

CRRI Database Projects - Detail (Closed)

Complex Projects

CRRI Database Projects

Project Type: 1. Complex Projects

ProjectID: 128 Discrepancy qryAmendments[AllSiteStatus]

Priority: Unkno

Folder \\10.130.128.10\CRRI\Maint\LegacyApplication\20071102_DiscrepancyQryAmendments1and2

Project Status

Completed

Created

11/2/2007

Completed

11/2/2007

Requestor

Jeffrey Stockton

Purpose: User was concerned that on 0707028 one query showed values and one showed none. Queries are: qryAmendments (vewAmendments) and qryAmendmentsAllSiteStatus (vewAmendmentsAllSiteStatus).

Scope: research qryAmendments/qryAmendmentsAllSiteStatus

Notes

Date

- | | | |
|---|---|-----------|
| 1 | qryAmendments has s.intstatus = 2 (active) as a criteria; this site is intstatus = 8 (Change of PI); the all status version of the query has no criteria for intstatus so it shows all records | 11/2/2007 |
| 2 | it probably would be a good idea to make a 1-character code for intstatus = 8 appear on the investigators tab of frmProtocol -- currently nothing shows where typically users see a for "active", s for "submitted", etc. | 11/2/2007 |

Tasks

Action

Entity

Assigned

Task Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 134 IRB Approval Notice Didn't Pull on 0705004**Priority: Unkno**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071102_IRBApprovalNoticeNoPull_0705004

Project Status

Cancelled

Created

11/5/2007

Requestor

Michele McGee

Rank

0

Purpose:

IRB Approval Notices are [probably] generated by [some query] which did not pull as expected for 0705004 Lucas. We need to do a data fix to put the [site?] record(s) in the state that they should be in.

The other question of how to explain the error is beyond the scope of my work. I will try to determine what happened and relate that back to Kelly/Michele.

Scope:

[Pending Scope]

NotesDate

- | | | |
|--|---|-----------|
| 1 | Kelly's 11/2 email: Hey Michele, My client for the Amylin study CRR I 0705004 asked me why an IRB Approval Notice was not sent for one sites in the study, Dr. Lucas, for the Administrative Letter #3 which approval was released on October 8, 2007. I researched into this and found out that the status of this site's page in the database reflects "Not Yet Reviewed" but the site was initially approved on 11/17/05, released 11/23/05, 1st Ann CR 10/25/06, and now is terminated on 10/18/07. | 11/5/2007 |
| <p>Therefore, when I ran my query for all the active sites to release the approval notice, this site did not show up because of the status being "Not Yet Reviewed". Which I did not know at that time. Can you ask David to look into this, as I think we are suppose to bring things like this through our Manager and how should I respond back to the client? I can send out an approval letter to the site today with maybe some special wording that says something like due to an administrative error the IRB Approval Notice for Administrative Letter #3 was inadvertently not sent to your site. However, your site was terminated on October 18, 2007 therefore, please retain this documentation in your files. What do you think?</p> <p>Kelly Johnson</p> | | |
| 2 | sent email to mm/kj; kj out of office today | 11/5/2007 |
| 3 | the site is currently pulling in the qry/view, unable to recreate the problem; tried to hypothesize some reasons it could have happened (mod intapproval change, site status change?, mod approval date populated)? | 11/6/2007 |
| 4 | user reported that site did not show the right status on qrySiteByProtocol until she went to the term record and hit "OK" an additional time, and now it propagated to the query. This technique was shared with her by another employee who has now left the company. qrySiteByProtocol uses vewPI as its data source. | 11/7/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 64 Data Fix to "complete" SR for 0306033**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070814_DataFix_Coopersmith_0306033Project Status

Cancelled

Created

8/14/2007

Completed

8/14/2007

Requestor

Vince Elliott

Rank

0

Purpose: Simple datafix for SR**Scope:** 1 record in SR tableNotesDate

- | | | |
|---|---|-----------|
| 1 | Coopersmith; mark 6-month completed | 8/14/2007 |
| 2 | need to see Site: 6-month review due on 10/1/06 turn to 2nd annual 2/1/08 | 8/14/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------------------|-------------------|------------|--------------|----------|-------------------------------------|
| 1 | Fix data in PROD | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | Notify user | Seek User Input/A | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 127 qryProtocolCR Shows Wrong Date For Next CR 1204017**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071102_QryProtocolCRDateDiscrepancyProject Status

Completed

Created

11/2/2007

Completed

11/5/2007

Requestor

Stephanie Housel

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

- | | | |
|---|--|-----------|
| 1 | Two other maintenances have been on 1204017:
88.
\\10.130.128.10\CRRIMaint\LegacyApplication\20070905_ChgPFRSemi2Annual_1204017

\\10.130.128.10\CRRIMaint\LegacyApplication\20070314_ProtocolDateFix1204017 | 11/2/2007 |
| 2 | fixed this instance of the update anomalie caused by the dependency between pr.dtmduedate and p.dtmnextreview; there can only be many, many more however; this database design "sucks" | 11/2/2007 |
| 3 | This maintenance raised concern that this type of discrepancy may exist for other records and will be followed up by 132. | 11/5/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|---|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | research and fix reported update anomalie instance | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|---|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 18 Add parameterized report for Expiring Sites**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070724_ParameterizedExpiringSitesStatusRpt

Project Status**Completed**Due

7/25/2007

Created

4/1/2007

Completed

7/25/2007

Requestor

David Pepper

Purpose:

Next month expiring sites query needs to be in query DB for users to use rather than having IT generate it.

Need to add user interface to parameterize report with default values and allow user to override them. Create logic to always get current (next) month.

Scope:

SP, Form, Report, Data in TEST and PROD.

NotesDate

- 1 explore further parameterizing to highlight various problem scenerios

1/1/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Copy best version of prod app to working folder	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Make Test App: ADP Connection	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Make Test App: Utilities QuickConnect	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
4 Make Test App: Set "Compact on Close"	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
5 TEST add report to tblreport	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
6 TEST make parameterized sp w/perms	Add	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
7 Test/implement parameterized report in special DB	Add	ADP Report	David Pepper	Complete	<input checked="" type="checkbox"/>
8 frmReports: make controls/automation	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
9 Test/implement parameterized report in Test App	Add	ADP Report	David Pepper	Complete	<input checked="" type="checkbox"/>
10 PROD add report to tblreport	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
11 PROD make parameterized sp w/perms	Add	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
12 Make Prod App: Utilities QuickConnect	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
13 Make Prod App: ADP Connection	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
14 Make Prod App: Unset "Compact on Close"	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
15 Version App	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 93 p.dtmExpired vs pr.dtmExpDate in qryActiveProtocol**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070906_qryActiveProtocolList_ExpirationDiscrep

Project Status**Completed****Created**

9/6/2007

Completed

11/16/2007

Requestor

Theresa Straut

Purpose: qryActiveProtocol only shows the p.dtmExpired, but the "real" expiration date of the protocol is in the history in tblprotocolreview. The rule for finding it might be max(dtmexpdate) where intaction = 1...

Scope:

P. PR

Notes**Date**

- 1 sent email to TS requesting further instructions, stating options 9/6/2007
- 2 resent email to theresa per meeting with her and bob this morning 9/17/2007
- 3 The simple part of this request is to change the data which is published in the query from p.dtmexpired to: the max pr.dtmexpired where there is an approved action. 10/3/2007

The complex part of the request is:
1. Do we leave the uphill discrepancy alone or fix it?
Answer: We leave it alone and consider fixing it later. We are paving a path away from the denormalized data. If we succeed it will no longer be the "field of record", so it will not matter. The correct end-game is not to fix it but to delete the field.

2. How do we notify users of the change and/or re-label the field?
Answer: We notify users of the change 1 time and do not change the name of the field. We are publishing the best data we have. It's our job to verify that it is accurate.
- 4 vewActiveProtocol_dp5a_Shows2ExpDateDiscrepancy.sql shows the discrepancy records in case we ever want to explore or correct them -- we still don't know why only sometimes the discrepancy arises, but typically it doesn't -- one possibility is that the life-cycle of a pr.intdatetype record (or possibly a P record) occasionally has a transformation that we don't understand or know about (similar to the synchronization of sr.dtmdate and sr.dtmeventdate which is occasionally broken according to business rules that we don't understand) 10/4/2007
- 5 despite status of "waiting for query release" the view change does not impact the query database because the changed field is aliased, and the alias will not change. 10/8/2007
- 6 im not sure there is any point in doing a data fix on the old p.dtmexpired -- we are moving away from it. 10/9/2007
- 7 Theresa couldn't come to the CRRIDatabase Projects weekly meeting, so Bob asked me to summarize what is on the table for the 2 maintenances which are linked together on this one (96.,110.) as well as the other one which is the same issue as this one but for P/PR (93.). I researched the problem and wrote the email for 4 hours, and have taken the issue as far as I can for now. Sent it to Bob. Accounting for 3 hours on 96., and 1 hour on 93. 10/10/2007
- 8 reopened this maintenance in light of possible future work as scope expands; waiting on bob/theresa to help steer us forward 10/10/2007
- 9 sent this back to in-progress one more time, since sql logic to find anomalie is being revised to switch from max(dtmExpDate) to top 1 syntax -- not happy about this; (has big implications beyond this maintenance) 11/6/2007

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|--|-----------------|------------------|--------------|------------|---|
| 1 | notify users | Review/Research | Business Process | David Pepper | Complete | ✓ |
| 2 | interview user | Review/Research | Business Process | David Pepper | Complete | ✓ |
| 3 | perform analysis | Review/Research | Business Process | David Pepper | Complete | ✓ |
| 4 | data fix 10-15 records with discrepancy | Change | Data | David Pepper | On Hold/Ca | ✗ |
| 5 | TEST view changes | Change | SQL View | David Pepper | Complete | ✓ |

6	Email Stuff to Bob	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
7	meet with jenn to go over discrepancies	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
8	PROD view changes w/QueryDB	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
9	1 jenn data fix	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
10	misc	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 144 Fix PI Brazg to Pull on Agenda 0805030**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071128_FixPIBrazgToPullOnAgenda_0805030

Project Status

Completed

Created

11/28/2007

Completed

11/29/2007

Requestor

Matthew Riesner

Purpose: This PI should be showing up on the agenda (vewCRAgenda, rptCRAgenda), but is not.**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 149 Reverse Invoice 1007017 Weiss**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071206_RevereInvoiceWeiss_1007017

Project Status

Completed

Created

12/6/2007

Completed

12/7/2007

Requestor

Matthew Riesner

Purpose: Needed to make a duplicate "added invoice item" for sitead be removed. Oddly, this table isn't related in any way to tblinvoice/tblinvoiceitems and the only thing that "deletes" an addedinvoiceitem is a bln that makes it disappear, that is named completely antiintuitively: blnInUse (default 0) 0 =in use, 1= not in use.**Scope:** tbladdedinvoiceevent

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 157 frmWizardSiteDates 3021 BOF/EOF Error on Term Recd**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080103_frmWizardSiteDates3021BOFEOFonTermRecd

Project Status**Completed**Created

1/3/2008

Completed

1/3/2008

Requestor

Heather Karabaich

Purpose: tblIRBDate is used by frmWizrdSiteDates and frmWizardChangeInv (and maybe elsewhere) to pick the next day to schedule an IRB meeting for. It is a list of the year's meeting days.

The list needs to be created in December for the following year for a smooth transition.

Scope: tblIRBDate

NotesDate

- | | <u>Notes</u> | <u>Date</u> |
|---|--|-------------|
| 1 | 1007014 hassman = test record | 1/3/2008 |
| 2 | Rick Cruise also reported the same issue on: 0306025 Gabrielle Carlson | 1/3/2008 |

TasksActionEntityAssignedTask Status

- | | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|---|--------------|---------------------|------------------|-----------------|--|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete <input checked="" type="checkbox"/> |
| 2 | release | Build/Entity Promot | IT Process | David Pepper | On Hold/Ca <input checked="" type="checkbox"/> |

ProjectID: 162 Data Manager (frmBulkSiteDates) New Year Rollover**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080107_Data ManagerFrmBulkSiteDatesNewYrRollover

Project Status**Cancelled**Created

1/7/2008

Requestor

Tara McDonough

Rank

1

Purpose: new Year rollover should populate dates in "data manager" (frmBulkSiteDates), similar to frmWizardSiteDates pull from tblIRBDate

Scope: [Pending Scope]

NotesDate

- | | <u>Notes</u> | <u>Date</u> |
|---|--|-------------|
| 1 | observed that combo boxes on form are populated by incidences of review dates, etc. in SR, etc., so in a sense they "look right" and there isn't any obvious way that roll-over issues would have affected this form. Tara said she wants to wait until Monique/[Heather?] who are out of the office return to evaluate if there is a problem. She said it wasn't an emergency today, but could become one [again] tomorrow. | 1/7/2008 |

TasksActionEntityAssignedTask Status

- | | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|---|--------------|-----------------|------------------|-----------------|----------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending <input type="checkbox"/> |

ProjectID: 172 New IRB Member Needs to be in CRRID as Reviewer**Priority: High**Project Status

Cancelled

Created

1/25/2008

Requestor

Tara McDonough

Rank

1

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 180 Social Behavior Query**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080229_SocialScienceQueryProject Status

Completed

Created

2/29/2008

Completed

3/5/2008

Requestor

Kira Newsom

Purpose: this is a basic query against tblProtocol which will retrieve basic information about a small subset of protocols. Therequest asked for "social behavior" active protocols, but the domain of the lookup list contains several values that might be what is intended "social science" being the most obvious (which it currently pulls). The SQL statement might need to be modified to pull some or all of these other values.

Scope: [Pending Scope]

<u>Notes</u>	<u>Date</u>
1 Active social/behavioral study CRRID # Sponsor name Sponsor protocol ID	2/29/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 186 Add Diane Jordan to CRRJ Group for SP Exec**Priority: High**Project Status**Completed**Created

3/25/2008

Completed

3/25/2008

Requestor

Diane Jordan

Purpose: User needed to be added to CRRJ group for exec perms on procAddIND.**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 191 Explore Setup of 3Mo. CR Protocol 0507025**Priority: High**Project Status**Cancelled**Created

4/3/2008

Requestor

Sharon Chang

Rank

1

Purpose: based on an email exchange between rick cruise and sharon chang, there is [or may be] a need to have the database track CRs for a protocol with an unusual 3-month CR schedule.**Scope:** everything

<u>Notes</u>	<u>Date</u>
1 left messages with rick and sharon. Need to schedule time to interview them both for 15 mins.	4/4/2008
2 according to email from TS this project is basically cancelled.	4/7/2008
3 DP sent email concerns about way non-standard cycle CRs are already being coded wrong in the app; evolving understanding is that there should be a datafix for deleting all but CRs that fit in real data model for "Initial", "First Annual", etc...	4/7/2008
4 talked to rick and amy walls who tracks the "6-month" CRs. Talked about possibility of treating this one as a "6-month" and that would mean that the other odd-month CRs would have to be the manually tracked records.	4/7/2008
5 sent addl email to sharon re question of billing or not billing for 6-month and 3-month crs	4/7/2008
6 heard back from sharon that these extra crs are unbilled. Sent email to ts and bg that included this fact and a statement of where this request stands.	4/7/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 talking about it	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 196 Datafix Childress 2ndAnnual 0306024**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080411_Datafix2ndAnnual_0306024**Project Status****Completed****Created**

4/11/2008

Completed

4/11/2008

Requestor

Stephanie Housel

Purpose: change deferred on populated 2nd annual line from deferred to approved**Scope:**

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 198 Delete Duplicate IB 0707002**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080415_DeleteDuplicateIB_0707002**Project Status****Completed****Created**

4/15/2008

Completed

4/15/2008

Requestor

Bonnie Buggs-Perow

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 200 Delete Version for 0407011**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080423_DeleteVersion_0407011**Project Status****Completed****Created**

4/23/2008

Completed

4/23/2008

Requestor

Bonnie Buggs-Perow

Purpose: Please delete the item, from the database, listed under versions, for study # 0407011 dated 04/10/08 and reviewed on 04/11/08. This item needs to be recorded in the site invoice section. Contact me if you have questions. Bonnie Buggs-Perow, BS, Project Coordinator**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 202 Delete Version 0507006**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080423_DeleteVersion_0507006**Project Status****Completed****Created**

4/23/2008

Completed

4/23/2008

Requestor

Bonnie Buggs-Perow

Purpose:

delete the item listed under versions, for study # 0507006 dated 03/21/08 and reviewed on 04/08/08. This item has been recorded in the site invoice section.

Scope:

[Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 212 Bucket CRs Phase 2 - Split Sites**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080516_BucketCRs_Phase2_SplitSites

Project Status**Completed****Created**

5/15/2008

Completed

5/20/2008

Requestor

Kelly Derflinger

Purpose:

Project 204. Bucket Active P/S by Next CR Month successfully counted future and past CRs for sites and protocols, but the site counts are made up of an uncertain and shifting mix of initial site CRs and subsequent site CRs. Initial site CRs are not billed, but do represent work for the IRB, so there is a business need to track and count both initial and subsequent CRs. Then another layer of aggregation needs to bring all this together in the same record: CRBucket CT_P, CT_Si, CT_Ss.

Scope:

add 3 views/queries for initial S CRs, modify existing 3 views/queries to change domain of records now pulled by site queries to only pull subsequent CRs (not initial).

Add one aggregate "CT_All" query for initial S CRs and modify existing CT_All query to only show data for subsequent CRs.

Add one more layer to aggregation to pull all bucketed data into one aggregate query showing the following fields for each CR bucket: BucketName(YYYYMM), TotalProtocols, TotalSites, CountSiteInitial, CountSiteSubsequent.

