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| ***MEETING MINUTES*** |  |

**SCRIBE:** Gaby Tulchinskaya

**PROJECT:** GreenSheets Re-Design

**MEETING NAME:** GreenSheets Re-Design

**ATTENDEES:** OGA:Crystal Wolfrey, Eugenia Chester, Stacey Kocher

CBIIT: Nelya Gunina, Jennifer Kwok, Gerald Momplaisir,

Yakov Polonsky, Larry Brem, Gaby Tulchinskaya, Subashini Varadarajan.

**MEETING DATE/LOCATION:** 10/20/2016; 9609 Medical Center Dr., Meeting Room # 1W032/034

**Purpose of the meeting:**

Discuss how GreenSheets system can provide ability to view and test submission of updated greensheet before promoting to production.

**Discussion and decisions**:

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| **Topic** | **Decisions** |
| Roles | Review Draft Greensheets link in GS system should be provided to all users of GS system who have Author or Approver role in Form Builder.    These users will have access to the screen below:    Only user(s) with Draft Admin role (Rob) will have ability to Promote and Reject module (buttons are displayed only for them)    Users, who can access “Review and Test module” screen, will send email to testers. Any user of GS (Program staff or Specialists) can be a tester. The system should NOT impose any restrictions on testing (e.g. Program Director can test Specialist greensheet and Specialist can test Program grrensheet. OGA staff will be responsible for preventing such situations, but no system restrictions are needed.  Tester will receive email with a link, and get access only to greensheet test page (no access to “Review and Test module” screen):    Any user, who can access “Review and Test module” screen, should also have ability to test any form |
| Test by form | One form is related to multiple type/mechs. Users need to test by form (no need to attach it to a specific grant; no need to test by type/mech). No need to test “matching answers’ functionality. |
| Revision module | Separate “Review and Test module” screen is still need for Revision module. User will send email to a tester who will test revision form. |
| Functionality, provided on Review and test GS screen | * Ability to add Comments about testing => not needed * Fill the form => needed * Ability to test submission => needed. Note: all validations on Save are repeated on submission, thus there is no need to have separate Save functionality; if submission test passed, the system should display success message * Ability to manually mark the form as tested (click “Test Completed” button) => needed. No validations are needed for completion of the test. User can never fill the form or submit, the system will still allow mark the form as tested. The system should capture the name of the user, who marked the form as tested * Clear All Answers => needed * View All Comments => needed * User will be able to click URL, it should open in the separate browser window => needed * “Close” or (if applicable) “Close and Go Back” – user will be taken to a prior screen, where s/he can test other combinations and/or Promote or Reject the module => needed |
| Functionality, provided on “Review and Test module” screen | * Ability to view Comments about testing => not needed * Ability to filter tested or not tested forms => not needed * Ability to see form type, name and related type/mechs => needed * Ability to view what changed in the module (type/mechs added/deleted and forms changed) => needed * Ability to select forms and send email to tester(s), requesting to test selected forms => needed. The system should capture the date when such email has been send      * Ability to see the name of who marked the form as ‘tested’ => needed * Ability to test any form => needed * Ability to promote/reject module should be provided to Admin only. NOTE: The system should NOT provide a warning, if form(s) are not tested. |

**Action items**:

| Item | Action | Related to | Status | Responsible party |
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|  | Provide the text for a warning message | See meeting minutes from 8/11/2016  When greensheet is in status “Saved” or “Unsubmitted” and a new template is promoted from Form Builder, GreenSheets system will display a warning message that the template has changed and instructions to a user. | Open | OGA |
|  | Estimate LOE for ‘copy attachments’ functionality | See meeting minutes from 8/11/2016  The system will provide ability to copy attachments that were saved before the template has been promoted.  Yakov: Rough LOEs for “Copy Attachments” functionality:  40h requirements + 40h development + 40h QA = 120h | Closed | CBIIT |
|  | Estimate LOE for building ad-hock report in QlikView | CBIIT will estimate LOE for building this report in QlikView and have internal management discussion if it can be done by CBIIT team | Open | CBIIT |
|  | Determine WYSIWYG controls for “Learn More” field | OGA should provide information which controls are needed in WYSIWYG editor for “Learn More” field | Open | OGA |
|  | Provide the boilerplate for email to form testers | Proposed text:  **TO:**  **SUBJECT:** Request to test the new greensheet form  **BODY:** To test the form (s), please click:  link to test <New form name 1> - <form type> for <list of related type/mech(s)>  link to test <New form name M> - <form type> for <list of related type/mech(s)>>  and provide a feedback in a separate email to OGA. | Open | OGA |