

SHAREPOINT 2010 PANELIST INVITATION, SELECTION, AND ASSIGNMENT SYSTEM:

SITE SET-UP AND DEVELOPER'S MANUAL

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Problems Summary

The Assign Panelist to Proposal form has usability issues. The workflows do not complete quickly enough for the form's updates to always process. Its finalize roles option also does not work due to this problem (proposals are not getting finalized as they do not update quickly enough).

The Assign Panels form has issues with finalizing panels. The current workflow is sorting incorrectly for these finalize options and must be fixed.

All looping reminders for Book Room, FastLane Reminder, Email Communications, and Invite Panelists have not been tested to see if they work correctly.

Emails after the panel assignment email in Email Communications do not work due to a pause that is incorrectly taking precedence (probably an incorrectly implemented workflow). Also, many emails are incorrectly pulling fields from lists and need to be updated.

All workflows need to be tested for usability/function.

Quick Set-Up Guide for DIS

1. Create a template of the site located here: <https://extsharepoint.nsf.gov/eng/eec/panels/>
2. Create a new site based off of this template
3. Update the data connections of all of the InfoPath forms, so that they correspond to this new site
4. Update workflows to correctly affect the lists on the new site and emails to link to it
 - a. The current workflows are likely out of date, so copying the [attached code](#) into new workflows would be more suitable
5. Move the appropriate people to their corresponding groups
 - a. Program Director -> EEC Panels Program Director, etc.
6. Communicate with the Program Director for any specifications or changes needed.
7. Add users to the site as the Program Director fills in the "Panelist Invitee" list or emails you
 - a. Fill in the corresponding Username and Password fields in this list

Site Groups

EEC Panels Owners

- Full permissions for the site; this group should be either DIS members or SharePoint savvy Program Directors

EEC Panels Program Director

- Full Permissions for the site; this group is reserved for the Program Director

EEC Panels Program Assistant

- Full Permissions for the site; this group is reserved for the Program Director's Assistant

EEC Panels Administrative Officer

- Full Permissions or at least read permissions for the site; this group is reserved for the Administrative Officer

EEC Panels Pre-Selection Panelists

- Limited permissions for the site; this group is reserved for panelists or panelist invitees

Lists and Libraries

Administrative Information

- List from 2007 project that contains forms hosted on site as content libraries. Not used much in 2010, kept to prevent the breaking of certain graphics.

Assign Panelist to Proposal

- List is used as a staging area with the Assign Panelist to Proposal form. It triggers a workflow that updates changes in the Proposals list.

Fields:

- **Filtered Proposal Number (Single line of text)** – This column holds the proposal number to assign panelists to.
- **Assign Lead (Single line of text)** – This column starts a workflow on the Proposals list. It assigns the person who is specified here to the role that the field specifies to the Proposal Number that Filtered Proposal Number currently is.
- **Assign Scribe (Single line of text)** – See above.
- **Assign Reviewer 1 (Single line of text)** - See above.
- **Assign Reviewer 2 (Single line of text)** - See above.
- **Panel 1 Is Finalized (Yes/No)** – This column starts a workflow on the Panel Dates list. If this is yes it sets Roles Finalized on the corresponding panel to Yes.
- **Panel 2 Is Finalized (Yes/No)** - See above.
- **Panel 3 Is Finalized (Yes/No)** - See above.
- **Panel 4 Is Finalized (Yes/No)** - See above.
- **Panel 5 Is Finalized (Yes/No)** - See above.

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – No Permissions

EEC Pre-Selection Panelists – No Permissions

Workflows:

- This is associated with the [Update Assignments Workflow](#)

Assign to Panels

- List is used as a staging area with the Assign Panelist and Proposal to Panels form. It triggers a workflow that updates changes in the Proposals list as well as one that updates EEC Panelist List, and a final one that updates Panel Dates

Fields:

- **Prop Changed (Single line of text)** – This column holds the proposal number that workflows will assign to the value present in Panel Changed
- **Panel Changed (Single line of text)** – This column holds the Panel number that the workflows use.
- **Panelist Changed (Single line of text)** – This column holds the Panelist that will be changed.
- **Panel Num Changed (Single line of text)** – This column holds the Panel number that the panelist will be assigned to by workflows.
- **Assign Lead (Single line of text)** – This column starts a workflow on the Proposals list. It assigns the person who is specified here to the role that the field specifies to the Proposal Number that Filtered Proposal Number currently is.
- **Assign Scribe (Single line of text)** – See above.
- **Assign Reviewer X (Single line of text)** - See above.
- **Panel 1 Is Set (Single Line of Text)** – This column starts a workflow on the Panel Dates list. If this is yes it sets Panelists Finalized on the corresponding panel to Yes.
- **Panel 2 Is Set (Single Line of Text)** - See above.
- **Panel 3 Is Set (Single Line of Text)** - See above.
- **Panel 4 Is Set (Single Line of Text)** - See above.
- **Panel 5 Is Set (Single Line of Text)** - See above.

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – No Permissions

EEC Pre-Selection Panelists – No Permissions

Workflows:

- This is associated with the [Update Panel Assignments Workflow](#)

Dashboard

- Library is used as a staging area with the Dashboard form. It triggers a workflow that updates various admin settings in the Task Timing Settings List and the Admin Form Options List.

Fields:

- **Book Room Reminder (Single line of text)** – This column holds the number of days between book room reminders.
- **Availability Reminder (Single line of text)** – This column holds the number of days between messages sent about Availability Pending.

- **Conflict Reminder (Single line of text)** – This column holds the number of days between messages about Conflicts Pending.
- **Invite Panelist Reminder (Single line of text)** - This column holds the number of days between emails to remind the Program Director to Invite Panelist.
- **Start Invite Panelist (Single line of text)** - This column holds the number of days before Program Directors are told to invite Panelists.
- **Adhoc Checked (Single line of text)** – This column holds the value deciding if the Ad Hoc feature will be allowed.
- **Prefer Not Review (Single line of text)** – This column holds the value deciding if the “I would prefer not to review” button will be allowed for panelists.

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Read Only

EEC Panels Administrative Officer – Read Only

EEC Pre-Selection Panelists – No Permissions

Workflows:

- This is associated with the [Admin Control Workflow](#)

Help Documents

- Library used to store helpful documents and tutorials for panelists, Program Directors and Assistants

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – Read Only (limit their access so that no ribbon appears)

Panelist Archive

- Library used to hold archive information about panelists; updated by the [EEC Panels Form](#)

Fields:

- **Address (Multiple lines of text)** – This column holds the address of the panelist
- **E-Mail (Single line of text)** – This column holds the email of the panelist
- **Expertise (Multiple lines of text)** – This column holds the expertise/interest of the panelist

- **First Name (Single line of text)** - This column holds the first name of the panelist
- **Last Name (Single line of text)** - This column holds the last name of the panelist
- **Phone Number (Single line of text)** – This column holds the phone number of the panelist
- **Title (Single line of text)** – This column holds the title of the InfoPath form uploaded
- **University** – This column holds the university of the panelist

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – No Permissions

Views:

- **Default** – Last Name, First Name, E-Mail, University, Expertise, Address, Phone Number

Review Panel

- Library not used but holds the Review Panels form

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – No Permissions

Travel Information

- Library used by panelists to update their Travel and Conflicts of Interests forms

Permissions:

EEC Panels Owner – Full Control

EEC Panels Program Director – Contribute

EEC Panels Program Assistant – Contribute

EEC Panels Administrative Officer – Contribute

EEC Pre-Selection Panelists – Contribute (limit their access so that no ribbon appears)

EEC Panels Forms

- List is contains all of the information entered by panelists. It triggers a workflow that emails panelists and Program Directors and Program Assistants

Fields:

- **Address (Multiple lines of text)** – This column holds the panelist’s address
- **Assignment Email (Yes/No)** – This column is a Yes or No value on whether or not a panelist has received an initial panel assignment email. If they have it is Yes, otherwise it is no. This prevents mass emails of conditions always evaluating true for the workflow.
- **Availability Email (Yes/No)** – This column is a Yes or No value on whether or not a panelist has sent an email to the Program Director. If they have it is Yes, otherwise it is no. This prevents mass emails of conditions always evaluating true for the workflow.
- **Conflicts (Single line of text)** – This is a list of all panel numbers separated by semicolons that the panelist has conflicts with.
- **Assignment Email (Yes/No)** – This column is a Yes or No value on whether or not a panelist has sent an email to the Program Director. If they have it is Yes, otherwise it is no. This prevents mass emails of conditions always evaluating true for the workflow.
- **Conflicts Pending Reminder (Yes/No)** – This is an unused field.
- **E-Mail (Single line of text)** – This is the panelist’s email address.
- **Expertise (Multiple lines of text)** – This is the panelist’s expertise.
- **ext (Single line of text)** – This is a random number appended to the file name the panelist submits. This is done to make randomly guessing access based on name much more difficult.
- **FastLane Check (Yes/No)** – This column is a Yes or No value on whether or the Program Assistant has confirmed the information here matches the information that is in FastLane.
- **FastLane Email (Yes/No)** – This column is a Yes or No value on whether that sets to yes after the system sends an email to the Program Assistant. It prevents repeated messages about FastLane.
- **First Name (Single line of text)** – This is the panelist’s first name.
- **Form Status (Single line of text)** – This is field indicating where in the panel selection process the panelist is.
- **Full Name (Calculated)** – This is the panelist’s full name.
- **Invitation Pending Reminder (Yes/No)** –Unused Field.
- **Last Name (Single line of text)** – This is the panelist’s last name.
- **Loop (Yes/No)** – This column is a Yes or No value on whether that sets to yes after the system detects it needs to be in a looping state. It allows the sister workflow to restart the first workflow.
- **Panel 1 (Single line of text)** – This is the panelist’s availability for the corresponding panel.
- **Panel 2 (Single line of text)** – This is the panelist’s availability for the corresponding panel.
- **Panel 3 (Single line of text)** – This is the panelist’s availability for the corresponding panel.
- **Panel 4 (Single line of text)** – This is the panelist’s availability for the corresponding panel.
- **Panel 5(Single line of text)** – This is the panelist’s availability for the corresponding panel.
- **Panel Assignment (choice)** – This is the panel the panelist is assigned to.

