



GM Lead Users Group

Date: April 14, 2004, Wednesday
Time: 9:00–11:00 a.m.
Location: 6001 Executive Building, Conference Room A1/A2
Advocate: Michael Loewe

Next Meeting: May 12, Wednesday, 9 a.m., 6001 Executive Blvd., Conference Room A1/A2

Actions Items

1. (All) Contact Bob Tarwater if you are interested in reviewing and updating the online documentation in the Grants Management Module.
2. (All) Contact Bob Tarwater if you are interested in assisting the Vision Committee in the creation of a poster representing GMAC achievements.
3. (Pam Mayer, Mike Loewe, Bob Tarwater) Provide list of Grants Management Lead Users group members to Patti Gaines so that she can grant them Web QT access.
4. (All) Contact Patti Gaines if you are interested in becoming a member of the Web QT Focus Group.
5. (Patti Gaines, Daniel Fox, Tina Milner) Send URL for Web QT demonstration to Mike Loewe, Pam Mayer, or Bob Tarwater for distribution to the Grants Management Lead Users Group.
6. (Pam Mayer, Mike Loewe, Bob Tarwater) Distribute URL for Web QT demonstration to Grants Management Lead Users Group.

Handouts

- Web QT Handout—The New Web Query Tool:
http://era.nih.gov/docs/Web_QT_handout_04-14-04.pdf
- Web Query Tool (Web QT) Presentation:
http://era.nih.gov/docs/Web_QT_Presentation_04-14-04.pdf

General Announcements

Bob Tarwater

Updates to Grants Management Web Page—There will be several updates to the Grants Management Web page, including references to ongoing working groups. It is important to be aware of the various workgroups and efforts of the Grants Management Lead Users group.

New Listserv—Bob plans to assemble a more comprehensive listserv that includes all of the new Grants Management Lead Users group members, specifically members from other agencies outside of the NIH. These members have requested information such as agendas, meeting minutes, and other announcements. The listserv should fill this request.

Online Documentation—Volunteers are needed to update and maintain the online documentation available in the Grants Management Module. Interested group members should email Bob.

GMAC Award Ceremony—Instead of holding a formal GMAC Award Ceremony, the Vision Committee will be assembling a poster representing GMAC achievements. Anyone interested in assisting in the creation of this poster should contact Bob.

Action: (All) Contact Bob Tarwater if you are interested in reviewing and updating the online documentation in the Grants Management Module.

Action: (All) Contact Bob Tarwater if you are interested in assisting the Vision Committee in the creation of a poster representing GMAC achievements.

Web Query Tool Demo

Patti Gaines, Tina Milner, Daniel Fox

eRA Analysts Patti Gaines, Tina Milner, and Daniel Fox presented a demonstration of the new Web Query Tool (QT)—a program that will eventually take the place of several query tools used by Grants Management, including CRISP Plus, ICSTORE, and QuickView. The development of a new query and reporting tool is necessary because the NIH is moving from a client-server to a J2EE environment. Although a plethora of query and reporting tools are already available at the NIH (i.e., CRISP Plus, Quickview, ICSTORE, etc.), there are too many query and reporting tools to maintain and replicate as the NIH migrates to a J2EE environment. A single Web-based query and reporting tool for operational and production use is more efficient. However, current query tools will not be retired until Web QT is fully functional. Right now, Web QT is still in pilot, but will be deployed in June 2004. An external version of Web QT will also be deployed to the NIH eRA Commons; this is scheduled for sometime later in 2004.

Daniel Fox presented the group with a live demonstration of Web QT. He explained that Web QT runs against the OLTP database and allows users to create, save, and maintain queries. Web QT also provides users with many key features, including documentation output and the ability to export data to a Microsoft Excel spreadsheet. The Basic Search screen contains basic categories of query parameters: Grant ID, PI Data, Institution, Meeting, Assignment, Grant Dates, Grant and Document Status, Award and Budget Data, Administrative Coding, and Text Search. Patti and Daniel explained that all of the search parameters currently in QuickView are present on the Basic Search screen. Once users conduct a search, they are presented with a hitlist of information, which they can customize according to their layout preferences.

Cathy Walker posited the possibility of linking to Web QT from the redesigned Grants Management Module. The group said that this was a good idea, provided that Web QT provided the same functionality or better as QuickView or other query tools.

