Reporting discussion with OGA

**Agenda:**

1. 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*)
   2. Database view to use for reporting (From OGAI2E-13 => Report itself can be produced by OGA as long as structured GreenSheets data is available*)*
2. 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).*

**Terminology:**

* **Greensheet Template (GST):** This is a set of questions within GreenSheets system after FBT is promoted to GreenSheets system. This is a set that will be pulled for Program or Specialist for related type/mechanism. It has options of the answers. This is NOT YET related to a specific award; no answers/comments/attachments for an award.
* **Form:** This is an instance of GST (Program or Specialist type) for a specific award. It is created only when user clicked Save for the first time on a greensheet.

**Discussions:**

# **Ad-hoc reporting**

**Assumptions based on OGA tickets**: Ad-hoc reporting will be a 2 step process:

* Step 1 – OGA user will have 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 (selected data will be passed to QlikView)
* QlikView will query a new db view (created by CBIIT)
* View 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 – Please confirm

## Questions for Step 1 – search and select the questions and answers via UI:

|  |  |  |
| --- | --- | --- |
| **#** | **Question** | **Answer** |
| 1 | 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 it will turn out that QlikView has selection capabilities and CBIIT will provide all necessary data, would it be possible for OGA to create a UI for selection of the question? |  |
| Regardless of who will build the UI, let’s discuss the question that affect db structure and view | | |
| 2 | What will be the SEARCH PARAMETERS for selection of the question?   * Please confirm that you need the **range of dates** between which **Greensheet Template (GST)** was active in Greensheets? * Do you need to indicate **“Program” or “Specialist”** questionnaire as search parameters? * Do you need **Application Type(s)**? * Do you need **Mechanism(s)**? * Do you need to search by the **text of the question** (full or partial)? * Do you need any other search parameters? |  |
| 3 | SEARCH RESULTS: When search is executed, what should be displayed to the users and what can be selected? Please see illustration below this table for specific questions. |  |
| 4 | Step 1 output: What should an outcome be after a user performed and saved selected question(s)/answer(s) (parameters to be passed to the actual reporting portion)? E.g.     * Do you needquestion identifier? * Do you needanswer identifier? * Do you need all previous search parameters (except the text of the question)? |  |

Table : Illustration for step 2

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| --- | --- | --- | --- |
| **Illustration** | | | **CBIIT questions** |
| Select question(s) | | Select option(s) of the answer |
|  | Is there substantial foreign involvement? | No  Yes, domestic grant with foreign involvement  Yes, foreign grant | Please confirm that there is a need to select an answer separately from the question |
|  | Were human subjects used? ---from version 1  Were human subjects referred? ---from version 2 | Yes - this was in version 1  No - this was in version 1  N/A - this was in versions 1 and 2 | Please confirm that all versions of the same question within the requested period should be displayed.  Can user have one checkbox for all versions of the question together? The final report in QlikView will bring one grant anyway  Please confirm that all versions of the answer options should be displayed.  Please confirm that each answer option can be selected separately. |
|  | Explanation required |  | 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 |
|  |  | | Please confirm that the UI for selection of the questions should NOT display question number on the screen since the same question can change the order from version to version.  We will keep it for a preview when the module is promoted from Form Builder, but we don’t need it on UI for selection of the question for ad-hoc reporting.  Reminder: Currently preview mode after promoting from Form Builder the system display a question number follow:  Question #7 with option Yes and No  Question #7.1 – related to Yes answer on #7  Question #7.2 – related to Yes answer on #7  Question #7.1 – related to No answer on #7 |
|  | Select any that apply: | Invention Statement  Progress Report | Please confirm that the screen should NOT display dependencies between top level questions and sub-questions. If identified question is a sub-question, top level question will NOT be displayed. (Reason: 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.) |

## Questions for Step 2– run report in QlikView. CBIIT needs to create a database view to use for reporting in QlikView

|  |  |  |
| --- | --- | --- |
| **#** | **Question** | **Answer** |
| 1 | What information is needed to be provided to OGA in this view? Is the following needed?   * Question identifier * Question text * Answer identifier * Answer value * Form identifier * Indication that this form was Program or Spec * Date when a form was frozen * appl\_id * Grant number (or do we need to provide separately type/mech/IC/serial number/suffix)? * PI name * Anything else? |  |
| 2 | Can OGA derive everything else about the grant from appl\_id or do we need to include into the view any other additional grant info (e.g. FY)? |  |

# **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 | If it should be visual report, created by CBIIT, what should be an output (PDF or Excel)? |  |
| 5 | 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. |  |
|  | What data should be provided on this report besides FBT name and type/mechanism? |  |