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). It will be easier to query later*

**Terminology:**

* **Form Builder Template (FBT):** This is a set of questions within Form Builder. There are no rules which template have to be Program or Specialist template. Only when a template assigned to a category, it will become Program or Specialist template.
* **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. This is NOT YET related to a specific grant.
* **Form:** This is an instance of GST (Program or Specialist type) for a specific grant. It is created only when user clicked Save for the first time on a greensheet.

**Discussions:**

## 1a. UI for selection of the question(s):

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| **#** | **Question** | **Answer** |
| 1 | ClickView allows making a selection. If 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)** has been promoted in Greensheets? NOTEs:   + In order to identify GST, user will need to indicate on the screen **“Program” or “Specialist”** as search parameters   + Within this date range, the same template can be published multiple times. Please confirm that ALL questions from ALL versions of template are needed. * Do you need **Application Type(s)**? * Do you need **Mechanism(s)**? * Do you need **Full of partial text of the question**? * Do you need any other search parameters? |  |
| 3 | When search is executed, what should be displayed to the users and what can be selected?   * Should all questions (and all versions of each question) from all versions of GST be displayed? * Should user be able to select the question (all versions together or each version separately)? * Should all options of the answers be displayed? * Should user be able to select the answer option? * Some questions might have an answer just as enterable text. How to accommodate such cases? |  |
| 4 | 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\_id? * Do you needanswer\_id? * Do you need all previous search parameters (except text of the question)? |  |

## 1b. Database view to use for reporting

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| --- | --- | --- |
| **#** | **Question** | **Answer** |
| 1 | What data is needed to be provided to OGA (in the view)?   * Should the view only contain the data for the greensheets in “FROZEN” status? * Should the view have all previous search parameters? * Should the view have Form id? * Should the view have an indication that this form was Program or Spec? * Should the view have the Date when a form was frozen? * Should the view have Question\_id? * Should the view have answer id? * Should the view have appl\_id? |  |
| 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)? |  |

## 2. A new report to easily check which questions sets belong to which mechanism

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| --- | --- | --- |
| **#** | **Question** | **Answer** |
| 1 | Who is intended user of this report? |  |
| 2 | Should it be a visual report provided to a user or can OGA create this report (possibly in ClickView) if all needed data is provided? |  |
| 3 | If it should be visual report, created by CBIIT, what should be an output (PDF or Excel)? |  |
| 4 | What data should be provided on this report besides FBT name and type/mechanism?   * Should the module be displayed? * Should indication if this is Program or Spec questionnaire be displayed? NOTE: this information is NOT in Form Builder (see definitions above). If this info is needed, the report can be done only within GreenSheets system or by OGA * 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. * Should FBT template\_id be displayed? * Should any dates be displayed? |  |