Group members asked if QVR would be retired. Daniel said that QVR will not be retired, since it is not under eRA control. The group also asked if Web QT provided historical data. Daniel said that Web QT currently does not provide this functionality, but there are plans “in the works” to do so. Specifically, the eRA data mart that is currently being developed under the direction of Steve Hughes will make the incorporation of historical data into Web QT a possibility.

Pam Mayer, Mike Loewe, and Bob Tarwater agreed to send Patti Gaines a list of the Grants Management Lead Users Group members so that she can grant them access to the Web QT pilot.

Group members who “experiment” with Web QT should pay attention to the differences between Web QT and QuickView and keep track of the functionality that appears to be missing in Web QT. These comments and observations should be forwarded to Tina Milner:

milnerta@od.nih.gov.

Patti Gaines encouraged group members to contact her (gainesp@od.nih.gov) if they are interested in becoming a member of the Web QT Focus Group. Currently, Pam Mayer is the only Grants Management representative participating on this committee.

Finally, Patti said that she would be sure to send Mike, Pam, and Bob the URL for the Web QT demonstration to the Grants Management Lead Users Group.

Action: (Pam Mayer, Mike Loewe, Bob Tarwater) Provide list of Grants Management Lead Users group members to Patti Gaines so that she can grant them Web QT access.

Action: (All) Contact Patti Gaines if you are interested in becoming a member of the Web QT Focus Group.

Action: (Patti Gaines, Daniel Fox, Tina Milner) Send URL for Web QT demonstration to Mike Loewe, Pam Mayer, or Bob Tarwater for distribution to the Grants Management Lead Users Group.

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Award Worksheet Report Update

Cathy Walker

At the last Grants Management Lead Users meeting in March, Cathy presented a prototype of the Award Worksheet, a single report that combines the PO Worksheet, the GM Worksheet, and the Checklist Report. This report is intended for both Grants Management and Program staff. By combining all three documents into one report, users will have a single, comprehensive report and will not have to view and print the separate items.

Over the last month, Cathy received helpful feedback from Program and Grants Management. Based on these comments, Cathy assembled a revised Award Worksheet Report. She presented this revision to the group for further comment. This revised version allows users the option of selecting what combination of the Budget, the GM Worksheet, and the PO Worksheet they would like to view on the screen.

In reviewing this version, group members suggested the following:

- Increase space for F&A section in the Budget portion of the Worksheet. This section needs to allow for up to seven years of programs.
- Move Program Official signature block to the left.

Finally, Cathy explained that currently the Award Worksheet Report is not stored anywhere. She proposed that the Award Worksheet Report should be “frozen” and stored in the electronic Grant Folder as a PDF document at the time of award. Specifically, at the six o’clock Work in Progress

(WIP) deadline (the point at which Grants Management cannot “unrelease” the award), the Award Worksheet Report would be saved and stored as a permanent record.

New Sign-Off Notification

Cathy Walker

Cathy asked the group if they would like to see the addition of a new notification in the Program Module that would inform Grants Management Specialists when Program Officials sign off on grants. The group said that this was a good idea, but that they would like this notification to be an option.

No-Cost Extensions Update

Marcia Hahn

Marcia reminded the group that there is no need to send a notification back to the institution when they submit a no-cost extension. The system already provides this notification. Sending an additional notification only creates confusion.

Just-in-Time Documents Update

Marcia Hahn

Mike Loewe and Marcia Hahn proposed to EPMC that the Just-in-Time (JIT) notifications be modified in the following ways:

- Currently, JITs are submitted with the priority score mailer if the Type 1 has a percentile score of 30 or better. Now, JITs will go out with the priority score mailer if the Type 1 has a percentile score of 20 or better.
- Currently, JITs are submitted with the priority score mailer. Now, JITs will be submitted two weeks after the priority score mailer is sent out. This will go into effect on June 1, 2004.

Web QT – The NEW Web Query Tool

WHY USE Quickview
WHEN YOU CAN USE
WEB QT

- ✓ Customized Hit Lists
- ✓ Hit List Sort Options
- ✓ Three Column Sorts
- ✓ Drop-down Menus
- ✓ Email Links
- ✓ Custom Query Definitions
- ✓ Increased Merge Limits

Join the Pilot Group and give Web QT a try by calling **(301) 496-4357**. Web QT will soon replace Quickview, so get on board now!

eRA Web QT - Basic Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://apps.era.nih.gov/webqt/hitlist/webQTSearch.jsp> Go Links >>

Welcome MILNERT

Log-out

Basic Search My Queries User Settings Help

Basic Search

Grant ID
PI Name
Institution
Meeting
Assignment
Grant Dates
Grant & Document Status
Award & Budget Data
Administrative Coding
Text Search
Use the above links to access additional search parameters.