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	TEST: add 3x next I site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2	TEST: add 3x previous I site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3	TEST: mod 3x next subs site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4	TEST: mod 3x previous subs site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5	TEST: add pastAndFuture "CTFuture" I site view	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
6	TEST: Add group perms	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
7	TEST: mod 2 P views past/future	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
8	TEST: add new values to tblQryDBObject	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
9	TEST: QDB, refresh, add/test queries	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
10	PROD: add 3x next I site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
11	PROD: add 3x previous I site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
12	PROD: mod 3x next subs site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
13	PROD: mod 3x previous subs site views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
14	PROD: add pastAndFuture "CTFuture" I site view	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
15	PROD: Add group perms	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
16	PROD: mod 2 P views past/future	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

17	PROD: add new values to tblQryDBObjects	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
18	PROD: QDB, refresh, add/test queries	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 219 Expired Sites Status Report 6/08**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070209_1659_UnreviewedStudyExpired\Outputs

<u>Project Status</u>	<u>Due</u>	<u>Created</u>	<u>Completed</u>	<u>Requestor</u>
Completed	5/30/2008	5/30/2008	5/30/2008	Theresa Straut

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 1 Expiration Date Override**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070612_ExpDateOverrideGroup**Project Status****Completed****Due**

6/25/2007

Created

6/12/2007

Completed

7/20/2007

Requestor

Theresa Straut

Purpose: Mod to grant option to override the setting of expiration date based on some sort of group (sql server or other)

There is a need for a small group of users to be able to set site expiration date (rather than having to accept the default dates provided by the system).

Scope: frmSiteDates, a new SP, a new set of modules for the new API-call based calendar that Jake provided a code sample for, database changes for new field in tblContact, new data in tblcontact, new data in tbllook

Notes**Date**

1 original working: \\10.130.128.10\CRRIMaint\LegacyApplication\20070612_ExpDateOverrideGroup 1/1/2007

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1	Make Test App: ADP Connection	Change	ADP Entity	David Pepper	Complete <input checked="" type="checkbox"/>
2	Make Test App: frmMain	Change	ADP Form	David Pepper	Complete <input checked="" type="checkbox"/>
3	Make Test App: Utilities QuickConnect	Change	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
4	Make Test App: Set "Compact on Close"	Change	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
5	TEST tblContact add new field	Change	SQL Table	David Pepper	Complete <input checked="" type="checkbox"/>
6	TEST tblLookType Data	Add	Data	David Pepper	Complete <input checked="" type="checkbox"/>
7	TEST tblLook Data	Add	Data	David Pepper	Complete <input checked="" type="checkbox"/>
8	TEST tblContact Data	Add	Data	David Pepper	Complete <input checked="" type="checkbox"/>
9	clsMonthCal	Add	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
10	modCalendar	Add	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
11	modColorPicker	Add	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
12	modFontPicker	Add	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
13	modAddrOf	Add	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
14	Variables	Change	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
15	frmMain in Test App	Change	ADP Form	David Pepper	Complete <input checked="" type="checkbox"/>
16	frmSplash	Change	ADP Module	David Pepper	Complete <input checked="" type="checkbox"/>
17	frmSiteDates in test app	Change	ADP Form	David Pepper	Complete <input checked="" type="checkbox"/>
18	TEST procUpdateSiteReviewExpirationDate	Add	SQL Stored Proced	David Pepper	Complete <input checked="" type="checkbox"/>
19	test implementation of cal control	Review/Research	IT Process	David Pepper	Complete <input checked="" type="checkbox"/>
20	get users approval to promote to prod	Seek User Input/A	Business Process	Theresa Straut	Complete <input checked="" type="checkbox"/>

21	PROD procUpdateSiteReviewExpirationDate	Add	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
22	PROD tblContact add new field	Change	SQL Table	David Pepper	Complete	<input checked="" type="checkbox"/>
23	PROD tblLookType Data	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
24	PROD tblLook Data	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
25	PROD tblContact Data	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
26	Make Prod App: Utilities QuickConnect	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
27	Make Prod App: ADP Connection	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
28	Make Prod App: Unset "Compact on Close"	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
29	Version App	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
30	get users approval to close maintenance	Seek User Input/A	Business Process	Theresa Straut	Complete	<input checked="" type="checkbox"/>
31	PROD Add users to tblContact intExpD	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 53 Change of PI**Priority: High**

Folder \\10.130.128.10\CRRI\Maint\LegacyApplication\20070730_ChangeOfPI

Project Status**Completed****Created**

7/30/2007

Completed

8/6/2007

Requestor

Summer Gonzalez

Purpose:

Reported by Summer Gonzalez to Michelle Knieriem
Change of PI resulted in or coincided with protocol not "pulling" on agenda

Fix data or app to have missing protocol(s) show up on agenda [report].

Scope:

PROD Changes:
1. Data only and/or 2. View changes and/or 3. Report changes

Notes**Date**

- 1 Michelle:
I talked with Summer about this problem, and she showed me what was happening with CRRI. Since we have already modified tonight's agenda by hand, and therefore the appropriate reviews will occur for this site, I am going to defer fixing this until David returns. This is a front-end MS Access problem, and he is more qualified than I am to be working on that front end code. -- Bob;

1/1/2007

somehow this request got fixed on its own, unable to reproduce the problem - mark as completed and wait and see - dp 8/6/07

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-----------------------|-------------------|------------------|--------------|----------|-------------------------------------|
| 1 | Interview user | Seek User Input/A | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-----------------------|-------------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 67 frmSiteDates and/or frmWizardSiteDates Edit Issue**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070815_frmSiteDatesEditIssue_0704006

Project Status**Completed****Created**

8/15/2007

Completed

9/21/2007

Requestor

Heather Karabaich

Purpose:

Heather writes: Dr. Kratz for 0704006 is up for his 6-month status report. We are not able to make this report NOI on the dates page. When we click edit on the 6 month line, the page simply refreshes, the edit box will not appear.

The edit button should allow the user to edit the record.

Scope:

frmSiteDates and/or frmWizardSiteDates; or data fix depending on what is found by researching problem.

Notes**Date**

- 1 the cmdEdit button is badly designed -- it is trying to figure out which of two forms frmWizardSiteDates[b] to open based on comparing a global variable which is supposed to store what "type" the protocol is and also what kind of record type (intDateType) the SR record is; the logic has a hole in it and no form opens. -- a proposed solution has been re-written in: frmSiteDates_cmdEdit_new2.bas 8/15/2007
- 2 A datafix was performed to address the problem, and the solution is ready pending a review by a representative of the users; the request is WAITING now for them. 8/15/2007
- 3 data integrity/business logic implies that dtmReviewDate(eventdate) and dtmDate be updated, as well as dtmExpDate. The value of dtmDate is null[ed] if reviewdate is null otherwise it is dtmreviewdate. 8/15/2007
- 4 Heather and I haven't been able to meet to go over this, but when we do I will propose the solution to her. 8/22/2007
- 5 This request was rolled into changes done and simultaneously released for ProjectID: 11 BOF/EOF on IB Tab 8/23/2007
- 6 A-S = "status report" (off-month review cycle, not a "6-month CR protocol")
SS = "full review" 9/25/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Data fix	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Copy best version of prod app to working folder	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Make Test App: ADP Connection	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
4 Make Test App: Utilities QuickConnect	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
5 Make Test App: Set "Compact on Close"	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
6 Research/recreate problem	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
7 Find/Test solution in TEST	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
8 Build Promotion Process	Build/Entity Promot	IT Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>

ProjectID: 96 Exp. Date Override #2 Dates Don't Appear in Qrys**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070913_ExpDatesDontAppearInQrys

Project Status**Completed****Created**

9/13/2007

Completed

11/16/2007

Requestor

Katie Bodenhorn

Purpose: Katie found that 2 queries don't pull corrected expiration dates. This could be because the Exp Date Override didn't change s.dtmExpDate, or perhaps something else. Example: 0807003

Scope: qrySiteByProtocol, qryCRStatus, (plus any qry that uses s.expdate rather than sr.expdate, etc.); also may involve rethinking frmsitedates expirationdateoverride or [gasp] changing frmwizardssitedates.

<u>Notes</u>	<u>Date</u>
1 one possibility would be to change views to use an expdate based on sr -- this might be a step in the right direction	9/13/2007
2 0807003, 1st pi: 8/13/08 changed to 8/9/08; all but 1 changed 8/15/07 9/13/07	9/13/2007
3 the point of expdt override was to prepare for a new type of logic in setting expdates that makes them always be the expdate of the protocol -- don't forget that this is the real goal, and it could be automated or assisted by automation -- the override was a pragmatic compromise that would allow that, but it involves a user in a new version of a process that is still automated wrong elsewhere in the application, and it could be arguably should be automated itself	9/13/2007
4 took a long set of notes in notes.txt	10/4/2007
5 sent theresa message asking for meeting to go over P/PR discrepancies -- since they don't follow any obvious pattern, we need to carefully consider if/when/how to show data in which there is a discrepancy (we need user input/feedback here)	10/4/2007
6 this request now includes all work on project: 110.	10/10/2007
7 Theresa couldn't come to the CRR Database Projects weekly meeting, so Bob asked me to summarize what is on the table for the 2 maintenances which are linked together on this one (96.,110.) as well as the other one which is the same issue as this one but for P/PR (93.). I researched the problem and wrote the email for 4 hours, and have taken the issue as far as I can for now. Sent it to Bob. Accounting for 3 hours on this one, and 1 hour on 93.	10/10/2007
8 waiting to hear back from bob/theresa with guidance	10/10/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 interview user 1/3	Seek User Input/A	Business Process	Katie Bodenhorn	Complete	<input checked="" type="checkbox"/>
2 research qrys; report to user	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 research data and compare with expdt overr code	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4 meet w/user and/or champion for strategy	Seek User Input/A	Business Process	Theresa Straut	Complete	<input checked="" type="checkbox"/>
5 explore log to see who changed what	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
6 find where s.dtmexpired is set	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
7 Email Stuff to Bob	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
8 Get approval/input into plan from TS	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
9 update PR query to break by Manager/Coord	Change	SQL Script(s)	David Pepper	Complete	<input checked="" type="checkbox"/>

10	update SR query to break by Manager/Coord	Change	SQL Script(s)	David Pepper	Complete	<input checked="" type="checkbox"/>
11	meet with Jenn to go over discrepancies	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
12	meet with Michele to go over discrepancies	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
13	meet with Michelle to go over discrepancies	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
14	verify why s.date 0107006 (jenn)	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
15	Deal with 1 code dependency on s.dtmExpired	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
16	change view and database against TEST	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
17	apply new view to PROD	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
18	build promotion to update Query DB	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>

ProjectID: 51 P&G Pharmaceuticals 0507010**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070731_FrmAndMergeIssue_PGPharm_0507010

Project StatusCreatedCompletedRequestor

Completed

7/31/2007

8/6/2007

David Pepper

Purpose:

Data entry process for lbs resulted in locked fields where users needed to be able to edit.

Need to fix this instance of data.

Would have like to evaluate whether to modify form so users can edit in the future, but this isn't the greatest priority.

Scope:

Fixed in data, so no need to fix the form [yet].

NotesDate

- 1 from erin, evidently passed from someone else:
User didn't enter the package insert in the IB page at the time of initial review. When I added this information to the database and selected "yes" for "Review with Initial", the DB locked all of the fields except the date of the document and most current.
Because there isn't an action date, this information will not merge into the site approval letters.;
- fixed by bob;
- Erin Notes about process:
1. qrySitesByProtocol (or is it qyry init appp)
2. office links publish to word/excel
3. published file becomes datasoure for merge

1/1/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 interview Erin/User	Seek User Input/A	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>
2 Data fix?	Change	Data	David Pepper	On Hold/Ca <input checked="" type="checkbox"/>
3 fixed by bob;	Change	Data	Bob Parkinson	Complete <input checked="" type="checkbox"/>

ProjectID: 105 Resolve Compact-on-close (COC) Update DB Conundrum Priority: HighProject Status**Completed**Created

9/19/2007

Completed

9/21/2007

Requestor

David Pepper

Purpose:

"Compact on Close" (COC) is a setting used in Access administration that affects how quickly the database opens and closes. COC is used to shrink the database to the smallest size possible as it is closing, so it tends to make the file closing process take 10-20 seconds rather than 2-3 seconds. I accidentally published release 396 with COC on and didn't think much of it until I went to test the next release and the updater failed to update file.

This turned out to be a particularly difficult problem, because the updater and the file with the offending COC setting were both local on every user's machine.

Even more problematic is the fact that the update process architecture iterates the version in the local ini file (i.e. how the local app knows what version it is) before the file is ordinarily overwritten. Since in this case the overwrite failed, this would mean the user would see a fairly obscure error talking about file locking, then the database would seem to open normally ever after. However, once this happens the app would error on each future update, and would NEVER AGAIN be able to be updated successfully by the existing version control process.

With this in mind, asking the users to perform the change themselves would invite problems.

Scope:

There didn't seem to be any way to uncheck the flag without either visiting each user's computer, or logging into each computer remotely to perform the update and/or change the setting.

Another possibility would have been to modify the updater app to pause for a few seconds to allow the slow-closing app to close fully, but that again would have required visiting each user's computer because although the updater app performs a version control function for the database, the updater app does not have version control itself.

Thus after conferring with Chris, it was determined that I would do the updates manually, rather than involve Chris, etc.

NotesDate

- | | | |
|---|---|-----------|
| 1 | needed to troubleshoot differently for users who had not performed the most recent update. One time in the past, I found an app in use that did not have version control in it (very old app). This means that auditing the physical install is a good idea to try to catch any other instances of apps without version control. | 9/19/2007 |
| 2 | 6 users out of about 65 did not have an install which was up to date, and I reinstalled everything to be sure I was getting everything. One user had no install at all. One user asked to be removed. One user was no longer here (and somehow slipped through the cracks). I found 1 user who had an account, but wasn't on my list somehow. 2 Users had O2K3 and I changed their macro:security settings to Low to escape the nagging warning messages on startup. Not sure what the "correct" alternative to lowering security would be. A "certificate"? | 9/19/2007 |
| 3 | got to every user on my list's machine except: lisa buchanan and bob parkinson | 9/19/2007 |
| 4 | 63 users in all including me; identified 3 users in AD, 2 of whom had active emails, 2 of the 3 had perms on network and were being charged for by MindShaft; explored process to reconcile between tblContact, AD, and SQL Server; effectively audited all users, deleted one account by user request, reestablished an install for one user, updated and identified several users who were not doing updates, including one who I think had a non-version control version of the app, met every single user and saw where they sit, identified 2 users with O2K3 and defeated their macro:security warnings | 9/21/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|--|-----------------|------------------|--------------|----------|---|
| 1 | go to every users' computer and set COC off | Review/Research | Business Process | David Pepper | Complete | ✓ |
| 2 | reconcile ad vs. sql server groups vs. tblcontact | Review/Research | Business Process | David Pepper | Complete | ✓ |

ProjectID: 110 Expedited PI reviews and queries**Priority: High**Project Status**Completed**Created

9/27/2007

Completed

11/16/2007

Requestor

Heather Karabaich

Purpose: Queries, such as qrySiteByProtocol sometimes don't pull sr.dtmexpdate, but instead pull s.dtmexpdate. This has already been identified as an issue on other queries and in other maintenances. This maintenance should trace the history of this value and if possible prove that the database "out of the box" is not consistent in updating/using the date correctly (rather than something I did with a datafix of some kind).

Scope: some forms, S SR, qrySiteByProtocol (implement business logic on server to make query pull correct value from SR rather than depending on S)

NotesDate

- | <u>Notes</u> | <u>Date</u> |
|---|-------------|
| 1 this overlaps 93. and 96. which are currently the top 2 "complex" projects, and are in the top 5 projects on the dashboard report. | 9/27/2007 |
| 2 sent theresa message asking for meeting to go over P/PR discrepancies -- since they don't follow any obvious pattern, we need to carefully consider if/when/how to show data in which there is a discrepancy (we need user input/feedback here) | 10/4/2007 |
| 3 this project is now being worked entirely on project 96. | 10/10/2007 |
| 4 same state as 96, waiting for bob/theresa | 10/10/2007 |

TasksActionEntityAssignedTask Status

- | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|--------------|-----------------|------------------|-----------------|--|
| 1 misc | Review/Research | Business Process | David Pepper | Complete <input checked="" type="checkbox"/> |

ProjectID: 145 Remove Ad Invoice From Goldstein 0307019**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071129_RemoveAdInvoice_0307019

Project Status**Completed**Created

11/29/2007

Completed

12/6/2007

Requestor

Matthew Riesner

Purpose: delete the "bipolar depression" ad on this site; it submitted to the IRB in error and data entered according to my interview of Matt

Scope: tblsitead, tblinvoice

NotesDate

- | <u>Notes</u> | <u>Date</u> |
|---|-------------|
| 1 developed plan with bp and sent email to matt, sharon and bob to get matt to instantiate the good record(s). I will take care of deleting the bad record(s), and bob will coordinate with accounting to confirm that all is well there. | 11/30/2007 |
| 2 deletion(s) will have 2 parts in scope, tblsitead and tblinvoice | 12/5/2007 |
| 3 sent bob email for hand-off, also have standing meeting for invoice related work thursdays 1:30 | 12/6/2007 |

TasksActionEntityAssignedTask Status

- | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|--------------|-----------------|------------------|-----------------|----------------------------------|
| 1 misc | Review/Research | Business Process | David Pepper | Pending <input type="checkbox"/> |

ProjectID: 151 Disambiguate ICF Mods and ICF Addl Mods**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\2008\20080103_DisambiguateICFModsAndICFAddlMods

Project Status**Completed**Due

1/7/2008

Created

12/14/2007

Completed

1/7/2008

Requestor

Kelly Derflinger

Purpose:

There is a need to make it clear in the vewInvoice output whether a transaction is an ICF Mod or an ICF Additional Mod.

Scope:

This may require code changes or might just involve adding records to a lookup table. Either way it will need to be researched. And in the end, whatever is published by CRR in vewInvoice needs to be in harmony with the middle-ware solution that consumes the feed and does whatever it does for Finance.