- **Panel Assignment Email (Yes/No)** – This is set to Yes after the panelist receives their assignment. This is used to prevent massive amounts of emails.
- **Panel Finalized Reminder (Yes/No)** – Unused Field
- **Panel Password (Single line of text)** – Password to access FastLane, entered during FastLane check.
- **Phone Number (Single line of text)** – This is the panelist’s phone number.
- **Prefer to Not Review (Single line of text)** – This is a list of all panel numbers separated by semicolons that the panelist would not like to review.
- **Prefer to Review (Single line of text)** – This is a list of all panel numbers separated by semicolons that the panelist would like to review.
- **Title (Single line of text)** – This is the Panelist Name + ext .xml
- **Txt Display Field (Calculated Value)** – Used in forms it displays First Name Last Name , University, Expertise
- **Volunteer Reminder (Yes/No)** – Set to yes when volunteers are thanked for their time but are not selected. Prevents old panelist from looping forever.
- **Display Name** – used in sorting for the Created By field

Permissions:

EEC Panels Owner – Full Control

EEC Panels Program Director – Contribute

EEC Panels Program Assistant – Contribute

EEC Panels Administrative Officer – Contribute

EEC Pre-Selection Panelists – Contribute (limit their access so that no ribbon appears)

Workflows:

This is associated with [FastLane Reminder](#), [Email Communications](#), and their sister workflows.

Admin Form Options

- List used to keep track of the different settings options for Program Directors. It must contain an item with the title Panel Settings.

Contents:

This list must contain an item with the following title

Panel Settings

Fields:

- **Title (Single line of text)** – This column says “Panel Settings”

- **AdHocReviewer (Yes/No)** – This column checks yes to indicate that the EEC Panel Form should ask for ad hoc reviews; no means it should not
- **Prefers not to Review Toggle (Yes/No)** – This column checks yes to indicate that the EEC Panel Form should allow panelists to check that they prefer not to review a proposal; no means it will not allow this

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Read Only

EEC Panels Administrative Officer – Read Only

EEC Pre-Selection Panelists – No Permission

Administrators

- List is used to hold information about the Program Director and his/her assistants and administrative staff

Fields:

- **Name (Single line of text)** – This column holds the name of the person
- **E-mail Address (Single line of text)** – This column holds the email address of the person
- **Position (Choice)** – This column holds the person’s position; either Program Director, Program Assistant, or Administrative Officer
- **Phone Number** – This column holds the person’s phone number

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – Read Only (limit their access so that no ribbon appears)

Views:

- **Default** – Name, Position, Business Phone, E-mail Address

Panel Dates

- List is used to hold information about the upcoming panels and track the completion of tasks associated with them

Fields:

- **Title (Single line of text)** – This column holds the title of the panel
- **Panel Number (Choice)** – This column holds the number associated with the panel; choice of Panel 1/2/3/4/5; this must be unique
- **Location (Single line of text)** – This column holds the room that the panel will be held in
- **Start Date (Date and Time)** – This column holds the start date and time of the panel
- **End Date (Date and Time)** – This column holds the end date and time of the panel
- **Roles Finalized (Yes/No)** – This columns indicates whether all roles have been finalized for proposals on the panel
- **Panel ID (Single line of text)** – This column holds the Panel ID as entered by the Program Assistant
- **Panelists Finalized (Yes/No)** – This column indicates whether panelists have been finalized for this panel
- **Book Room Date (Calculated Value)** – This column has the date that the Program Assistant can first start booking a room for the panel (Start Date - ~6 months)
- **Book Room Mutex (Yes/No)** – This column holds a control used in the [Book Room workflow](#) to control looping
- **Invitee Mutex (Yes/No)** – This column holds a control used in the [Invitee Reminder workflow](#) to control looping
- **Panelists Invited (Yes/No)** – This column indicates whether the Program Director has finished inviting panelists or not
- **Booked (Yes/No)** - This column indicates whether the Program Assistant has finished booking the room or not
- **Number of Anticipated Panelists (Number)** – This column holds the number of panelists that the Program Director anticipates

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – Read Only (limit their access so that no ribbon appears)

Views:

- **Default** – Edit, Title, Panel Number, Location, Start Date, End Date, Panel ID, Number of Anticipated Panelists, Book Room, Invitee Reminder B, Invitee Reminder, Book Room B
- **Create Panels** – Edit, Title, Panel Number, Location, Start Date, End Date, Panel ID, Number of Anticipated Panelists, Book Room Date
- **Panel Tasks** – Panel Number, Start Date, Location, Panel ID, Booked, Panelists Invited, Panelists Finalized, Roles Finalized (datasheet view)

Workflows:

The [Book Room Reminder](#) and [Invitee Reminder](#) workflows and their sister workflows are associated with this list.

Panelist Invitees

- List is used to enter information of people the Program Director wants to invite to panels; start workflows to email them

Fields:

- **Email (Single line of text)** – This column holds the email of the invitee
- **Phone Number (Single line of text)** – This column holds the phone number of the invitee
- **First Name (Single line of text)** – This column holds the first name of the invitee
- **Last Name (Single line of text)** – This column holds the last name of the invitee
- **Password (Single line of text)** – This column holds the SharePoint password of the invitee
- **Username (Single line of text)** – This column holds the SharePoint username of the invitee
- **Full Name (Calculated Value)** – This column holds the full name of the invitee (= [First] & “ “ & [Last])
- **Invitation Sent (Yes/No)** – This column indicates that an invitation has already been sent to the invitee in the [Invite Panelist workflow](#)

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – No Permissions

Views:

- **Default** – First Name, Last Name, Email, Phone Number, Username, Password (datasheet view)

Workflows:

The [Invite Panelist workflow](#) is associated with this list

Proposals

-List is used for displaying all of the proposals that are up for review between all of the panels on the site. It has several workflows associated with it that automate the sending of emails when assignments change.

Fields:

- **Proposal Number (Single line of text)** – Proposal Number.
- **PI Last Name (Single line of text)** – This is Principal Investigators Last Name.
- **PI First Name (Single line of text)** – This is Principal Investigators First Name.
- **Institution (Single line of text)** – This is the institution that submitted the proposal
- **Title (Single line of text)** – Title of the proposal.
- **Program Announcement (Single line of text)** – Field Automatically pulled by Inside FastLane
- **1Dir/2Div/3pgmEle (Single line of text)**- Field Automatically pulled by Inside FastLane
- **Dir-Div-P (Single line of text)** - Field Automatically pulled by Inside FastLane
- **Org (Single line of text)** - Field Automatically pulled by Inside FastLane
- **Submit Date (Date and Time)** - Field Automatically pulled by Inside FastLane
- **Submit Time (Single line of text)** - Field Automatically pulled by Inside FastLane
- **Co-PI Email(Single line of text)** – unused Field
- **Panel Assignment (Single line of text)** – Panel number that the proposal is assigned to
- **Lead (Person or group)** – This is person assigned to be lead on the proposal
- **Old Lead (Person or group)** – This is person who was assigned to be lead on the proposal. Used by workflows.
- **Scribe (Person or group)** – Similar to lead. Corresponds to role.
- **Old Scribe (Person or group)** Similar to lead. Corresponds to role.
- **Reviewer 1-8 (Person or group)** – Similar to lead. Corresponds to role.
- **Old Reviewer 1-8 (Person or group)** Similar to lead. Corresponds to role.
- **Collaborative Role (Choice)** – Specifies if this is a collaborative proposal.
- **Collaborative Lead (Single Line of Text)** –Says it is the leading proposal.
- **Collaborative Secondary (Single Line of Text)** – It is the secondary role in a collaborative proposal.
- **Number of Reviewers (Number)** – The required number of reviewers for a proposal (4-10, default value = 4)
- **Assignment Finalized (Yes/No)** – It is yes if all 4 roles are assigned.
- **Display (Calculated)** – It is what gets displayed in the forms. It is the Proposal Number Proposal Title Institution and Lead PI fields

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

EEC Pre-Selection Panelists – Read Only (limit their access so that no information appears)

Workflows:

- The [Assignments Email](#) is associated with this list

Views:

- **Proposal Information** – Proposal Number, Panel Assignment, PI Last Name, PI First Name, Institution, Title (linked to item), Program Announcement, Dir-Div-P, Org Code, Submit Date, Submit Time, Requested Amount
- **Paste View** – Proposal Number, PI Last Name, PI First Name, Institution, Title, Program Announcement, 1Dir/2Div/3pgmEle, Dir-Div-P, Org Code, Submit Date, Submit Time, Requested, PI Email Address (datasheet)
- **Proposal Data Sheet** – Proposal Number, Panel Assignment, PI Last Name, PI First Name, Institution, Title (linked to item), Program Announcement, Dir-Div-P, Org Code, Submit Date, Submit Time, Requested Amount
- **Assign Roles** – Proposal Number, Panel Assignment, PI Last Name, PI First Name, Institution, Title (linked to item), Lead, Scribe, Reviewer 1, Reviewer 2, Assignments Finalized

Task Timing Settings

- List used to hold important dates that need modifying for reminders to function correctly. Its contents must be set as indicated in this section.

Contents:

This list must contain items with the following titles:

Time between reminders to book room for panels

Time between reminders to Mark Availability

Time between reminders to Mark Conflicts and Preferences

Time between reminders to invite panelists

Time before panel start for invite reminders

Fields:

- **Title (Single line of text)** – This column holds the title of the task
- **Time (Days) (Number)** – This column holds the how long it delays for.

