



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

Export FASAMS Data Set Rules WI 11119

Created by: Jesse Lindsey

Dated: 10/10/2019

CONTENTS

General.....	3
Version Control	3
Stakeholders	3
Supporting Documents and References	3
Scope.....	3
Initial Request & Assumptions	3
Business Statement.....	3
Scope Definition	3
Existing Functionality	3
Proposed Functionality	3
Initial Estimate/ Quote History	4
Requirements.....	4
1. Changes to Rules tile and Export document.....	4

GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
10/10/2019	1.0	Jesse Lindsey	Initial Document Creation
10/14/2019	1.1	Jesse Lindsey	Updates after meeting with dev team

STAKEHOLDERS

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

SUPPORTING DOCUMENTS AND REFERENCES

- [ClientDataSetRules_20191010](#)

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

FASAMS users have a need to export rules for each data set in the FASAMS Portal but cannot be exported. Having the ability to export the FASAMS rules will be a great benefit to the SEs and DCF. Data quality will be improved with the ability to export data set rules.

Scope Definition

The enhancement will add vertical ellipses to the rules tile and allow users to export each of the Rules data sets from the Configuration tab > Rules tile as an Excel document that includes all collections within the data set.

EXISTING FUNCTIONALITY

Currently, FASAMS has no ability to export any of the tables on the Configuration tab.

PROPOSED FUNCTIONALITY

In the Configuration tab,

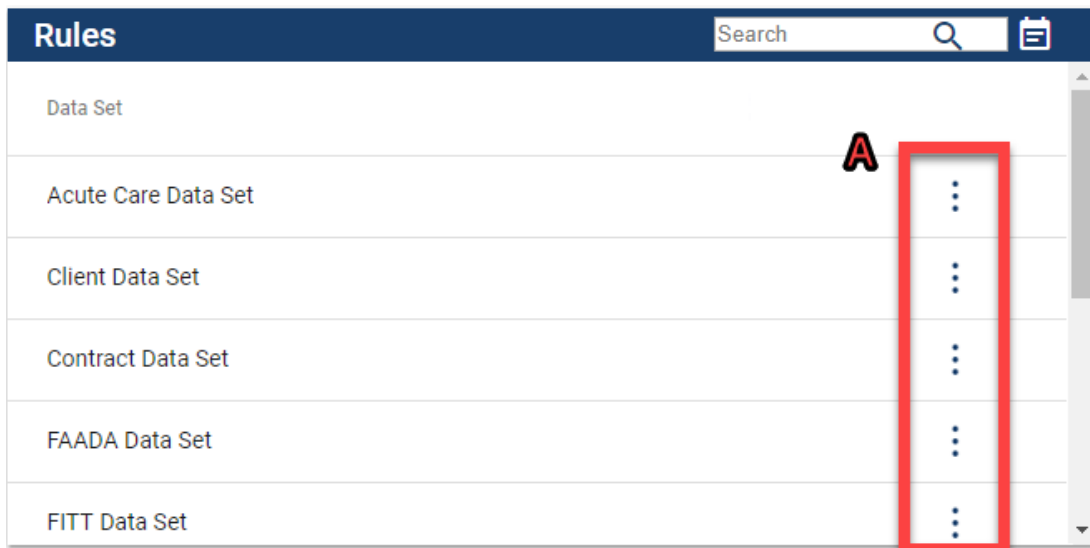
- Vertical ellipses added to each data set row on the Rules tile
 - Vertical Ellipses will open a new dropdown menu
 - Menu items will include “View Details” and “Export Rules”
 - “Export Rules” button allows user to download as an Excel document of the data set’s rules

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
10/14/2019	11119	Initial Estimate	
10/14/2019	11119	Final Estimate	Final Estimate: Analysis - 20 Dev - 32 Test - 32 AM/PM/IM - 12 Total - 96