NotesDate

- 1 see pricelist research at

\\10.130.128.10\CRRIMaint\LegacyApplication\Research\2007\2007_InvoicePointsOfEntry

1/4/2008

TasksActionEntityAssignedTask Status

- 1 misc

Review/Research

Business Process

David Pepper

Pending

☐**ProjectID: 13 Research and troubleshoot qryActiveProctolList****Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\2007\20070622_qryActiveProctolList_Data

Project Status**Completed**Created

6/22/2007

Completed

10/5/2007

Requestor

Theresa Straut

Purpose:

Along with qryTermedStudies, the same defect in data is reflected in qryActiveProctolList

Figure out what is causing bad data; fix data; prevent problem from recurring.

Scope:

tblProtocolReview records related to the list of about 30 protocols -- hundreds of records, should be done by script rather than manually.

NotesDate

- 1 fix broken records; formerly "qryTermedStudies research" (qryTermedStudies shows bad data),
\\10.130.128.10\CRRIMaint\LegacyApplication\2007\20070613_QryTermedStudies, apparently submitted by
Kelly Derflinger

1/1/2007

- 2 In order to close this I need Theresa to look at the PR/SR records and make sure that we can live with
any extra records that may have been created as a result of user hitting save on form -- we know these
are there, because it is what we used to identify which protocols/sites had been so changed.

8/24/2007

- 3 this request is being retired because the data fixes seem to have been sufficient (by changing
P.intstatus). The other records which may be damaged or wrong in some way don't seem to be affecting
anything (these would be PR records I think, and would probably have been automatically created when
saving a PR record - like next expiration date, etc.). Since these Ps are already termed long ago, this stuff
probably doesn't matter.

10/5/2007

TasksActionEntityAssignedTask Status

- 1 **Phase 2 to delete/change PR records**

Delete

Data

David Pepper

On Hold/Ca

☒

- 2 **Get Theresa to say we don't need to delete PR recs**

Seek User Input/A

Business Process

David Pepper

Pending

☐

ProjectID: 138 Change ~40 Sites Review Type 0407015**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071106_Change40SitesReviewType**Project Status****Completed****Due**

11/12/2007

Created

11/6/2007

Completed

11/9/2007

Requestor

Vince Elliott

Purpose:

Sites of this protocol are all set to 6-month cycle when they need to be annual

Scope:

P S

Notes**Date**

- 1 the lblNextReview on frmPI that currently is set to "6 Month Review due on 11/1/2007" pulls from SR using logic that is mirrored in frmPI_lblNextReview.sql; this shows that it is the dtmDueDate, action, intinvoiced, and that it is a CR record, and the sort order ASC on the due date that is determining what shows on frmPI

11/8/2007

Tasks**Action****Entity****Assigned****Task Status**

1

misc

Review/Research

Business Process

David Pepper

Pending

☐

ProjectID: 101 Set Up Additional Instances of "Study" #1**Priority: High**Project Status

Cancelled

Created

9/17/2007

Requestor

Theodore (TJ) Luck

Rank

5

Purpose:

Original request was in relation to having difficulty data entering site contacts. Interview with user and manager made it clear that what is needed is data and procedures to support a use of data where additional [CRRRI] "protocols" are added for each new business partner who may be working on different parts of a [sponsor-level] "protocol". The metaphor we used was "Big P" for the sponsor level (which is synonymous with "Study") and "Little P" for the CRRRI level (which is synonymous with "customer").

This issue is something that has probably happened before, and which is anticipated to happen again. Certain practices in communication (and billing which is a kind of communication) that likely exist to handle these exceptions may worse than the overall problem.

On the other hand, business and technical changes may need to be implemented to "disambiguate" "Big P" protocols which would have previously been stored in the database in the same "little p" protocol record.

Scope:

business processes, delete PI(s), user reenters deleted PI(s), watch for disambiguation issues in billing and communications, IRB Admin "assigns the CRRRI number".

NotesDate

- 1 user works in "single site"
"how hard is it to add choices to drop down menu?"

[Pis/sites] previously autonomous, attn cc, Pis have all own contacts,
need to add choices for contacts
x549
9/17/2007
- 2 original request was to "There is a need to consider changes to either PI or Contacts of PI to have "more choices" (in a combo box). The goal is to facilitate communication with sites." 9/18/2007
- 3 talked it all the way out with theresa, jen stephenson, and bob; it was decided that it was a simple fix of putting in the work under a new protocol number and letting nature take it's course; I made a point of stressing that the same people should work on both sets of records, I also mentioned some possible conflicts that might come up -- conflicts between obligations to customers in terms of privacy, etc. vs. insights that we might have from one protocol to another (e.g. protocol mods, etc.) 10/3/2007

TasksActionEntityAssignedTask Status

- | | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> | |
|---|--|-----------------|------------------|-------------------|--------------------|-------------------------------------|
| 1 | interview user and clarify request | Review/Research | Business Process | Theodore (TJ) Luc | Pending | <input type="checkbox"/> |
| 2 | interview theresa/bob for prioritization | Review/Research | Business Process | Theresa Straut | Pending | <input type="checkbox"/> |
| 3 | Identify P and Ss to "move" | Review/Research | Business Process | Theodore (TJ) Luc | Pending | <input type="checkbox"/> |
| 4 | IRB Mgmt Assign P number | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
| 5 | Q: DP change ID to harmonious ID | Review/Research | Business Process | David Pepper | On Hold/Ca | <input checked="" type="checkbox"/> |
| 6 | Data enter new data to match old | Review/Research | Business Process | Theodore (TJ) Luc | Pending | <input type="checkbox"/> |
| 7 | Identify Disambiguation Anomalies | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |

ProjectID: 139 Verify Invoice Records OK w/"moving" site Charges**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071109_VerifyInvoiceRecordsOKwMovingSiteRecs

Project Status**Completed**Created

11/9/2007

Completed

11/30/2007

Requestor

Austin Grace

Purpose: 0605023 charged in error for "release of other orotocol materials to each site - subject diary intrusion dated 9/24/07" 15x\$45=675, and "Review of other protocol materials" 1x\$125 (total \$800).

Need to reverse charges "credit memo" in future output of vewInvoice.

Scope: 0605023 - tblmod - bad
0307021 - tblmod - good

NotesDate

- | | | |
|---|---|------------|
| 1 | this is actually a lower priority because the vewInvoice that consumes the data which will contain the adjusting transactions won't be pulled until after the first of next month | 11/9/2007 |
| 2 | interviewed austin and concluded that there is no p:invoice or s:invoice task that creates an invoice record for the transactions that need to be reversed. These transactions are handed off to sharon who adds them to an invoice manually, and the reversal has already been done. The only data fix that needs to be done is to "move" the "version" record from one protocol to another -- on the paper invoice it appears as 2 items, but in the database it is stored as a single line | 11/30/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 181 frmWizardContact Needs Input Mask or Validation**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\2008\20080306_frmWizardContact_InputMaskOrValidation

Project Status**Completed**Created

3/6/2008

Completed

3/19/2008

Requestor

Stephanie Housel

Purpose: user reported error on saving very long (>50 chars) title. There are many fields on the form that presumably would generate the same error with overflowing input.

Scope: [Pending Scope]

NotesDate

- | | | |
|---|---|-----------|
| 1 | researched differences between input mask, form control validation rules, and event-based validation. Seems like the input mask (50x"a") is the most elegant solution, because it won't let users data enter anything wrong and for a variety of other reasons too. See:
C:\TEMP\CodeSamples\AccessSamples\FieldValidation.mdb | 3/6/2008 |
| 2 | This maintenance is part of a larger collection of changes that include a straggling part of 81 and 166. | 3/17/2008 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 10 Invoicing Projects**Priority: Low**Project Status

Cancelled

Created

6/15/2007

Requestor

Bob Parkinson

Rank

24

Purpose: Support Bob's invoice/reconciliation project**Scope:** Could be a lot, especially if there have to be database schema and app changes on the legacy side to support reconciliation. No way to tell until the architecture of the new solution is clearer.NotesDate

- 1 help bob find invoice adding code
research invoice crisis (Kelly) - BOB Working
kelly report - wants invoices batched by month in certain way -- need to reconcile Theresa with Kelly

1/1/2007

TasksActionEntityAssignedTask Status

- 1 **Meet with Bob** Review/Research Business Process David Pepper Pending ☐

ProjectID: 17 Email Project for CIRBI GoLive**Priority: Low**Project Status

Cancelled

Created

3/1/2007

Requestor

Theresa Straut

Rank

25

Purpose: PI email is a requirement for CIRBI golive. Get spreadsheet with PI emails and apply data to PROD DB where appropriate.**Scope:** Potentially the scope could include the whole data model which affects Pis: tblSite, tblContact, tblCC, and others.NotesDate

- 1 Process returned spreadsheet into update - WAITING TO HEAR BACK FROM THERESA, ETC.
Email field expose in GUI?
Email migrate site:phone:email to contact? 1/1/2007
- 2 this project may be cancelled per Bob G. 8/20/2007
- 3 CIRBI go-live obsoleted this request -- if there is a need to do anything with PI emails in the legacy system we now know how to do it. 10/5/2007

TasksActionEntityAssignedTask Status

- 1 **misc** Review/Research Business Process David Pepper Pending ☐
- 2 **Receive data back from users** Seek User Input/A Business Process David Pepper Pending ☐
- 3 **Update database with data from users** Change Data David Pepper Pending ☐

Project Type: 2. Data Fixes**ProjectID: 143 Troubleshoot Term 0805030 Poss****Priority: Unkno**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071128_frmPIDoesntShowNextReview_0805030

Project Status**Completed**Created

11/28/2007

Completed

11/28/2007

Requestor

Matthew Riesner

Purpose: PI Poss got "untermmed" and now the frmPI shows "not yet reviewed" when it should be "next review is 11/1/07". The site record has been transformed by the process of updating the

Scope:

SR

NotesDate

- 1 sr.intinvoiced is a flag that is set from 0 to 1 for terms; to unterm a PI the flag needs to be flipped back to 0 (this bln seems to be named completely wrong) 11/28/2007

TasksActionEntityAssignedTask Status

- 1 misc Review/Research Business Process David Pepper Pending ☐

ProjectID: 147 Add 2nd Initial Line to Venkataraman 0507010**Priority: Unkno**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071204_Add2ndInitialLineToVenkataraman_0507010

Project Status**Completed**Created

12/4/2007

Completed

12/4/2007

Requestor

Elizabeth Hache

Purpose: subramanian venkataraman 0507010

Scope:

[Pending Scope]

TasksActionEntityAssignedTask Status

- 1 misc Review/Research Business Process David Pepper Complete ☒

ProjectID: 34 Data Fix 0406005 Vine Term**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070716_DataFixTermVine_0406005Project Status**Completed**Due

7/17/2007

Created

7/16/2007

Completed

7/17/2007

Requestor

Reba Frey

Purpose: This is a standard data fix for Site Review Terminations.**Scope:** Data in tblSiteReview, tblSite, and possibly tblProtocolReview and tblProtocol.

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Create SELECT/Update script(s)	Add	SQL Script(s)	David Pepper	Complete	<input checked="" type="checkbox"/>
2 run UPDATE script(s)	Change	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Notify User	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 48 Dr. Giller for CRR 0406005 Term on 4/24/07**Priority: High**Project Status**Completed**Created

7/25/2007

Completed

7/25/2007

Requestor

Kelly Johnson

Purpose: This is a standard data fix for Site Review Terminations.**Scope:** Data in tblSiteReview, tblSite, and possibly tblProtocolReview and tblProtocol.

<u>Notes</u>	<u>Date</u>
1 Current the date is 7/20/07 but should be 4/24/07.	1/1/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 SR Data fix process	Change	Data	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 77 Delete PI from 0805007 (Co-PI Situation)**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070824_DeletePIInCoPISituation_0805007

Project Status**Completed**Created

8/24/2007

Completed

9/20/2007

Requestor

Amy Walls

Purpose: This protocol has an unusual Co-PI as one of the site instances and it has an extra PI that shouldn't be there**Scope:** S, SR, [CC], Address, Ads, SAEs, [Audits]NotesDate

- | | | |
|---|--|-----------|
| 1 | This could be as simple as a delete PI, or it could be quite complex. | 8/24/2007 |
| 2 | explained where the request is to Amy and we found an "audit" which appears on both records; amy thinks the audit is a record which is appearing in error, so DP will research the datamodel/app to see why it appears and where it is stored, and amy will confirm or deny whether it should be there | 9/11/2007 |

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 research	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 perform fixes	Change	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
3 user for approval	Seek User Input/A	Business Process	Amy Walls	Pending	<input type="checkbox"/>

ProjectID: 137 Correct CRRRI Number**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071106_CorrectCRRINumber

Project Status**Completed**Created

11/6/2007

Completed

11/6/2007

Requestor

Theodore (TJ) Luck

Purpose: change strcrrprotid from 1108002 to 1107002**Scope:** P

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 140 Term 1105007 Gordon at Site Level for frmPI Status**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071112_TermGordonAtSiteLevel_1105017**Project Status****Completed****Created**

11/12/2007

Completed

11/13/2007

Requestor

Summer Gonzalez

Purpose:

This site didn't term properly. The data fix will probably be to dtmNextReview; nope, the two tell-tales on frmPI are lblNextReview (which should say terminated) and lblTermReceived which says "term received" and is made visible/invisible by the form. The s.intStatus is 2. Needs to be 3? Something like that.

Scope:

S

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 46 Change term DT for Dr. Duckor in 0406005**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070725_DataFixTermDuckor_0406005**Project Status****Completed****Due**

7/25/2007

Created

7/25/2007

Completed

7/25/2007

Requestor

Erin Larson Reilly

Purpose:

This is a standard data fix for Site Review Terminations.

Scope:

Data in tblSiteReview, tblSite, and possibly tblProtocolReview and tblProtocol.

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 SR Data fix process	Change	Data	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 55 qryActiveProtocols Active Protocols Show Expired**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070806_qryActiveProtocolsShowExpiredInError**Project Status****Completed****Due**

8/28/2007

Created

8/6/2007

Completed

8/29/2007

Requestor

Theresa Straut

Purpose:

5 active protocols show expired (in error):

0404007

0406012

1200007

1003008

1001004

A protocol which is active and which has expired violates data integrity for this application. In this case, the protocols are active and are incorrectly showing as expired.

Scope:

Possibly View only.

Notes**Date**

- 1 only 0404007 still has problem -- change s.intstatus to 3 to term it.

8/24/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 change 0404007 p.intstatus to 3	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Interview User 1/2	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Interview User 2/2	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4 qryActiveProtocols vs. SR Expired Data	Review/Research	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 58 Withdrawn 0406012 Pulling as "Active"**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070808_DataFix_ImproperlyMarkedActive_0406012**Project Status****Completed****Created**

8/8/2007

Completed

8/15/2007

Requestor

Lauri Carlile

Purpose:

Data integrity rules (either through automation or through user action) should have made the protocol by marked Withdrawn when the last [only] PI withdrew. This maintenance needs to fix the data to what it should have been if it had been processed correctly.

This is a classic data fix cunundrum, because it is relatively easy to fix this instance of the problem, but it won't be clear without considerable research if the problem is with the application or with something a user did/did not do. Typically we end up fixing the data without doing the rest of the research due to competing priorities.

Scope:

Data in tblProtocol and tblProtocolReview. This is really a site term maintenance, but just the part of the site term where the site is ok and then the protocol has to be termed because it is the last site that has termed.

Notes**Date**

- | | | |
|---|---|-----------|
| 1 | per Theresa, need to use the 8/28/06 date in S, P, PR to term S and P, due to regulatory fact that it was reviewed by the board on that date. | 8/14/2007 |
| 2 | Took a good look at other "Administrative" termed protocols (16 records, intdatetype=35), and there isn't as much consistency as I would like. Found 2 other possible problem records: (1205010, 1205014) out of the 5 or so that I examined. I think the plan is to follow the script, update intdatetype in P, PR to 35, and the dates like Theresa said. | 8/14/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|--|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | Research/analysis | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | Test Fix and Fix data in PROD | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | found/fixed one issue with P datafix script | Change | SQL Script(s) | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 73 Term Swanson on 0705004**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070823_TermSwanson_0705004**Project Status****Completed****Due**

8/24/2007

Created

8/23/2007

Completed

8/27/2007

Requestor

David Pepper

Purpose:

term data fix for S and SR, unusual only in that it is an exotic term type (Out of Cycle).

