

IAR Commons, Version 2.6.5

List of Requirements and Solutions

July 28, 2004

#	Requirements Description	CQ #	Use Case Name	Solution Description
1	Discussants need to be able to submit late critiques during Read phase.	CQ19386	View List of Applications	The list of applications for the Reviewers in the Read and Edit phases will ignore the Blocked status for Discussants and always display the [Submit] feature in READ phase for assigned applications (new), and in EDIT phase for assigned and unassigned applications (like before).
2	SUMMARY STATEMENTS OF MULTI-PROJECT APPLICATIONS: Need capability to create preliminary SS of subprojects.	CQ19387	Create Pre-SS	Modify the programming to create word Prelim SS files for subproject applications. The word Prelim SS file will include only critiques for that subproject. Now there will be a [Word] option for subprojects as well as parent application.
3	<p>When producing Preliminary Summary Statements, use RPC developed guidelines to plug in Headings of each section right inside the document. Fully format per ss needs (caps, bold) Insert New, Foreign... Flag human subj.</p> <p>Prep for electronic abstracts - the ability to automatically pull electronic abstracts (from electronically submitted applications) should be planned for.</p> <p>The summary statement contains a "Description" submitted on the grant application. Since applications are scanned and bookmarked, this "Description" section should be evaluated for feasibility of automatically incorporating it into the summary statement during generation/combination of critiques.</p> <p>Once done – do the following:</p> <p>If Read phase ended (or Edit Phase if specified) and meeting is released, automatically submit preliminary ss as a draft summary statement. This will later be available on Prepare SS Screen In Peer Review. If meeting was NOT release by the time the phase ended, use meeting release to trigger the automatic submission of the SS draft. See Solution Description for alternative solution.</p>	CQ19408	Create Pre-SS	<p>Base the headings in the document on the Summary Statements Preparation Guide (developed by RPC).</p> <p>For all available and future data that can be pulled into the file (such as specific aims, abstract, etc.) develop a technique to pull that data into the file.</p> <p>Note: Need to investigate what is available via CGAP submission for the above.</p> <p>Rather than submitting the Summary Statement draft automatically as requirement specifies (this will create an unnecessary toll on the system, since every SS Draft will need to be created, but surely will need to be edited and resubmitted again), provide the ability on the Prepare Summary Statements screen in Peer Review to view and save locally the Preliminary SS word files generated by IAR.</p> <p>Group decided to change the trigger that starts to generate Preliminary SS and add a meeting wide option to specify the Date/Time the Summary Statement generation should kick in. This way they can much better control where they want things to start. The only rule where is that Generate Prelim SS Date cannot be less (earlier) than Submit Phase End Date.</p> <p>Also, after the Detailed specifications are done for the Summary Statement template inclusion, we need to Review that with users via a</p>

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				separate meeting.
4	Allow Reviewers to see List of Assigned Reviewers in all Phases (should be a pop up window off of application record in the list of applications) – except COI.	CQ19410		This is changed to Medium/Low priority. The solution would be to add a meeting-wide option to allow Reviewers to see a list of all assigned reviewers for applications where they are assigned. This is not going to be implemented in this release.
5	THE SRA-GTA SHOULD BE able to monitor system generated emails. A way to meet this requirement would be to provide in the control center a method for the SRA, GTA, RTA to see “who got what and when” (reviewer, date/time enabled, and which email they received (new account, existing account) and provide current sample of the email text they received.	CQ19411	View Control Center	<p>Several Modifications for the Control Center:</p> <ol style="list-style-type: none"> 1. Date Reviewer was Enabled (instead of Y) 2. What type of email went out (new, existing, pending nih, pending reviewer) 3. New Screen to show example of all emails 4. Link on Control Center to new Email Examples screen (also add the Subject Examples to each eMail type) <p>See IAR 2.6.5 GUI changes Document.</p>
6	HELPDESK INFO: Help Desk contact information should be displayed more prominently and clearly. It is currently found in the footer for commons under a Contact Us link.		Global Supp Spec.	<p>This is across the board requirement for the entire Commons web site. It has been agreed to change the [Contact Us] link on the footer to larger font and add the word “Helpdesk”, so it will look like this: [Contact Us/Helpdesk]</p> <p>See IAR 2.6.5 GUI changes Document.</p>