Enter at least one of the following required fields:
Fiscal Yr. (2002,2003) Council (Current, 200401) Admin IC (HG,CA,AI) Serial No. Appl. ID Include Duals?

Additional Search Parameters
Grant ID
Grant No. Grant Type Groupings
Type Activity IC Code Serial Num Support Yr Suffix Subproj. ID RFA/PA Grant Status Group ALL

Project Title

Output Options: Click on any of the below buttons to execute the query and perform the intended action

Select Hitlist Layout Basic Hitlist SEARCH Print Hitlist Export to Excel

Select Document - Select Document - Merge Documents Zip Documents

Click the links on the left panel to continue entering search criteria.

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Your feedback is extremely important and encouraged!
Comments or questions can be directed to Tina Milner: milnerta@od.nih.gov





Web Query Tool (Web QT)

GM Lead User Group

April 14, 2004



Agenda

- What is Web QT?
- What will it replace?
- Upcoming releases
- Demo of Web QT
- Comments and Questions



What is Web QT?

- Designed to provide operational support by offering a simple and intuitive method for running queries
- Runs against the OLTP Production Database
- Provides users with many key features including: ability to maintain queries, documentation output, and exporting data to MS Excel
- External version of Web QT will be deployed to the Commons (later in 2004)



What eRA applications will Web QT replace?

- Web QT will replace client/server apps: Quickview, ICSTORE, and Crisp Plus.
- This will give users the benefit of having **one** query tool v.s. **many** query tools
- eRA will not retire any of the applications until all functionality for that application is migrated to Web QT
- eRA will work closely with user community on retirement of client/server applications



Upcoming Releases

June 2004

- Ability to query on PI only – *will add PI last name as required field*
- Increase number of hitlist rows – *will increase default to 50 rows*
- Modify Abstract header- *will add Project Title and Institution Name*
- Add ability to sort by Application Status code within hitlist
- Increase merge limit on abstracts and resumes – *will increase to 500*
- End Pilot – *fully deploy Web QT and begin thinking about retiring Quickview*
- Fix several defects/bugs

July 2004

- Ability to perform a range search on numeric fields and date fields
- Wildcard search in RFA/PA field

Future Release

- Deploy external version of Web QT to Commons
- Add Maintain Layouts functionality – *will give user the ability to customize and save hitlist layouts*

Demo of Web QT

eRA Web QT - Web Query Tool - Microsoft Internet Explorer

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
National Institutes of Health
Web Query Tool (Web QT)

Username
Password
Run Default Query Login

Web Query Tool

[Help](#)

About Web Query Tool

The Web Query Tool (Web QT) is designed to provide operational support by offering a simple and intuitive method for running queries against the eRA on-line transaction processing (OLTP) production database. Web QT will eventually replace eRA Oracle-forms based tools, such as Quickview, ICSTORE, and later, CRISP Plus. Web QT provides users with many key features including: ability to maintain queries and hitlist layouts, documentation output, exporting data to MS Excel, and a choice of system viewing options (basic or expanded view).

Resources

- [Release Notes](#)
- [Web QT FAQ](#)
- [Web QT User's Manual](#)

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FIND. APPLY. SUCCEED.SM

eRA Web QT - Basic Search - Microsoft Internet Explorer

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
National Institutes of Health
Web Query Tool (Web QT)

Welcome Internal User [Log-out](#)

[Basic Search](#) | [My Queries](#) | [My Layouts](#) | [User Settings](#) | [Help](#)

Basic Search

Search Parameters

GrantUPI Enter at least one of the required (bold) fields

Grant No. Grant Type New Competing Non-competing Include Subprojects
 Include Duats

Gov. FY (2002,2003) Council (Current, 200401) Appl. ID

Type Activity Admin IC Serial No. Support Yr Suffix Subproj. ID RFA/PA Grant Status Group

Use the above links to access additional search parameters.

Set Sort Order
Define/Redefine Layout

View Layouts

PI Last Name PI First Name MI PI SSN

SRG SRG Flex SRA Designator SRA Flex Group

Show Search Criteria

Clear Search Criteria
Save Query

Output Options: Click on any of the below buttons to execute the query and perform the intended action

Select Hitlist Layout

Select Document

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Questions? Comments?

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