Scope:

S SR

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-----------------------------------|--------|------|--------------|----------|-------------------------------------|
| 1 | modify term script and run | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-----------------------------------|--------|------|--------------|----------|-------------------------------------|

ProjectID: 87 Delete PI Patterson from 0607021**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070830_DeletePI_Patterson_0607021

Project Status**Completed**Due

8/30/2007

Created

8/30/2007

Completed

8/30/2007

Requestor

Tierre Franklin

Purpose: Standard PI deletion (w/no SAEs or SiteAds)**Scope:** CC, SR, S

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 103 Convert Expired Protocol to term 0405014**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070917_ResearchImproperlyExpiredProtocol_0405014

Project Status**Completed**Created

9/17/2007

Completed

9/28/2007

Requestor

Amy Walls

Purpose: amy had givne a deadline to a site of 4pm on Friday, and went home at that time, but they sent in their term request after 4 and should be allowed to term, although they were marked as expired by Amy before she went home. Data fix is to reverse the expiration and apply a term.**Scope:** S SR

<u>Notes</u>	<u>Date</u>
1 this is a good example of the tension that the application/forms imposes on users -- on the one hand, denying users the ability to back-date a certain field forces them to enter records on a certain date, on the other hand, it also generates data fixes like this one, and may introduce errors. This request assumes I understand data integrity for both expirations (which I'm pretty sure I do not) and terms (which I hopefully do)	9/17/2007
2 correct date for term is Friday 9/14/07	9/17/2007
3 I think nc should be no now that they have been converted to term; waiting to hear back from amy to mark completed	9/27/2007
4 NC is ok here because they really were NC and this doesn't get rolled back due to their conversion from Expired to Terminated. (per Amy Walls)	9/28/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 research	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>
2 delete expiration SR record	Delete	Data	David Pepper	Complete <input checked="" type="checkbox"/>
3 research dtmExpired (is 9/17/07)	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>
4 term record per term data fix procedures	Change	Data	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 109 Deletion of FDA Audit**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070921_DeletionOfFDAAudit**Project Status****Completed****Created**

9/21/2007

Completed

9/25/2007

Requestor

Tierre Franklin

Purpose: There is a need to delete FDA audit for 2/15/05 which is on 0707027, which duplicates an existing record.**Scope:** [Pending Scope]**Notes****Date**

- | | | |
|---|---|-----------|
| 1 | I received a site submission for 0707027 Kaiser that had the FDA audit date listed as 02/15/2005 however I did not receive documentation for this audit therefore I sent a clarification e-mail. When I received the clarification I noticed that the actual FDA audit was 02/24/2004-03/02/2004 and the letter was dated 02/15/2005. I wanted to know if you could delete the FDA audit date of 02/15/2005. Please let me know. Thank you! | 9/25/2007 |
|---|---|-----------|

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 111 0306026 - Protocol Termination**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070927_0306026_ProtocolTermination**Project Status****Completed****Created**

9/27/2007

Completed

10/3/2007

Requestor

Heather Karabaich

Purpose: User has reported 2 instances where terming the last site didn't result in the popup asking if the protocol should be termed. The other instance it turned out there was >=1 site that was still submitted (so the site in question was not really the last open one). In this case it remains to be seen. Either way, the user wants to term this protocol along with the last site.**Scope:** P PR S SR, possibly frmWizardSiteDates/B**Notes****Date**

- | | | |
|---|--|-----------|
| 1 | researching data got to point that I couldn't update what I thought I should be able to in order to term the site -- it already has a sr record for term (although without an action and without an event date), but all the controls are disabled. It might be tblcontact values that differ between me and power users (heather); either way this is on hold and the bad data still needs to be fixed. | 10/2/2007 |
| 2 | leaving question of how it happened to another day -- I wasn't able to update the term record when I tried; my best guess is that heather and I have different tblcontact values for 1 or more of the special user administration settings there; this is 100% data driven, so me being dbo doesn't magically make it work (i.e. it's not basic sql server object level permissions that allow or deny a action) | 10/3/2007 |
| 3 | researched some more by changing blnIND in tblContact and assigning me her to her SQL Server group "CRR!" and still no luck -- I think the disabled controls are part of the record state -- not sure how she created the term record or how it should ideally be created -- or if the term record that is there should be or should be in the state that it is | 10/3/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|--------------------------------------|-----------------|------------------|--------------|------------|-------------------------------------|
| 1 | research what went wrong | Review/Research | Business Process | David Pepper | On Hold/Ca | <input type="checkbox"/> |
| 2 | fix this instance of bad data | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 114 Re-Term Dr. Goetsch on 1105009**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071010_ReTermDrGoetsch_1105009**Project Status****Completed****Created**

10/10/2007

Completed

10/10/2007

Requestor

Summer Gonzalez

Purpose:

This is a non-standard situation where the PI has termed before (reapproved) and now has to term again.

Summer wants me to add a new line and let her edit it, rather than go down the usual site term process. The normal process would be to cannibalize the most recent scheduled CR record, change it's type to term (or in rare cases a non-standard termination type date type - e.g. "out of cycle"), and then to apply changes to the new record. My best guess is that adding a record might end up with the two records not sorting right and needing to be adjusted in terms of various dates that drive the sort.

Scope:

S SR

Notes**Date**

- | | | |
|---|--|------------|
| 1 | need confirm termination intDateType, date of termination, etc. | 10/10/2007 |
| 2 | summer agreed to let me term the record -- it is a normal term, but she still hasn't given me the date | 10/10/2007 |
| 3 | term date is 10/10/07 | 10/10/2007 |
| 4 | summer helped me update the term script. Thanks summer! | 10/10/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-----------------------------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | interview | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | termination script process | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 119 0907016 Duped Twice (3 records)**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071017_0907016DupedTwice

Project Status**Completed****Created**

10/17/2007

Completed

12/4/2007

Requestor

Jeffrey Stockton

Purpose:

need to delete 2 P records, 1 S record, and 1 SR record, and any other subordinate records which might be in scope (anything within scope of PI deletion)
 -- really this is a PI deletion with 1 more step (since it has to be done from below any way)

Scope:

P PR S SR...

Notes**Date**

- 1 1st instance generates eof error on navigating to it, 2nd instance is of "submitted" status, 3rd instance is "active" and probably/hopefully has the most history 10/17/2007
- 2 talked to TJ, I think his errors are real, and are intermittent, pointing to a leak of some kind in a sub that is accessed recursively -- I am thinking tblcontact edit wizard; every user uses a different part of application and I think this form is making the whole application unstable, possibly by using up DB connections, etc. 10/25/2007
- 3 see \\10.130.128.10\CRRIMaint\LegacyApplication\Research\20071031_TablesFieldsEtc 10/31/2007
- 4 Kelly wrote back on Friday 11/2/07:
David-Sharon correctly invoiced 0907016 for the Initial Protocol Review in September. No other activity was invoiced in the month of October. The initial review records were duplicated on Accounting's invoicing query, but Sharon de-duped the records manually. Please provide confirmation to Accounting no other billable activities have been performed in October for Protocol #0907016 that should be invoiced. 11/5/2007

Accounting does not object to deleting the duplicate records in the CRRRI legacy database.

--THIS opens a new can of worms since I don't know much about the invoicing process, or even how various records in the database (created automatically or manually) result in invoice activity.

The other piece that would have to be analyzed is the price list and the way that discounts are applied -- this doesn't feel "right" to me for me to do this. I think it is more likely that Bob P. will have to make sense of this side of it, and that would be very helpful.

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 interviewed user (TJ)	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 researched issue and planned deletion	Review/Research	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 write delete protocol scripts	Add	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4 reproduce/catch error in PROD db to understand	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
5 execut delete protocol scripts in PROD	Delete	Data	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 124 Help Apply 2nd Initial to 0707027**Priority: High**Project Status**Completed**Created

10/31/2007

Completed

11/5/2007

Requestor

Michelle Knieriem

Purpose:

A site was deferred at its initial review and Michelle would like to add a 2nd initial line to the sr records to carry the 2nd date that the s was reviewed.

Scope:

[Pending Scope]

NotesDate

- | | | |
|---|---|------------|
| 1 | amy walls helped austin to create the 2nd initial line by manhandling the interface and creating/overwriting/deleting records | 10/31/2007 |
| 2 | might still need some fine tuning; can only imagine that things are not really ok with the data, particularly the data that isn't seen in the front end | 10/31/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 142 Term 0207014**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071121_Term0207014

Project Status**Completed**Created

11/21/2007

Completed

11/27/2007

Requestor

Heather Karabaich

Purpose:

Term 0207014 on 11/21/07. The site level looks ok. This is just a protocol term.

Scope:

S SR P PR

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 164 Deleted Scheduled CR Still Shows On qrySubmittedPI**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080110_DeletedScheduledCRStillShows_0507020

Project Status**Completed**Created

1/10/2008

Completed

1/10/2008

Requestor

Stephanie Housel

Purpose:

1/16/08 meeting was scheduled and then deleted for 0507020 florete. The meeting still shows up on qrySubmittedPI/viewSubmittedPI because of deletion anomalie caused by dependency between sr.dtmeventdate? And s.dtinitialapproval

Scope:

[Pending Scope]

NotesDate

- | <u>Notes</u> | <u>Date</u> |
|---|-------------|
| 1 stephanie housel 622 | 1/10/2008 |
| 2 also would be good to consider a project to remove the dependency on the uphill field | 1/10/2008 |

TasksActionEntityAssignedTask Status

- | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|--------------|-----------------|------------------|-----------------|--|
| 1 misc | Review/Research | Business Process | David Pepper | Complete <input checked="" type="checkbox"/> |

ProjectID: 171 Term Site Following Reapproval Goldenberg 0705004**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080124_TermSiteFollowingReapproval_0705004

Project Status**Completed**Created

1/24/2008

Completed

1/28/2008

Requestor

Katie Bodenhorn

Purpose:

This site expired and then was reapproved. Now they want to term and the database won't let them (due presumably to the presence of a termination type status in the history). Therefore, this is a manual term site process.

Scope:

S SR P [PR]

NotesDate

- | <u>Notes</u> | <u>Date</u> |
|--------------|-------------|
| 1 katie x566 | 1/24/2008 |

TasksActionEntityAssignedTask Status

- | <u>Tasks</u> | <u>Action</u> | <u>Entity</u> | <u>Assigned</u> | <u>Task Status</u> |
|---------------------|-----------------|------------------|-----------------|----------------------------------|
| 1 classic term site | Review/Research | Business Process | David Pepper | Pending <input type="checkbox"/> |

ProjectID: 179 Delete P Clarifications Recd Line 1106022**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080228_DeletePClarificationsRecdLine_1106022**Project Status****Completed****Created**

2/28/2008

Completed

2/29/2008

Requestor

Jamie Strand

Purpose:

Due to some tangled history there is a need to delete a PR record that really shouldn't be there. The Clarifications received line (which contains the expedited flag) is making the P pull on the "expedited review log" in error.

Scope:

[Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 183 Term Sambunaris on 0306032**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080311_TermSambunaris_0306032**Project Status****Completed****Created**

3/12/2008

Completed

3/12/2008

Requestor

Katie Bodenhorn

Purpose:

termination date of 12/10/2007

Scope:

[Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 184 PExpDt wrong in qryPastDue 0504008**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080314_PExpDTWrongQryPastDue_0504008

Project Status**Completed****Due**

5/30/2008

Created

3/14/2008

Completed

6/2/2008

Requestor

Michelle Knieriem

Purpose:

Data integrity for exp date exists across 4 tables; a well-known problem of non-normalized data stored uphill for query convenience causes update anomalies due to numerous form/database data integrity rules (implied, not known) not being applied correctly. This presumably is happening through form automation which updates part of the data (probably the downhill date) without maintaining data integrity (probably in the uphill date).

The query needs to be updated to pull the correct downhill value instead and uphill value should be fully obsoleted by changing all other queries which depend on the obsolete field, and any form reference(s) to the field also would need to be changed (although there may be none -- in other similar cases, the forms have occasionally made use of an uphill date).

Scope:

[Pending Scope]

NotesDate

- | | | |
|---|---|-----------|
| 1 | 0504008, example PI Holroyd | 3/14/2008 |
| 2 | created an estimate of time to complete; to bob and theresa; total 6 hours minimum, with 3 tasks likely to grow. Could be 10-12 hours easy. I think less than 15. | 5/21/2008 |
| 3 | utility to output view and SP text added to blank_naboo | 5/31/2008 |

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	misc/planning	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2	develop/test scalar function to get pr.dtmexpdate	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3	find and plan to address dependencies in views	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4	find and address dependencies in form code	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5	find and address dependencies in form controls	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
6	find and plan to and address dependencies in SPs	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
7	DEV make entities use UDF test/build promotion	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>
8	PROD make entities use UDF test/build promotion	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 188 Term Blumenau on 1105015**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080328_TermBlumenau_1105015Project Status**Completed**Created

3/28/2008

Completed

4/18/2008

Requestor

Austin Grace

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

1 term date 2/6/08

3/28/2008

TasksActionEntityAssignedTask Status

1 misc

Review/Research

Business Process

David Pepper

Pending

☐**ProjectID: 197 Delete Invoice Recs for Print/Radio Ad 0308005****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080411_DeleteInvoiceRecs_0308005Project Status**Completed**Created

4/11/2008

Completed

4/23/2008

Requestor

Sharon Chang

Purpose: Hi Sharon, I accidentally invoiced the above site for a print and a radio advertisement. Can you please delete these entries? I forgot that they automatically get generated. Thanks! Tanesha**Scope:** This maintenance requires the deletion of tblSiteAd records (frmSiteAds) and some way to make the complementary tblInvoice records not appear in output (frmAddedInvoiceItems). The two forms both have delete button. frmAddedInvoiceItems just changes a flag from 0 to -1. This doesn't affect the invoice output, therefore something else needs to be done to complete the deletion from the point of view of invoicing. frmSiteAds does the other piece, deleting the tblsitead record and also inserting adjusting invoice items.TasksActionEntityAssignedTask Status

1 misc

Review/Research

Business Process

David Pepper

Pending

☐

ProjectID: 199 Expiration Date Data Fix 1107005**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080416_ExpirationDateDataFix_1107005**Project Status****Completed****Created**

4/16/2008

Completed

4/16/2008

Requestor

Michelle Knieriem

Purpose:

qryAmendments still points to s.dtmExpired and should probably follow the logic used in the expiring sites status report to select the right sr.dtmexpdate from the SR record set.

This maintenance only made a data fix for the one instance of the date problem.

Scope:

change s.dtmexpired from 2/19/09 to 11/18/08

Notes**Date**

- 1 several issues were discussed: 1. the harmonization of S/SR expiration dates and P/PR expiration dates is a source of concern for various reasons, 2. the expiration date override is allowing the SR date to be changed, but business logic firing on queries is "changing it back", or changing it according to existing business rules, probably to the next future date which would/should have been selected if it weren't for the change in business rules.

4/16/2008

Tasks**Action****Entity****Assigned****Task Status**

- 1 **misc**

Review/Research

Business Process

David Pepper

Pending

☐**ProjectID: 201 Change strCRRIProtID for tblProtocolpk 1904****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080423_ChangeStrCRRIProtID_0408003**Project Status****Completed****Created**

4/23/2008

Completed

4/23/2008

Requestor

Theodore (TJ) Luck

Purpose:

need to change from 0408002 to 0408003

Scope:

[Pending Scope]

Tasks**Action****Entity****Assigned****Task Status**

- 1 **misc**

Review/Research

Business Process

David Pepper

Pending

☐

ProjectID: 203 Remove Billing for Change of PI 0607003**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080424_RemoveBillingForChangeOfPI_0607003**Project Status****Completed****Created**

4/25/2008

Completed

4/25/2008

Requestor

Bonnie Buggs-Perow

Purpose: This change of PI is not billable; the invoice item for change of PI needs to be removed.

Scope: In this case we are removing a charge that shouldn't have been there and we are really deleting the invoice record. Ordinarily invoice recs are reversed so that if they have been billed they can be credited, etc. In this case Sharon is already handling the billing exception and the chage data is bogus so it can be deleted.

Notes**Date**

- | | | |
|---|--|-----------|
| 1 | "PI" is not really a PI, this is an international study and there may or may not be a PI in this case, since the way the system is used to generate correspondence there needs to be a PI. | 4/25/2008 |
|---|--|-----------|

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 206 Delete Version from 0107019**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080430_DeleteVersion_0107019**Project Status****Completed****Created**

4/30/2008

Completed

5/21/2008

Requestor

Bonnie Buggs-Perow

Purpose: Remove the database entry under version for 0107019. The doc date is 4/23/08 and the action date is 04/24/08. It is the unanticipated problems. This is the incorrect study for this entry.

Scope: [Pending Scope]

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 210 Delete 2 Ads on 0707019**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080512_Delete2Ads_0707019**Project Status****Completed****Created**

5/12/2008

Completed

5/21/2008

Requestor

Bonnie Buggs-Perow

Purpose:

Can you please remove the generic ad entries for study number 0707019? The dates are: received 5/8/08 and IRB review 5/12/08. There are two entries please remove both.

Scope:

[Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 215 Term Protocol 0207017**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080523_TermProtocol_0207017**Project Status****Completed****Created**

5/23/2008

Completed

6/4/2008

Requestor

Austin Grace

Purpose:

Please add a termination line and terminate CRR I 0207017 on the protocol dates page. The button was not selected to terminate the protocol at the time the last PI terminated. The termination date should be February 26, 2008 and the line should read as follows:

Description	Action	Event Date
Termination	Completed	February 26, 2008

Scope:

[Pending Scope]

<u>Notes</u>	<u>Date</u>
1 ok to wait on this per austin	5/23/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 221 Change Term Date for Gilliam 0905001**Priority: High**Project Status

Cancelled

Created

6/4/2008

Requestor

Katie Bodenhorn

Rank

1

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

1 this request dupes 218

6/4/2008

TasksActionEntityAssignedTask Status

1 misc

Review/Research

Business Process

David Pepper

Pending

☐**ProjectID: 38 Delete PI C. G. Wells from 0607007****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070718_DeleteSiteFromP_0607007Project Status

Completed

Due

7/18/2007

Created

7/18/2007

Completed

7/25/2007

Requestor

Anthony Shalcosky

Purpose: This is a Delete PI from Protocol datafix.**Scope:** Delete all subordinate records in related tables and then delete the Site (tblICC, tblSiteReview, tblSite).NotesDate

1 delete PI

1/1/2007

TasksActionEntityAssignedTask Status

1 Delete PI Data fix process

Change

Data

David Pepper

Complete

☒

ProjectID: 59 2 Protocol Expiration Date Data Fixes**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070808_DataFixe_2ProtocolsExpDt**Project Status****Completed****Created**

8/8/2007

Completed

8/20/2007

Requestor

Amy Walls

Purpose:

This is a data fix for expiration date that parallels the most common data fix (site expiration date), but this one is for protocol expiration date. Since we created the Expiration Date Override for site, we may also want to create one for Protocols as well.

Scope:

tblProtocolReview, and maybe tblProtocol if data integrity impacts that table. We won't know until we look. These are rare.

