

Plan for New J2EE Query Tool for Operational & Production Use





Plethora of eRA Query Tools and Access Methods

- ICSTORe
- QuickView
- CRISP Plus
- IQR
- CRISP on the Web
- ICO

- QVR/ECB
- Ad Hoc Query
- IRDB Power Views
- BA-specific Query Screens





Plethora of eRA Query Tools

- Confusing for users too many choices!
- Users want features provided in newer tools to be reproduced in older tools
- Duplicative functionality inefficient use of resources
- Project decision to migrate from Client/Server to J2EE Architecture – Migration Plan recommendation
- Desire to update & improve appearance to a real Web UI
- Desire to provide same interface for some reporting functions to internal and external users



Types of Users

- Quick View Users
- Scientific Query Users
 - Regular
 - Power
- Advanced Query Users (ICSTORe)
- Business Area Specific Users









Types of Users, cont.

- Document Tracking Users
- Program/IC Portfolio Users
- Finance & Budget Users
- Program Analysis Users





Requirements for Universal Query Tool Architecture

Different categories of users have different requirements for query and retrieval, making a single user interface impractical.

The purpose of this analysis is to identify requirements for different query & retrieval interfaces and their common components.





- QuickView & Status Users
- Scientific Query Users
 - Regular
 - Power
- Advanced Query Users
- Business Area Specific Users
- Document Tracking Users
- Program/IC Portfolio Users
- Peer Review Users
- Finance & Budget Users
- Program Analysis Users

- ICSTORe- Tack & Order,
- ICSTORe Book Definition
- ICSTORe Advanced Query
- QuickView
- CRISP Plus
- IQR
- CRISP on the Web
- QVR
 - **ECB**
- Ad Hoc Reporting
- Commons Status Reporting
- IRDB TechView
- IMPP TechView
- Business Area Query Screens



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 - IMPP TechView
- Business Area Query Screen (ICO)



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The Challenge:

To retain the unique requirements of each interface/access method while eliminating unnecessary duplication



Component types needed to support Query & Retrieval

Online Data
Viewing
Components
GUM + QV

Output Method Components

Print Central
Export to Excel
Zip/Merge, etc.

Query &
Retrieval
Architecture

Output Format Components

Fixed Reports, Discoverer repts. Documents, etc.

Query Parameter Components

Indiv.query fields, special selects, default query blocks, custom.
Query, etc.

Hit List Components

Custom.hit lists,
Default hit lists,
Column sort
Buttons, etc.





Task 1: For each eRA Query tool and access methods listed, identify:

Task 2:

Based on data collected in Task 1, develop a matrix that lists every component available and show which tools/access methods use which component.





For each eRA Query tool, identify:

- Target community
- Primary objectives
- Unique or special features
- Other similar or overlapping tools
- Early recommendations on how to improve
- Components used for the following:
 - Query parameters and options
 - Hit list fields and options
 - Sort fields and options
 - Online viewing fields and options
 - Output format and methods





Develop matrix listing listing every feature/option and field and show which tools/access methods use which component.



Sample Task 2 Matrix Component to Query Tool

	QV	ICO	Adv.Q	QVR
custom		•	0	
	0	0	0	
Custom Query	0			
		0		0
Dual PO	0		0	
save Query		0	0	

Sample Task 3 Matrix Query Field to Query Tool

	IC	PI	PO	PCC
ICO		•	0	
QV	0	0	0	
CRISP	0			
Adv.Q		0		0
QVR	0		0	
		0	0	



Based on analysis, build draft UI and Pilot J2EE Query Tool

- Select business area(s)
 - Grants Management, Program, etc.
- Convene focus group(s)
 - Subset of business area user group
- Pilot tool in July
- ◆ Roll-out in October





Online Data Viewing Components

Purpose:

• For viewing details of the selected or retrieved (hit list) record

Sample:

- Grant Update Module (GUM) screens
- QuickView screens

Examples of Requirements:

• While for transactions, desirable to have special screens for updating, for query/retrieval, the on-line view of the data and the output should be identical (e.g., hitlist with more data; snapshot report for both online viewing and output.





