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**

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