Notes**Date**

1 #1 0107009 and 0107006 change to expdate 1/19/08

8/14/2007

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	#1 Make simple ExpDate changes	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2	Need to hear back from submitter RE #2	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3	#2 Research data integrity for protocol exps	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4	#2 Apply changes to PROD	Change	Data	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 84 1105009 - Richard Krause Data Fix**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070829_DataFix_Krause_1105009

Project Status**Completed**Due

8/29/2007

Created

8/28/2007

Completed

9/25/2007

Requestor

Heather Karabaich

Purpose: Datafix to tblSiteReview records needs to fix data.**Scope:** SRNotesDate

- | | | |
|---|--|-----------|
| 1 | Would you mind taking a look at 1105009 Dr. Richard Krause when you have a moment? IRB Admin mistakenly entered dates on the 2nd annual line on the dates page (the review for 2nd annual isn't due until 12/1/07) and now the review cycles are listed in error. It should read 1st annual, 18 month then 2nd annual. The information that is listed on the 30 month line should be listed on the 18 month line and the 2nd annual line should not have any information listed. | 8/29/2007 |
| 2 | the sorting is some kind of show-stopper; sent heather email explaining sorting of form; not sure where this is going... | 9/5/2007 |
| 3 | asked user for input/mtg. etc. several times; if the data is right, the sort is right, if the sort is wrong the data is wrong; user says the sort is wrong but the data is right; I can only change data to what they say to change it to; in light of no user input and no new instructions to change data marking completed | 9/12/2007 |
| 4 | 3rd annual and 30-month still wrong... | 9/21/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|--|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | interview user | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | script selection of records for manual update | Review/Research | SQL Script(s) | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | automated script to update dates (sometimes null) | Review/Research | SQL Script(s) | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 4 | numerous attempts to change data | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 5 | get approval | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 6 | more attempts to change data | Change | Data | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 108 Delete PI Feinstein from 0507010**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070920_DeletePIFeinstein_0507010

Project Status**Completed**Created

9/20/2007

Completed

9/27/2007

Requestor

Temi Osanyin

Purpose: PI deletion during data entry**Scope:** standard PI deletion processTasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 122 Delete Term Line 1203003: Cobb**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071026_DeleteTermLineForCobb_1203003Project Status**Completed**Created

10/26/2007

Completed

10/26/2007

Requestor

Tierre Franklin

Purpose: Normal data fix.**Scope:** SR

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 126 Terming Site with Multiple Instances**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071101_TermingSiteWithMultipleInstances_0605018Project Status**Completed**Created

11/1/2007

Completed

11/28/2007

Requestor

Kelly Johnson

Purpose: All this is in the end is to change the term date of the "first" instance of the PI on the study, updating term date for site and site review: from 7/26/07 to 7/14/06.**Scope:** SR S

<u>Notes</u>	<u>Date</u>
1 talked to kelly, we should meet -- they need to tell me what to change if anything	11/1/2007
2 kelly out of office 11/5, will try to meet with her as soon as possible, starting Tuesday 11/6; sent email.	11/5/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 135 Make term line for Tsao 0705004**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071106_TermTsao_0705004Project Status**Completed**Created

11/6/2007

Completed

11/9/2007

Requestor

Vince Elliott

Purpose: make term line, null everything else, do not make an action or process the termination**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 156 Delete 2nd Instance of Patel on 0507010**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080102_DeleteLAPatelInstance0507010Project Status**Completed**Created

1/2/2008

Completed

1/28/2008

Requestor

Michele McGee

Purpose: this is a standard data fix to remove an instance of a PI on a study that was data entered in error.**Scope:** S SR

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 57 Lauri Carlile Data Fixes**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070807_LauriCarlileDataFixesProject Status**Completed**Created

8/7/2007

Completed

8/20/2007

Requestor

Lauri Carlile

Purpose: Various discrepancies need to be fixed for data integrity**Scope:** tblprotocol, tblprotocolreview, tblsite, tblsitereview data review and fixes for 4 different sets of records

<u>Notes</u>	<u>Date</u>
1 1200007, 1001004, 1003008, 1206003	8/16/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 Research and fix #1	Change	Data	David Pepper	Complete <input checked="" type="checkbox"/>
2 Research and fix #2	Change	Data	David Pepper	Complete <input checked="" type="checkbox"/>
3 Research and fix #3	Change	Data	David Pepper	Complete <input checked="" type="checkbox"/>
4 waiting to discuss #4 with Lauri	Seek User Input/A	Business Process	David Pepper	In Progress <input type="checkbox"/>
5 Research and fix #4	Change	Data	David Pepper	Pending <input type="checkbox"/>

ProjectID: 70 0604023 Delete Duplicate IB record**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070820_DataFix_DeleteDupIB**Project Status****Completed****Created**

8/20/2007

Completed

8/20/2007

Requestor

Rick Cruise

Purpose: data fix to 1. delete duplicate record, 2. evaluate if there is a way to improve the delete button functionality which the user said is not to be used...

Scope: data, (possibly frmIBs).

Notes**Date**

1 Delete the IB "edition #6" that has no comment

8/20/2007

Tasks**Action****Entity****Assigned****Task Status**

1 **delete data**

Delete

Data

David Pepper

Complete

**ProjectID: 71 Data Fix Site Term 0804015****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070822_DataFixTermDate_0804015**Project Status****Completed****Created**

8/22/2007

Completed

8/22/2007

Requestor

Lauri Carlile

Purpose: Site Term Dates impact two tables (S, SR) and often two other tables (P, PR).

Scope: S, SR, [P, PR]

Tasks**Action****Entity****Assigned****Task Status**

1 **Create scripts to update field in PROD**

Change

Data

David Pepper

Complete



ProjectID: 85 Duplicate PI Shah 0507010 Data Fix**Priority: High**

Folder \\10.130.128.10\CRRI\Maint\LegacyApplication\20070829_DataFix_DupPIShah_0507010

Project Status**Completed**Due

8/30/2007

Created

8/29/2007

Completed

8/30/2007

Requestor

Michele McGee

Purpose: Standard "PI deletion" (really deleting an instance of a site on a protocol).**Scope:** SR,SNotesDate

- 1 One of my Doc Specialists entered a PI into the DB twice. I can't delete the 2nd entry. Would you be able to do it? 8/29/2007

It is Umedchandra Shah for 0507010. The incorrect entry will not have a contact name.

TasksActionEntityAssignedTask Status

- 1 SQL script/manual fix Change Data David Pepper Complete ☒

ProjectID: 88 Change Protocol from Semi-Annual to Annual**Priority: High**

Folder \\10.130.128.10\CRRI\Maint\LegacyApplication\20070905_ChgPFRSemi2Annual_1204017

Project Status**Completed**Due

9/7/2007

Created

9/5/2007

Completed

9/7/2007

Requestor

Stephanie Housel

Purpose: p.pintreviewinterval and p.intreviewinterval are the two fields in tblProtocol which store values that indicate whether the protocol and site(s) are annual or semi-annual. Values in these fields govern certain business rules, particularly what happens when the CR cycle is established. In some cases these values change in the middle of the life-cycle of the protocol. The consequences of this are not well understood, but have been linked to some problems.

One of the major issues is that sites of a protocol are sometimes said to be of mixed type, (i.e. some annual some semi-annual), and this business need conflicts with the datamodel. In order for the data model to accommodate this situation, the intreviewinterval would have to be stored in tblSite, and would be an attribute of the site, rather than the protocol.

Scope: P, PR: 1204017NotesDate

- 1 in march meeting (3/7/07) it was decided to change the P from 6-month to annual
delete the 42-month review
pintreview change from id for annual to id for semiannual
3rd annual review change due date to 2/1/08 9/5/2007

TasksActionEntityAssignedTask Status

- 1 misc Review/Research Business Process David Pepper Pending ☐

ProjectID: 98 Term Protocol 1005001 and Research Why No Pop-up**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070914_TermProtocolandResearch_1005001**Project Status****Completed****Created**

9/14/2007

Completed

9/21/2007

Requestor

Heather Karabaich

Purpose:

This is a normal protocol term data fix, but the user says that the pop-up never happened. Since we just refreshed TEST recently, we should be able to recreate the problem and step through where the decision was [not] made to prompt the user to term the protocol.

Scope:

P PR, frmWizardSiteDates/B

Notes**Date**

- 1 sent email re PI (krauss) who is still in submitted status. This would explain why the no pop-up, and terming this PI might kick off the protocol term like it's supposed to.

9/20/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 interview user	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 research data	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 sent email for feedback see note	Seek User Input/A	Business Process	Heather Karabaich	Complete	<input checked="" type="checkbox"/>
4 term protocol properly 9/14/07	Change	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
5 research why it happened	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
6 consider making a form change	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>

ProjectID: 155 Dedupe PI Phoebe Rich 2nd Contact Instance**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071219_DedupePIPhoebeRich**Project Status****Completed****Created**

12/20/2007

Completed

1/31/2008

Requestor

Sharon Chang

Purpose:

The original request was to delete the 2nd instance of a PI on a protocol, which presumably was data entered in error. (1107009/21428)

However, audits are not really child records of a site, rather the audit table stores 3 FKs on every audit record: contact, site, address. Thus the audits just kind of show up wherever they are supposed to so the reviewers have insight into who the pi is, where they are working, and what has historically gone on at the site.

Since the site that was to be deleted was linked to by an audit, deleting it would have orphaned it so the audits had to be switched over in terms of their contact and site pks. Also, there were 2 instances of the same address being used within the scope of the records, so that had to be straightened out too. The data model with regard to site/PI/address/coinvestigator is complicated and not clear; it might be ingenious, or it might be criminally incompetant, or a blend of the 2.

Once all that was handled it was finally a standard PI deletion request.

Scope:

s sr aud cc

EXCLUDED: tblcontact and tbladdress -- these should be handled by other projects for deduping contacts and addresses. To actually delete the records with confidence, we would have to identify every FK stored everywhere that was actually an fk to a contact record or an address record. FKs are not always named blahFK, they are often renamed, e.g. "intUser".

Notes**Date**

1 audits are one of the important data migration details of CIRBI

1/30/2008

Tasks**Action****Entity****Assigned****Task Status**1 **misc**

Review/Research

Business Process

David Pepper

Pending

☐

ProjectID: 65 1204002 Goldstein "entered twice" & last PI term**Priority: High**Project Status

Cancelled

Due

8/28/2007

Created

8/14/2007

Requestor

Michelle Knieriem

Rank

5

Purpose: User wants P to be terminated correctly, but we want to make sure that 2nd instance of PI in received state is in error, not a 2nd instance of the PI.

Scope: potentially: delete PI, and term Protocol

NotesDate

- | | | |
|---|---|-----------|
| 1 | Michelle will determine if the 2nd instance is in error or legitimate. | 8/14/2007 |
| 2 | left message waiting to hear what to do | 8/21/2007 |
| 3 | talked to michelle; she will get back with info RE 2nd instance -- it looks like the 2nd instance is legit to me, but we'll see... | 8/22/2007 |
| 4 | policy is you can reinstate w/in 30 days, but it went over | 8/24/2007 |
| 5 | Request cancelled -- 2nd instance of PI is correct; user reports everything is happy and one of the instances (2nd I suppose) is termed successfully now. | 8/30/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|--|-------------------|------------------|--------------|----------|-------------------------------------|
| 1 | Need to hear back from Michelle | Seek User Input/A | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|--|-------------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 79 Delete PI on 0807013**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070823_DataFix_DeletePI_0807013

Project Status

Completed

Created

8/23/2007

Completed

8/27/2007

Requestor

Rick Cruise

Purpose: Standard Delete PI request: I have a question, please. This is for 0807013. This is a new submission was processed today and the PI was incorrectly entered. I know I'm not supposed to delete anything from the dbase, so can you remove Robert Lamar Parker Jr. from the site page and I'll then enter the correct PI?
Thanks. Rick Cruise

Scope: CC, SR, S

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 3 Remove 2 PIs from Protocols**Priority: Medium***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070628_Delete2SitesFrom2ProtocolsProject Status**Completed**Due

6/26/2007

Created

6/25/2007

Completed

6/25/2007

Requestor

Temi Osanyin

Purpose: 0803010 J Winder and 0806007 P Thomas**Scope:** Delete all subordinate records in related tables and then delete the Site (tblCC, tblSiteReview, tblsite).

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 PI Deletion process	Change	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 20 Allow Null State for International Addresses**Priority: Low***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070523_EmptyAndNullStateProject Status**Completed**Due

8/28/2007

Created

5/23/2007

Completed

8/30/2007

Requestor

Kira Newsom

Purpose: Kira asked for a way to store no state for international addresses, so the rest of the address fields could be exploited to print out the labels for Internation Addresses correctly**Scope:** State list in tbllook or wherever it is.

<u>Notes</u>	<u>Date</u>
1 sent email inquiring about whether the solution is going to be used and if there is anything else we can do.	8/28/2007
2 marked as completed, sent numerous phone messages, emails, etc. which were not returned -- I can only assume that this will never be used.	8/30/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Analysis and Data fix	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Interview user	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Get user to verify project complete	Seek User Input/A	Business Process	David Pepper	In Progress	<input type="checkbox"/>

Project Type: 3. Research/Query/Reports**ProjectID: 152 Email List for Holiday Email to Sites****Priority: Unkno**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071218_HolidayEmailList

<u>Project Status</u>	<u>Due</u>	<u>Created</u>	<u>Completed</u>	<u>Requestor</u>
Completed	12/19/2007	12/18/2007	12/19/2007	Kira Newsom

Purpose: There is a need to make an email list to send a holiday email to sites.
 Selection:
 (CRR Number),
 (tblcontactpk),
 [PI/Contact]Name,
 [ContactType or PI]Role,
 Email
 Criteria:
 site was active this year
 [contact/PI] email is not null

Scope: [Pending Scope]

<u>Notes</u>	<u>Date</u>
1 Sent email to KN to state big picture of emails and kick off talking about requirements to build set-based logic for query.	12/18/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 41 Site not pulling on Qrys After NOI Update 0706014**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070718_SiteNotPullingOnQrysAfterNOIUpdate

<u>Project Status</u>	<u>Due</u>	<u>Created</u>	<u>Completed</u>	<u>Requestor</u>
Completed	7/18/2007	7/18/2007	7/18/2007	Erin Larson Reilly

Purpose: A site was not pulling on "Queries" After NOI Update that needs to.

Scope: Data fix only.

<u>Notes</u>	<u>Date</u>
1 sql file pulls sites of pi, and secondary sql pulls sr records with sr.blissues <> 0 or sr.blnoncompliant <>0; vince came by and we concluded that s.bltermreport was set to 1 for some reason and that is why the site wasn't pulling from qryCRStatus; we changed s.blTermReport to 0 and moved forward	1/1/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 Get more info from Erin	Seek User Input/A	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>
2 Changed data	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>

ProjectID: 125 FrontEnd Submitted Date Does Not Match Query**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071101_QrySubmittedInvestigators

Project StatusCreatedCompletedRequestor**Completed**

11/1/2007

11/5/2007

Katherine Watson

Purpose:

User reported the wrong date is showing up in the query (11/29 should be 11/1), but the date in s.dtmRecieved and sr.dtmreviewdate are both 11/29. This is fine if she wants both to be changed, but I am not able to determine this from her request of from subsequent emails. Could be a data fix, might be something else.

Scope:

QrySubmittedInvestigators, sr

NotesDate

- | | | |
|---|---|-----------|
| 1 | had several emails, and left vm message but never got call back and never got her on phone despite trying several times -- sent new email | 11/1/2007 |
| 2 | This maintenance raised concern that this type of discrepancy may exist for other records and will be followed up by 131. | 11/5/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 189 Expired Sites Status Report 4/08**Priority: High**Project StatusCreatedCompletedRequestor**Completed**

4/2/2008

4/2/2008

David Pepper

Purpose:

[Pending Purpose]

Scope:

[Pending Scope]

NotesDate

- | | | |
|---|--|----------|
| 1 | set up calendar for rest of year. Also ran feb, and march which were evidently skipped (at least by me). | 4/2/2008 |
|---|--|----------|

ProjectID: 204 Bucket Active P/S by Next CR Month**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080425_BucketActivePSsByNextCRMonth

Project Status**Completed****Created**

4/25/2008

Completed

5/7/2008

Requestor

Sharon Chang

Purpose:

Original scope was to bucket future CRs from the database point of view (not invoice). Later the scope was changed to also look backwards at bucketed Previous CRs.

These are very similar sets of queries, but actually are counting slightly different things. One way this is rationalized is by having the cut-off for the future be next month (based on NOW), and the past is up to the present. This means that unless the query is run at COB of a given month, there is a possibility of underreporting CRs for the current month.

In general, once something makes it into a previous bucket, it should stay there forever. The future on the other hand is volatile, and future CRs can term right up until the meeting, I would think that the count would tend to be a ceiling that shrinks slightly as it approaches, but also this would be adjusted by the process of CRs being scheduled (especially the initial), so while the immediate future months would tend to shrink, the distant future months might be more unpredictable.