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7	Multi-project applications - The Word document that is generated for the entire summary statement does not separate the projects and cores. The GTA has to go through the document and figure out where one project ends and the next begins. It would help in managing the Preliminary Summary Statements if each subproject critique is marked with the Header of the Subproject in the Preliminary Summary Statement text.	CQ19412	Create Pre-SS	Modify generation of preliminary ss programming to separate each new section of critiques for each subproject with a heading. Each group of critiques for each subproject should be separated by IC Subproject ID (like Sub 1) + Title of that subproject application + next line that reads : (Description as provided by applicant)
8	The Critique Upload screen should allow Reviewers to submit user-defined alphanumeric preliminary scores. If a Reviewer submits an alphanumeric score, the Critique Upload screen should limit the entry to 3 characters. The Critique Upload Screen should verify that the alphanumeric score submitted by the Reviewer exists on the score list of values (acceptable values need to be determined by group). Per 6/3/04 meeting, several ICs (NCI, NHLBI, NIAID) would use this for triage. Scores would be defined and maintained at an IC level. This should be discussed at a future RUG meeting.	CQ19414	Submit Critique/Score View Control Center	More discussion needed. We need to set up a meeting to discuss this issue alone. We need representation from RUG and RPC.
9	On Control Center, include (Mail) next to mail reviewers (like (Phone))	CQ19416	View Control Center	Self explanatory – this will be based on the Reviewer Type as set up in CM (Outside Opinion/Mail Reviewer option). See IAR 2.6.5 GUI changes Document.
10	Option to force all reviewers to enter score (numeric or non-numeric) - for some meetings, streamlining not used; also, pilot being run to provide scores for applications that end up streamlined. Default should be NO – do not force. This should be implemented as a meeting wide option.	CQ19418	Submit Critique/Score Use Case Manage Phases Mtg Wide Options	Add a new Meeting Wide option to control this option. By default it is set to No. If it is set to yes – when Critiques are Uploaded and there is an ability to enter scores (sometimes scores are not allowed to be entered – for example after the meeting dates are passed), if score is not entered – the error message will come up “Score is required”. This option will apply to both SRA/GTAs and Reviewers. See IAR 2.6.5 GUI changes Document.
11	In the Read phase, when a reviewer goes to check out the score matrix, they are given a notice on all their Discussant assignments that "you are blocked from seeing scores." I know this came up earlier, and the workaround is for them to go back to their own assignment list which DOES show the scores, but it is inconvenient when they want to take in "the big picture."	Bug 15285	View Score Matrix	This bug is addressed in the upcoming 2.6.4 Commons release which is already in test.

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12	The reviewers of Cancer Research Fellowship Study Section (ZRG1 F09 20L) would like to have a column for the Sponsor's Name on the List of Applications. At present this list contains the columns for Application number, PI Name, Project Title, Institution Name, and RFA/PA. The introduction of Sponsor's Name in the list would greatly help the reviewers in deciding whether they are in conflict with any application	CQ19419	View list of Applications	Add Sponsor Name for Fellowship Applications to all lists of applications for everyone. There will be a hard return after the title then Sponsor Name: Blah Blah Blah See the IAR 2.6.5 GUI changes Document
13	When Subproject Number starts with 0, like in 0001, the Sort of Subprojects under the parent application stops working. This needs to be fixed, so that Subprojects always appear under the Parent Grant on the List of Applications screens.	CQ19423 Bug	View List of Applications	Self Explanatory.
14	Add a link to ZIP all Preliminary Summary Statements when there is at least one preliminary word summary statement in the meeting to a List of Meetings screen for SRA/GTAs (instead of going to list of applications screen)	CQ19424	View List of Meetings	See the IAR 2.6.5 GUI changes Document
15	INVITATION LETTER: Should have subject line matching the meeting name in the IMPACII system (reviewers will be more likely to identify the e-mail as genuine and important).	CQ19425	Commons email messages.doc	Meeting Identifiers + Meeting Title Also make sure that the Subject Line is prefixed with NIH or IAR or Commons.
16	MULTIPLE PROFILES: In the CM module one of the multiple profiles should be identified as the one that is "active" in IAR (does not apply to reviewers who have multiple profiles none of which are active in IAR)	N/A	N/A	This is addressed by adding the Registration Status to the Person Admin Screen

