Ad Hoc reporting

## **General questions:**

* Should the data be real-time or can it be a day old?
* **Please confirm** that the report should bring up the grants with FROZEN greensheets only
* **Please confirm** that revision greensheets must be excluded

**Conceptual illustration for the discussion (what OGA will be reporting on?):**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Search parameters selection area** | | | | | | | | | | | | | |
| First OGA user finds QUESTIONS in this green area (need to discuss search parameters). Something like this: | | | | |  | This is the area where search results (questions and corresponding answer options) will be displayed. User will be able to select questions and answer options that will be used in the search for grants. Something like this: | | | | | | | |
| **Search parameter** | | **Enterable portions** | | | **Question** | | | | **Answer options** | | | |
| **Range of dates** between whicha formwas active in Greensheets | | Can be slider or enterable fields or calendar or anything else (dev pending) | | |  | Is there substantial foreign involvement? | | |  | | No  Yes, domestic grant with foreign involvement  Yes, foreign grant | |
| **Form Type** | | Program Specialist | | |
| **Type/Mechanism** | |  | | |  | Were human subjects used? | | |  | | Yes  No  N/A | |
| **Report area (grants that have a greensheet with selected question/answer)** | | | | | | | | | | | | | |
| **Appl\_id** | **Grant number** | | **PI Name** | **PD Name** | | | | **Specialist Name** | **Form type** | | **Question text** | | **Answer value** |
| 1234567 | 1R01CA123456-01 | | Dylan, Bob | While, Barry | | | | Streisand, Barbra | Program | | Need financing? | | Sure |
| 7654321 | 1R01CA111111-02 | | Redford, Robert | Eastwood, Clint | | | | Hanks, Tom | Program | | Need financing? | | Hmmm |

# Questions and proposal related to business requirements:

|  |  |  |
| --- | --- | --- |
| **Question(s) and answer(s) selection portion of the screen – how user will find and select questions and answers?** | | |
| **Question Search Parameters** area of the screen |  | **Question(s)/Answer option(s) selection** |
| * Please confirm that you need the **range of dates** between whicha form **(promoted blank form)** was active (used) in Greensheets? * Do you need to search by **Application Type(s)**? * Do you need to search by **Mechanism(s)**? * Do you need to indicate **“Program” or “Specialist”** questionnaire as search parameters? If yes, should it be exclusive or can you select both types of forms? * Do you need to search by the **text of the question** (full or partial)? * Do you need any other search parameters? | |  |  |  |  | | --- | --- | --- | --- | | **CBIIT questions** | **Illustration (what user will see in this section?)** | | | | Select question(s) | | Select option(s) of the answer | | Assumption: there is a need to select an answer separately from the question |  | Is there substantial foreign involvement? | No  Yes, domestic grant with foreign involvement  Yes, foreign grant | | Assumption: all versions of the same question within the requested period should be displayed.  Assumption: one checkbox for all versions of the question will be used. **The final report will bring one grant anyway (same question\_id)**  Assumption: all versions of the answer options should be displayed. |  | Were human subjects used? ---from version 1  Were human subjects referred? ---from version 2 (after new GS was promoted within requested date range) | Yes - this was in versions 1 and 2  No - this was in versions 1 and 2  N/A - this was in version 2 only | | Some questions might have an answer just as enterable text or a date. How to accommodate such cases?  Proposal: provide checkbox for a question only |  | Explanation required |  | | Assumption: question number should NOT be displayed on the screen.  **Please note** that the same question can change the order from version to version. |  | Reminder: Currently there are two ways for a user to find a  question/sub-question number:   1. Find NOT STARTED greensheet, click on answers and see the   number depending on the answer to the top level question   1. In preview mode, after promoting from Form Builder the   system display a question number as follow:  Question #6 with option Yes and No  Question #6.1 – related to Yes answer on #6  Question #6.2 – related to Yes answer on #6  Question #6.1 – related to No answer on #6  We will keep these numbers in preview mode when the module is  promoted from Form Builder, but we don’t need them on UI for  selection of the question for ad-hoc reporting. | | | Assumption: screen should NOT display dependencies between top level questions and sub-questions.  **Please note:** same question can be a sub-question for several different top level questions. Simultaneously, this question can be a top level question for other sub-question. |  | Select any that apply: | Invention Statement  Progress Report | |
| **Report section – what fields should be on the report?**   * **Should the columns be sortable?** | | |
| Do you need to see how many grants are found?  Grant number?  Appl\_id?  PI Name?  PD Name?  Specialist Name?  Form Identifier?  Form type (Program or specialist)?  Question identifier?  Question text?  Answer identifier?  Answer value?  Anything else (e.g. application status or FY or budget start date)? | | |

**Possible implementation solution questions:**

* Should ad-hoc report be created in QlikView or does OGA consider any other reporting possibilities (Excel or any other tool)?
  + If Excel => we don’t need a UI for selection of the question/answers
  + If QlikView => we need to discuss business requirements (what user will see on the screen)
* If CBIIT will develop QlikView UI, what are the maintenance expectations (can CBIIT just turn over the code to OGA or should CBIIT support the code)?