1	<p>Job Submission set document format (see <i>Rule export sample</i> above)</p> <ul style="list-style-type: none"> <li>• The tab will have 8 columns. Those 8 columns are,           <ul style="list-style-type: none"> <li>○ Column A               <ul style="list-style-type: none"> <li>▪ Label will be “Name”                   <ul style="list-style-type: none"> <li>• Shows the name of the file</li> </ul> </li> </ul> </li> <li>○ Column B               <ul style="list-style-type: none"> <li>▪ Label will be “Submitter”                   <ul style="list-style-type: none"> <li>• Shows the submitting entity name</li> </ul> </li> </ul> </li> <li>○ Column C               <ul style="list-style-type: none"> <li>▪ Label will be “User”                   <ul style="list-style-type: none"> <li>• Shows the user that submitted the file</li> </ul> </li> </ul> </li> <li>○ Column D               <ul style="list-style-type: none"> <li>▪ Label will be “Date”                   <ul style="list-style-type: none"> <li>• Shows the date the file was submitted</li> </ul> </li> </ul> </li> <li>○ Column E               <ul style="list-style-type: none"> <li>▪ Label will be “Status”                   <ul style="list-style-type: none"> <li>• Status will be one of the following: Initialized, Running, Complete, or Deleted</li> <li>• Note: the submission tab will show a progress bar for jobs currentling running but the export should show Processing if the job is still running</li> </ul> </li> </ul> </li> <li>○ Column F               <ul style="list-style-type: none"> <li>▪ Label will be “Successful”                   <ul style="list-style-type: none"> <li>• Shows the number of successful records from the file</li> </ul> </li> </ul> </li> <li>○ Column G               <ul style="list-style-type: none"> <li>▪ Label will be “Errors”                   <ul style="list-style-type: none"> <li>• Shows the number of errors from the job</li> </ul> </li> </ul> </li> </ul> </li> </ul>	H	<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"><li>○ Column H<ul style="list-style-type: none"><li>▪ Label will be “Warnings”<ul style="list-style-type: none"><li>• Shows the number of warnings from the job</li></ul></li></ul></li></ul>			