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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, Sean Hine

CBIIT: Nelya Gunina, Jennifer Kwok, Gerald Momplaisir,

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

**MEETING DATE/LOCATION:** 09/08/2016; 9609 Medical Center Dr., Meeting Room # 2W032/034

**Purpose of the meeting is to discuss:**

* User-friendly interface for active hyperlinks
* Creation of the Revision form in FB and promotion of the Revision module
* Issues related to navigation

**Discussion and decisions**:

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| **Topic** | **Decisions** |
| User-friendly interface for active hyperlinks | ***Please see the diagram below this table***  Form Builder functionality will be modified as follow:   * All changes to a question (including Learn More field) in the QUESTIONS library must be propagated to the SECTIONS library and to the form(s), where these section(s) are used * Edits to any part of the question in the SECTIONS library will be applicable to this section only and to the forms, where this section is used. * Changes made in the SECTIONS library will NOT be propagated back to QUESTIONS library * Ability to edit question(s) from the QUESTIONS library is NOT needed on the FORM level * CBIIT will keep ability to add and edit question on the form level. It can be used when OGA adds a brand new question (that is NOT in the Question library) to the form * Form Builder will have WYSIWYG editor instead of enterable field for “Learn More” (in all 3 places: questions library, sections library, form) * Form Builder should provide ability to navigate from a question in the SECTIONS library directly to the same question in the QUESTIONS library * A new report (that ties a question to its usage information) should be readily accessible to a user working on a question in SECTIONS and/or QUESTIONS library   Functionality change is NOT needed for:   * Search in Form Builder (currently “learn more” field is not searchable; we can keep it as-is) * Usage information when user clicks on the number next to the question in the SECTIONS library and in the QUESTIONS library; keep as-is * Existing business rules related to an approval process that allow or not editing a question can be kept as-is |
| Creation of the Revision form in FB and promotion of the Revision module | CBIIT proposed the workflow for the creation of the Revision form in FB and promotion of the Revision module. This workflow was accepted by OGA |
| Issues related to navigation | * Specialists are not using grants list screen in GreenSheets system. The only requirement is to have ability to unlock program or specialist greensheet. If this ability can be provided in GPMATS, then CBIIT can decommission the Specialist grants list screen. * Even if ability to unlock a greensheet will not be moved to GPMATS, there is no need to query all grants assigned to a specialist. Specialist can just search the grant by grants number. * There is no need to display revision greensheets on grants list. * There is no need to provide navigation from an individual greensheet to grants list. |



**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 |