Reporting discussion with OGA on 8/25/2016

**Agenda:**

1. Form Builder tasks updates (Program Competing forms and other related stuff)
2. Clarification: eGrants/GS relationship for migrated data after GreenSheets re-design
3. Ad-hoc reporting needs *(Critical)*
   1. User interface for selection of the questions (*From OGAI2E-138 => 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 QlickView or DB query*). *There might be a need to pull data from sublevel questions. DB and reporting structure should support it*
   2. Provide structured GreenSheets data to OGA for reporting (From OGAI2E-138 => *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)*
4. If we have time: *OGAI2E-144 (Major?) => A new report is desired to easily check which questions sets belong to which mechanism; Report that ties the version of template to type/mech should have an “expiration date” (when new version got promoted).*

**Discussions:**

# **Ad-hoc reporting**

1. **QlikView demo** (David)
2. **Description: how the data is passed from CBIIT to QlikView** (Gerald)
3. **Question:**

OGA request to build UI for selection of the question(s) was based on the assumption that the data for selection of the questions and options of the answers should be pulled from Form Builder, effectively making it a 3 steps process, described below *in blue*. With a new database structure all the question(s) and answer option(s) will be stored and GreenSheets database and can be provided to OGA. 3 steps process is no longer necessary. After seeing the demo, if CBIIT provides necessary data, would it be possible for OGA to change the ticket description and build the whole report in QlikView in one step?

***For Reference only****: OGAI2E-138 ticket describes ad-hoc reporting as 3 steps process:*

* *Step 1 – OGA user needs to identify and select the question(s) and answer option(s) that will be used to find grants in step 3. Assumption was that this information is available only in Form Builder and interface can be built only by CBIIT.*
* *Step 2 – pass the results of Step 1 (selected question(s) and answers(s)) to QlickView*
* *Step 3 –run a report in QlikView to find grants where greensheet with selected question/answer exists*

# **New report is desired to easily check which questions sets belong to which type/mechanism**

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