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

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| **Topic** | **CBIIT item** | | | | **OGA requests** | | | |
| **Summary** | **Description** | | **Priority** | **Summary** | **Description** | **Priority** | **Corresponding OGA ticket** |
| Fix recurring production issues | GS Time out  (in scope, O&M; issue will go away with re-design) | User enters Greensheet data and doesn't save the Greensheet - returns to the application 5+ hours later, completes the form and attempts to save the form (receives the Timeout error message which causes them to lose all data entered) | | Fix is in progress. Still will be revisited in redesigned version | GS - New Greensheets should have NO defaults  (#2 in scope, O&M; issue will go away with re-design; #1 FB O&M) | The new system should fix the bug for placing default on dropdowns of sub-questions. Per business needs, there should be NO default answers on GS.   The issues has 2 parts:  1) it would be nice not to have a default answer on anything  2) the system should not be checking and recording answers of conditionally hidden sub-questions. | Critical | OGAI2E-139 |
| Greensheets Submission  (in scope, O&M; issue will go away with re-design) | User does not have the ability to Submit the Greensheet form because the "Submit" button is not available; NOTE: this is not a system issue; the system works as expected. It’s just the rules are not obvious to users. Interface is not intuitive and help system is deficient. | | Critical | GS FB - timeout  (O&M FB) | When user first accesses FB the system times out. Second or third attempt is successful. The system should work on first try. | Critical | OGAI2E-142 |
| Duplicate Greensheets  (TBD, depends on solution selected by OGA) | Two Greensheets forms (same Type) are created for the same grant number (OGA creates a dummy grant in GPMATS and then creates the Greensheet (usually Type 3 or 4) then the actual grant comes into IMPAC II and they create a second Greensheet - This causes there to be two Greensheet forms for the same grant number) | | Major |  |  |  |  |
| Roles (For OGA: streamline user access) | Guest (in scope, O&M; issue will go away with re-design) | This is not a role, it’s the lack of other GreenSheets roles. Allows view-only access to both types of greensheets. Is there a need of creation of a true GS read-only role? | | Minor |  |  |  |  |
| Diversity Supplement PD (in scope, O&M; issue will go away with re-design) | User can see only minority supplements grants. Only one user (minoritysupplements.userids  =OGUNBIYIP).  Need to determine if this role is still needed. | | Minor |  |  |  |  |
| Super user (in scope, O&M; issue will go away with re-design) | Super user role has been created in the past for troubleshooting and test purposes. Super user can change user (assume user’s identity, change FY, review/promote FormBuilder templates). Developers must have a way to address the issues in production environment. Need to find a way to address production issues without assuming somebody’s identity in production. This is a security concern. | | Critical |  |  |  |  |
| Update technology stack | Update technology stack (in scope, O&M) | Update technology to be in compliance with NIH/NCI security policies | | Critical |  |  |  |  |
| search capabilities | Enhance search capabilities (Depending on navigation requirements; in scope) | Create user-friendly dashboard to easily access the grants and the underlying GreenSheets which would help visualize some of the key metrics | | TBD, might not be necessary according to OGA |  |  |  |  |
| Facilitate ad-hoc reporting on statistics related to answers to a specific question | Prepare database for reporting  (in scope, new dev) | A new approach to extracting questions from Form Builder and saving them in different tables. This approach will prepare the database to handle reporting requirements with ease. | | Critical | GS - Need ability to provide ad-hoc reporting on specific questions. | Random requests from Building 1 and the Congress need to be addressed with quick turnaround. To support these requests, database needs to have easily retrievable information about answers to specific questions across the versions of GS. Such requests can cover up to 3 years of awarded grants data (but not limited to this number).  OGA and CBIIT need to have a requirements session prior to design of the new GreenSheets database.   GreenSheets ad-hoc reporting requests:  a. Reporting should be done on AWARDED grants only, by checking for GS with status FROZEN.  b. There might be a need to pull data from sublevel questions. DB and reporting structure should support it.  c. Usually reporting is ordered on current FY, however it may go back 2-3 years. In addition, the current FY may have 2 or more versions of published GreenSheets questions. In order to reliably select all the relevant questions across the published versions, OGA needs a screen where user will be able to select a range of dates and the system will produce a report with all published questions. The user will be able to select multiple questions and either send it as a parameter for the report or save it outside the system to be used in QlikView or DB query.  d. Report itself can be produced by OGA as long as structured GreenSheets data is available, however the set of questions probably needs to be pulled form GSFB.  e. Greensheets on revised awards are not needed for ad-hoc reporting.  f. For multiyear awards, only select the grant of the award was issued in the requested FY of the report. | Critical | OGAI2E-138 |
| Create user interface allowing to search and select questions. (in scope, new dev) | User interface allowing searching and selecting of all questions from all version of promoted FB templates within the date range is needed. As the end goal, the interface should allow to find question(s) id(s) and corresponding answer(s) id(s). These id(s) will be used by OGA for reporting. | | Critical |  |  |  |  |
| Providing data for OGA reporting (in scope, new dev) | A view should be created for OGA for reporting purposes that contains questions and answers id(s) and other relative data (TBD) | | Critical | GS - Data migration for GreenSheets  (in scope, new dev) | Data from prior years should either be migrated or easily accessible for up to 3 years.  Greensheets are required for the official grant file until the archive/purge of the record. Data migration will be needed to support this requirement.   * 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). For illustration see this doc., sec. Other system relationships => eGrants – changes for re-design * CBIIT will create a new view that OGA will use for ad-hock reporting in QlikView. This view should contain all data for FY2017 and at least 3 prior years. However, if all the data will be migrated, there is no need to restrict this this to 3 prior years only. * 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 | Critical | OGAI2E-140 |