Scope:

[Pending Scope]

Notes**Date**

- | | | |
|---|---|-----------|
| 1 | Bob said to meet on Tuesday about this. | 4/25/2008 |
| 2 | published qry 1 of 2 results in excel (CR records with bucket code); 2 of 2 will be aggregation by bucket | 4/30/2008 |

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	Phase 1 "future" Select Next CRs in SQL (1of2)	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2	Phase 1 "future" Aggregate Results in SQL (2of2)	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3	Phase 1 "future" Implement in QDB	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4	Phase 2 "past" selection	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5	Phase 2 "past" aggregation	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
6	Phase 2 "past" integrate future and past in 1 rpt	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
7	Phase 2 "past" Implement in QDB	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
8	Validate and Proof Results	Review/Research	Business Process	David Pepper	On Hold/Ca	<input type="checkbox"/>
9	Chart Results	Review/Research	Business Process	David Pepper	On Hold/Ca	<input type="checkbox"/>
10	Q: Bucket Detail Reporting	Review/Research	Business Process	David Pepper	On Hold/Ca	<input type="checkbox"/>

ProjectID: 205 Expired Sites Status Report 5/08**Priority: High**Project Status

Completed

Created

4/30/2008

Completed

4/30/2008

Requestor

Theresa Straut

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 217 CR Bucketing Report 5/08**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080530_CRBucketingRpt_0508Project Status

Completed

Due

5/30/2008

Created

5/30/2008

Completed

5/31/2008

Requestor

Kelly Derflinger

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 60 Expired Protocol Didn't "Pull"**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070808_ExpiredDidntPull

Project Status**Completed****Due**

8/28/2007

Created

8/8/2007

Completed

9/21/2007

Requestor

Amy Walls

Purpose:

This is a rare case where a protocol had NO sites and expired, but for some reason didn't show up on reports. In the normal situation I think sites expire and that expired status is in some way inherited by the protocol, so this record is an anomalie. No matter what, we need to research the qry/report that should show the protocol and then go back to the user to evaluate what if anything should be done.

Scope:

datafix to term site Mary Louise Stedman on 1004007 (tell michelle knieriem); update query with new logic (all 4 left joins), notify users of change

Notes**Date**

- | | | |
|---|---|-----------|
| 1 | qryCRNoticeForms, qryNonCompliant; was in active protocol | 8/17/2007 |
| 2 | for qryCRNotice we made a new version that relaxes the joins and lets in a few more records (which tentatively seems like it is right) and communicated the criteria instatus=2(active) to Amy, and that is [another reason] why 0606016 was not pulling. The current proposed solution is to make the changes to the view if they seem happy, and/or to make a new view/report that shows these anomalous records; another way would be to make serious changes to the view to include those records, which I guess is the more elegant solution maybe | 8/17/2007 |
| 3 | qryNonCompliant has similar constraints to the other query: all joins are inner, s.intstatus=2 is a criteria, and as well there are many other criteria too. | 8/20/2007 |
| 4 | qryCRNotice is pulled by users the last week of month/first week of next month | 9/11/2007 |
| 5 | vwCRFeed has several criteria that limit what CR records are pulled by CRFeed, (some of the criteria are tbllooktypefk = 11, action = none, etc.), clearly not CRs in the sense that I would have thought of | 9/11/2007 |
| 6 | sent email to michelle for permission to fix data per amy's instructions (change s.intstatus from 2 to 3 probably) | 9/12/2007 |
| 7 | have sent numerous emails to mk including today -- need user to authorize data change | 9/21/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|---|---------------------|------------------|-------------------|-------------|-------------------------------------|
| 1 | Interview user 1/2 | Seek User Input/A | Business Process | Amy Walls | Complete | <input checked="" type="checkbox"/> |
| 2 | Research and find propose solution | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | Interview user 2/2 | Seek User Input/A | Business Process | Amy Walls | Complete | <input checked="" type="checkbox"/> |
| 4 | compare delta of Ps in old and proposed new qrys | Review/Research | SQL Script(s) | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 5 | Apply new view to TEST and PROD | Change | SQL View | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 6 | notify users of view change | Build/Entity Promot | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 7 | get permission to data fix s.intstatus | Seek User Input/A | Business Process | Michelle Knieriem | In Progress | <input type="checkbox"/> |
| 8 | data fix | Change | Data | David Pepper | Pending | <input type="checkbox"/> |
| 9 | fix research view files with prod version | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 74 Expiration Process Enhancements Phase #1**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070824_ExpirationProcessEnhancements_1

Project Status**Completed****Due**

9/7/2007

Created

8/24/2007

Completed

9/17/2007

Requestor

David Pepper

Purpose: Phase 1: Enhance Expiring Sites Status Report

We need to know at least 2-weeks before sites are set to expire, and especially we need to know if multi-site protocols are set to expire.

Scope: P, PR, S, SR, Epiring Sites Status Report, frmReports, views, SPs, functions, etc.NotesDate

- | | | |
|---|---|-----------|
| 1 | this has to be in place for next month, so it has to be done by Friday 8/31/07. | 8/24/2007 |
| 2 | see \\10.130.128.10\CRRIMaint\LegacyApplication\20070724_ParameterizedExpiringSitesStatusRpt | 8/31/2007 |
| 3 | CRRIDev2 entities scripted out to:
\\10.130.128.10\CRRIMaint\LegacyApplication\Administration\CRRIDev2Refresh\200709041105; goal is to overwrite CRRIDev2 with PROD data to minimize testing with live data | 9/4/2007 |
| 4 | report currently pulling several Pis who are set to expire; it seems to be working. | 9/7/2007 |
| 5 | Buckley pulled on today's new version of report (9/13/07); this wrong, but part of resultset that came through when we changed criteria. Most of the change was desirable. I think that Buckley is a anomaly in the data where more than one record has an expiration date, or the presence of the newer expiration date threw it off. This will result in the development of a new set-based test in the criteria of the sp. | 9/14/2007 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|--|---------------------|------------------|--------------|------------|-------------------------------------|
| 1 | Copy best version of prod app to working folder | Build/Entity Promot | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | Make Test App: ADP Connection | Change | ADP Entity | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | Make Test App: Utilities QuickConnect | Change | ADP Module | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 4 | Make Test App: Set "Compact on Close" | Change | ADP Entity | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 5 | TEST new version of procRptExpiringSites.sql | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 6 | PROD promote procRptExpiringSites.sql | Build/Entity Promot | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 7 | fix view/rpt issue (buckley) from 9/13 | Change | SQL View | David Pepper | On Hold/Ca | <input type="checkbox"/> |
| 8 | get user approval | Seek User Input/A | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 158 Research and Troubleshoot ICF Mod 0707025**Priority: High**Project Status**Completed**Created

1/3/2008

Completed

1/28/2008

Requestor

Sharon Chang

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

- | | | |
|---|---|-----------|
| 1 | there is nothing to do here -- the request is ostensibly to "make it right if there is anything to do", and the tblinvoice records have already been pulled for December, and once they have reached this stage, they are not consumed by any business process (including back office), and no specific request has been made to change them either | 1/28/2008 |
|---|---|-----------|

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 research problem	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 update data if discrepancy warrants it	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
3 misc	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 86 Query Amendments Not Pulling IB Mod**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070829_QueryAmendmentsNotPullingIBMod

Project Status**Completed**Due

8/31/2007

Created

8/29/2007

Completed

9/17/2007

Requestor

Jeffrey Stockton

Purpose: Need to determine if problem is with app, view, or data and evaluate if there is anything to be done.**Scope:** data is in P, S, M, tblLook; the scope of the maintenance ended up being the creation of a new view in SQL Server, and implementing it in the query database, (with a new QDB release)NotesDate

- 1 A modification to an Investigator's brochure is entered in the database under IBs. Query amendments should pull this information. It's not happening. 8/29/2007

IB mods entered (Aug2807) for the following:

0606004

0706016

0507028

0507029.

ONLY 0706016 is showing this IB mod under query amendmenta.

- 2 showed user criteria in qry Research\vwAmendments_dp1.sql and compared with values in records in scope SelectRecs.sql and concluded that the problem is with s.intstatus must be active. 8/29/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 notify users	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 interview user 1/2	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 research qryAmendments	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4 interview user 2/2 decide to change view or not	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5 TEST new view for all statuses	Add	SQL View	David Pepper	Complete	<input checked="" type="checkbox"/>
6 TEST implementing new view in QDB	Add	MDB Query	David Pepper	Complete	<input checked="" type="checkbox"/>
7 Amy will look at 4 records, and consider 1st rec	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
8 DP: write up description of proposed qry changes	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
9 DP: ask about delete translation criteria	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
10 TEST add query to tblQryDBObject	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
11 PROD add query to tblQryDBObject	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
12 Publish MDB query db app	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 159 Research and Troubleshoot Package ICF Mod 0307017**Priority: High**Project Status**Completed**Created

1/3/2008

Completed

1/28/2008

Requestor

Sharon Chang

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

- | | | |
|---|---|-----------|
| 1 | there is nothing to do here -- the request is ostensibly to "make it right if there is anything to do", and the tblinvoice records have already been pulled for December, and once they have reached this stage, they are not consumed by any business process (including back office), and no specific request has been made to change them either | 1/28/2008 |
|---|---|-----------|

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|------------------------------|-----------------|------------------|--------------|------------|-------------------------------------|
| 1 | research | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | update data if needed | Review/Research | Business Process | David Pepper | On Hold/Ca | <input checked="" type="checkbox"/> |
| 3 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 78 Rpt Fixes for rptSiteAdFax and rptSiteAdLetter**Priority: Medium****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070824_RptSiteAddLetterAndFaxFixesProject Status**Completed**Due

8/30/2007

Created

8/24/2007

Completed

8/29/2007

Requestor

Katie Bodenhorn

Purpose: two changes that katie wanted, plus fix box around log control which shouldn't be there**Scope:** rptSiteAdLetter, rptSiteAdFax, view/function?NotesDate

- | | | |
|---|---|-----------|
| 1 | added logo fix and LC fix to db version 394 | 8/28/2007 |
|---|---|-----------|

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|--|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | find source of address and add space | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | LC initials portion of tagline thingy | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | unbox logos | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 95 **Help user add a new board member****Priority: Medium**Project Status**Completed**Created

9/12/2007

Completed

9/12/2007

Requestor

Jane Liu

Purpose: research app/datamodel and help user do task.**Scope:** using the app, thinking about datamodelNotesDate

- 1 contacts have a "type" fk in tblcontact; the app overcomes the limitation of this design by having types that are combinations of types (e.g. employee/board member)

9/12/2007

TasksActionEntityAssignedTask Status1 **misc**

Review/Research

Business Process

David Pepper

Complete



ProjectID: 50 Expedited not Reported Issue**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070802_ExpeditedNotReported

Project Status**Completed**Due

8/28/2007

Created

8/2/2007

Completed

8/29/2007

Requestor

Jeffrey Stockton

Purpose: reported by Jeffrey Stockton: Lauri Carlile**Scope:** viewExpeditedNotReported, frmWizardProtocolMods, frmProtocolMods, tblModNotesDate

- | | | |
|---|---|-----------|
| 1 | reported while I was out of town - dp 8/6 | 1/1/2007 |
| 2 | see screenshot: IRB Notification ... Required = NO; should be no IRB Notification date;
Query criteria = YES and null date | 8/20/2007 |
| 3 | user reported that he chose "no" but the thing is still null; not sure how to interpret that -- need to test in
test to see what the limitations of the form are | 8/21/2007 |
| 4 | left msg with user -- I think that he just needs to make sure that all versions have no rather than null | 8/21/2007 |
| 5 | Emailed Theresa with plan to change default for blnIRBRequired to 1 (Yes) -- waiting for go-ahead | 8/22/2007 |
| 6 | also released in 395 | 8/29/2007 |

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 interview user	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 analyze report	Review/Research	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
3 analyze form	Review/Research	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
4 test form	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5 TEST Change tblMod.blmIRBRequired default to 1	Change	SQL Table	David Pepper	Complete	<input checked="" type="checkbox"/>
6 TEST change frmWizardProtocolMods call to sps	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
7 TEST change frmWizardProtocolIBs call to sps	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
8 TEST procAddProtocolMod	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
9 TEST procUpdateProtocolMod	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
10 TEST procAddProtocolIB	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
11 TEST procUpdateProtocolIB	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
12 PROD change frmWizardProtocolMods call to sps	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
13 PROD change frmWizardProtocolIB call to sps	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>

14	PROD Change tblMod.blnIRBRequired default to 1	Change	SQL Table	David Pepper	Complete	<input checked="" type="checkbox"/>
15	PROD procAddProtocolMod	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
16	PROD procUpdateProtocolMod	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
17	PROD procAddProtocolIB	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
18	PROD procUpdateProtocolIB	Change	SQL Stored Proced	David Pepper	Complete	<input checked="" type="checkbox"/>
19	version app	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
20	Fix PROD Add SPs to use form Control Values	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
21	Fix PROD Add frmWizardProtocolMods w/default Yes	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
22	version app	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 42 Received Protocols with Sites by Year/Month**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070719_RptProtocolsWSitesReceived

<u>Project Status</u>	<u>Created</u>	<u>Requestor</u>	<u>Rank</u>
Cancelled	7/19/2007	Lynn Weatherly	10

Purpose: Jennifer started to make a request for some reporting and analysis and put the project on hold after we began to discuss the specifics.

Scope: Would be/have been a complex analysis and reporting project with a new interface for a parameterized report -- probably about 2 days of work.

<u>Notes</u>	<u>Date</u>
1 sent email to Jen articulating what we talked about and requesting more info about what we are trying to do; request is on hold per Jen	1/1/2007
2 Ownership transferred from Jennifer Stephenson to Lynn Weatherly per Jenn.	8/30/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc work	Add	IT Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 148 Research Two Queries For Address Issues**Priority: Medium**Project Status

Cancelled

Created

12/5/2007

Requestor

Michelle Knieriem

Rank

11

Purpose: Two Documents are occasionally pulling scrambled addresses. Need to research the qry/views to reveal where/how the data is stored/retrieved that might contribute to the problem.

Scope: irb approval notice: qryInitialApproval (vewInitialApproval parameterized by team and approval date)
 routine termination of irb approval notice: qryTermApproval (vewTermApproval parameterized by team and approval date)

NotesDate

- | | | |
|---|---|------------|
| 1 | sent email to michelle asking for example data that have discrepancies to help distinguish between duplicate records and query/report problems. | 12/21/2007 |
| 2 | sent email again asking for example records | 1/16/2008 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 31 Discrepancy betw. qryPastDue and qrySiteStatusRpt**Priority: Low**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070711_KratzDiscrepQryPastDueAndQrySiteStatusRpt

Project Status

Completed

Due

7/11/2007

Created

7/11/2007

Completed

7/11/2007

Requestor

Heather Karabaich

Purpose: Compare logic between qryPastDue and qrySiteStatusReport to see why Kratz doesn't pull on the qrySiteStatusReport

Scope: Research queries/data and make data fix.

NotesDate

- | | | |
|---|---|----------|
| 1 | There are 2 instances of Kratz as a site on this protocol; heather runs [one of] the queries (SSR?) and filters by "CR No.", "Term No."; qrySiteStatusReport has criteria for p.intPReviewInterval = 1 and p.intReviewInterval = 2; since this protocol is annual/annual (1/1) it won't pull on the qrysite statusreport (vewStatusReport) | 1/1/2007 |
|---|---|----------|

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------------------------------|-----------------|----------|--------------|----------|-------------------------------------|
| 1 | Research qrySiteStatusReport | Review/Research | SQL View | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------------------------------|-----------------|----------|--------------|----------|-------------------------------------|

ProjectID: 2 Update Report Letterhead**Priority: Low****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070613_UpdateLetterHead_RptSiteAdLetter**Project Status****Completed****Due**

8/24/2007

Created

6/13/2007

Completed

8/24/2007

Requestor

Reba Frey

Purpose: update report letterhead and do for gail**Scope:** minimal changes to an ADP report; need to have a release to publish it in, hopefully on another maintenance.**Notes****Date**

- | | | |
|---|--|-----------|
| 1 | This request was rolled into changes done and simultaneously released for ProjectID: 11 BOF/EOF on IB Tab | 8/23/2007 |
| 2 | katie, and other asst coordinators use this report most. | 8/24/2007 |
| 3 | there are really 2 reports: rptSiteAdFax,rptSiteAdLetter -- both are sent to PDF, printed [and then faxed in the case of the fax one]. | 8/24/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|---|---------------------|------------|--------------|------------|-------------------------------------|
| 1 | test rptSiteAdLetter 2 | Change | ADP Report | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | rptSiteAdLetter and rptSiteAdFax | Change | ADP Report | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 3 | Build Promotion process | Build/Entity Promot | IT Process | David Pepper | On Hold/Ca | <input type="checkbox"/> |

Project Type: 4. Form Troubleshooting**ProjectID: 90 Troubleshoot CR Update Clarifications Recd 0507023****Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070905_CRUpdateClarificationsRecd_0507023

Project Status**Completed****Created**

9/5/2007

Completed

9/5/2007

Requestor

Bonnie Buggs-Perow

Purpose:

User needs to update CR record with Clarifications Received data; numerous disabled controls and unpredictable form automation makes this difficult. Need to do immediate data fix and then troubleshoot form so users can change what they need to.

Scope:

immediate data fix to SR and long-term project to form logic on frmWizardSiteDates and frmWizardSiteDatesB; only real persistent problem is that "clarifications received" (dtmReportedDate, see "Dates" form) is disabled and so needs a data fix to change it.

Notes**Date**

- | | | |
|---|--|----------|
| 1 | user wants to change:
1. review type from full board to expedited
2. event date from 6/1 to 6/22/07
3. irb notification date from 6/1 to 7/9/07 (control is disabled)
4. clarification received should remain "yes", but turns disabled "no" [when the date it set?]
5. CR Received should be "no"; may change similar to clarification recd. | 9/5/2007 |
| 2 | user also pointed out wrongness of storing a record type of clarifications received and having a clarifications received combo box | 9/5/2007 |
| 3 | also saving generates error "protocol not active...the protocol you are trying to approve..."; protocol appears to be "submitted" rather than active | 9/5/2007 |
| 4 | changing status fixed all problems except need to set IRBNotificaiton Date from 6/1/07 to 7/9/07 | 9/5/2007 |
| 5 | it seems likely that clarifications received is different than the other CR date types and the workflow around it is different; it is a record where you go back in and change the data after the record exists -- rare | 9/5/2007 |
| 6 | will submit a new maintenance to change the control to be enabled or something | 9/5/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|---|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | Change p.intstatus to active & repeat data entry | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | change IRBNotificaiton Date from 6/1/07 to 7/9/07 | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 92 Secure "IRB Notify Date" with SQL Group 1/2**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070906_SecureIRBNotifyDateSQLGroup**Project Status****Completed****Due**

10/26/2007

Created

9/6/2007

Completed

1/21/2008

Requestor

Tara McDonough

Purpose:

frmWizardSiteDates: IRB Notify Date and frmSiteDates: Reported Date both expose data stored in the sr.dtmReportedDate field. This user/manager would like to limit access to this field to a group of users.