Permissions:

EEC Panels Program Director – Full Control

EEC Panels Program Assistant – Full Control

EEC Panels Administrative Officer – Full Control

Views:

- **Default** – Title, Time

Side-Bar

Example site: <https://extsharepoint.nsf.gov/eng/eec/panels/default.aspx>

Note: Everything is visible to EEC Panels Owners

Panel Set Up

- Visible to the Program Director, Manager, and Administrative Staff

Enter Personal Info – Link to the Administrator list (default/all items)

Create Panel – Link to the Panel Dates list (default/all items)

Invite Panelists – Link to the Panelist Invitees list in a datasheet view (default/all items)

Panel Tasks – Link to Panel Dates list, Panel Tasks view (datasheet)

FastLane Check – EEC Panels Forms library, FastLane check view (datasheet)

Add Proposals – Proposals list, datasheet view

Panel Info

- Visible to panelists only

NSF Administrators' Contact Information – Link to Administrator list, all items

Panel Dates – link to panel dates list, all items

Panelists

- Visible to panelists only

My Info – link to EEC Panel Forms library, My Info view (filter Created By = [me])

Useful Documents – link to Panelist Documents folder in Help Documents

Submit Forms Here – link to Travel Information library, default view (filter Created By = [me])

Form Update

- Visible to Program Directors, Managers, and Administrative Staff

Assign to Panel – direct link to the Assign to Panel InfoPath form, disappears when deleted; this should be replaced with an InfoPath form webpart instead (not available on example site due to 2007 to 2010 migration)

Assign Roles – direct link to an Assign Roles InfoPath form; should be replaced with InfoPath webpart of the Assign Roles form instead

Manual Update

- Visible to Program Directors, Managers, and Administrative Staff

Assign Proposals to Panel – link to Proposals list, Add Proposals view (datasheet)

Assign Panelists to Panel – link to EEC Panel Forms library, Panel Assign View (datasheet)

Assign Roles – link to Proposals list, Assign Roles view (datasheet)

Review Panels

- Visible to Program Directors, Managers, and Administrative Staff
- Direct link to a Review Panels InfoPath form; should be replaced with an InfoPath form webpart

Help Documents

- Visible to all
- Link to help documents folder

Panelist Archive

- Visible to Program Directors, Managers, and Administrative Staff
- Link to Panelist Archive library

People and Groups

- Visible to Program Directors, Managers, and Administrative Staff
- Link to groups on the SharePoint site

Top Bar

Dashboard

- Visible to Program Directors, Managers, and Administrative Staff
- Link to a Dashboard form; can be replaced with InfoPath webpart, but not necessary (It's Big)

Panelists

- Visible to Program Directors, Managers, and Administrative Staff
- Link to EEC Panel Forms library webpart (all items) and Travel Forms library (all documents)

Proposals

- Visible to Program Directors, Managers, and Administrative Staff
- Link to Proposals list (all items)

All Site Content

- Visible to Program Directors, Managers, and Administrative Staff
- Link to All Site Content

Technical InfoPath Form Documents

Assign to Panels Form

Main Purpose:

The purpose of this form is to provide a visual display that helps Program Director assign proposals to panels based on the available panelists. It also enables them to then assign panelists to panels based on the proposals in each panel and finalize these assignments.

Display:

The visual display has a proposal list box, automatically generated from the Proposals list from <https://extsharepoint.nsf.gov/eng/eec/panels/>. Selections from this list are moved to the subsequent display boxes corresponding to the pressed assign button if not already present and then are removed from another box if necessary. This is achieved by using the proposal number as an identifier with the contains conditional and then setting fields using concat and the substring-before and after functions.

The panelist boxes follow the same protocol but with three separate list boxes filtered by their availability. The finalize buttons at the bottom are meant to indicate when the Program Director is done assigning panelists and subsequently email volunteers who were not assigned to any of their available panels. It acts as a two-step process by popping up an “Are you sure text?” and disables the assign controls when pressed.

Fields Overview:

- propTitleBox – proposal number of currently selected proposal in the list box. It is used to add/remove the correct proposals from the display
- panelXProposals – contains the proposals currently assigned to panel X. Updated on assign X button press.
- propChanged – contains the number of the proposal to be updated. It is changed every time an assign to panel button under the proposal box is pressed, and submitted if there is a change.
- panelChange – contains the number of the desired panel for proposals. It is updated on button press.
- PanelistsXYes – contains the panelists available for panel X. Updated on assign X button press.
- PanelXPanelists – contains the panelists currently assigned to panel X. Updated on assign X button press.
- panelistChanged – contains the txt_display for the changed panelists. It is updated on and submitted on button press if there is a change.
- panelistNumChange – the desired panel change number. It is updated and submitted on button press.
- PanelistAssign Group – this group is hidden until the Start Assigning button is pressed, which changes the startAssign field. It contains all the lists boxes for available panelists and the current assignments. This helps make sure proposals are assigned before panelists. The Disable Control button hides this group again.
 - PanelXFinal – this group contains the “Are you sure?” option for finalizing panel assignments. It appears when the corresponding Finalize button is clicked by setting the FinalX field to No. Clicking the Cancel button will re-hide this field by setting FinalX to Yes.

- Un-finalX – this group allows backwards steps and appears when a Program Director has clicked “Yes” in PanelXFinal, setting PanelXSet to true. Clicking Unfinalize will revert this change. This appears only when PanelXSet is true.
- PanelistOverview – this group contains the default panelist display and hides when the assign control is activated
- panelistsAvailableX – this field contains the panelists available for panel X.
- startAssign – this field changes the display to allow the Program Director to start assigning panelists to panels. Its values are Yes and No. Yes displays the assign options; no hides them.
- FinalX – first step to finalize two-step process. Yes/No field that becomes Yes when the finalize button is pressed
- PanelXSelect – indicates which panels are now finalized. Yes means they are. This is set by the “Yes” button in the corresponding panelXFinal section.
- PanelXFinalized-this value is used for the list value of Panel Finalized for the specified panel. On form load, this value is used in rules to reset the FinalX, PanelXSelect fields according to its value.

Data Connections:

- **LineBreak** – this is a simple xml file that is used for formatting the outputted strings. It allows for paragraph breaks in multi-line text boxes
- **EEC Panelist** – this populates the panelist data. The txt_display field is what displays in the panelist boxes and is used as a unique identifier. The Panel 1, 2, and 3 fields are used for sorting panelists by their availability. Panel assignment is used to filter by panel.
- **Proposals** – this populates the proposal data. The display field is what displays in the list and text boxes. The panel assignment field filters by panel. The collaborative role field ensures that secondary proposals are not listed. The proposal number is used as a unique identifier.
- **SharePoint Library Submit** – this form library takes the propChanged and panelChange fields to allow a workflow to update the proposal with that proposal number to the specified panel. It takes the panelChange and panelistNumChange to update the panelist with that name to the specified panel number. It also submits Panel1Set, 2, and 3 to prompt workflows to update the Panelists Finalized field in the Panel Dates list if those fields are true.

Workflow:

Each submit should prompt a workflow that updates the Proposal list, EEC Panelist form library, or Panel Dates list accordingly. A detailed example is provided in [Update Panel Assignments](#).

Dashboard Form

Main Purpose:

The purpose of this form is to provide a visual display of all stored panel data and tasks. It also has a section for adjusting administrative settings for email reminders and form features.

Display:

The visual display has four main sections navigated by the buttons on top. The Tasks/Overview shows tasks of the Program Assistant and Program Director and their status (green=complete, red=incomplete). It includes links to the relevant site location where they can complete those tasks or mark their status. Below this, it gives a statistical overview of each panel and its date.

The Panelists Status tab provides a more in-depth look at this information and includes an invitation status tracker. The Response Pending value is calculated by adding the forms that have been saved for later editing and those names in the Panelist Invitee list that do not have their names included in the EEC Panel Form library Created By section and therefore have not filled a form. The Conflicts Pending column checks both those forms with Conflict Pending and those with Invitation Accepted that have already been assigned to a panel. All other calculated values simply check form status and panel assignment. The location values will show as red boxes if no location is filled in within the Panel Dates list.

The Proposals Status tab first lists the proposals not assigned to a panel. Then, the dropdown menu provides specific proposal information per selected panel. For details on how this display updates see the [“While Loop”](#) section.

The Admin Settings page gives the current timing settings for email reminders and allows users to change them and then submit their changes. It also shows checkboxes to allow for adhoc reviewers during the invitation process or the prefers not to review option when filling out conflicts and preferences.

Fields Overview:

- CurrentSection – modified by the buttons at the top of the screen to display the correct group. Its values correspond to the name of the button.
- Panelist – the group shown when CurrentSection = Panelist Status; it displays detailed information about the panels
 - PanelXAccept – contains the full names of those panelists available for panel X filtered from the EEC Panelist Forms list where Panel X = “Yes”
 - Declined – contains the full names of panelists who were not available for panels or adhoc review filtered from the EEC Panelist Forms list where Form Status = “Invitation Declined”
 - Adhoc – contains the full names of panelists available for adhoc review; form status = “adhoc Accept”
 - Pending – contains full names of panelists who have not yet responded to the invitation; it is filtered from the EEC Panel Form where Form Status = “Availability Pending” and the panelist invitee library where their full names are not contained within the EEC Panel Form library Created By section (possible issue if panelist have the same name)

- Assignments CompleteX – EEC Panel Form where Form Status = “Assignments Confirmed” and Panel Assignment = X
- Conflicts Marked/Pending X - EEC Panel Form where Form Status = “Conflicts Marked/Pending” and Panel Assignment = X
- Form Last Names – Contains the names of those who have created forms in the EEC Panels Form library; used to sort pending invitations
- RoomX – the room for panel X taken from the Panel Dates list; turns red if there is no specified value
- Proposal – group that gives detailed information on proposals; it displays when CurrentSection = “Proposal Status”
 - PanelSelect – used to select which panel information is displayed
 - ***Complete fields repeat these fields except filter for Proposal Finalized = “Yes”
 - More detail on how these sections work is found here: [While Loop](#)
 - Display – populates itself with proposal data where assignments are not yet finalized
 - ProposalNum – list of incomplete proposal numbers from panel PanelSelect separated by semicolons; used to filter when populating Display field
 - Count – counter for while loop to fill Display
 - FirstNumInc – the first proposal number that is not finalized
 - ***End of repeated fields
 - DisplayUnassigned – shows the proposals where Panel Assignment is still empty or 0
- Tasks – group that gives overview of tasks and panel data; CurrentSection = “Tasks”
 - BookRoomX – Booked field from Panel Dates where Panel Number contains X; the field is red when false and green when true
 - FastlaneCheck – count of the number of list items in the EEC Panelist Forms list that do not have FastLane checked to true; if this value is greater than 0, the field is red. Else it is green. (% = checked/total)
 - InvitePanelistsX – Panelists Invited field from Panel Dates where Panel Number contains X; the field is red when false and green when true
 - AssignProptoPanel – count of proposals not yet assigned to panels from Proposal list; >0 the box is red, but if it equals 0, it is green (% = assigned/total)
 - AssignPanelisttoPanelX – Panelists Finalized check box from the Panel Dates list where Panel Number contains X; green means check; red means not checked
 - AssignRolesonPropsX – count of proposals without Proposal Finalized checked where Panel Assignment = X; >0 means red; 0 means green (% = finalized/total)
- Admin – group that allows admins to change reminder email and form settings; Current Section = “Admin”; everything in this section is submitted when pressing the submit button prompting a workflow to update the values in the Task Timing Settings and Admin Form Options lists
 - BookRoomReminder – days between book room reminder emails
 - AvailabilityReminder – days between reminders to panelists to fill out their availability
 - ConflictReminder – days between reminder to panelists to fill out their conflicts
 - InvitePanelistReminder – days between reminder to Program Director to invite panelists
 - StartInvitePanelist – days before the start invite panelist reminders to the Program Director begin
 - AdhocChecked – whether or not the EEC Panelist Forms have an adhoc option
 - PreferNotReview – whether or not the EEC Panelist Forms have a “Prefer not to Review” option
- PanelX – checks if panel X is present in the Panel Dates list
- SubmitSplash – simple view that merely provides feedback to the user on a successful submit