Output Methods & Formats

Purpose:

 Methods for receiving output results and formats for receiving output after identifying desired query results

Samples:

- Methods: Print Central; Merge & Zip; Export hit list to Excel;
 Generate report & print; Burn CD
- Formats: Fixed report; Exportable report; Labels; Form template report w/pre-printed info.; PDF Document; ASCII file; Data for spreadsheet; CD

- In addition to samples above, print hitlists directly from Browser without having to generate a report.
- Output formats & methods should be available to a all applications (e.g., output hit list to Excel shouldn't be limited to ICSTORe but should be an option for all hitlists).



Query Components

Purpose:

For facilitating user query

Samples:

- Lists of Values (LOVs)
- Customizable query (ICSTORe Adv.Query)
- ◆ Text search and syntactic operations (BT, NT, Soundex)

- Ability to save queries in all applications
- Can set default queries to automatically execute
- ◆ Need quick 'search & go' option without navigating through pages of esoteric query parameters
- Desire customized 'query template'





Query Fields

Purpose:

 User-entered, run-time parameters for retrieving desired data and documents

Samples:

- Grant number components
- ◆ Ability to query by dual council date, dual PO, dual PCC
- Special Selects (active grant, animal concern, etc.)

- Search for absence of value
- ◆ Date and numeric range searching (before, today + 1 week)
- Search for multiple values for same parameter
- Search for availability or non-availability of documents





Hit List Components

Purpose:

◆ For viewing query results to identify desired records and for viewing retrieved information

Examples:

- Default Hit Lists; ability to reset custom HL to default
- Customizable Hit List
- Ability to add individual records to hitlist
- Select checkbox with 'Select all'Deselect all'
- Scrolling hit list columns
- Nested sorts
- Sort 'by value'

Examples of Requirements:

◆ Save named hit list templates & associate w/saved queries

♦ Have hit list serve double duty as report



Hit List Fields

Purpose:

 Data to display query results for 1 or more retrieved records

Examples:

- ◆ ID data
- Status information
- Flags

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Links to additional data or documents

- Customize order of columns
- Select subset of rows for output





Sort

Fields & Options

Purpose:

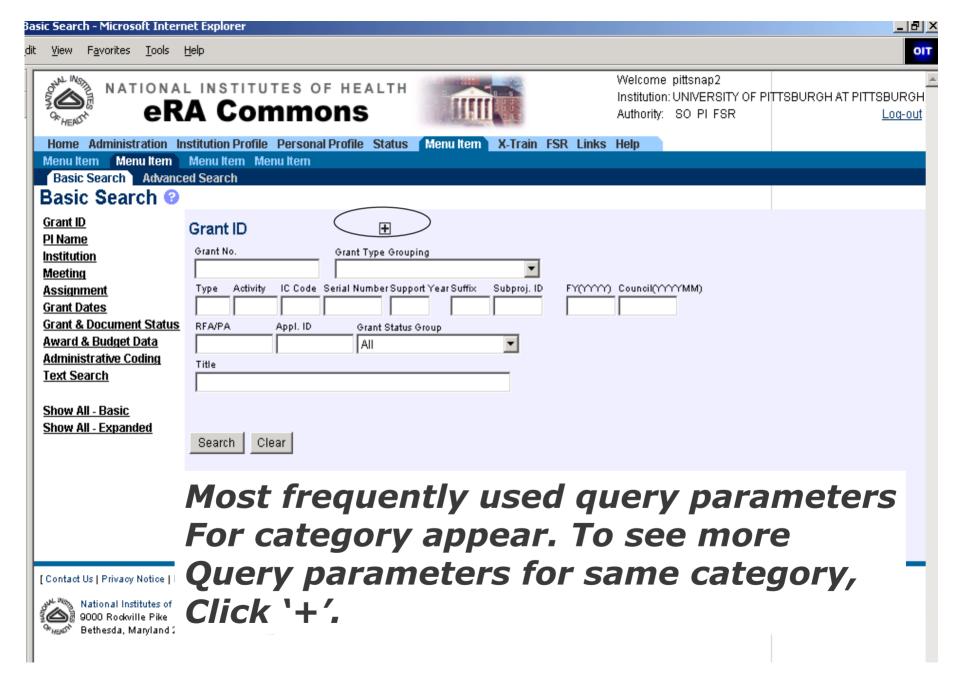
Re-order retrieved records and output as desired

