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| ***MEETING MINUTES*** |  |

**SCRIBE:** Gaby Tulchinskaya

**PROJECT:** GreenSheets Re-Design

**MEETING NAME:** GreenSheets Re-Design

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

CBIIT: Jennifer Kwok, Gerald Momplaisir,

Yakov Polonsky, Larry Brem, David Chang,

Gaby Tulchinskaya.

**MEETING DATE/LOCATION:** 08/25/2016; 9609 Medical Center Dr., Meeting Room # 1W032/034

**Purpose of the meeting:**

* Provide Form Builder tasks updates
* Follow up on data migration requirement (additional question)
* Discuss ad-hoc reporting needs
* Clarify the priority of OGAI2E-144 - “A new report is desired to easily check which questions sets belong to which mechanism”

**Discussion and decisions**:

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| **Topic** | **Discussion** |
| Form Builder tasks updates | CBIIT added XML for 1/F99 and R50 (multiple types) and testing the changes |
| Data migration requirement | CBIIT question: should eGrants and other applications display greensheet data prior to FY2017 after re-design?  OGA answer:   * When user clicks a greensheet link in eGrants for an old grant (e.g. awarded 5 years ago), greensheet data should be displayed (this is a part of the official data file) * Greensheet data should be eventually deleted in accordance with data retention policies. When grant data is deleted, OGA will coordinate with CBIIT the deletion of corresponding greensheets |
| Clarify the priority of OGAI2E-144 (A new report is desired to easily check which questions sets belong to which mechanism) | OGA provided requirements for the report and marked it as “additional feature to be developed’ (not critical) in the combined scope. All critical features must be addressed first. This report should be developed when resources are available. |
| Discuss ad-hoc reporting needs | * Gaby explained that with a new database structure all question(s) and answer option(s) will be stored and GreenSheets database and can be provided to OGA alone with actual greensheet data for specific grants. * David demonstrated QlikView capabilities for retrieving grants, based on selection of questions/answer’s options * OGA indicated that they don’t have an expertise to build such report in QlikView, but can investigate the possibility of hiring 3rd party experts for building this report as long as CBIIT provides necessary data. CBIIT technical assistance will be needed. * CBIIT will estimate LOE for building this report in QlikView and have internal management decision if it can be done by CBIIT team |

**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. | Open | 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 |