Data Connections:

- **LineBreak** – this is a simple xml file that is used for formatting the outputted strings. It allows for paragraph breaks in multi-line text boxes
- **Panelist Invitee** – populates invitee data. The full name field is used for the visual display of pending invitations and counts them
- **EEC Panelist** – this populates the panelist data. Conflicts, Form Status, Panel X, Panel Assignment, Prefer to/not to Review, FastLane Check, and Created By are used for filtering. Txt_display and full name are used for display.
- **Task Timing Setting** – populates the admin page for email reminder settings
- **Panel Dates** – populates information about panels. Panel Number is used for sorting. Location and start/end times are displayed, and other fields are check boxes for tasks.
- **Proposals** – this populates the proposal data. The display field is what displays in the list and text boxes. The panel assignment and proposal finalized fields filter. The collaborative role field ensures that secondary proposals are not listed. The proposal number is used as a unique identifier. Lead, Scribe, and Reviewer fields are used for sorting and display.
- **Admin Form Options** – populates the admin page for admin form settings
- **SharePoint Library Submit** – this form library takes in all the fields on the admin page and prompts a workflow to update them

While Loop:

While loops were needed in this section in order to include information from two separate lists that were related by proposal number (eval does not fulfill this need). InfoPath has no built-in while loops, so displaying proposal information using something similar is rather rough. Ideally, here's the code:

```
While(ProposalList(item) is not empty){  
  
    Display = concat(Display +ProposalList(item) +Panelist[filter w/ ProposalList(item)]) ;  
  
    ProposalList.nextItem;  
  
}
```

Rules do not run until completion however, so a classic “do this, update list, continue” approach does not work. This way, InfoPath infinitely loops since updating a field causes its rule to trigger again. To solve this, one extra field and rule was implemented. This is why the dropdown PanelSelect box also updates Display to include the very first return in the generated proposal list, and the Display rule is reordered to first decrement its count and then update. So basically, we get this:

```
For(count=1; count < propNums; count++){  
  
    Display = Display + Info[count] ;  
  
}  
  
Display = Info[count] + Display ;
```

Workflow:

Each submit should prompt a workflow that updates the Admin Form Options and Task Timing Settings lists. A detailed example is provided in [Admin Control](#).

Assign to Proposals Form

Main Purpose: The purpose of this form is to provide a visual display that helps Program Director assign panelists to proposals based on the available panelists and their conflict of interests. It also enables them to finalize these assignments.

Display: The visual display has two primary sections. The left side is a list of panelists with their preferences. These lists are filtered to exclude those that have conflicts preventing their selection. The right side of the display contains a proposal and a list of assignments for it. The data on both sides is pulled from sections of this site: <https://extsharepoint.nsf.gov/eng/eec/panels/>. Selections from this list are moved to the subsequent display boxes corresponding to the pressed. This is achieved by using the proposal number as an identifier with the “contains” conditional and then setting fields using “concat” and the “substring-before” and “substring-after” functions.

The finalize button at the bottom are meant to indicate when the Program Director is done assigning panelists.

The top section of the display contains buttons that switch the current panel to allow the other fields to filter data accordingly.

Note: The display pulls data every time a panelist is assigned. The form submits on any type of navigation with the buttons as well as clicking on Finalized and Email Panel.

Fields Overview:

- FilterProposalNumber – proposal number of currently displayed proposal in the list box. It is a hidden field that filters the contents of concatPropNum using propChStart and propChEnd
- AssignLead, AssignScribe, AssignReviewerX – These fields default to the name of the person who is currently assigned to a particular role in a proposal. They are also a staging area before data is submitted where the new assignments go.
- PanelXisFinalized- This is a flag denoting that the panel is finalized and the workflow should update the corresponding Panel Dates list entry.
- currentPanel – This field holds the current panel number, it is used for filtering purposes and is changed by the buttons near the top
- currentProp – This field is a count of how many proposals have been looked through. The first proposal is 1, the last proposal is n.
- totalProp- This field is a count of how many total proposals there are
- PropChStart – Hidden field, counts what character FilterProposalNumber will start on
- propChEnd- Hidden field, a count of how long the proposal numbers are
- prefReview, noPref, prefNotReview – List boxes that contains all panelists filtered to those without a conflict to the current proposal and are part of the current panel.
- propInfoDisplay- detailed proposal info gotten from data connection
- concatPropNum- Hidden field, a list of all the proposal numbers separated by “;”s
- LeadCount, ScribeCount, ReviewCount1, ReviewCount2 – Count of the number of times a panelists is assigned a particular role
- WarningMessage- text that appears when all proposals in a panel are assigned
- Finalized- text that appears after a panel is finalized

- ReviewerXcountReviewX- count of number of time a panelist is assigned to be a reviewer on each review slot, this is done because count()+count() do not add together properly within one instruction.
- CountofFalse-a count of how many proposals in the current panel are still not finalized

Data Connections:

- **EEC Panels Forms** – this populates the panelist data. Conflicts field ensures no panelists with a conflict of interest are selected. Panel Assignment is used for filtering of information, as is Prefer to Not Review and Prefer to Review Fields. Full Name is used to display pertinent info in the left side of the form
- **Proposals** – this populates the proposal data. The display field is what displays in the list and text boxes. The panel assignment field filters by panel. The collaborative role field ensures that secondary proposals are not listed. The proposal number is used as a unique identifier. Lead, Scribe, Reviewer1, Reviewer2 are used to get the current person assigned to a position.
- **SharePoint Library Submit** – this form library takes the FilteredProposalNumber field to allow a workflow to update the proposal with the new panelist assignments. These come from the AssignLead ,AssignScribe ,AssignReviewerX fields, and assign the panelists to the position the name includes. Finally the PanelXisFinalized is used to update the Panel Dates List and only on the proper Panels.

Workflow: On each submit, a workflow changes the specified proposal accordingly. A detailed example is provided in [Update Assignments](#).

EEC Panelists Form

NOTE: Information here is as accurate and informative as possible. However, this form was inherited and not made solely by us.

Main Purpose: This form has three separate functions that all relate to collecting information from or displaying information to panelists. Its first display is used to invite and collect general data on a panelist and allow them to mark their availability for panels. The second section is used to gather their conflicts of interest and preferences for proposals. The third screen gives them a review of their assignments, so that they can accept them.

Displays: Panelist Information and Availability (default) – This display collects has labeled boxes to collect panelist information. Depending on the panels in the Panel Dates list, the different panel groups hide or display. Panelists must fill in the entire form in order to submit, but if they are unavailable, they will be asked to accept an ad hoc review according to Admin Form Settings. If still unavailable, they decline the invitation.

Panelist Conflict Selection – This display iterates through the proposals for the panelist’s panel and allows them to select conflicts or preferences for each. The top of the form contains a link to the a help documents library on the SharePoint site with a COI Form and the Program Director’s email taken from the Administrator SharePoint list. The Co-PI and Collaborative Proposal displays hide if they have no value, and the preference to not review a proposal hides based on Admin Form Settings. All COIs must be checked yes or no in order to continue.

Review section – shows the panelist’s assignments based on where their name appears as Lead, Scribe, or Reviewer. This display is generated from a calculated value in the Proposals list. A button allows panelists to mark additional conflicts of interest and a check box that appears once all proposals for their panel have been finalized allows them to accept their assignments. Afterwards, the COI button and checkbox disappear, but panelists can still return to the screen to review their assignments. A link to FastLane is shown at the bottom.

Various Splash Screens – pretty straightforward in display, these appear when an action is required by the Program Director or Assistant before the panelist can continue to the next section of the form.

Fields Overview:

- txtReviewerFirst – inputted first name of the reviewer; this field is required
- PropSharePointID – iterator used in the COI form that increments or decrements by one according to the Next/Previous buttons
- date – the current date
- AssignedPanel_Number – the panelist’s Panel Assignment from the EEC Panel Forms Library, sorted by email for uniqueness
- getAssignmentsFinalized – string of 0s and 1s that show whether all proposals in the given panel are finalized in the Review Section; any 0s means not all assignments are finalized, so the panelist cannot yet accept his/her roles

- Assigned_Lead – displays the txt_Display field for proposals that the panelist is assigned lead to, separated by line breaks and sorted by email
- Assigned_Scribe – same as lead but for scribe instead
- txtReviewerEmail – inputted email of user; this field is required
- txtReviewerExpertise – inputted interest of panelist, helpful for sorting/assignment; this field is required
- txtReviewerLast – inputted last name of panelist; required
- txtReviewerPhone – inputted phone number of panelist; required
- txtConflicts – array of proposal numbers separated by semicolons for which panelist has a conflict; populated every time a panelist marks or unmarks a conflict
- txtPrefYes – array of proposal numbers separated by semicolons for which panelist has a preference; populated every time a panelist marks or unmarks a preference
- txtPrefNo - array of proposal numbers separated by semicolons for which panelist prefers not to review; populated every time a panelist marks or unmarks a preference to not review
- Assigned_Reviewer - displays the txt_Display field for proposals that the panelist is assigned reviewer 1 or 2 to, separated by line breaks and sorted by email
- txtPropNum – this is probably used somewhere in the conflicts review section
- rbtnGender – I believe the original form had an option to select gender that has since been removed. This field does nothing
- rbtnDisability – Same as gender, the form used to ask if people were disabled
- boxProposalNum – the proposal number of the proposal currently being reviewed for conflicts; it is generated from the concatPropNumbs of all proposal numbers in the panel and the PropChStart and PropCHEnd which change depending on the Next/Prev buttons. This works as all proposal numbers are 7 digits.
- txtProposalTitle – title of proposal currently being reviewed for conflicts
- txtPropPName – principal investigator of current proposal being reviewed for conflicts
- txtPropInstitute – institution of current proposal being reviewed for conflicts
- rbtnConflicts – the yes/no conflicts radio buttons that populates the txtConflicts field when marked; panelists cannot advance to the next proposals without marking this button
- rbtnPreference – the preference buttons that populate the txtPrefYes/No fields; it defaults to No Preference
- CountProposals – counts the proposals that a panelist must mark conflicts for
- PanelX_Start – when panel X starts; obtained from Panel Dates list
- PanelX_End – when panel X ends; obtained from Panel Dates list
- rbtnPanelX_YesNo – indicates panelist's availability for panel; yes means available; no means not; defaults to No on Form Load if Panel X does not exist; all buttons must be marked to allow submit; asks for decline of invitation if all No's
- hdnStatus – controls the Form Load rules for views; values are Availability Pending (default screen), Invitation Accepted (Processing Splash), AdhocAccept (Processing Splash), Conflicts Pending (Conflicts Screen), Assignments Confirmed/Conflicts Marked (Review Section); the changes to hdnStatus are made based on submits and Panel Assignment
- txtInstitution – inputted panelist institution; field is required
- WarningBox – some text; not sure why this is a field
- AgreementBox – checked if they forfeit their invitation
- txtAvailabilityStatus – checks if all rbtnPanelX_YesNo boxes are no (true) or at least one is yes (false); true means show the decline or ad hoc fields; false allows submission of the form
- txtNoConflicts – list of proposal numbers separated by semicolons where the panelist indicated they had no conflict; propagated by the rbtnConflicts rules

