



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

Add filtering to Submission tab WI 8353

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GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
09/13/2019	1.0	Jesse Lindsey	Initial document creation
09/16/2019	1.1	Jesse Lindsey	Document updated after JAD
10/9/2019	1.2	Jesse Lindsey	Update document with dev team input
10/14/2019	1.3	Jesse Lindsey	Update after review with dev team

STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
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FEI Project Manager	Jessica Knott
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TERMS AND DEFINITIONS

Terms	Description

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

Due to the number of jobs that display on the Submission tab, the screen should allow users to limit the date range of the jobs shown based on submission date AND users need the ability to filter jobs by the column headers.

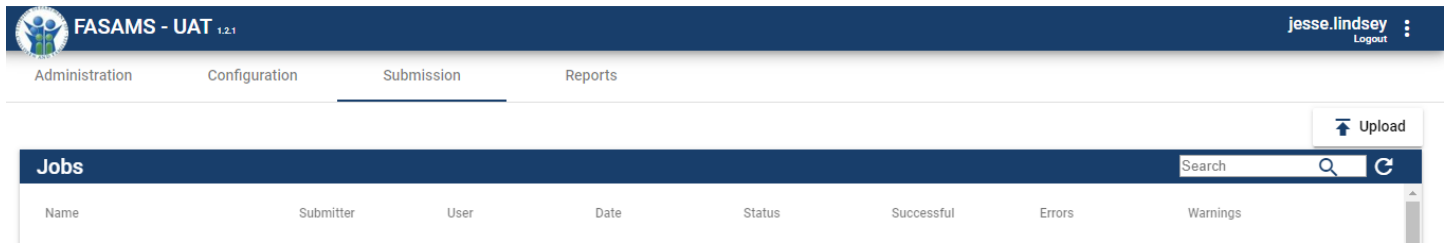
Scope Definition

The scope of this enhancement is to modify FASAMS to allow the user to limit jobs based on submission date and filter jobs on the Submission tab by each of the column headers on the tab: Name, Submitter, User, Date, Status, Successful, Errors.

EXISTING FUNCTIONALITY

Currently FASAMS has the ability to search the jobs on the Submission tab using a search box that searches on all Submission tab columns.

Screenshot:



PROPOSED FUNCTIONALITY

Submission tab will now have the following functionality:

- Limit Jobs based on submission date
 - Date parameter defaults to 14 days in the past from current date
 - Remove search box
- Filtering
 - Name:
 - Provider, Client, TreatmentEpisode, ServiceEvent, Subcontract, WaitingList, and AcuteCare
 - Submitter
 - Include all submitting entities associated with the logged in user
 - User
 - Include all users that are associated with submitting entities associated with the logged in user
 - Date:
 - Begin and End Date included
 - Status
 - Initialized, Running, Complete, and Cancelled
 - Successful
 - "0" or "More than 0"
 - Errors
 - "0" or "More than 0"
 - Warnings:
 - "0" or "More than 0"

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
1/31/2019	8353	Initial Estimate	90 - 180
10/14/2019	8353	Final Estimate	Final Estimate: Development: 96 Testing: 64 Analysis: 24 AM/PM/IM: 18 Total: 202

REQUIREMENTS

1. FILTER ICON ON SUBMISSION TAB AND DROPDOWN FILTERS ON COLUMNS

The screenshot shows the FASAMS 1.2.1 interface. The 'Submission' tab is active. The 'Jobs' table is displayed with columns: Name, Submitter, User, Date, Status, Successful, Errors, Warnings. A tooltip labeled 'B' points to a filter icon, and a tooltip labeled 'A' points to a search box. The table contains two rows of job data.

Name	Submitter	User	Date	Status	Successful	Errors	Warnings
SubcontractDataSet_201910031725232050	Central Florida Cares Health System (CFCHS)	Debbie.Stephenson	10/04/2019 10:50 AM	Complete	881	158	334
ProviderDataSet_20191004_2_000000	South Florida Behavioral Health	marco.delgado	10/04/2019 10:11 AM	Complete	1796	0	0

The screenshot shows the FASAMS 1.2.1 interface with the 'Jobs' table. The 'Data Set Type' column has a dropdown menu (D) with options like Acute Care, Client, Provider, etc. Other columns have dropdown filters (E, F, G, H, I, J, K) for 'Begin date', 'End Date', and 'Status'. A tooltip labeled 'C' points to a search icon, and a tooltip labeled 'L' points to a refresh icon. The table contains several rows of job data.