Examples:

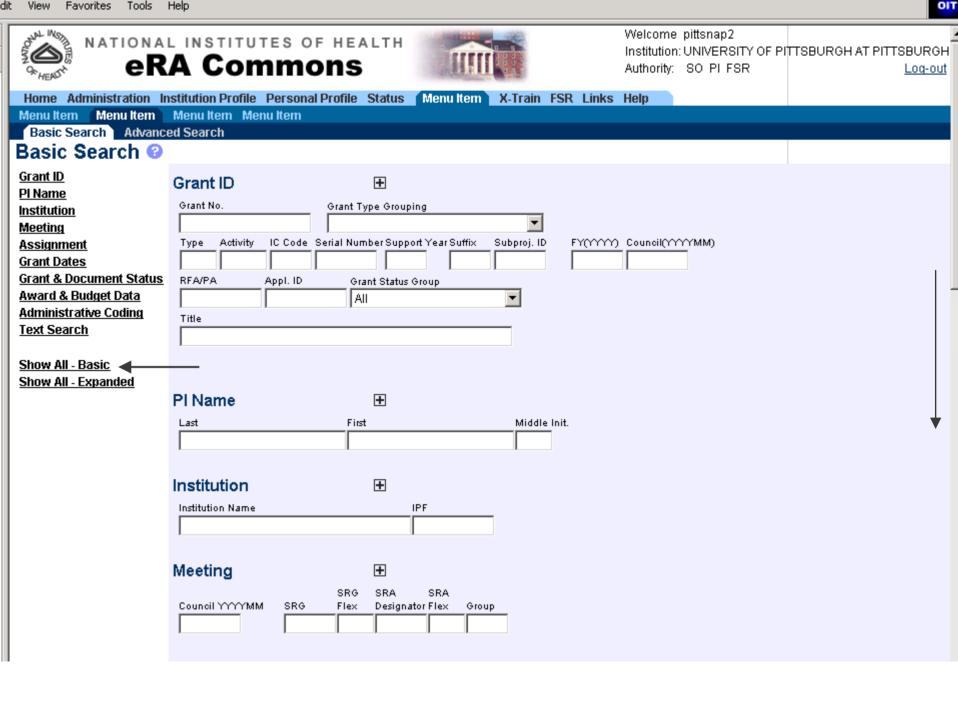
- Sort buttons as column headers
- Nested sort
- ◆ Sort 'by value' (e.g., sort by Activity with Us 1st, Rs 2nd, etc.)
- Output results in different sections, each w/diff.sort
- Manually order hit list w/re-sequence option

- Display sort order on screen & output
- Retain user-determined sort order between screens