- CountProposalsReview – counts the semicolons in the array of proposal numbers to determine how many proposals there are to review for conflicts (cool, but could just use a count)
- txtUnderstand – text in a field inexplicably
- grpDemographicInfo – a group used for determining ethnicity; this control has since been abandoned
- rbtnAgreeDemographic – an abandoned control for determining ethnicity
- txtAssignedStartDate – the start date of the panelist’s assigned panel retrieved from Panel Dates and filtered by the Assigned Panel Number field
- txtAssignedEndDate - the end date of the panelist’s assigned panel retrieved from Panel Dates and filtered by the Assigned Panel Number field
- Proposals – a cool folder
- concatPropNumbs – the list of proposal numbers in the panelist’s assigned panel separated by semicolons; retrieved from the Proposal list sorted by Assigned Panel Number = Panel Assignment and Role != Secondary
- PropChStrat – iterator used in the COI form that increments or decrements by 8 according to the Next/Previous buttons
- PropChEnd – 7 because proposal numbers are 7 digits long
- txtCo_PIX – the Co-Principal Investigator for the proposal currently being reviewed for conflicts
- chkAcceptAssignments – indicates whether a panelist has accepted their assignments in the Review Section
- AssignmentDisclaimer – some text that stays hidden if assignments have not been finalized (redundant)
- txtHideOrShow – true if all assignments in panelist’s panel are finalized; false otherwise
- Collaborative Research – Information on all secondary proposals up to 6; only displays if the current proposal up for review has Collaborative Role = Lead
 - SecondaryX – populated by the Secondary field of proposal numbers
- CO-PIs – hides the CO-PI section if none are listed
- txtSecondaryProposals – proposal numbers of the secondary proposals associated with the currently reviewed proposal separated by semicolons
- group10/11 – probably useless
- Unavailable – don’t know
- Group13 – used to hide the Collaborative Research group by checking its sections propNums to all be blank
- AcceptBox – used to control whether panelists’ can accept their assignments based on the finalized proposals
- txtDisplayField – calculated value used in other forms for more informative display purposes (can be moved to library columns)
- adhoc – section dealing with ad hoc acceptance; activated based on Admin Form Settings and if no other availability were indicated
- Panel X – group for hiding Panel X if no Panel 2 is present
- pdEmail – the Program Director’s email, retrieved from the Administrator list
- txtPrefNotReview – toggle used to determine the Admin Form Settings for disabling the prefer not to review option
- NoPrefGroup – used to hide the prefer not to review option
- PrefGroup – used to maintain formatting with the other preference options
- addressLine1 – inputted address from user; this is required
- addressLine2 – inputted address from user; no required
- City – inputted city from user

- State – inputted state from panelist
- Zip – inputted zip code from panelist
- Address – concatenates the two lines of address and submits them
- RandomValue – calculation based on the minutes and seconds when the form opens; used when form is first opened to establish the 5 digit extension used to make guessing URLs more difficult
- Ext – set once for added security by making URLs unique
- Link – link to get back to form
- FastLane Info – contains information used to sign into FastLane; shown after assignments have been confirmed

Data Connections:

- **LineBreak** – this is a simple xml file that is used for formatting the outputted strings. It allows for paragraph breaks in multi-line text boxes
- **EEC Panelist** – this populates the panelist data as set by the program administration (Panel Assignment). Email is also used for filtering.
- **Proposals** – this populates the proposal data. The panel assignment field filters by panel. The collaborative role and secondary fields ensure that secondary proposals are used correctly. The proposal number is used as a unique identifier. Title, university, PI, and other similar fields are used in the display for COIs.
- **Admin Form Options** – used to disable/enable certain form features (ad hoc series and prefer not to review button)
- **Administrators** – this populates information about the Program Director
- **Panel Dates** – used to display information about the different panels that panelists can mark their availability for
- **SharePoint Library Submit** – this form library takes the information filled out in the first panel form as well as the conflicts and preferences arrays
- **Archive Submit** – this form library takes panelists' information from the first screen minus their availability for archival purposes

Workflow: Each submit should prompt a workflow that updates the EEC Panelist form library or sends emails. This workflow is [Email Communications](#), which loops with [Email Communications B](#).

Workflow Pseudo-code

CI = Current Item

Email Communications:

- List workflow associated with the EEC Panels Forms list that runs every time a form is created or updated used to automate email communication between the panelists and the Program Director

If CI:Form Status equals Invitation Accepted

and CI:Panel Assignment is blank

 Email Group: EEC Panels Program Director (1)

Else If CI:Form Status equals Invitation Declined

 Email Group: EEC Panels Program Director (2)

Else If CI:Form Status equals adhoc Accept

 Email Group: EEC Panels Program Director (2.1)

Else IF CI:Form Status equals Availability Pending

 Pause for Task Timing Settings:Time(Days) (filter:title = Time between reminders to mark availability) days

 then Email CI:Created By (3)

 then Update item in CI:Loop is Yes

 Terminate Workflow

Else if CI:Panel Assignment is empty &

CI:Form Status = Invitation Accepted &

CI:Volunteer Reminder = No

 Pause 7 days

 If CI:Panel Assignment is empty

 Var:count = 0 ;

 If CI:Panel 1 is Yes

 Local Var:count = count + 1

 If CI:Panel 2 is Yes

count = count + 10

If CI:Panel 3 is Yes

count = count + 100

If CI:Panel 4 is Yes

count = count + 1000

If CI:Panel 5 is Yes

count = count + 10000

If count >= 10000

if Panel Dates:Panelists Finalized (filter: Panel Number = Panel 5) is Yes

count = count - 10000

If count >= 1000

if Panel Dates:Panelists Finalized (filter: Panel Number = Panel 4) is Yes

count = count - 1000

If count >= 100

if Panel Dates:Panelists Finalized (filter: Panel Number = Panel 3) is Yes

count = count - 100

If count >= 10

If Panel Dates:Panelists Finalized (filter: Panel Number = Panel 2) is Yes

count = count - 10

If count >= 1

If Panel Dates:Panelists Finalized (filter: title = Panel 1) is Yes

count = count - 1

If count = 0

Email CI:Created By (4)

Update item in list CI:Volunteer Reminder = Yes

else

Update item in CI:Loop is Yes

If CI:Panel Assignment is not empty

and CI:Form Status equals Invitation Accepted

and CI:Panel Assignment email is No

Email Current Item: Created By (5)

Update item in list CI:Panel Assignment email is Yes

Else If CI:Form Status equals Conflicts Pending

Pause for Task Timing Settings:Time(Days) (filter: title = Time between reminders to Mark Conflicts and Preferences) days

Email CI:Created By (6)

Update item in CI:Loop is Yes

Terminate Workflow

Else If Current Item:Form Status equals Conflicts Marked & CI:Conflicts Marked Email = No

Email Group: EEC Panels Program Director (7)

Update CI:Conflicts Marked Email = Yes

Else If CI:Assignment Email is No & Panel Dates:Roles Finalized (filter where Panel Number contains CI:Panel Assignment) equals Yes

Update list item CI:Assignment Email is Yes

Email:Created By (8)

Else If CI:Assignment Email is No & Panel Dates:Roles Finalized (filter where Panel Number contains CI:Panel Assignment) equals No

Pause 1 day

Update list item CI:Loop is Yes

If CI:Form Status = Process Finalized

Email:Group:EEC Panels Program Director (9)

Email Communications B:

- Sister workflow for looping; runs every time an item is updated (EEC Panels Forms)

If CI:Loop is Yes

Update list item CI:Loop is No (loop)

Update Assignments:

- List workflow associated with the Assign Panelist to Proposal form library that runs on creation or update; provides the functionality for the form

If CI:Panel 1 Is Finalized equals Yes

and Panel Dates:Roles Finalized (filter where Panel Number = Panel 1) equals No

Update list item in Panel Dates:Roles Finalized (filter where Panel Number = Panel 1) set Yes

If CI:Panel 2 Is Finalized equals Yes

and Panel Dates:Roles Finalized (filter where Panel Number = Panel 2) equals No

Update list item in Panel Dates:Roles Finalized (filter where Panel Number = Panel 2) set Yes

If CI:Panel 3 Is Finalized equals Yes

and Panel Dates:Roles Finalized (filter where Panel Number = Panel 3) equals Yes

Update list item in Panel Dates:Roles Finalized (filter where Panel Number = Panel 3) set Yes

If CI:Panel 4 Is Finalized equals Yes

and Panel Dates:Roles Finalized (filter where Panel Number = Panel 4) equals Yes

Update list item in Panel Dates:Roles Finalized (filter where Panel Number = Panel 4) set Yes

If CI:Panel 5 Is Finalized equals Yes

and Panel Dates:Roles Finalized (filter where Panel Number = Panel 5) equals Yes

Update list item in Panel Dates:Roles Finalized (filter where Panel Number = Panel 5) set Yes

Update list item Proposal:Lead (filtered w/ Proposal Number = CI:Filtered Proposal Number) to EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Lead)

Update list item Proposal:Scribe (filtered w/ Proposal Number = CI:Filtered Proposal Number) to EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Scribe (return as String))

Update list item Proposal:Reviewer 1 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 1)

Update list item Proposal:Reviewer 2 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 2)

Update list item Proposal:Reviewer 3 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 3)

Update list item Proposal:Reviewer 4 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 4)

Update list item Proposal:Reviewer 5 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 5)

Update list item Proposal:Reviewer 6 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 6)

Update list item Proposal:Reviewer 7 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 7)

Update list item Proposal:Reviewer 8 (filtered w/ Proposal Number = CI:Filtered Proposal Number) EEC Panel Forms:Created By (filtered where Display Name = CI:Assigned Reviewer 8)

Assignments Email:

- List workflow associated with the Proposals list that runs every time an item is updated; finalizes assignments and emails panelists when there is a change in their finalized assignments