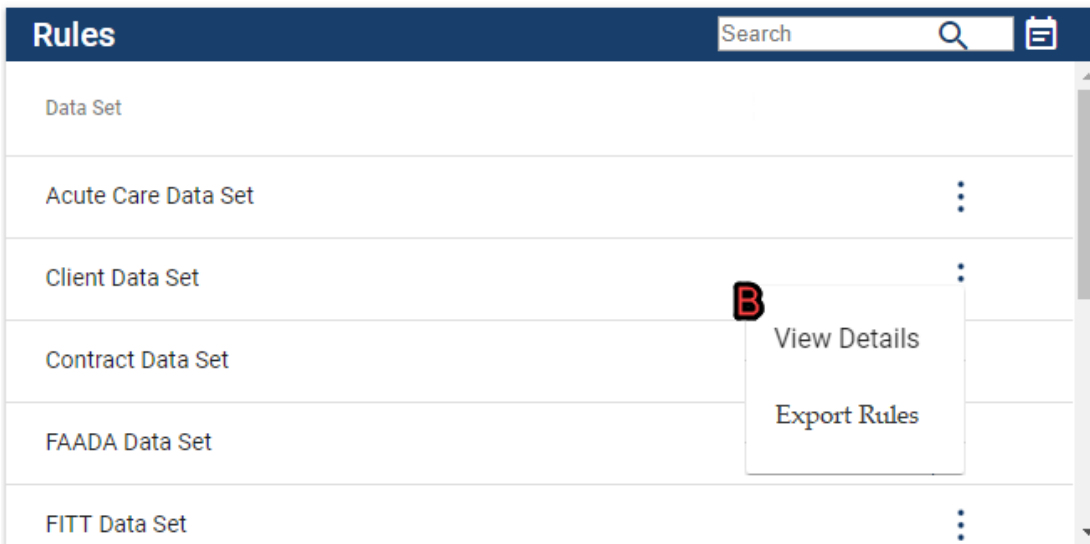
REQUIREMENTS

1. CHANGES TO RULES TILE AND EXPORT DOCUMENT



The screenshot shows the 'Rules' interface with a search bar and a list of data sets. A red box labeled 'A' highlights the vertical menu icons (three dots) for each data set row.

Rules	Search	🔍	📅
Data Set			
Acute Care Data Set			⋮
Client Data Set			⋮
Contract Data Set			⋮
FAADA Data Set			⋮
FITT Data Set			⋮



The screenshot shows the 'Rules' interface with a context menu open for the 'Contract Data Set' row. The menu options are 'View Details' and 'Export Rules'. A red box labeled 'B' highlights the menu.

Rules	Search	🔍	📅
Data Set			
Acute Care Data Set			⋮
Client Data Set			⋮
Contract Data Set			⋮
FAADA Data Set			⋮
FITT Data Set			⋮

B

- View Details
- Export Rules

Rule export sample:

CollectionName	RuleName	Status
ProviderClientEmailAddress	Email Address Required Rule	Enabled
ProviderClientIdentifier	Identifier Required Rule	Enabled
ProviderClientIdentifier	PSSN Must Match Regular Expression If Type PSSN Rule	Disabled
ProviderClientIdentifier	SSN Must Match Regular Expression If Type SSN Rule	Enabled
ProviderClientIdentifier	Type Code Required Rule	Enabled
ProviderClientPhone	Phone Number Must Match Regular Expression Rule	Enabled

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	<p>Create “Export Rules” permission</p> <ul style="list-style-type: none"> Allows role assigned with this permission to see the ‘Export Rules’ button on Rules tile dropdown 			
1.1	<p>Create column on Rules tile with vertical ellipses on each data set row</p> <ul style="list-style-type: none"> Drop down menu will display on screen when the user clicks on the vertical ellipse for any data set <ul style="list-style-type: none"> List items on drop down menu: <ul style="list-style-type: none"> “View Details” – clicking this will take the user to the data set page (same functionality as clicking on the data set name) “Export Rules” – clicking this will download a Rule Export Excel document – defined in section 1.2 and 1.2.1 	A B		
1.2	<p>Rule Export Excel document</p> <ul style="list-style-type: none"> The Rule Export document will be named after the data set that is being downloaded with the word “Rules” and date of download appended to end of data set name <ul style="list-style-type: none"> Date will me in the following format, YYYYMMDD <ul style="list-style-type: none"> File name example: ClientDataSetRules_20191010 The document will contain one tab which will show all rule collections for the specified data set <ul style="list-style-type: none"> The tab will be named after the data set selected <ul style="list-style-type: none"> Example: ClientDataSet The format of the tab is defined in 1.2.1 <p>Note: See ClientDataSet_20191010 link under SUPPORTING DOCUMENTS AND REFERENCES section</p>			
1.2.1	<p>Data set document format (see <i>Rule export sample</i> above)</p> <ul style="list-style-type: none"> The tab will have 3 columns. Those 3 columns are, <ul style="list-style-type: none"> Left column <ul style="list-style-type: none"> Label will be “Collection Name” <ul style="list-style-type: none"> Shows the name of the collection from which the corresponding rule originated 			

	<ul style="list-style-type: none">○ Center column<ul style="list-style-type: none">▪ Label will be “Rule Name”<ul style="list-style-type: none">• Shows the rule name○ Right column<ul style="list-style-type: none">▪ Label will be “Status”<ul style="list-style-type: none">• Shows the current status of the rule<ul style="list-style-type: none">○ Status can either be ‘Enabled’ or ‘Disabled’			
--	--	--	--	--