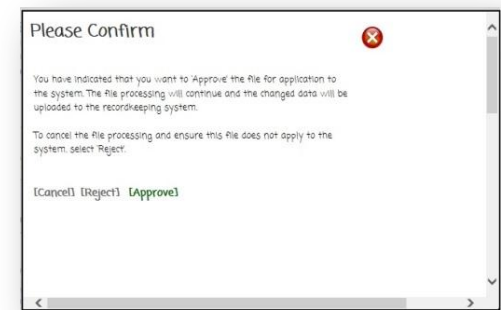


# Homework

## File Workflow (Approval functionality)



- There are 2 places to setup 'Auto Apply' settings:
  - [File Configuration] page available for users;
  - [File Dashboard] page (with list of files related to the Client) available for administrators.
- If Approval = 'Auto Apply' then the file is downloaded without manual actions;
- If Approval = 'Peer Review' then the file downloading is stopped after validation phase and can be downloaded only after an administrator's approval
- File can be approved from 2 pages by pressing on a button:
  - [File Breakdown] page with the file statistic;
  - [Errors and Warnings] page with the error details tabs
- User can Cancel the action, approve or reject the file



# Homework

□ If Approval = 'Auto Apply' and a file is failed on validation step, user can:

- Correct errors
- Skip the file



□ After the error corrections user can:

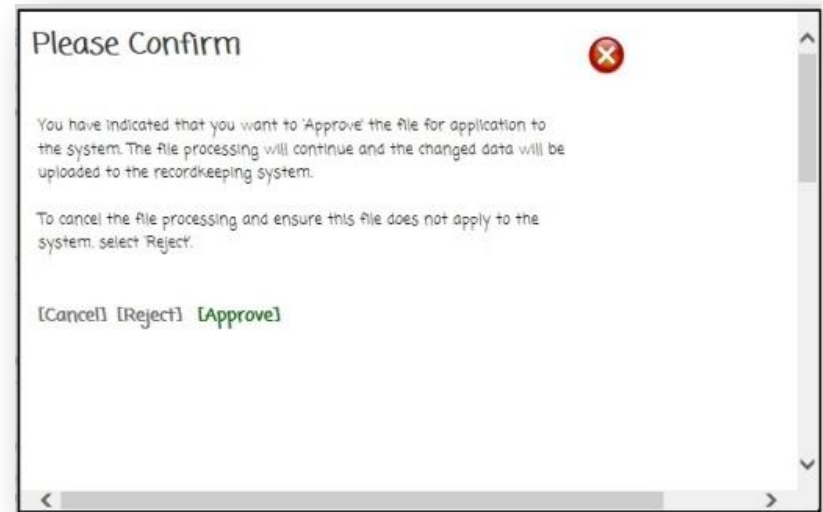
- Remediate the file
- Skip the file

□ After file remediation user can

- File is uploaded without errors
- File is not uploaded because of errors

□ After the file was skipped user can:

- Return the file back (to failed state)
- Delete the file



# Homework

- If Approval = 'Peer Review' and a file does not contain errors, user can:
  - Approve the file
  - Reject the file
- If Approval = 'Peer Review' and a file contains errors, user can:
  - Correct errors
  - Skip the file
  - Approve
  - Reject



- After the error(s) correction user can
  - Remediate the file
  - Skip the file
  - Approve
  - Reject

- After the file remediation the file can be:
  - Uploaded without errors
  - Not uploaded because of errors
- After the file was skipped user can:
  - Return the file back (to failed state)
  - Delete the file

# Homework

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## □ Approve button is:



- Active if file is ready for approval
- Inactive if file is not ready for approval (no file uploaded; file is in progress before approval; file is in progress after approval; file is uploaded)
- Disabled for file with “Auto Apply” option

# Homework

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- ❑ **Requirement 1:** 'Peer Review' settings value is applied for future files only
- ❑ **Requirement 2:** 'Auto Apply' settings value is applied for future files only
- ❑ **Requirement 3:** Option value can be changed from 'Peer Review' to 'Auto Apply' if there are no pending for review files
- ❑ **Requirement 4:** Option value can be changed from 'Auto Apply' to 'Peer Review' at any time
- ❑ **Requirement 5:** Option value is synchronized between [File Configuration] and [File Dashboard]
- ❑ **Requirement 6:** Option value is synchronized between the roles (user/Admin)
- ❑ **Requirement 7:** [Apply] button state is synchronized between [File Breakdown] and [Errors and Warnings]
- ❑ **Requirement 8:** [Apply] button state is synchronized between the roles