If CI:Lead and CI:Scribe are not blank

and CI:Assignments Finalized is No

Set local variable count = 2

If CI:Reviewer 1 is not blank

count = count + 1

If CI:Reviewer 2 is not blank

count = count + 1

If CI:Reviewer 3 is not blank

count = count + 1

If CI:Reviewer 4 is not blank

count = count + 1

If CI:Reviewer 5 is not blank

count = count + 1

If CI:Reviewer 6 is not blank

count = count + 1

If CI:Reviewer 7 is not blank

count = count + 1

If CI:Reviewer 8 is not blank

count = count + 1

If count is greater than or equal to CI:Number of Reviewers

Update list item CI:Assignments Finalized to Yes

Else

Update list item CI:Assignments Finalized to No

If Panel Date:Roles Finalized (filter where title = Panel CI:Panel Assignment) equals Yes

If CI:Old Lead != Lead

Email Old Lead (10)

Email Lead (11)

If CI:Old Scribe != Scribe

Email Old Scribe (10)

Email Scribe (11)

If CI:Old Reviewer 1 != Reviewer 1

Email Old Reviewer 1 (10)

Email Reviewer 1 (11)

If CI:Old Reviewer 2 != Reviewer 2

Email Old Reviewer 2 (10)

Email Reviewer 2 (11)

If CI:Old Reviewer 3 != Reviewer 3

Email Old Reviewer 3 (10)

Email Reviewer 3 (11)

If CI:Old Reviewer 4 != Reviewer 4

Email Old Reviewer 4 (10)

Email Reviewer 4 (11)

If CI:Old Reviewer 5 != Reviewer 5

Email Old Reviewer 5 (10)

Email Reviewer 5 (11)

If CI:Old Reviewer 6 != Reviewer 6

Email Old Reviewer 6 (10)

Email Reviewer 6 (11)

If CI:Old Reviewer 7 != Reviewer 7

Email Old Reviewer 7 (10)

Email Reviewer 7 (11)

If CI:Old Reviewer 8 != Reviewer 8

Email Old Reviewer 8 (10)

Email Reviewer 8 (11)

Update List Item CI:Old Lead to Lead

Update List Item CI:Old Scribe to Scribe

Update List Item CI:Old Reviewer 1 to Reviewer 1

Update List Item CI:Old Reviewer 2 to Reviewer 2

Update List Item CI:Old Reviewer 3 to Reviewer 3

Update List Item CI:Old Reviewer 4 to Reviewer 4

Update List Item CI:Old Reviewer 5 to Reviewer 5

Update List Item CI:Old Reviewer 6 to Reviewer 6

Update List Item CI:Old Reviewer 7 to Reviewer 7

Update List Item CI:Old Reviewer 8 to Reviewer 8

Update Panel Assignments:

- List workflow associated with the Assign to Panels form library that runs every time an item is updated or created; provides functionality for the form

If CI:Prop Changed is not empty

Update item in Proposals:Panel Assignment (filtered by Prop Changed = Proposal Number) set to CI:Panel Changed

If CI:Panelist Changed is not empty

Update item in EEC Panelist:Panel Assignment (filtered by Panelist Changed = txtDisplay) set to CI:Panel Changed

If CI:Panel 1 Set = Yes &

Panel Dates:Panelists Finalized (filter Panel Number equals Panel 1) is No

Update item in Panel Dates:Panelists Finalized is Yes (filter by Panel Number contains 1)

If CI:Panel 2 Set = Yes &

Panel Dates:Panelists Finalized (filter Panel Number = Panel 2) is No

Update item in Panel Dates:Panelists Finalized is Yes (filter by Panel Number contains 2)

If CI:Panel 3 Set = Yes &

Panel Dates:Panelists Finalized (filter by Panel Number = Panel 3) is No

Update item in Panel Dates:Panelists Finalized is Yes (filter by Panel Number contains 3)

If CI:Panel 4 Set = Yes &

Panel Dates:Panelists Finalized (filter by Panel Number = Panel 4) is No

Update item in Panel Dates:Panelists Finalized is Yes (filter by Panel Number contains 4)

If CI:Panel 5 Set = Yes &

Panel Dates:Panelists Finalized (filter by Panel Number = Panel 5) is No

Update item in Panel Dates:Panelists Finalized is Yes (filter by Panel Number contains 5)

Book Room:

- List workflow associated with the Panel Dates list that runs every time an item is created or updated; handles reminders to book a room to the Program Assistant

If CI:Booked is No & CI:Book Room Mutex is No

Update list item CI:Book Room Mutex = Yes

Pause until CI:Book Room Date

Email Group: EEC Panels Program Assistant (12)

Pause for Task Timing Settings:Time(Days) (filter by title = Time between reminders to book room for panels)

Update list item CI:Book Room Mutex = No (loop)

Book Room B:

- Sister workflow for book room in order to loop; runs every time an item is updated

If CI:Booked is No & CI:Book Room Mutex = No

Update list item CI (loop/do nothing)

Invite Panelist:

- List workflow associated with the Panelist Invitees list that runs every time an item is updated or created; sends invitation emails to panelists

If CI:Email is not blank & CI:Username is not blank & CI>Password is not blank & CI:Invitation Sent is No

Update list item CI:Invitation Sent to Yes

Email CI:Email (13)

Invitee Reminder:

- List workflow associated with the Panel Dates list that runs every time an item is created or updated; sends reminders to Program Director to invite panelists

If CI:Panelists Invited = No & CI:Invitee Mutex = No

Update list item CI:Invitee Mutex = Yes

Subtract Task Timing Settings:Time(Days) (filter: title = Time before panel start for invitee reminders) days from Current Item:Start Date (Output to Variable: date)

then Pause until Var:date

Email Group: EEC Panels Program Director (14)

Pause for Task Timing Settings:Time(Days) (filter by title = Time between reminders to invite panelists)

Update list item CI:Invitee Mutex = No

Invitee Reminder B:

- Sister workflow for invitee Reminder in order to loop; runs every time an item is updated

If CI:Panelists Invited is No & CI:Booked Room Mutex = No

Update list item CI (loop)

Admin Control

- List workflow associated with the Dashboard list that runs every time an item is created or updated; provides functionality for the form

Update Task Timing Settings:Time(Days)(filtered where Title = Time between reminders to book room for panels) to CI:Book Room Reminder

Update Task Timing Settings:Time(Days) (filtered where Title = Time between reminders to Mark Availability) to CI:Availabilty Reminder

Update Task Timing Settings:Time(Days)(filtered where Title = Time between reminders to Mark Conflicts and Preferences) to CI:Conflict Reminder

Update Task Timing Settings:Time(Days)(filtered where Title = Time between reminders to invite panelists) to CI:Invite Panelist Reminder

Update Task Timing Settings:Time(Days)(filtered where Title = Time before panel start for invitee reminders) to CI:Start Invite Panelist

Update Admin Form Options:AdHocRev(filtered where Title = Panel Settings) to CI:Adhoc Checked

Update Admin Form Options:Prefer not to Review toggle(filtered where Title = Panel Settings) to CI:Prefer Not Review

FastLane Reminder:

- List workflow associated with the EEC Panels Forms list that runs every time a form is created or updated; reminders to the Program Assistant to add Fastlane information

If CI:Panel Assignment is not blank & FastLane Check is No & Form Status = Invitation Accepted

If CI:FastLane Email is No

Email:Group:EEC Panels Program Assistant (15)

Update CI:FastLane Email to Yes

Pause for 1 Day

Email:Group:EEC Panels Program Assistant (15)

FastLane Reminder B:

- Sister List workflow associated with the EEC Panels Forms list that runs every time a form is created or updated used to force reminder to loop

If CI:Panel Assignment is not blank & FastLane Check is No & Form Status = Invitation Accepted

Update CI (Loop/does nothing)

Emails:

(1) Subject: [%CI:Full Name%] Availability

Dr. [%Administrators: Name%] (filter by position = Program Director)

[%CI:Full Name%] has responded to your invite and marked their availability for panels.

Panel 1: [%CI:Panel 1%]

Panel 2: [%CI:Panel 2%]

Panel 3: [%CI:Panel 3%]

Panel 4: [%CI:Panel 4%]

Panel 5: [%CI:Panel 5%]

If you want to continue using the SharePoint site, the next step is to assign invitees to a panel using this [or manually assigning them \[.\]\(https://extsharepoint.nsf.gov/eng/eec/panels/EEC%20Panels%20Forms/Forms/Panel%20Assign.aspx\)](https://extsharepoint.nsf.gov/eng/eec/panels/_layouts/FormServer.aspx?XmlLocation=/eng/eec/panels/assign%20to%20panels/panelassign.xml%3Fopenin=browser)

Remember to assign proposals to panelists first!

Thank you,

NSF SharePoint Bot

(2) Subject: [%CI:Full Name%] Declined

Dr. [%Administrators: Name%] (filter by position = Program Director),

[%CI:Full Name%] has indicated that they are unable to attend a panel at this time.

Thank you,

EEC SharePoint Bot

(2.1) Subject: [%CI:Full Name%] Ad hoc

Dr. [%Administrators: Name%] (filter by position = Program Director)

[%CI:Full Name%] ([%CI:email%]) has indicated that they are unable to attend a panel at this time, but they are willing to do an ad hoc review.

Thank you,

EEC SharePoint Bot

(3) Subject: Action Needed: Mark Availability

Hello [%CI:Full Name%],

You indicated interest in attending in EEC panel but have not yet filled out your availability. Please follow this link and complete the form.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

(4) Subject: EEC Panel Update

Hello [%CI:Full Name%],

Thank you for volunteering to be on an EEC Panel. However, we do not require your assistance at this time.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

(5) Subject: Panel Assignment

Hello [%CI:Full Name%],

Thank you for agreeing to serve on the [%Panel Dates: Title(filter where Panel Number contains CI:PanelAssignment)%] panel from [%Panel Dates:Start Date (format date) (filter where Panel Number contains CI:PanelAssignment)%] to [%Panel Dates:End Date (format date) (filter where Panel Number contains CI:PanelAssignment)%] for the Engineering and Education Centers. The panel will be

held in [%Panel Dates:Location(filter where Panel Number contains CI:PanelAssignment)%] starting at [%Panel Dates:Start Date (format time)(filter where Panel Number contains CI:PanelAssignment)%] Please plan to arrive at least 15 minutes early to check in with security and obtain your visitor's pass.

Before proceeding please download and fill out the forms located < a href="https://extsharepoint.nsf.gov/eng/eec/panels/Program%20Directors%20Documents/Panelist%20Documents/"> here . Afterwards, upload them to here by clicking add a document.