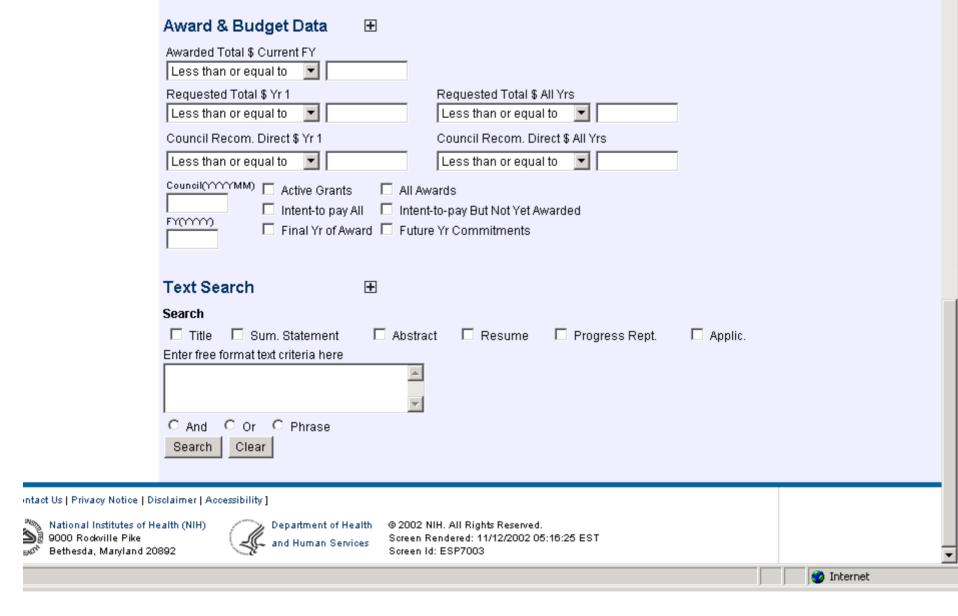


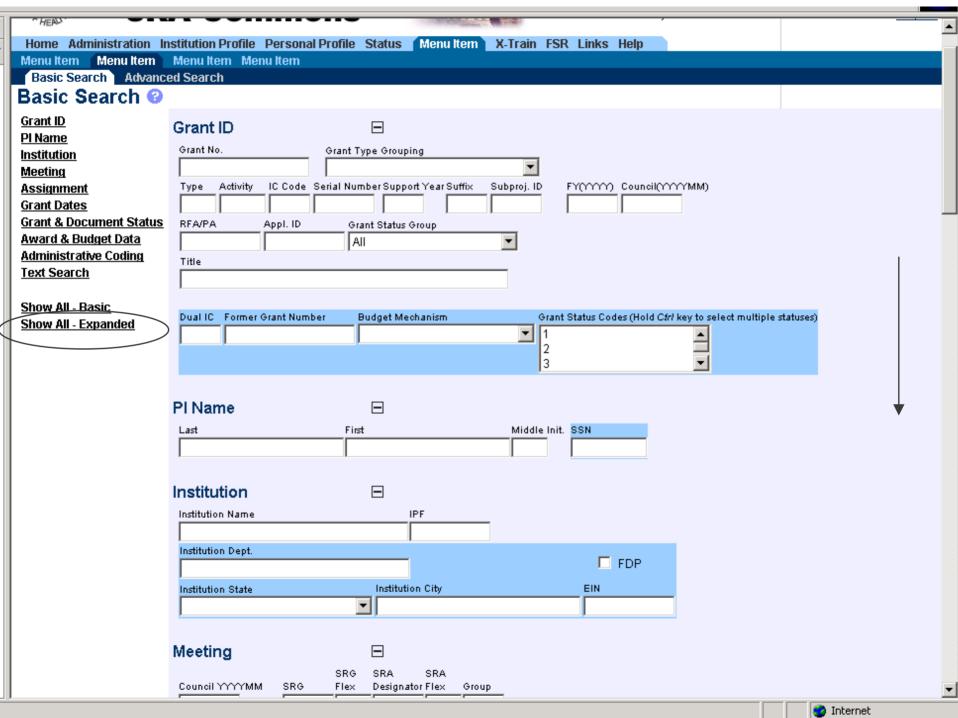


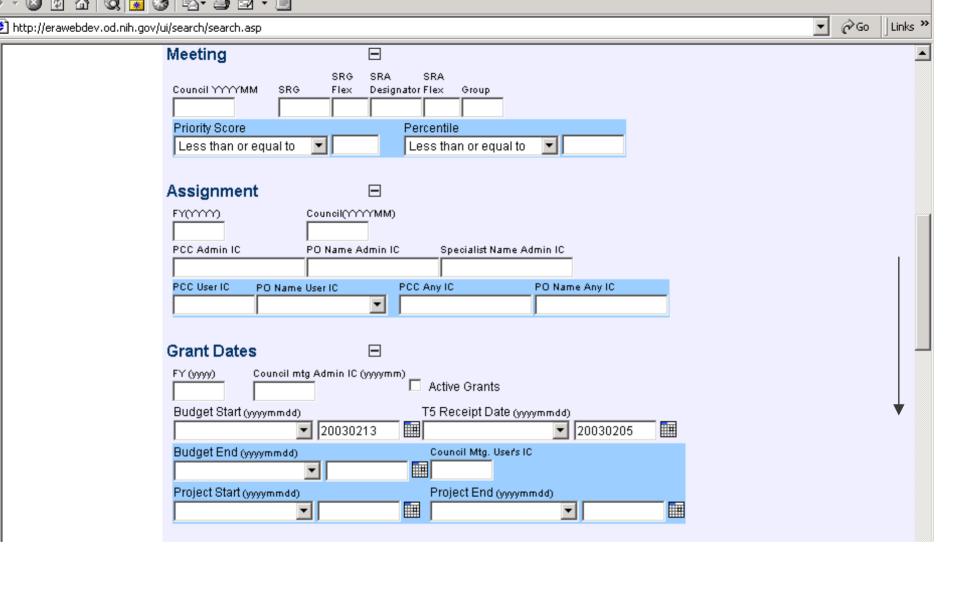
