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TRAINING DOCUMENT FSP TRACKING SYSTEM: RELEASE 1.4

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1. DOCUMENT REVISION LOG

Version	Version Date	Description of changes
0.1	2009-07-02	Created by John Gallimore.

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2. INTRODUCTION

Purpose of this Document

This document outlines the Training related to functionality that has been identified to be included in Release 1.4 of the Forest Stewardship Plan Tracking System, released for production in July, 2009. The items included for this release were selected by the FSP Project Team from a list of proposed requirements that was collected over the past 6 months and ranked as high, medium or low priority by the CGI project team as a 'first cut' at ranking and determining the scope of Release 1.4.

Target Audience for this Document

This document as a whole will be reviewed by the business lead for Resource Tenures and Engineering Branch at MoFR and the IMB Project Manager. Specific segments of the document will be reviewed by subject matter experts, as required by the Project Manager for IMB.

Assumptions

- Government staff on the business side and at IMB through the Business Application Support center(BASS) will be available in a timely manner as required for support of this document.

Key Related Documents

The following documentation is available on the RTEB web site and the FSP Support Site for the FSP project. The URL's are:

- Administrative Guide to Forest Stewardship Plans
<http://www.for.gov.bc.ca/hth/timten/AGFSP/index.htm>
- FSP business process
<http://www.for.gov.bc.ca/his/fsp/business.htm>

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3. OVERVIEW

The high level goals of the system are documented in the original Detailed Business Requirements document, dated June 13, 2006, and the current FSP tracking System Master Project Plan, dated April 22, 2008. This document will focus on the training aspects and user documentation of release 1.4 of the FSP tracking system.

3.1 Release Overview and Objectives

Release 1.4 focused on enhancements to the FSP Tracking System resulting from user identified maintenance or enhancement requests recognized during the mini-requirements discovery session held at the end of release 1.2 User Acceptance Testing, April 22 – 24, 2008, as well as additional suggestions received by the project team over the past eight months. These were deemed important from a user, technical and business perspective.

3.2 Confirmation of Scope and Deliverables

This release incorporated the following “work packages” and deliverables:

- Technical maintenance items related to changes in other Ministry applications that FSP is integrated with (see Sections 4.1, 4.2, 4.3, 4.7, 4.11, 4.12, 4.13 and 4.14)
- Approval processing enhancements for amendments with spatial updates (see Sections 4.4 and 4.6)
- Improvements to FDU spatial handling in FSPTS and MapView (see Sections 4.5 and 4.9)
- ESF maintenance items for processing FSP submissions (see Section 4.8)

3.3 Out of Scope

The following items previously discussed at the requirements discovery session held April 22 – 24 2008 will not be addressed in this release:

- Automatically expiring FSPs
- The ability to delete Identified and Declared Areas from an FSP
- Reporting requirements
- Additional text presented on amendment initiation outlining the standards for submission files
- Any enhancements related to Transitional FSPs
- FSP Extensions as a process separate from Amendments
- Functionality to turn Transitional FSPs into regular FSPs
- Specifying primary Districts or Agreement Holders in the FSPTS
- Partitioning the FSP so that only certain sections apply to specific Agreement Holders

All these items have been noted as outstanding items that will be recorded by the current project team and will be pursued as time, money and resources permit.

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4. TRAINING REQUIREMENTS

4.1 Convert to FTA 4.0 and Corporate BEC table structures

Issue Analysis

A number of corporate database tables that FSP uses were changed over the past year. These include tables in FTA and the corporate BEC tables. Legacy views were maintained for other applications that use these tables, but these views are to be phased out within the next year. The FPSTS switched its functionality to the new corporate table structures before the legacy views were retired.

User Requirements

Req. #	Description
4.2.1	Upgraded FSPTS to use the new FTA 4.0 table structure. No user impacts
4.2.2	Upgraded FSPTS to use the new BEC table structure. No user impacts

4.2 Add Additional buttons at the top of the FSP500 screen

Issue Analysis

This item came from the responses to the Licensee/BCTS survey that was done in the summer of 2008. It is a simple enhancement to include action buttons at the top of the Stocking Standards list on the FSP500 screen so that users do not have to scroll to the bottom of this screen to access the buttons.

User Requirements

Req. #	Description
4.3.1	Added 'Add New' and 'Search Standards' buttons at top of FSP 500 Stocking Standards screen. These buttons will have the same functionality as the 'Add New' and 'Search Standards' buttons at the bottom of the screen.