The following form will allow you to view the proposals to be reviewed in this panel. Please complete this form indicating whether you have a conflict of interest with a proposal or a preference to review or not review it.

 Link

Please review the panel instructions on this document.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

(6) Subject: Action Needed: Mark Conflicts

Hello [%CI:Full Name%],

You have been assigned to Panel [%CI:Panel Assignment%] from [%Panel Dates:Start Date[where Panel Number contains CI:Panel Assignment]%] until [%Panel Dates:End Date[where Panel Number contains CI:Panel Assignment]%] but have not filled out your conflicts of interest. Please follow this link and complete the form. If you are unable to attend the panel, please contact the Program Director at [%Administrators: Email%] (filter: position = Program Director).

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

7

Subject: [%CI:Full Name%] has Marked COIs and Preferences

Hello Dr. [%Administrators: Name (filter for Position = Program Director)%],

This is an automatic email to inform you that the panelist [%CI:First Name%] [%CI>Last Name%] has marked their conflicts of interest.

For more detailed metrics about panelists please visit the site at <a href = <https://extsharepoint.nsf.gov/eng/eec/panels/Review%20Panel/Forms/AllItems.aspx>> Link.

If you want to continue using the SharePoint site, the next step is to assign panelists to proposal roles using this Form

or manually assigning them here .

Thank you,

EEC SharePoint Bot

8

Subject: EEC Panel Roles

Hello [%CI:First Name%] [%CI>Last Name%],

This is an automatic email to inform you that your assignments for the panel have been posted.

You can review your assignments at <a href =
https://extsharepoint.nsf.gov/eng/eec/panels/EEC%20Panels%20Forms/[%CI:FirstName%]%20[%CI:Last
Name%][%CI:ext%].xml> Link.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

9

Subject: [%CI:Full Name%] Completed Assignment Review

Hello Dr. [%Administrators: Name (filter for Postition = Program Director)%],

This is an automatic email to inform you that the panelist [%CI:First Name%] [%CI:Last Name%] has completed the panel setup process and is ready for the upcoming panel [%Panel Dates: Title(filter where Panel Number contains CI:Panel Assignment)%].

For more detailed metrics about panelists please visit the site at <a href =
"https://extsharepoint.nsf.gov/eng/eec/panels/Review%20Panel/Forms/AllItems.aspx"> Link.

Thank you,

EEC SharePoint Bot

10

Subject: EEC Panel Role Change

Hello,

This is an automatic email to inform you that you are now assigned for the following proposal [%CI:Proposal Number%] [%CI:title%].

You can review your assignments at this link .

Simply click on your name on the page and the correct form will open.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

11

Subject: EEC Panel Role Change

Hello,

This is an automatic email to inform you that you are either no longer assigned, or your assignment has changed for the following proposal

[%CI:Proposal Number%] [%CI:title%].

You can review your assignments at this link .

Simply click on your name on the page and the correct form will open.

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

12

Subject: Book Room Reminder

Hello Program Assistant(s),

This is an automatic email reminder that you must book a room for the panel [CI:title] on [CI: Start Date].

If you have already done this you can cancel all future reminders by marking the corresponding "Room Booked" check box in the following list.

Thank you,

EEC SharePoint Bot

13

Subject: Welcome to the EEC Panel Process

Hello [%CI:First Name%] [%CI>Last Name%],

You previously indicated an interest in doing a panel for the Engineering and Education Centers Division at the National Science Foundation. Please follow the link to a form that will provide you the dates for panels. On this form, please indicate your personal information and availability.

Here is your login information:

Username: [%CI:Username%]

Password: [%CI>Password%]

Even if you are unavailable, please take the time to fill out this form.

Link

Thank you,

EEC SharePoint Bot

*** Note: This is an automated response. Please do not respond. If you are unsure why you are receiving this email, please contact Dr. [%Administrators: Name%] at [%Administrators: Email%] (filter both by position = Program Director)

14

Subject: Invite Panelists Reminder

Hello Dr. [%Administrators: Name (filter for Position = Program Director)%],

This is an automatic email reminder that you must invite panelists for your panel [%CI: Title%] on [%CI: Start Date%].

If you have already done this you can cancel all future reminders by marking the check box "Panelist Invited" in the following list >.

Thank you,

EEC SharePoint Bot

15

Subject: Verify In FastLane

Hello Program Assistant,

This is an automatic email reminder that [%CI: Full Name%] has been assigned to the panel [%Panel Dates:title[where Panel Number contains CI:Panel Assignment]%) and needs their FastLane information verified. Also, please enter their FastLane password into the field by their name in the following list >.

If you have already done this, you can cancel future reminders by marking the check box "FastLane Check" next to the corresponding name.

Thank you,

EEC SharePoint Bot

Testing Protocol:

Summary:

All test results are as of 12/10/2012. Revisions to workflows have been made but not implemented. Certain failures should become passes once these changes take place. Other failures occur due to limitations of SharePoint, and although considerations have been made to alleviate the consequences of these failures, more development may be necessary in certain cases.

Panelist Permissions Test:

This is a test to see if the panelist can gain access to sections of the SharePoint site that they should not be allowed to see. To perform this test change User Permission to EEC Panels Pre Selection Panelist

Test One: Determine if Panelist can get to information that they are not allowed to view using anything on the site.

1. On the homepage check the following items. The panelist should not be allowed to add information to these tables.
 - a. Panel Dates
 - b. NSF Administrators
 - c. Announcements
 - d. Tasks
 - e. Links
2. Attempt the sidebar and try all of the pages that it links to. The panelist should not be allowed to add information to these tables except for My Info and Submit Forms Here.
 - a. NSF Administrators Contact Information
 - b. Panel Dates
 - c. My Info
 - d. Useful Documents
 - e. Submit Forms Here
 - f. Help Documents

Test Two: Determine if Panelist can get to information that they are not allowed to view using outside methods

1. Direct Links from people at NSF or by guessing the web address
2. Use of browser add-ons to mess with javascript (noscscript, greasemonkey etc.)

Results:

Test One: PASSED

User cannot gain access to anything. All of the libraries that the user has access to have toolbars hidden by JavaScript. All of the lists are read only and do not provide any useful option for gaining information.

Test Two: **FAILED/PASSED**

1. **User can gain access to areas that should be disallowed by getting linked from an NSF user or by guessing; this is due to the fact there are no item level permissions in SharePoint on submit and that user must have read access to a list for SharePoint forms to pull data. This is especially an issue as if they access Windows Explorer through SharePoint; they have read permissions on most content of the site. Windows Explorer is disabled on all panelist facing pages.**
2. We were unable to gain access, however, this is still something to consider.

Panelist Form Test:

These are tests to see if the panelist can fill out forms and if the forms still work with incorrect information and perform all the correct logic. To perform this test, change User Permission to 'EEC Panels Pre Selection Panelist'

Invitation Screen:

Test One: Fill out false information for Panelist Accepted and submit it

1. Go to My Info and click add a document
2. Fill out the form with incorrect information, indicating availability for at least one panel
3. Submit the form

Test Two: Fill out correctly for Panelist Accepted and submit

1. Go to My Info and click add a document
2. Fill out the form with information corresponding to your SharePoint account indicating availability for at least one panel
3. Submit the form

Test Three: Fill out incorrectly for Panelist Adhoc Accepted and submit

1. *** Make sure ad hoc request in Admin Form Options is checked
2. Go to My Info and click add a document
3. Fill out the form with incorrect information indicating that you're not available for any panels

4. Accept the ad hoc request
5. Submit the form

Test Four: Fill out correctly for Panelist Adhoc Accepted and submit

1. *** Make sure ad hoc request in Admin Form Options is checked
2. Go to My Info and click add a document
3. Fill out the form with correct information indicating that you're not available for any panels
4. Accept the ad hoc request
5. Submit the form

Test Five: Fill out incorrectly for Panelist Declined and submit

1. Go to My Info and click add a document
2. Fill out the form with incorrect information indicating that you're not available for any panels
3. Decline the ad hoc request if asked
4. Accept your declination
5. Submit the form

Test Six: Fill out correctly for Panelist Declined and submit

1. Go to My Info and click add a document
2. Fill out the form with correct information indicating that you're not available for any panels
3. Decline the ad hoc request if asked
4. Accept your declination
5. Submit the form

Test Seven: Fill out correctly for Invitation Pending

1. Go to My Info and click add a document
2. Save the form to get Panelist Pending Status
3. Wait until the reminder email is sent and verify its contents

Results:

Test One: PASSED/FAILED

Form still works correctly with incorrect information. Emails are still sent to the email address specified by the user's SharePoint account, and the form will still be processed. Certain fields are correctly required, and email, zip code, and phone number are also correctly checked versus regular expressions. **The information will, of course, be displayed incorrectly in forms that use it, and it is**

difficult to edit. More considerations for editing should be taken and comparison with the SharePoint information.

Test Two: PASSED

Correct usage of the form results in data collection to the EEC Panelist Forms and Archive libraries. Emails are sent to the Program Director upon completion.

Test Three: PASSED

Incorrect information is emailed to the Program Director, but the ad hoc request completes as intended.

Test Four: PASSED

An email is sent to the Program Director with confirmation of the ad hoc acceptance, and the form cannot reopen.

Test Five: PASSED

Incorrect information is sent to the Program Director indicating the panelist's declination. The form opens as if the panelist submitted nothing if they open it up again.

Test Six: PASSED

Correct information is sent to the Program Director indicating the panelist's declination. The form opens as if the panelist submitted nothing if they open it up again.

Test Seven: PASSED

After the time period specified by the Program Director passes, the SharePoint site sends an email to the panelist who still has the status Invite Pending.

Conflict of Interest Screen:

Test One: Verify Conflict of Interest Logic is correct

1. Check off that you would like to review something
2. Check off that you have a conflict
3. Click next

Test Two: Verify that Toggle for hiding "I'd rather not" works

1. In the Admin Form Options form, uncheck this feature
2. Load up the Conflict of Interest Form

Test Three: Verify Save and Close Works

1. Immediately click Save and Close
2. Check that the form still opens properly

3. Make some progress filling out the form
4. Repeat 1-2
5. Wait the number of days it takes to receive the email reminder

Test Four: Verify Submit works

1. Fill out the entire form, click submit and verify that the information is accurate.
2. Verify that the email sent to the Program Director is correct

Test Five: Check how the Zero Proposals case works

1. Make sure there are zero proposals assigned to a panel
2. Assign a panelist and open their form

Results:

Test One: PASSED

Form automatically unchecks all preferences and declares no preference instead of allowing someone to prefer to review a topic but still having a conflict.