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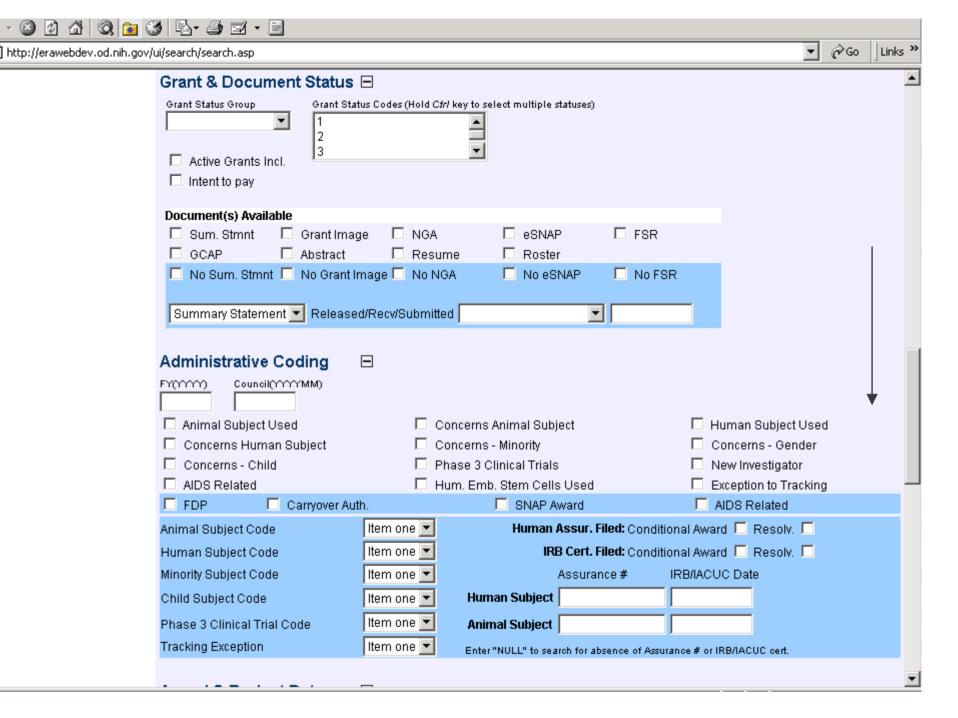