| UI modernization and usability | Ability to add policy link to a question (out of scope, new dev) | The system should provide ability to add policy link to a question | | Critical | Create link to GreenSheets from GPMATs (out of scope, GPMATS O&M) | Create ability to navigate from GPMATs to GreenSheets on grant level. | Major | OGAI2E-153 |
| Opening GreenSheets in same browser window (in scope, O&M) | Currently if user clicks greensheet icon on a hit list, it opens greensheet in separate window. User perform some actions (Save or Submit) that change the STATUS of greensheet. User closes a greensheet window and hitlist displays OLD status. This is confusing.  Need to open a greensheet in the same browser window | | Critical |  |  |  |  |
| Look and feel (in scope, O&M) | The system needs to have a consistent look and feel with new template | | Major |  |  |  |  |
| Additional list of UI improvements (in scope, O&M) | Additional list of UI improvements will be discussed during UI re-design | | Minor |  |  |  |  |
| Additional business needs |  |  | | | Provide ability to complete GS on revised award. (out of scope, new dev) | The process of approving revised award needs to be defined and documented to understand the needs of additional GM GS completion and its implementation.   The questions on GS for revisions can be different from original GS. Could it be handled with conditional questions on the same template and saved in GreenSheets for each revision? | Major | OGAI2E-151 |
| GS - Create ability to version GS. (in scope, new dev) | In order to preserve question numbers, the system should be able to display submitted or frozen GS with the corresponding question set from the time of submission. GreenSheets system needs to be able to version GreenSheets when the new set of questions is published. The system should capture the effective date of the new version.  FROZEN and SUBMITTED GS should keep the version at the time of status change. SAVED GS will need to be presented with the new template.  In addition, for SAVED GS it would be nice if the system could copy answers from old version to the new for questions which did not change. | Critical | OGAI2E-136 |
| GS FB - new report to validate mechanisms selected for each question set. (out of scope, FB O&M) | When a question is modified in Form Builder it is not easy now to find out what it will affect. It would be nice to have a report which displays the following elements:   1. Question text 2. Question id (since the same question cannot be used in sections of the same form they end up creating tons of “Please Explain” or “Additional Comments”, it is a pain point finding these particular questions for future re-use. Maybe we need to take a look at the reason why the same Comments box cannot be used in several sections of the same form in FB) 3. Created date of the question 4. Creator user id 5. Last\_upd\_date 6. Last\_upd\_id 7. Section name/identifier 8. Form name/identifier 9. Module 10. Note: Module deployment date is not a strong preference as it does not give us idea of “life span” of the question.   Additional requirement for the report:   1. It would be nice to have excel version for markup. Online version may work too. 2. Users of the report: Sean, Shane and Crystal (all OGA staff), and maybe some people from OGA Operations team. 3. Explore a possibility to display question id with the questions in the FB screens (library, and possibly others, mostly where the questions are being picked to be used on the section)   **Note:** There is a desire to get a group of users together (Sean, Shane, Crystal, Stacey, me, Rob Jones, Kevin Johnson), possibly with CBIIT representatives at the beginning of October 2016 to define the SOPs for creating questions and making edits to them. OGA users want to understand the downstream effect of these modifications and put together a guidance for OGA on creating clean data. Clean up of the existing data may become part of this group discussion | Major | OGAI2E-144 |
| Integrate Supplements Across All Systems Prior to Award (out of scope, I2E O&M) | \*\*Crystal would like to do this during FY16.  OGA and CBIIT need to brainstorm a solution for capturing supplement records when they are in a work in progress status and have not been awarded. Need to find a way to associate with the correct grant record and be able to distinguish the order if there are multiple supplement records. This would be needed in Greensheets and integrated with eGrants. | Major | OGAI2E-70 |
| GS - validate any legacy activity codes in the old system (O&M) | Validate if there are any hard coded activity codes which still make sense and should be coded as exceptions. Examples: type 4, "4,UH3", "4,U42", "4,UH2", "4,R01", "4,R03", "4,R33", "4,R00", "4,U44", "4,DP1", "4,R42", "4,P01", "4,R44", "4,U54", "4,R21", R37?  Per Crystal, this sounds like a one-time adjustment for sub-accounting migration. It is possible that no hardcoding is needed. for type 4 only 4 activity codes will have GSs: UH3, U42, R42, R44, R00. This should be possible to handle with Category on the form in GSFB. | Major | OGAI2E-146 |
| GS- documentation needs (in scope, O&M) | Documentation needs are to be discussed with OGA management. Suggestion - troubleshooting guide, and user help on search page.  Is there any chance Flare can be implemented? | Minor | OGAI2E-141 |
| Assess streamlining integration of GreenSheets and FormBuilder | Analysis of additional existing FB features to turn on (out of scope, new dev) | During initial GS FB integration some FB features were turned off. Analysis and OGA discussion is needed to evaluate the need to turn on additional capabilities. | Minor | | GS - feature allowing PDs and Specialists to preview GS (out of scope, new dev) | OGA staff requests to create a preview mode on unpublished greensheets for specific PD and Specialist users. This function will be used to get feedback from PDs and test both PD and GM GS validations on new greensheets. PD should be able to answer all the questions and click complete without recording the completion action. This may be possible to achieve by providing dropdown of type and mechanism options to filter the questions instead of selecting a grant.  It is important to keep in mind that some questions/forms needs to be removed from production, currently this is achieved via module publishing action.  Alternative process for verification of PD greensheet is to send PDs emails with all the questions. | Minor | OGAI2E-148 |
|  |  | | | GS FB - Validate the need to create competing and non-comp modules. (out of scope, new dev) | There is a need to be able to publish small subset of questions as a module or any other collection (form perhaps).   What is the reason for being able to publish only 4 modules? Is there a need to have modules at all? | Major | OGAI2E-147 |