Test Two: PASSED

There are now only two buttons to select from, I'd Like to and No Preference

Test Three: PASSED

Clicking save at any point closes the form and records all the results that had been entered up to that point. Returning to the form opens it up on the last page that the user filled out.

Test Four: FAILED

The email occasionally incorrectly waits for a week before sending, we believe our new workflow corrects this. DIS will need to update the workflow to fix this.

Test Five: FAILED

A lot of blank fields show up, this case should never occur if Program Directors assign everything in proper order.

Review Screen:

Test One: Verify Returning to Conflict of Interest Screen works

1. Click on the button near the top of the screen titled as such

Test Two: Verify that all the Titles showing up are correct

Test Three: Verify Close Works

1. Try to close the form
2. Verify that it still opens unchanged

Test Four: Verify Submit works

1. Click submit and determine if the splash screen is correct
2. Confirm that the Panelist status field is now "Process Complete"
3. Verify that the email sent to the Program Director is correct

Results:

Test One: PASSED/FAILED

Opens the previous step correctly

Does not notify the Program Director on subsequent marking of conflict of interests

Test Two: PASSED

Enforcing values to come from a list guarantees that all panelists' names are displayed correctly and that they will display if they match the current user.

Test Three: PASSED

Clicking save at any point closes the form, at this point we assume the panelist is fine with their assignments so we do not send a reminder email; this could change if we hear the Program Directors want to disallow this.

Test Four: PASSED/FAILED

When assignments are finalized the text box displays and allows for a confirmation from the panelist, at this point all of their FastLane login information is granted.

The email to the Program Director does not send – hopefully updated in the new workflows.

Assign to Panel:

Test One: Verify that the GUI is picking up all the Proposals and that they all update correctly when the Assign to Panel X is pressed.

1. Assign a proposal to Panel 1
2. Assign the same proposal to Panel 2
3. Repeat for all possible combinations to ensure that all the rules are present

Test Two: Verify Assigning Panelists works correctly

1. Repeat Test One but for Panelists instead

Test Three: Verify that Finalize and all its sub-actions work correctly

1. Click on Finalized, a confirmation message should appear

2. Click Cancel, the message should vanish
3. Repeat 1
4. Click Yes
5. The selected Panel should gray out preventing assignments, check that Panel is Finalized in Panel Tasks
6. Un-finalize? Should reset everything to step 1
7. Repeat for the other panels.

Test Four: Verify Submit and Close Works

1. Click on Submit and Close, the form should close

Test Five: Verify that the system doesn't panic if a user manually edits the list incorrectly

1. Put in junk values such a numbers where they don't belong etc
2. Check the status of the workflow to see if it errors out. If it didn't find what changed

Results:

Test One: PASSED

The form correctly adds and removes proposals from all 5 panels

Test Two: PASSED/FAILED

The form correctly adds and removes panelists from all 5 panels

Although this works, the email is only sent on the first assignment. Also the email has some fields filtered incorrectly that need updating.

Test Three: FAILED

The form correctly updates, but the workflow errors out.

DIS needs to update the workflow to fix this; it is currently filtering the wrong field.

Test Four: PASSED

The form closes and submits all the data it hadn't submitted before.

Test Five: PASSED

The form is read only and prevents manual edits.

Assign to Roles:

Test One: Verify that the GUI is picking up all the Panelists correctly and assign them to various fields, ensure # of times fields are updating correctly.

1. Toggle through the different Panels using the buttons at the top

2. Highlight different names in the list and assign them to roles
3. Use next and previous to navigate around, make sure that the proposal numbers are updating correctly.

Test Two: Verify that Finalize only shows up when there is only 1 Proposal without complete assignments

1. Pick a panel with multiple proposals
2. Fill out assignments on all but two, the last one and a random one within the form
3. Fill out assignments on the last one
4. Fill out assignments on the only unfilled one
5. When this completes the button should become clickable
6. Repeat but have the last proposal be the one that gets filled out last

Test Three: Verify that the 0 Proposals assigned to Proposal Error Displays

1. Make sure that there are no proposals assigned
2. Look at the field underneath Proposal Information, it should be blank

Test Four: Verify that the system doesn't panic if a user manually edits the list incorrectly

1. Put in junk values such a numbers where they don't belong etc
2. Check the status of the workflow to see if it errors out. If it didn't find what changed

Results:

Test One: PASSED/FAILED

The form filters all the data correctly and updates roles. **However, the updates are slow, and pressing the next buttons too soon will lose updates.**

Test Two: PASSED/FAILED

The form has the correct logic to disable the button only when one proposal is not complete. **It does not update quickly enough for this button to be of use within the form.**

Test Three: PASSED

The form correctly identifies no proposals in a panel.

Test Four: PASSED

The form is read only.

Review Panels:

Test One: Verify that the GUI is picking up all the Panelists correctly

Results:

Test One: PASSED

The form filters all the data correctly, if a field is not filled out then there is a blank spot in the readout, this has no negative effects on the function of the form besides looking weird.

Dashboard:

Test One: Verify that the GUI is displaying all fields correctly, and that the colors of tasks change to Cyan when they are completed

1. Skim the fields and check that no values seem off, particularly under the Panel Overview sections

Test Two: Verify that the GUI colors the tasks as they complete correctly

1. Open the form and find some Red Boxes
2. Follow the link and do actions that will turn them Cyan
3. Check their status
4. Do the reverse

Test Three: Verify the system will not panic due to the various day fields filled out with legit values.

1. Put number values into the Admin Form Options page
2. Attempt to submit

Test Four: Verify the system will not panic due to the various day fields filled out with nonsense.

3. Put non-number values into the Admin Form Options page
4. Attempt to submit

Test Five: Verify that the system doesn't panic if a user manually edits the list incorrectly

1. Put in junk values such as numbers or other characters in fields
2. Check the status of the workflow for errors.

Results:

Test One: PASSED/FAILED

All fields display correctly. Under Panelists' Status, if names do not correspond to usernames, the Invitee information will be inaccurate. It will also be inaccurate for panelists that share names.

Test Two: PASSED

All colors update correctly.

Test Three: PASSED/FAILED

This is currently passing but it is due to a workaround.

One of the filters had a typo where Preference is misspelled; DIS needs to update the workflow to fix this, after that is done, change the spelling of Preference in the Task Timing List and everything will work again.

Test Four: PASSED

The form correctly checks that these are digit values.

Test Five: PASSED

The document is read only and can only be changed through use of the form.

Enter Personal Info:

Test One: Fill Out the form with as much incomplete information as possible

1. Attempt to fill out information for a new item in all patterns of incompleteness (ex. No information, only Name, only Position, etc.)

Test Two: Program Director is not listed as a position

Results:

Test One: PASSED

All required fields are correctly required.

Test Two: FAILED

No Program Director results in incomplete emails and missing information on the EEC Panelist Form.

Create Panel:

These tests are completed in the "Create Panel" section of the site

Test One: Fill Out the form with as much incomplete information as possible

1. Attempt to fill out information for a new item in all patterns of incompleteness (ex. No information, only Start Date, only Panel ID, etc.)

Results:

Test One: PASSED

All required fields are correctly required.

Invite Panelists:

These tests are completed in the “Invite Panelists” section of the site.

Test One: Fill out the form with as much incomplete information as possible and see results

Test Two: Valid but Incorrect email

Results:

Test One: PASSED

Incomplete information has no unfortunate consequences – just no purpose. It does, however, display oddly in the Dashboard and the list itself.

Test One: **FAILED**

An incorrect sequence of events where the Username and Password is filled out before a correct email results in a failed workflow invitation, and the email would then have to be sent out manually.

Panel Tasks:

These tests are completed in the “Panel Tasks” section of the site.

Test One: Check off boxes in incorrect order/at random

1. Marked Panelists Finalized or Roles Finalized before Booked or Panelists Invited
 - a. Repeat for all incorrect iterations

Results:

Test One: PASSED

This correctly stops the reminder emails, and the check boxes do not interact with each other.

FastLane Check:

These tests are completed in the “FastLane Check” section of the site.

Test One: Do not fill out panelists email information before they get to the review screen

Test Two: Check off the FastLane Check at random

Results:

Test One: **FAILED**

This generates blank fields on the final review screen.

Test One: PASSED

This correctly stops the reminder email.

Add Proposals:

These tests are completed in the “Add Proposals” section of the SharePoint site.

Test One: Fill out all fields incorrectly

Test Two: Fill out proposal number with numbers greater than 7 digits.

Results:

Test One: **FAILED**

Incorrect fields are not captured in any capacity. The intention is to directly copy fields from an Excel sheet generated from FastLane.

Test Two: **FAILED**

The datasheet does not verify this value, and a larger proposal number will be handled incorrectly by multiple forms. The intention is to directly copy fields from an Excel sheet generated from FastLane.

Assign Proposals to Panel:

These tests are completed in the “Assign Proposals to Panel” section of the SharePoint site.

Test One: Attempt to assign a nonsense panel assignment

Results:

Test One: **PASSED/FAILED**

The list prevents values other than numbers one through five. It does not update with the number of available panels however.

Assign Panelists to Panel:

These tests are completed in the “Assign Panelists to Panel” section of the SharePoint site.

Test One: Attempt to assign a nonsense panel assignment

Test Two: Attempt to assign a panelist with a conflict to a panel

Results:

Test One: **PASSED**

The list prevents values other than numbers one through five. It does not update with the number of available panels however.

Test Two: **FAILED**

The datasheet does not prevent this assignment.

Assign Roles:

These tests are completed in the “Assign Roles” section of the SharePoint site.

Test One: Attempt to assign a nonsense value as a panelist

Test Two: Attempt to assign a panelist not on the same panel as the proposal

Test Three: Assign a panelist to multiple roles on the same proposal.

Test Four: Toggle Assignments Finalized before the correct number of reviewers is present

Test Five: Verify that the variable number of reviewers works correctly

1. Specify the number of reviewers required
2. Check Proposal Finalized with numbers of reviewers less than that value
3. Check Proposal Finalized with a number of reviewers equal to that value

Results:

Test One: PASSED

The list prevents values other than those available in the Pre-Selection Panelists group.

Test Two: **FAILED**

The datasheet does not prevent this assignment.

Test Three: **FAILED**

The datasheet does not prevent this assignment.

Test Four: **FAILED**

The list does not correctly change this value. This should be fixed if DIS updates workflows

Test Five: **FAILED**

This should be fixed if DIS updates workflows, currently it finalizes when Lead, Scribe, Reviewer 1, and Reviewer 2 are set