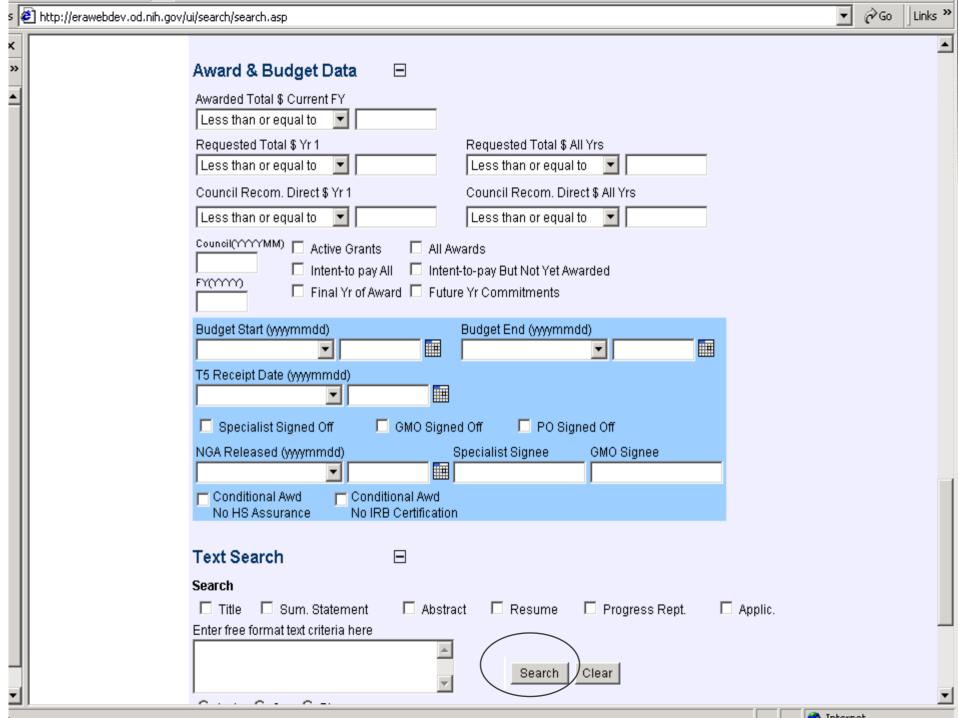
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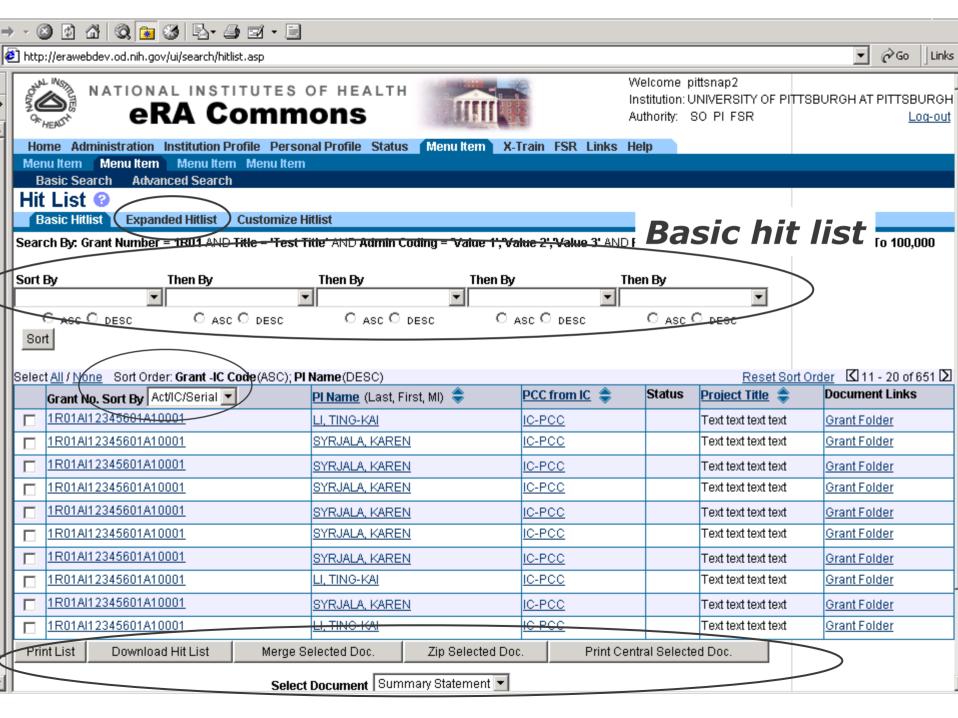