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4.3 Submit FDU changes in Amendments prior to approval

Issue Analysis

Currently, when an amendment includes changes to FDU spatial data, there is no requirement that the spatial data be submitted electronically, thereby updating the LRDW. There is a requirement to add functionality in the workflow screen that stops an FSP from being approved by the decision maker unless an ESF submission has been done to update the FDU spatial. These updates will then be replicated to the LRDW.

User Requirements

Req. #	Description
4.4.1	When the Approve button is clicked on the FSP700 – Workflow screen for an FSP Amendment, if the FDU is being updated, or an attachment exists with a map, then a validation check is performed to ensure that an entry exists in the FSP tracker for that Amendment.

4.4 Update FDU spatial data viewing and processing functionality

Issue Analysis

There were a number of issues related to viewing and processing FDU spatial data within the FSPTS and in MapView.

Previously, when initiating an amendment, the FDU spatial data from the previous amendment was automatically copied forward to the current amendment. This created confusion when reviewing the amendment, as the reviewer did not know if this is new updated spatial or old previously existing spatial. Also when approving an amendment which had indicated an FDU update, there was no way to see onscreen that the FDU spatial had been updated. Previously, there were also no system validations to ensure that the spatial had been updated.

Previously the LRDW view included FDU spatial in each amendment record for reasons of efficiency; however, it was not possible to tell in MapView if the FDU spatial was updated in any given amendment. This limited the ability of FSP reviewers or Geomatics staff to easily review FDU spatial changes and compare them to previous linework.

The FSPTS should not copy forward FDU spatial when an amendment was initiated, but should only store newly submitted FDU spatial data for an amendment. When new spatial data is submitted, it should be validated against the previous copy of the FDU spatial data to ensure that the linework has changed. When the views are created for the LRDW, the most recent FDU spatial should be included in the view with the amendment number of the amendment that the FDU spatial data is coming from. MapView was updated to include the Spatial Amendment Number that the FDU spatial came from, and will only display the spatial in the Approved layer from amendments where the FDU spatial data was changed.

Data Model/Spatial datafix Impacts

There was a requirement to add an additional attribute, SPATIAL_UPDATE_AMENDMENT_NUMBER, to the LRDW view for FSP. There will also be a requirement to perform a data cleanup datafix to the FDU_GEOM table to remove duplicate copies of FDU spatial where the

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spatial has just been copied forward without changes. This can be done by comparing Entry and Update timestamps on the FDU_GEOM table. The FSP View processing will also need to be updated to populate the new SPATIAL_UPDATE_AMENDMENT_NUMBER column in the View, and obtain the FDU geometry from the correct location. The view will need to be initialized to take into account the changes based on the data cleanup datafix performed on the FDU_GEOM table.

User Requirements

Req. #	Description
4.5.1	Remember that the the logic that copies forward the FDU geometry into the FDU_GEOM table when a new amendment is initiated will be removed.
4.5.2	Now when new FDU spatial data is submitted, a validation is performed comparing the new spatial data to the previous existing spatial data to confirm that the new spatial data is different. If it is not, an error message will be returned.
4.5.4	MapView is modified to enable better views for the FSP via updates to the LRDW: <ol style="list-style-type: none"> 1. Now the user may track the amendment that the spatial data originated from. 2. Create a current, submitted, draft and previous version of the FSP views for simplifying access and queries on the Mapview side. 3. For the previous view include a flag that determines whether or not the geometry is original (i.e. not copied from the previous version). 4. Add more clients and licenses in the view to support the maximum number of both.
4.5.5	A number of datafixes to align the view of the FSP on Mapview by rationalising the most recent amendment spatial with the amendment number

4.5 Submit Identified Area changes in Amendments prior to approval

Issue Analysis

Currently, when an amendment includes changes to Identified Area spatial data, there is no requirement that the spatial data be submitted electronically. There is a requirement to add functionality in the workflow screen that stops an FSP from being approved by the decision maker unless the ESF submission updates the spatial data.