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17	Some large meetings suffer performance due to a large amount of records to display on one page. Suggestion is to allow users to “paginate” through pages when there are more than 75 applications in the meeting. If there are 75 + applications in the meeting, then paginate 50 records at a time. Otherwise, no pagination.	CQ119426	View list of Applications	<p>Develop suggestion as specified in the requirement for pagination. Additionally, to minimize the need to go to the list of applications screen, enhance the Control Center in the following ways:</p> <ol style="list-style-type: none"> 1. Link to View Score matrix. 2. Link to Download Zip of all Pre-SS files in the meeting. 3. Link up the Reviewer Name with List of Applications Screen which will filter only on the Reviewer name and will show Assigned applications for the Reviewer and Unassigned applications for which Reviewer submitted critiques. <p>Also, place the View Score Matrix and Download Zip of all Pre-SS links to the List of Meetings screen (Action Column).</p> <p>Additionally, develop a new Simple list of Applications screen, which will show a one liner records of applications with the following data elements:</p> <ol style="list-style-type: none"> 1. Order of Review 2. Grant Number 3. PI Name 4. Project Title (Sponsor name for Fellowships) 5. Number of assigned Reviewers 6. Number of submitted critiques (that would count files only – not scores). 7. Average Score 8. View all PDF, View all Word options for each application 9. Lower Half/Significant Differences in Scoring Flags. 10. Link to the List of Applications that will navigate to the full featured list of applications only for clicked application record. <p>All fields will be sortable. Other links on the Screen will include all current links on the full featured list of applications screen + the link to the Full featured list of applications screen. The By Reviewer link will be excluded form the Simple List of Applications screen. Link to Simple List of Applications will be put on the Control Center, Full Featured list of Applications, and List of Meetings Screens.</p> <p><i>All Navigation Links across all screens will be standardized to allow ease of navigation o any screen in the system.</i></p> <p>The Simple List of Applications screen is available only to SRA/GTAs.</p> <p>The link to the List of Applications Screen will be broken into list of Applications by Application and List of Applications by Reviewer. See the IAR 2.6.5 GUI changes Document</p>

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18	There seem to be a bug where list of subproject critiques within preliminary summary statements is not ordered using the Order of Review order. Also, the ability to specify the order for subproject critiques using Peer Review Order of Review screen is not well known or advertised.	CQ19428	Create Pre-SS	Fix the bug. The advertisement issue is a training issue and does not affect the software..
19	System should allow the ability to create a significant difference report. Identification of significant difference could be by SRA scanning the list of scores and checking to indicate applications with major differences of opinions Add Significant Differences Check Box to the Designate Lower Half – the flag should work just like for Lower Half for SRA/GTA. Show Significant Differences label on List of Applications, just like for Lower half to SRA/GTA	CQ19429	Designate Lower Half Use Case	See the IAR 2.6.5 GUI changes Document Make a flag “Lower Half/Significant Differences” larger in font and bold on the list of applications screens.
20	Allow sorting of all lists of applications screens (including the score matrix) for SRA/GTA on Review Order.	CQ19430	View List of Applications View Score Matrix	Add Review Order to all Lists of applications screens. Add ability to sort on that. See the IAR 2.6.5 GUI changes Document
21	Score Matrix & Streamlining Popup of revr names, assgnmts, scores - by clicking on appl - would allow SRA to assess where the scores came from, who might be missing	CQ19431	View Score Matrix View Control Center	Highlight (link) the PI Name on the Score Matrix screen. When clicked will show full featured list of applications screen, but only with the application record that was clicked on the Score Matrix. See the IAR 2.6.5 GUI changes Document
22	New Meeting-Wide option to toggle Reviewer ability to submit Score for unassigned applications		Submit Critique Score	Modify Control center to add a new option: Allow Scores for Unassigned Applications Default to No. If Yes, the Submit Critique/Score screen will allow reviewers to submit the Score in addition to application.