

Homework

File Workflow (Approval functionality)



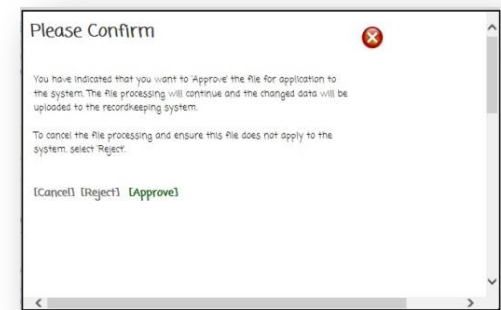
- There are 2 places to setup 'Auto Apply' settings:
 - [File Configuration] page available for users;
 - [File Dashboard] page (with list of files related to the Client) available for administrators.

- 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

- **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

- ❑ **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
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