It should be noted, however, that most Declared Areas are included in amendments not requiring approval; therefore this enhancement will not affect the majority of Declared Area submissions. **Ministry staff will need to rely on the email notification system to be warned of amendments not requiring approval that include Declared Areas, and review these amendments to ensure that spatial data gets submitted.**

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User Requirements

Req. #	Description
4.6.1	When the Approve button is clicked on the FSP700 – Workflow screen for an FSP Amendment, if the IDENTIFIED_AREAS_UPDATE_IND = 'Y', or an attachment exists with an FSP_ATTACHMENT_TYPE_CODE in ('FRPA196(1)', 'FRPA196(2)', 'FPPR14(4)'), then perform a validation check that an entry exists in the FSP_IDENTIFIED_AREA_GEOMETRY section for that Amendment.
4.6.2	A new FSP view for the LRDW is created for Identified and Declared Areas. This view will include the FSP ID, Amendment Number, Identified Area ID, FSP Legislation Type Code, Identified Area Name and Identified Area Geometry for records in Draft, Submitted and Approved Status.

4.6 Miscellaneous Online Help Items from Release 1.3

Issue Analysis

There were a few Online Help items identified in Release 1.3 QA testing, but were not significant enough to delay the production 1.3 release. It was agreed that they would be included in Release 1.4.

User Requirements

Req. #	Description
4.7.1	<ol style="list-style-type: none"> 1. FSP 550 Online Help <ul style="list-style-type: none"> - Moved FSP ID element to proper place - Moved Convert to Multi-Layer button to proper place - Removed extra View button beside Save/Cancel for attachments
4.7.2	<ol style="list-style-type: none"> 2. FSP 250 Online Help <ul style="list-style-type: none"> - Added pop-up description for Layer Tabs - Added pop-up for Back Button - Added Edit button
4.7.3	<ol style="list-style-type: none"> 3. FSP 501 Standards Search Online Help <ul style="list-style-type: none"> - Added Client Search (...) Pop-up - Added BGC Search (...) element and Pop-up - Added Details Button element and Pop-up - Added Results Pages (Hyperlink) element and Pop-up - Added Row Count element and Pop-up

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4.7 MapView Enhancements

Issue Analysis

Currently, the LRDW only stores views of FSPs and Amendments in Submitted and Approved status. The business requires that FSP records in Draft status also be submitted to the LRDW for display in MapView.

Additionally, due to the volume of FDUs it is hard for a user to determine which FSP they are viewing, and more importantly what specific amendment. Enhancements were required to make the spatial viewing more functional from a business perspective.

There was also a requirement to be able to query Identified Areas in MapView. This required an update to the FSP views, or the creation of new views to accommodate Identified Areas.

Requirements

See section 4.5 for changes to the LRDW views.

Req. #	Description
4.9.1	Updated MapView to display FDUs in approved, submitted, draft and previous views. Each status was broken into a separate Layer. Selecting the previous view would only display records where the spatial data is original and different than the current approved view
4.9.2	Updated the "identify queries" to show the amendment number of the geometry.
4.9.3	Updated the "identify queries" to show all clients and licenses included in the new views.
4.9.4	Updated the previous view to only show whether or not the particular amendment had a geometry change. The flag will be part of the previous view (see section 4.5).
4.9.5	Added a query to MapView that will allow a user to determine what FDUs were in place at a particular date. The user should optionally be able to isolate a single FDU for the query.
4.9.6	Created a link from MapView to allow a user to navigate to a specific record in the FSP Tracking System. The FSP tracking system will need to expose the appropriate URL.
4.9.7	From a specific FDU in FSP link to MapView. MapView is enhanced to "zoom to" and highlight the specific FDU so it is clear to the user which FDU they queried.
4.9.8	Created a new layer to display Identified Areas in Draft, Submitted and Approved status. Ensure that functionality identified in 4.9.1 through 4.9.7 in this section also apply to Identified Areas.

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4.8 Increased size of Agreement display field to show all Licences

Issue Analysis

Currently, the Agreement display field was fixed length, and could only display up to approximately four Licences held by an Agreement Holder. If there were more Licences, they would not display.

User Requirements

Req. #	Description
4.11.1	The size of the Agreement display field is increased so that all Licences related to an Agreement Holder display on the screen.

4.9 Enable Term and Expiry Date Fields in SUB Status for IDIRS

Issue Analysis

During initial review of potential enhancement items for Release 1.4, it was confirmed that FSP extensions are to be handled as part of an amendment that requires approval. The application currently supports this business process so no changes to the application were identified. However, during Working Group review an issue was raised with regards to the ability of the DDM to modify a proposed extension after it had been submitted. Currently, the only way to modify the submitted extension is to Request Clarification to set the amendment back to Draft status. The business requires that the DDM be able to modify the proposed new term and/or Expiry Date while the amendment is in Submitted status.

Data Model/Spatial Impacts

There are no Data Model or Spatial Impacts for this requirement.