Scope:

frmWizardSiteDates, tblContact (psuedo-role) or alternatively a real SQL Role, several other forms which also have an "irb notify date" which is also set by irbadmin

Notes**Date**

- | | | |
|---|--|------------|
| 1 | left message RE request and suggested we meet for interview | 9/6/2007 |
| 2 | asked theresa for help prioritizing this request -- seems like an unusually draconian change to come from one user (even a manager) | 9/11/2007 |
| 3 | got go-ahead from Theresa, she said that this was partly a "training issue" but that limiting access to field was a good idea; Emailed Tara for interview and asked for list of people to enable with this. Seems like we will be doing the same architecture as expiration date override ("low road") -- changing data model to allow a different kind of user, rather than doing it in roles -- lame | 9/17/2007 |
| 4 | requirements extend to "same" field appearing on several forms and storing a date in several different tables -- the idea in most or every case is that other users may schedule a site or protocol CR, or instantiate a version (tblmod), or an IB, but IRB Admin puts in the date for when the IRB does something. | 9/19/2007 |
| 5 | IRB Admin sets date for initial, cr, suspended (both), for cause, change of pi, and DOES NOT set a date for terminated, out of cycle term, administrative term, [and data verified]. | 9/19/2007 |
| 6 | This request parallels the expiration date override request:
\\10.130.128.10\CRRIMaint\LegacyApplication\20070612_ExpDateOverrideGroup
\\10.130.128.10\CRRIMaint\LegacyApplication\20070711_ExpDTOverride_FreshStart | 10/15/2007 |

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 interview user 9/19	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 TEST make field in tblContact modeled on expdtor	Change	SQL Table	David Pepper	Complete	<input checked="" type="checkbox"/>
4 TEST data in tbllook/tbllootype modeled on expdtor	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
5 -1 global v for new group membership	Change	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
6 0 change login form to store global	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
7 1 frmwizardsitedates OptionExplicit/CodeStyle	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
8 2 frmwizardsitedatesB OptionExplicit/CodeStyle	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
9 3 frmwizardprotocoldates OptionExplicit/CodeStyle	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
10 4 frmwizardprotocolib OptionExplicit/CodeStyle	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
11 5 frmwizardprotocolmods OptionExplicit/CodeStyle	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>

12	push frmwizardprotocolib changes to prod	Build/Entity Promot	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
13	push frmwizardprotocolmods changes to prod	Build/Entity Promot	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
14	push frmwizardprotocoldates changes to prod	Build/Entity Promot	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
15	push frmwizardsitedates changes to prod	Build/Entity Promot	ADP Module	David Pepper	Complete	<input checked="" type="checkbox"/>
16	PROD make field in tblContact modeled on expdtor	Change	SQL Table	David Pepper	Complete	<input checked="" type="checkbox"/>
17	PROD data in tbllook/tbllootype modeled on expdtor	Add	Data	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 177 User errors with 94 Null value on Terming with Add**Priority:** High

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080206_UserErrorsWith94NullOnADDTerm

Project Status

Completed

Created

2/6/2008

Completed

2/6/2008

Requestor

Brandon Jonson

Purpose:

User was using add to try to term a line; the correct procedure is to use edit on the last CR (which presumably didn't happen).

User also had a permissions error due to a conflict between username in AD versus SQLServer/tblcontact.

Scope:

[Pending Scope]

NotesDate

- 1 The permissions error could theoretically cause big problems. It would probably be a good idea to force close on the error message, to push any other incidences to the top. The message SAYS to contact a DB admin, but apparently that doesn't inspire users to actually stop what they are doing, since the application may still seem to work.

2/6/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 100 Unable to put in 6-month CR (only 6-month comment)**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070914_UnabletoPutIn6MonthCR**Project Status****Completed****Created**

9/14/2007

Completed

9/21/2007

Requestor

Elizabeth Hache

Purpose: User is unable to put in record she thinks she should / used to be able to.**Scope:** This could be a datafix to SR alone, or we might need to rethink the logic of what happens when you hit edit on frmSiteDates. Recent maintenance revised the rules that governed what happened when you hit edit (formerly based on p.pintReviewType and p.intReviewType, changed to just intdatetype). A larger issue is how the data model and the business need don't agree in context of the two review types.**Notes****Date**

- | | | |
|---|---|-----------|
| 1 | Elizabeth referred me to Monique Hawkins to discuss rules for the edit button. | 9/14/2007 |
| 2 | met with Monique and Heather to discuss; in conclusion, we decided to rollback the maintenance that Heather asked for original change on
\\10.130.128.10\CRRIMaint\LegacyApplication\20070815_frmSiteDatesEditIssue_0704006 will rollback to old logic with msgbox to message user in case that heather identified as needing IT attention | 9/18/2007 |

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	research/interview monique and heather	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2	pull copy of prod db for new code	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3	add code and test if necessary	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
4	publish release	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5	get user approval to close	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 120 Secure "IRB Notify Date" with SQL Group 2/2**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070906_SecureIRBNotifyDatewSQLGroup**Project Status****Completed****Due**

11/2/2007

Created

10/18/2007

Completed

1/21/2008

Requestor

Tara McDonough

Purpose:

frmWizardSiteDates: IRB Notify Date and frmSiteDates: Reported Date both expose data stored in the sr.dtmReportedDate field. This user/manager would like to limit access to this field to a group of users.

Scope:

frmWizardSiteDates, tblContact (psuedo-role) or alternatively a real SQL Role, several other forms which also have an "irb notify date" which is also set by irbadmin

Notes**Date**

- 1 frmWizardSiteDatesB dropped out because it has no IRB Date. We'll leave the code clean up and option explicit though. 10/18/2007

	<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1	1 frmwizardprotocolmods Form_Open note	Change	ADP Form	David Pepper	Complete	✓
2	1 frmwizardprotocolmods UserAction note	Change	ADP Form	David Pepper	Complete	✓
3	2 frmwizardprotocolib Form_Open note	Change	ADP Form	David Pepper	Complete	✓
4	2 frmwizardprotocolib UserAction note	Change	ADP Form	David Pepper	Complete	✓
5	3 frmwizardprotocoldates Form_Open note	Change	ADP Form	David Pepper	Complete	✓
6	3 frmwizardprotocoldates UserAction note	Change	ADP Form	David Pepper	Complete	✓
7	4 frmwizardsitedates Form_Open note	Change	ADP Form	David Pepper	Complete	✓
8	4 frmwizardsitedates UserAction note	Change	ADP Form	David Pepper	On Hold/Ca	✗
9	1 frmwizardprotocolib Diagram	Change	ADP Form	David Pepper	Complete	✓
10	2 frmwizardprotocolmods Diagram	Change	ADP Form	David Pepper	Complete	✓
11	3 frmwizardprotocoldates Diagram	Change	ADP Form	David Pepper	On Hold/Ca	✗
12	4 frmwizardsitedates Diagram	Change	ADP Form	David Pepper	On Hold/Ca	✗
13	1 frmwizardprotocolib Secure dtmirbdate	Change	ADP Form	David Pepper	Complete	✓
14	2 frmwizardprotocolmods Secure dtmirbdate	Change	ADP Form	David Pepper	Complete	✓
15	3 frmwizardprotocoldates Secure dtmirbdate	Change	ADP Form	David Pepper	Complete	✓
16	4 frmwizardsitedates Secure dtmirbdate	Change	ADP Form	David Pepper	Complete	✓
17	Presentation to Managers Meeting	Seek User Input/A	IT Process	David Pepper	On Hold/Ca	✗

18 **New Version to PROD**

Build/Entity Promot IT Process

David Pepper

Complete

**ProjectID: 11 BOF/EOF on IB Tab****Priority: Medium***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070403_ProtocolIB_BOFEofError**Project Status****Completed****Due**

8/24/2007

Created

7/5/2007

Completed

8/24/2007

Requestor

Summer Gonzalez

Purpose: Form throws some errors in normal use (BOF/EOF) navigated to through IB tab.
Troubleshoot form.

Scope: Changes tZo ADP form.

Notes**Date**

- 1 Original Issue see Reba/Summer Gonzales (0307022)
New pending issue from 4/13 see Reba (0407006)

1/1/2007

- 2 new issue from Michelle K. 0807012

8/23/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Test changes to form	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Copy best version of prod app to working folder	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Make Changes to PROD pointing App	Change	ADP Entity	David Pepper	Complete	<input checked="" type="checkbox"/>
4 Version App	Build/Entity Promot	IT Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 19 Correct bad hard-coded status list on frmProtocol**Priority: Medium****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070615_CorrectHardCodedStatusList_frmProtocol**Project Status****Due****Created****Completed****Requestor****Completed**

8/30/2007

6/15/2007

8/29/2007

Theresa Straut

Purpose:

When users return to frmProtocol from another form (e.g. frmprotocoldates) the status list that looks up the description from p.intStatus conflicts with the hard coded list that is used when the form loads. It was determined that the form load list is ok

Scope:

frmProtocol.RefreshStatusLabel()

Notes**Date**

- | | | |
|---|--|-----------|
| 1 | This is almost done, we just need to test. | 8/24/2007 |
| 2 | see \\10.130.128.10\CRRIMaint\LegacyApplication\Research\frmProtocol_RecordDisplay.txt | 8/29/2007 |
| 3 | see \\10.130.128.10\CRRIMaint\LegacyApplication\Research\StatusNotes.txt | 8/29/2007 |
| 4 | version 396 | 8/29/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|--------------------------------|--------|------------|--------------|----------|-------------------------------------|
| 1 | Test changes to form | Change | ADP Form | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | build promotion process | Change | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 160 Add Error Handling for NewYr Rollover (tblIRBDate)**Priority: Medium****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\2008\20080103_AddErrorHandlingNewYrRoll**Project Status****Created****Completed****Requestor****Completed**

1/3/2008

2/27/2008

David Pepper

Purpose:

Easy-to-add error handling here would have saved some time and work. Like across the board, error handling saves time and energy.

Scope:

frmWizardSiteDates UpdateSiteRecieved, frmWizardChangeInv btnNEXt

Notes**Date**

- | | | |
|---|---|-----------|
| 1 | see 157 for notes about rs that errors with eof/bof (currently frmWizardSiteDates line 1263), SQL:
SELECT TOP 1 dtmIRBDate FROM dbo.tblIRBDate WHERE (dtmIRBDate > GETDATE() + 6) | 1/3/2008 |
| 2 | added error handling to frmWizardChangeInv, also added option explicit to same form and had to guess about variable scope and visibility. Best guess is everything is ok. Bob and Theresa said to "take risks". I hope they meant it. | 2/27/2008 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|----------|-------------------------------------|

ProjectID: 121 SAE edit form errors on >=4-character Initials**Priority: Medium***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071026_SAEEditFormErrors4Char**Project Status****Completed****Created**

10/25/2007

Completed

2/29/2008

Requestor

Theodore (TJ) Luck

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

ProjectID: 166 Protocol Versions frmWizardPrototocolMods**Priority: Medium***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\2008\20080118_PVersionsFrmWizardPrototocolMods**Project Status****Completed****Created**

1/18/2008

Completed

3/19/2008

Requestor

Stephanie Housel

Purpose: frmWizardPrototocolMods (edit) on form_load clears action to 0 (none) and then if the user doesn't reset it to whatever it is supposed to be, it gets saved as none.

There is also a need to identify protocols/records with the data problem and pass them to Stephanie as a dataset.

FrmWizardPrototocolMods is closely related to another form called frmWizardPrototocolIB, which has one place where intApproval is changed to 0. See frmWizardPrototocolIB_intApprovalSetTo0.txt This form is outside the scope of this maintenance.

Scope: frmWizardPrototocolMods

<u>Notes</u>	<u>Date</u>
1 0107010 revised protocol version 3: action0 and date not null	1/18/2008
2 this is similar to 116	1/22/2008
3 Jane Liu also reported this problem -- it's obviously very serious. Frustrating that a problem like this isn't considered enough of a priority to fix. But it isn't. The CRRIM that we tested the issue on is: 1107005	2/14/2008
4 This maintenance is part of a larger collection of changes that include a straggling part of 81, and 181.	3/17/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 Handle all instances of intApproval Changing to 0	Review/Research	Business Process	David Pepper	Complete <input checked="" type="checkbox"/>
2 hand-off list of suspicious data to Stephanie	Review/Research	Business Process	David Pepper	On Hold/Ca <input checked="" type="checkbox"/>

ProjectID: 81 Custom Error Message for Login Without Account**Priority: Medium**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20070828_CustomErrMsg4NoLogin

Project Status**Completed**Due

8/30/2007

Created

8/28/2007

Completed

3/19/2008

Requestor

Lauri Carlile

Purpose:

Enhancing this message will make user administration easier and is a "no-brainer". What is currently happening is that new users get the database application on their computer and try to start the application and get this message. Often I haven't been notified of the new user, or haven't gotten enough information to set up their accounts. Typically the missing piece of information is a "model user" to base the new user's permissions on.

Scope:

tblContact, SQL Server: Security Logins, Logins:Database:Roles

NotesDate

- | | | |
|---|--|-----------|
| 1 | -2147217900 "The request for procedure 'tblVersion' failed because 'tblVersion' is a table object. | 8/28/2007 |
| 2 | This maintenance is part of a larger collection of changes that include 166 and 181. | 3/17/2008 |

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 1 more place where there needs handling	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Test error in TEST with domain user	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Create solution and insert into production databas	Change	ADP Form	David Pepper	Complete	<input checked="" type="checkbox"/>
4 Version App	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 72 Safety Report Issue**Priority: Low**Project Status**Completed**Created

8/23/2007

Completed

8/23/2007

Requestor

Lauri Carlile

Purpose:

The safety report form and wizard form for editing have some issues. Lauri reported a discrepancy between the Wizard:FollowUp Number (14) and the Safety Report Form: Report Type string which lists the type and the followup number (1). Lauri had the good idea that the string might be getting truncated.

Scope:

udfINDFollowUpNumber

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 tested modified UDF in TEST and promoted to PROD	Build/Entity Promot	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

Project Type: 5. Account Setup/Troubleshoot**ProjectID: 182 Account Setup Dana Hayden****Priority: Unkno****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\2008\20080306_AccountSetup_DanaHayden**Project Status****Completed****Created**

3/6/2008

Completed

3/6/2008

Requestor

David Pepper

Purpose: model on Brandon Jonson**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 36 Genda Sungelo's Account needs Troubleshooting**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070717_AccountSetup_GlendaSundelo**Project Status****Completed****Due**

7/17/2007

Created

7/17/2007

Completed

7/17/2007

Requestor

Chris O'Brien

Purpose: new account setup**Scope:** tblContact record, SQLServer Logins.

<u>Notes</u>	<u>Date</u>
1 per chris o'brien model on mellissa crouse	1/1/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 ask for model user	Seek User Input/A	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 set up new user	Add	IT Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 49 Theodore Luck Account Setup**Priority: High**Project Status**Completed**Created

8/6/2007

Completed

8/6/2007

Requestor

David Pepper

Purpose: set up new user, modelled on Judith Judkins.**Scope:** tblContact record, SQLServer Logins.NotesDate

- 1 -2147217900
the request for procedure 'tblVersion' failed because 'tblVersion' is a table object

1/1/2007

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|---------------------------|-------------------|------------------|--------------|----------|-------------------------------------|
| 1 | ask for model user | Seek User Input/A | Business Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | set up new user | Add | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |

ProjectID: 83 Account Setup for John Morais**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070828_AccountSetup_MoraisProject Status**Completed**Due

8/28/2007

Created

8/28/2007

Completed

8/28/2007

Requestor

David Pepper

Purpose: [Pending Purpose]**Scope:** [Pending Scope]NotesDate

- 1 Model on Amy Walls

8/28/2007

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|-------------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | In Progress | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|-------------|--------------------------|

ProjectID: 115 Judith Judkins Account Troubleshoot**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071011_JudithJudkinsAccountTroubleshoot**Project Status****Completed****Created**

10/11/2007

Completed

10/11/2007

Requestor

Judith Judkins

Purpose: make user like amy walls so she can edit P-Dates**Scope:** tblContact.blncnginv**Notes****Date**

- | | | |
|---|---|------------|
| 1 | experiment with perms one at a time while she is on the phone to see what makes what happen | 10/11/2007 |
| 2 | tblContact.blncnginv = 1 makes user able to edit P:dates | 10/11/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 154 Account Setup Felix**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071219_AccountSetupFelix**Project Status****Completed****Created**

12/19/2007

Completed

12/19/2007

Requestor

Theresa Straut

Purpose: [Pending Purpose]**Scope:** [Pending Scope]**Tasks****Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 89 Robert Cheek Account Setup/ Brandon Johnson Troubl**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20070905_AccountSetups_BJohnsonAndRCheek**Project Status****Completed****Created**

9/5/2007

Completed

9/6/2007

Requestor

Kira Newsom

Purpose: standard acct setup per Chris O'brien; johnson's perms need to be researched to resolve reported inability to edit "archive" section**Scope:** C, SQLLogin; Role: CRRAdmin governs access to updatable view vewSiteArchived.sql**Notes****Date**

- | | | |
|---|---|----------|
| 1 | numerous emails trying to figure out who has access to archives that brandon lacks | 9/5/2007 |
| 2 | checked bandura vs. newsom vs. johnson vs. pepper and can see no settings that are set in such a way that any one would have access and any other would not -- went to VBs desk (she was the only one around) and observed that she could access/edit archives, although she said before she did it that she thought she could not. | 9/6/2007 |
| 3 | select * from vewsitearchived where tblprotocolfk = (select tblprotocolpk from tblprotocol where strcrriprotid = '0304018') | 9/6/2007 |

Tasks**Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------------------------------|-----------------|------------------|--------------|----------|-------------------------------------|
| 1 | setup robert | Review/Research | IT Process | David Pepper | Complete | <input checked="" type="checkbox"/> |
| 2 | troubleshoot brandon johnson | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |

ProjectID: 104 Name Change for Deborah Toich to D. Scotton**Priority: High****Project Status****Completed****Created**

9/19/2007

Completed

9/21/2007

Requestor

David Pepper

Purpose: account setup requires name change**Scope:** C, SQL User configuration**Tasks****Action****Entity****Assigned****Task Status**

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 117 Grant Expiration Date Override Perms to Vince**Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071017_GrantExpDateOverRPermsToVinceAndMatt**Project Status****Completed****Created**

10/17/2007

Completed

10/19/2007

Requestor

Michele McGee

Purpose: [Pending Purpose]**Scope:** C**Notes**

1 as soon as possible

Date

10/17/2007

Tasks

1 misc

Action

Review/Research

Entity

Business Process

Assigned

David Pepper

Task Status

Pending

☐**ProjectID: 130 Name Change For Katie Everett Bodenhorn****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071105_AccountsBodenhornAndFilescan**Project Status****Completed****Created**

11/5/2007

Completed

11/5/2007

Requestor

Katie Bodenhorn

Purpose: [Pending Purpose]**Scope:** [Pending Scope]**Tasks**

1 misc

Action

Review/Research

Entity

Business Process

Assigned

David Pepper

Task Status

Pending

☐**ProjectID: 141 Set up Tanesha Schreiber like Katie B./Matt R.****Priority: High***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20071126_AccountSetupTaneshaSchreiber**Project Status****Completed****Created**

11/26/2007

Completed

11/27/2007

Requestor

Chris O'Brien

Purpose: [Pending Purpose]**Scope:** [Pending Scope]**Tasks**

1 misc

Action

Review/Research

Entity

Business Process

Assigned

David Pepper

Task Status

Complete

☒

ProjectID: 161 Account Setup Ling.Tang**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080104_AccountSetup_HeeLingTang**Project Status****Completed****Created**

1/4/2008

Completed

1/4/2008

Requestor

Chris O'Brien

Purpose: account setup**Scope:** C, SQLRole**Notes****Date**

1 model after anthony shalcosky

1/4/2008

2 user name was changed from hee [ling] tang to "ling tang".