Name	Submitter	User	Date	Status	Successful	Errors	Warnings
SubcontractDataSet_OMR2-AdultSA756	FEI Test Submitter	Michelle.Mohammadi	09/16/2019 05:58 PM	Complete	7	1	0
SubcontractDataSet_OMR2-AdultSA754	FEI Test Submitter	Michelle.Mohammadi	09/16/2019 05:55 PM	Complete	7	1	0

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Add 'filter list' Icon		<input type="checkbox"/>	<input type="checkbox"/>
1.1	Add icon to the Jobs banner to the left of search box	A	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Add tooltip <ul style="list-style-type: none"> When a user hovers over the 'filter list' icon a tooltip appears saying "Advanced Filtering" 	B	<input type="checkbox"/>	<input type="checkbox"/>
1.3	When the 'filter list' icon is clicked the following will occur, <ul style="list-style-type: none"> The search box is removed and no longer visible to the end user <ul style="list-style-type: none"> User cannot use Advanced Filtering and the search box at the same time The 'search' icon is added to the Jobs banner <ul style="list-style-type: none"> Icon added to the left of the refresh icon Add tooltip <ul style="list-style-type: none"> When a user hovers over the 'search' icon a tooltip appears saying "Basic Filtering" 	C L	<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> ○ Clicking on the 'Search' icon will revert the screen back showing the Search box and removing the dropdown lists from the columns ● Dropdown lists appear for each column <ul style="list-style-type: none"> ○ Defined in requirements 1.3.1 – 1.3.8 			
1.3.1	Add dropdown to the Name column <ul style="list-style-type: none"> ● Dropdown will: <ul style="list-style-type: none"> ○ Include all data sets ○ Include a "Select All" option at the top of the list ○ support multi-select 	D		
1.3.2	Add dropdown to the Submitter column <ul style="list-style-type: none"> ● Dropdown will: <ul style="list-style-type: none"> ○ Include all submitting entities associated with the logged in user ○ Include a "Select All" option at the top of the list ○ support multi-select 	E		
1.3.3	Add dropdown to the User column <ul style="list-style-type: none"> ● Dropdown will: <ul style="list-style-type: none"> ○ Include all users that are associated with submitting entities associated with the logged in user ○ Include a "Select All" option at the top of the list ○ Support multi-select 	F		
1.3.4	Add date pickers to Date column <ul style="list-style-type: none"> ● Add "Begin" label <ul style="list-style-type: none"> ○ Default Begin date will be null (includes all submission dates) ○ Include a date picker ○ Identifies starting date range of jobs returned ● Add "End" label <ul style="list-style-type: none"> ○ Default End date will be null (includes all submission dates) ○ Include a date picker ○ Identifies ending date range of jobs returned 	G		
1.3.5	Add dropdown to Status column <ul style="list-style-type: none"> ● Dropdown will: <ul style="list-style-type: none"> ○ Include all job statuses ○ Include a "Select All" option at the top of the list ○ Support multi-select 	H		
1.3.6	Add dropdown to Successful column <ul style="list-style-type: none"> ● Dropdown will the following selection options <ul style="list-style-type: none"> ○ "Select All" <ul style="list-style-type: none"> ▪ When selected shows all jobs no matter the successful count ○ "Count = 0" <ul style="list-style-type: none"> ▪ When selected returns all jobs that had 0 successful records ○ "Count > 0" <ul style="list-style-type: none"> ▪ When selected returns all jobs that had more than 0 successful records 	I		
1.3.7	Add dropdown to Errors column <ul style="list-style-type: none"> ● Dropdown will the following selection options <ul style="list-style-type: none"> ○ "Select All" <ul style="list-style-type: none"> ▪ When selected shows all jobs no matter the error count ○ "Count = 0" <ul style="list-style-type: none"> ▪ When selected returns all jobs that had 0 error records ○ "Count > 0" <ul style="list-style-type: none"> ▪ When selected returns all jobs that had more than 0 error records 			

Req. ID	Requirement	Ref. ID	Dev	QA
1.3.8	Add dropdown to Warnings column <ul style="list-style-type: none">• Dropdown will the following selection options<ul style="list-style-type: none">○ "Select All"<ul style="list-style-type: none">▪ When selected shows all jobs no matter the warnings count○ "Count = 0"<ul style="list-style-type: none">▪ When selected returns all jobs that had 0 warnings records○ "Count > 0"<ul style="list-style-type: none">▪ When selected returns all jobs that had more than 0 warnings records			