Requirements

Req. #	Description
4.12.1	The application was enabled so the the Term and Expiry Date fields on the FSP700 Workflow screen in 'SUB' status for district staff with the Administrator and Approver could be allowed.

4.10 Enhancements to History screen

Issue Analysis

During Working Group review of the requirements for Release 1.4, the following enhancements to the FSP800 – History screen were proposed:

1. A new column for the ESF Submission ID be added to the list portion of the screen.
2. A 'Sort by' selection be available to provide the option to view the history in amendment number order.

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3. A new History Event name of 'In Effect' was added to the event types to describe the submission of amendments not requiring approval. Previously it was confusing and inaccurate to describe the submission of amendments not requiring approval as 'Approved' in the event history. This was also extended to the FSP Status Code for these amendments. In order to implement this change technically, it was easier and more accurate to add a new FSP Status Code of 'INE – In Effect' for submitted amendments not requiring approval. This status acts exactly the same as 'APP – Approved' from a processing point of view, but more accurately describes the state of the amendment (i.e. not requiring approval after it has been submitted).
4. A small screen change was included, moving the 'Approval Required Indicator' column to the left of the 'Event' column.

User Requirements

Req. #	Description
4.13.1	Add a column to the right of the History list portion of the FSP800 – History screen called 'Submission ID' that displays the latest ESF Submission ID for the specific history record displayed.
4.13.2	Add a title and radio buttons in the middle of the screen on the Back button row which displays as: Sort By: Event Date; Amendment Number The default setting is the current order by Event Date, descending. The second option is by Amendment Number, descending.
4.13.3	Created a new FSP Status Code = INE – 'In Effect', which would apply to all amendments not requiring approval when they are submitted. The new code would act the same as the current APP – 'Approved' code for processing. A data fix is required to all approved minor amendments to change the Status code from APP to INE. The FSP800 – History screen will be updated to display 'In Effect' in the Event column for all records with an FSP Status Code = INE. A notification will also generated if the district has created a notification requirement on screen(FSP900-District Auto Notification when the licensee uses this 'in Effect' processing
4.13.4	Moved the 'Approval Required Indicator' column to the left of the 'Event' column, and decreased the width of both of these columns to accommodate the new FSP Submission ID column.
4.13.5	Removed the Amendment Number drop list from the History screen, and now always display all history events for the FSP when this FSP800 history screen is displayed.

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4.11 FSP Services (FSPSVC) Updates –

Issue Analysis

In addition to any updates to ESF component of FSP required through the enhancements detailed elsewhere in this document, there was one specific enhancement required to address another issue. The successful submission message returned by ESF will be updated to reflect the acknowledgement that a submission is received.

Requirements

Req. #	Description
4.14.1	<p>The update to the ESF successful submission message will read:</p> <p>Outcome of Submission: xxxxxx:</p> <p>FSP: xxx Amendment Number: xx has been received by MoFR. This file is currently in: xxx status.</p>

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4.12 Appendix A – User Role Reference Guide

The following user roles are defined in the FSP system:

- FSP_VIEW_ONLY
 - Role is designed only for Licenses.
 - Limited to viewing **in effect**/approved FSP/Amendment records that they are Agreement Holders of.
- FSP_VIEW_ALL
 - Can View all **in effect**/approved FSP/Amendment records.
- FSP_SUBMITTER
 - Add, update or delete FSP/Amendment records that they are Agreement Holders of, which are in Draft status.
 - Can submit FSP/Amendment records online or through ESF.
 - Can view FSP/Amendment records that they are Agreement Holders of, in any status.
- FSP_REVIEWER
 - Can view all pages of FSP/Amendment records in any status.
 - Can update Review Details section in the Workflow page, when FSP/Amendment is in Submitted status.
- FSP_DECISION_MAKER
 - Can view all pages of FSP/Amendment records in any status.
 - Can approve FSP/Amendment records in submitted status.
 - Can update the Workflow page when FSP/Amendment is in Submitted status.
- FSP_ADMINISTRATOR
 - Can view all pages of FSP/Amendment records in any status.
 - Can approve FSP/Amendment records in submitted status.
 - Can update the Workflow page when FSP/Amendment is in Submitted or Approved status.
 - Can update spatial data of approved FSP/Amendment records through ESF
 - Can update FSP/Amendment records that are of Draft or **In Effect**/Approved status.
 - Can create/update non-default stocking standards in FSP/Amendment records that are of Draft or **In Effect**/Approved status.