Reporting discussion with OGA

**Agenda:**

1. Form Builder tasks updates (Program Competing forms and other related staff)
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*)*
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. **Assumptions based on OGA tickets (Please confirm)**: Ad-hoc reporting will be a 2 step 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 2
* Step 2 – report will be run in QlikView to find grants where greensheet with selected question/answer exists
* Step 1 output will become a Step 2 input
* QlikView will query a structured GreenSheets data, provided by CBIIT
* Structured GreenSheets data will contain only information related to FROZEN greensheets that are related to AWARD action (Program and Specialist), no information about REVISION greensheets will be provided

1. **QlikView demo** (David)
2. **2 step process 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 information that QlikView doesn’t allows making a selection. If QlikView has selection capabilities and if CBIIT will provide all necessary data, would it be possible for OGA to create a UI for selection of the question?

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

|  |  |  |
| --- | --- | --- |
| **#** | **Question** | **Answer** |
| 1 | What is a main business need of this report? |  |
| 2 | Who is intended user of this report? |  |
| 3 | Should it be a visual report provided to a user in GreenSheets or FormBuilder application or can OGA create this report (possibly in ClickView) if all needed data is provided by CBIIT? |  |
| 4 | What is a real business need behind the requirement “*Report that ties the version of template to type/mechanism should have an “expiration date” (when new version got promoted).”?* Form Builder doesn’t have any information when new version has been promoted within GreenSheets system. Module can be deployed in Form Builder, but not yet promoted in GreenSheets or rejected altogether. |  |
| 5 | What data should be provided on this report besides FBT name and type/mechanism? |  |