**Combined CBIIT and OGA high level scope for GreenSheets re-design project**

The Greensheets system currently supports the NCI grant review process by allowing program and grants management staff to complete and submit dynamic questionnaires that are required for documentation of grant files.

As defined in the course of several meetings between CBIIT and OGA, the system capabilities should be extended. “Critical Items” are those that must be completed for use of the system. The “Additional Features” should be implemented later in the life of the project.

Identified key features generally fall into two categories below:

Critical Items for Technical ‘Refresh’ & Business Needs:

* Update technology stack to be in compliance with NIH/NCI security policies
* Fix recurring production issues
* Provide an ability to view and test submission of updated Greensheet before promoting to production
* Address UI and usability issues (especially navigation and browser windows)
  + Hyperlinks should be active in the system; this is a usability issue
* Evaluate search and navigation capabilities (isn’t this a dup. of above? what are the issues? OGA cannot prioritize until we know that issues PDs have reported)
* Facilitate ad-hoc reporting
  + Create database for ad-hoc reporting
  + Provide access to data for OGA reporting
  + Ability to search and select questions for reporting
* Greensheets are required for the official grant file until the archive/purge of the record. Data migration will be needed to support this requirement.
* Ability to version GS
* Provide ability to complete greensheets on revised awards
  + Create and promote revision template in Form Builder
* Determine and provide documentation for redesigned system
  + User documentation – minimal; troubleshooting guidance, only required due to tech redesign. It is assumed CBIIT is doing technical documentation.

Additional Features to be Developed:

* Enhance GreenSheet system to allow automatic copy of answers to the latest version (answers, comments and attachments)
* Provide access to greensheets from GPMATS
* Do not display GreenSheet on non-reconciled supplements (dummy action record).
* Streamline integration of Greensheets system and Form Builder
  + Implement smaller modules
  + Discuss other FormBuilder features not currently used and discuss possibly leveraging them
* Provide new Form Builder report or data to view type/mechanism selected per form
* Integrate Supplements across all systems prior to award