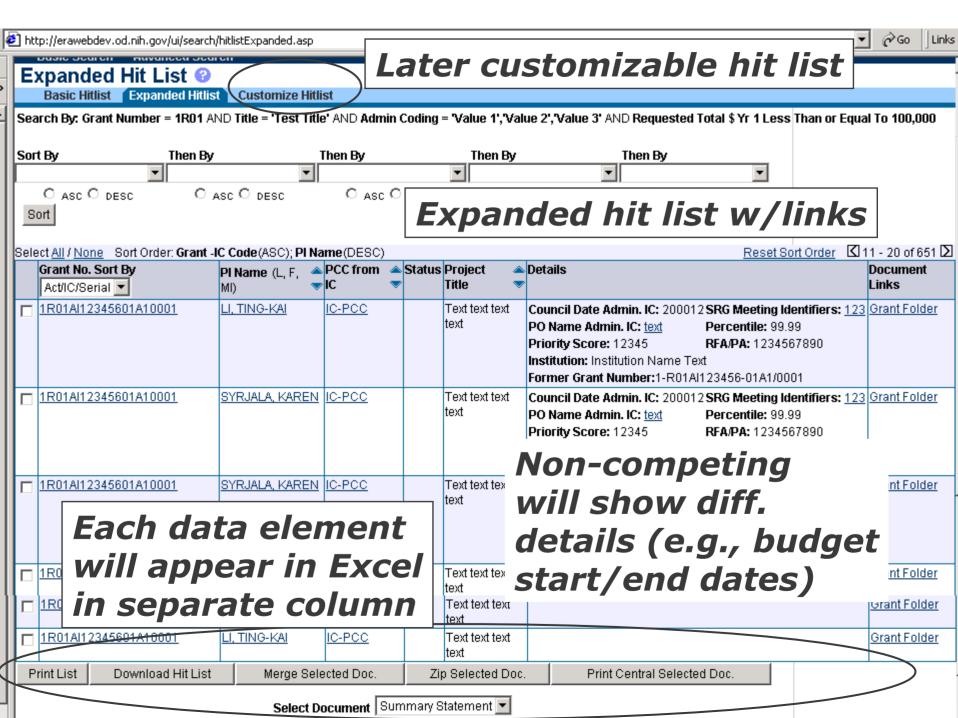


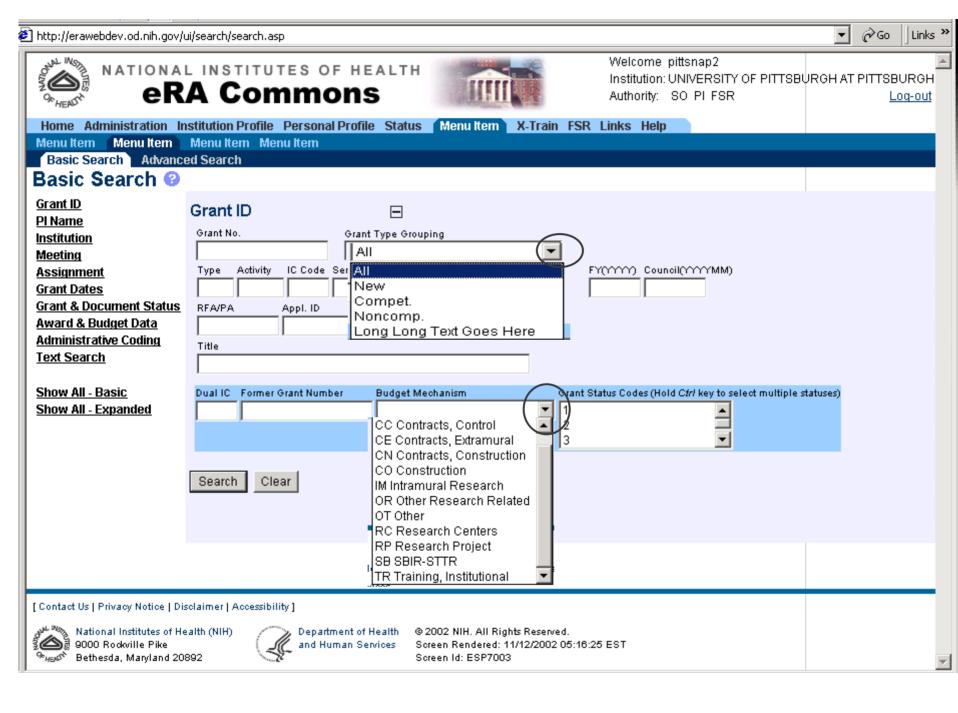


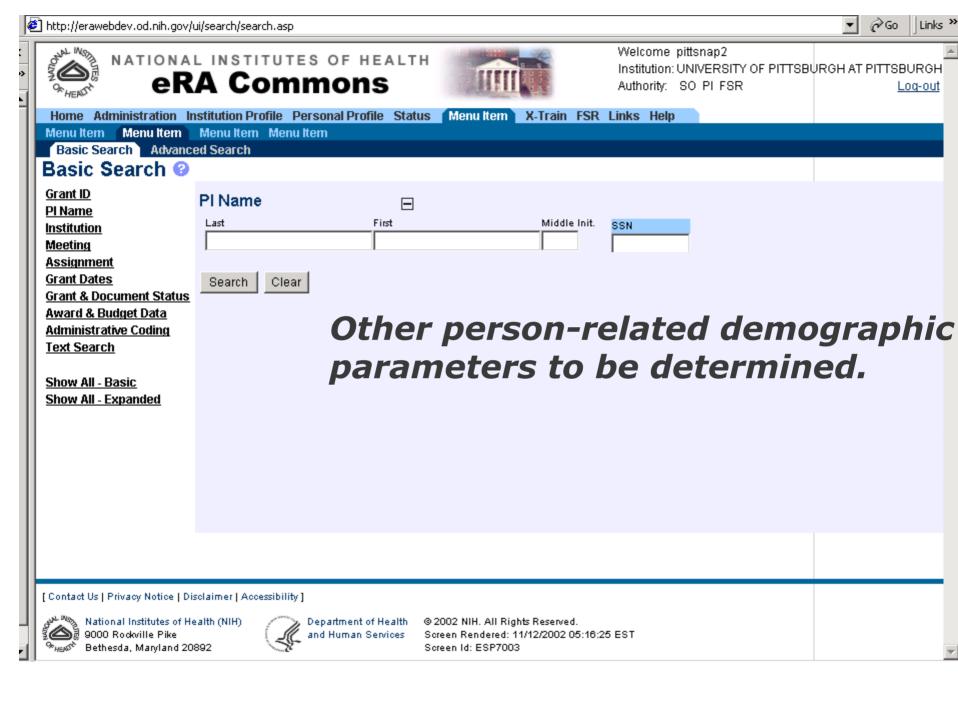