1/11/2008

Tasks**Action****Entity****Assigned****Task Status**1 **misc**

Review/Research

Business Process

David Pepper

Complete

**ProjectID: 169 Set up Giselle Diener****Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080122_AccountSetup_GiselleDiener**Project Status****Completed****Due**

1/23/2008

Created

1/22/2008

Completed

1/22/2008

Requestor

David Pepper

Purpose: setup user who is part of work group including shirley bailen and mellissa crouse.**Scope:** SQL group, C**Notes****Date**

1 probably like shirley bailen (crradmin) or mellissa crouse (crr); jeff trunzo (beard) is manager

1/22/2008

Tasks**Action****Entity****Assigned****Task Status**1 **misc**

Review/Research

Business Process

David Pepper

Complete



ProjectID: 173 Account Perms Change Brandon Johnson**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080130_AccountSetup_BrandonJohnson**Project Status****Completed****Created**

1/30/2008

Completed

1/30/2008

Requestor

Michelle Knieriem

Purpose: brandon is switching jobs; model his new CRRID perms after Ling Tang**Scope:** c, sql server

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 176 Account Setup Melissa Crouse**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080201_AccountSetup_MelissaCrouse**Project Status****Completed****Created**

2/1/2008

Completed

2/1/2008

Requestor

Chris O'Brien

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 178 Turn On Safety Report Deletion for TJ Luck**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080206_TurnOnSafetyRptDeletion_TJLuck**Project Status****Completed****Created**

2/6/2008

Completed

3/5/2008

Requestor

David Pepper

Purpose: [Pending Purpose]**Scope:** [Pending Scope]

<u>Notes</u>	<u>Date</u>
1 sample rec: 0407005	2/6/2008
2 referred to theresa who referred it to Lauri; sent email to TJ - wait and see.	2/6/2008
3 Tons of other users have blnchngrinv turned on; not sure who uses it.	2/6/2008

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 213 Adjust Perms to Edit Site Dates for Cheek**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080521_AccountPermsChange_Cheek**Project Status****Completed****Created**

5/21/2008

Completed

6/4/2008

Requestor

Michelle Knieriem

Purpose:

robert cheek needs to be able to edit event dates on frmwizardsitedatesb which seems to be controlled by tblContact.blnChngInv.

Scope:

[Pending Scope]

Notes**Date**

1 test record: 0807022 ~Devon

5/21/2008

Tasks**Action****Entity****Assigned****Task Status**1 **misc**

Review/Research

Business Process

David Pepper

Pending

☐**ProjectID: 118 Grant Expiration Date Override Perms to Matthew R.****Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071017_GrantExpDateOverRPermsToVinceAndMatt**Project Status****Completed****Created**

10/17/2007

Completed

11/2/2007

Requestor

Michele McGee

Purpose:

[Pending Purpose]

Scope:

[Pending Scope]

Notes**Date**

1 after or about 11/1?

10/17/2007

Tasks**Action****Entity****Assigned****Task Status**1 **misc**

Review/Research

Business Process

David Pepper

Pending

☐

ProjectID: 133 Setup CRRIDB for "filescan" account

Priority: High

Folder \\10.130.128.10\CRRIMaint\LegacyApplication\20071105_AccountsBodenhornAndFilescan

<u>Project Status</u>	<u>Created</u>	<u>Completed</u>	<u>Requestor</u>
Completed	11/5/2007	11/5/2007	Chris O'Brien

Purpose:

"filescan" is the loginid for the file room computer that will be used to access the application

Scope:

[Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>
1 misc	Review/Research	Business Process	David Pepper	Pending <input type="checkbox"/>

Project Type: 6. Administrative**ProjectID: 102** Change Proj DB for daily reporting of new pending**Priority:** UnknoProject Status

Completed

Created

9/17/2007

Completed

9/17/2007

Requestor

David Pepper

Purpose: per meeting this morning, there is a need to email theresa (and bob) every new project that is not routine (not accounts or administrative)

Scope:

1 qry

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Add	MDB Query	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 106 Meeting Prep for 9/21 Mtg.**Priority:** HighProject Status

Completed

Created

9/20/2007

Completed

9/20/2007

Requestor

David Pepper

Purpose: [Pending Purpose]

Scope: [Pending Scope]

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 56 Make Changes to Project Management DB for Status R**Priority: High**

Folder \\10.130.128.10\CRRIMaint\ProjectManagement\20070618MiniProjectMgmt

Project Status**Due****Created****Completed****Requestor****Completed**

8/31/2007

8/6/2007

10/5/2007

David Pepper

Purpose:

Bob wants to know:

1. What projects are open[/closed]
2. Where they came from (who)
3. Total amount of time worked
4. Total amount of time estimated
5. Weekly Status Report for meeting with past week progress
6. Bi-Weekly User/Requestor report [process] with open requests and simple status (pending, working, [%?] completed).

Aid in project management: Changes to mini project management DB to make status of projects transparent to Bob G. and to make the documentation consistent

Scope:

DB structure, Form and Report Development to mini-project management DB

Notes**Date**

- 1 Send 6. Bi-Weekly Status Report to requestors and to Theresa and Lauri, Bob and Bob. 8/14/2007
 - 2 bi-weekly is to communicate status of all requested work to requestors and cohort of interested people; could be 2 things, an overall and a detail going to each user, like an email RE status. 8/14/2007
- Should only distinguish between data fixes and other "projects"; needs: status, creation date, %complete, no hours, pending or in-progress
- 3 Project dashboard report will only show high-priority projects from each category (and maybe medium projects more than 75% complete) -- it's like a todo list and it HAS to be a single page; it's for Theresa's 30 minute meeting 9/6/2007
 - 4 BG supplied requirements for "project dashboard report":
\\10.130.128.10\CRRIMaint\ProjectManagement\20070618MiniProjectMgmt\CRR Database Projects and Activities.doc 9/11/2007
 - 5 the development phase for this app is basically finished -- there are still somethings that probably should be done, including adding the legend to the main report, parameterizing the "detail" report so it can be run for a single project only, etc. Another area where the planned project is no longer needed is in the dashboard and weekly report tasks; we are now handling that with a 1-page summary that shows 5 most important ("High priority") requests and also shows recently completed requests. 10/5/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Change datamodel for status	Change	MDB Table	David Pepper	Complete	<input checked="" type="checkbox"/>
2 Harmonize Form for status	Change	MDB Form	David Pepper	Complete	<input checked="" type="checkbox"/>
3 Harmonize Report for status	Change	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
4 Harmonize Report for notes	Change	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
5 Harmonize Form for notes	Change	MDB Form	David Pepper	Complete	<input checked="" type="checkbox"/>
6 Project Summary Report	Add	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
7 Change datamodel for time	Add	MDB Table	David Pepper	Complete	<input checked="" type="checkbox"/>
8 Update data for time	Change	Data	David Pepper	Complete	<input checked="" type="checkbox"/>
9 Parameterize Project Report (s)	Change	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
10 Enhance form/report with calculated time backlog	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

11	Project Dashboard Report	Add	MDB Report	David Pepper	Complete	<input checked="" type="checkbox"/>
12	Make Legend, etc. to Clarify Categories	Change	MDB Report	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
13	Create Weekly Progress Reporting Process	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
14	Create Bi-Weekly User Reporting Process	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
15	Parameterize Report for Single Project Output	Change	MDB Report	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>

ProjectID: 99 Meeting Prep for 9/17 Mtg (9 AM)

Priority: High

Project Status

Completed

Created

9/14/2007

Completed

9/20/2007

Requestor

David Pepper

Purpose: Prepare for meeting ahead of time

Scope: Guest Package:

Admin Package:

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 113 Modify Apps to Remove Dependency on Admin Perms**Priority: High**Project Status**Completed**Created

10/8/2007

Completed

10/10/2007

Requestor

Chris O'Brien

Purpose:

There is a need to revoke "administrator" privileges on user's computers. The greatest concern is that users could side-step the VPN by installing "LogMeIn"/"PC Anywhere" type software.

However, Access ADPs and MDBs require extensive permissions on the files/folders they work with (although only on those files/folders). Our architecture has a common install directory (C:\Program Files\CRRIDB).

The simplest solution would be to grant permissions on just the 1 folder.

The more commonly accepted solution to this architecture (which would make administrative overhead for each application) is to have the app installed to the user's sand-box (C:\Documents and Settings\[UserName]...), which is what it is for.

Another scenerio would be to install it to a network location that each individual user has access to (e.g their network drive).

Each of these 3 scenerios should be evaluated. The criteria for deciding which approach to take should weigh the anticipated costs of administration, the impact on network performance [if any], and the elegance of the solution, because solutions are often extended and duplicated.

Scope:

In the case of 1.: no application modifications, just a permissions change on the user's computers.

In the case of 2. application changes, probably to both apps, and again to the version control "CRRID Update" application which operates fairly transparently, and few people know about.

In the case of 3. Testing of network performance of new remotely installed app.

If we do 2 or 3, we might be able to architect a solution that works for both (i.e. doesn't care where the database is installed).

NotesDate

- 1 tested this out with Chris, he can take it from here, and there shouldn't be an issues with CRRID/CRRIDQuery.

10/10/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 meet to strategize	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 test version control and folder ownership with IT	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>

ProjectID: 167 Monique Hawkins Broken DB File**Priority: High**Project Status**Completed**Created

1/22/2008

Completed

1/22/2008

Requestor

David Pepper

Purpose: Monique used the DB after running the update, but somehow the file got corrupted, and today the size is reported as 0kb.

Scope: [Pending Scope]

NotesDate

- | | | |
|---|--|-----------|
| 1 | Re-ran the update by updating the file by hand and changing the ini file version. Then for safe measure, overwrote the whole fileset with the install fileset. | 1/22/2008 |
| 2 | talked to chris, our theory is that the file got corrupted "on it's own" sometime yesterday, possibly due to network issues, etc. We'll see if it recurs. | 1/22/2008 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 187 Evaluate Restored SQL Server DB**Priority: High**

Folder \\10.130.128.10\CRRIMaint\LegacyApplication2008\20080324_EvaluateRestoredSQLDB

Project Status**Completed**Created

3/28/2008

Completed

4/18/2008

Requestor

David Pepper

Purpose: As a test of the backup/archival process there is a test server at 192.168.134.8 that is to be used to evaluate. There are no apps on it, so this is a limited test to see if the data is there and observe if the groups, perms, etc are there as much as can be done from EM/QA

Scope: So far no AD related testing (nothing with perms), just opened the DB in EM and QA and observed it doing what it is supposed to (from the point of view of dbo).

NotesDate

- | | | |
|---|--|-----------|
| 1 | database container stood up in mindSHIFT domain, so testing consisted of what was possible with administrator account. OK for now, but we weren't able to take the test task very far. To take it the next steps we will need to add a 2nd non-dbo test account, log in with that, and attempt to do things to the DB from QA to evaluate if the DB is handling perms and users correctly. All-said, I think that this backup is working as I would expect it to be. | 3/28/2008 |
| 2 | now waiting for Chris to get back from vacation 4/7/08. | 3/28/2008 |
| 3 | per bob's instructions sent draft report of findings from this project to Chris for editing. | 4/16/2008 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 80 Diagram CRR Database Milieu**Priority: High**Project Status**Completed**Due

8/31/2007

Created

8/27/2007

Completed

9/5/2007

Requestor

Bob Gosline

Purpose: Make diagram to help explain project types and scope.**Scope:** Visio diagram to clarify scope of CRR projects.

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 misc	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 112 Make/Install "TEST" DB for Heather's Computer**Priority: High****Folder** \\10.130.128.10\CRRIMaint\LegacyApplication\20071001_InstallTestDBFor2UsersProject Status**Completed**Created

10/1/2007

Completed

10/16/2007

Requestor

Michelle Knieriem

Purpose: There is a temporary need to grant access to the test database to 2 users.**Scope:** Heather and Austin's computers; need to be mindful of these users of the test database -- this is a two-way process where they need to be aware of my actions and I need to be aware of theirs.

<u>Notes</u>	<u>Date</u>
1 there is no version control for the test db, so new releases will tend to obsolete the test db unless I replace it.	10/2/2007
2 still waiting for Heather to be here to install it on her computer	10/15/2007

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 interview michelle	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
2 create new SOP for test DB versions	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
3 create new version of app pointing to test	Review/Research	Business Process	David Pepper	On Hold/Ca	<input checked="" type="checkbox"/>
4 create new version of qdb pointing to test	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
5 add heather and austin as users	Review/Research	Business Process	David Pepper	Complete	<input checked="" type="checkbox"/>
6 install apps for heather and austin	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>
7 talk them through launching etc.	Review/Research	Business Process	David Pepper	Pending	<input type="checkbox"/>

ProjectID: 150 Document "Invoice" Process From Price List to CRR**Priority: High**Project Status

Cancelled

Created

12/12/2007

Requestor

David Pepper

Rank

7

Purpose:

Several "invoice" projects have pointed to a need to understand "invoices" (tblinvoice, tblinvoiceitems, tblprotocolinvoice, etc.), vewInvoice, and [accounting] invoicing better. A short documentation project could be used to help facilitate any number of discussions and processes, including education of users, confronting risks of under-billing or billing wrong, day-to-day maintenance. Understanding this is a prerequisite for any reconciliation in CRR. It could also be used to help develop reports that would help users, IT, and/or finance get insight into the CRR data.

Scope:

[Pending Scope]

NotesDate

- | | | |
|---|---|-----------|
| 1 | see pricelist research at
\\10.130.128.10\CRRIMaint\LegacyApplication\Research\20071207_InvoicePointsOfEntry | 1/4/2008 |
| 2 | this has been reworked as 192,193,194, and 195. | 4/18/2008 |

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 97 Rewrite App (ADP) and QueryDB (MDB) Publishg. Instr**Priority: Medium***Folder* \\10.130.128.10\CRRIMaint\LegacyApplication\20070913_RewriteADPAndMDBPubInstructionsProject Status

Completed

Created

9/13/2007

Completed

9/14/2007

Requestor

David Pepper

Purpose:

During recent maintenance to QDB it has become clear that the documentation for doing a release isn't specific enough about the process and how it differs from ADP vs QDB.

The instructions need to spell out how to make a TEST instance of the two apps (which has a different procedure for each) and should now be separated into two separate documents.

Scope:

\\sql01\ManageWare\Database\ForDeveloperToPublishNewAppRelease.txt
 \\sql01\ManageWare\Database\ForDeveloperToPublishNewQueryDatabaseRelease.txt

TasksActionEntityAssignedTask Status

- | | | | | | | |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|
| 1 | misc | Review/Research | Business Process | David Pepper | Pending | <input type="checkbox"/> |
|---|-------------|-----------------|------------------|--------------|---------|--------------------------|

ProjectID: 62 Email Too-broad proj.s to Theresa and delete recs**Priority: Medium****Project Status****Completed****Created**

8/14/2007

Completed

8/14/2007

Requestor

David Pepper

Purpose:

the following projects were too broad to ever be worked/finished and need to be removed from the mini-project mgmt db:
22 CRRIQuery.qryCRStatus vs. CRRI:SiteReviewHistory
23 CR vs. Dates:Due Date Discrepancy
26 Agenda: Troubleshoot and Overcome all issues
27 Terminations: Troubleshoot and Overcome all issues
28 #4 All other CR history issues

Scope:

PM Database

<u>Tasks</u>	<u>Action</u>	<u>Entity</u>	<u>Assigned</u>	<u>Task Status</u>	
1 Misc	Delete	Data	David Pepper	Pending	<input type="checkbox"/>