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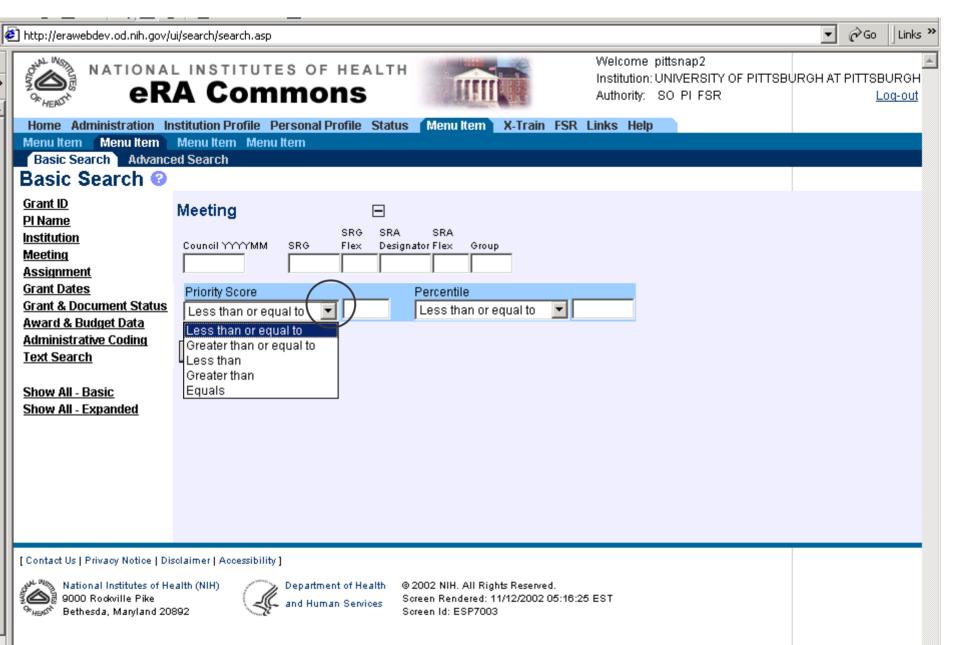
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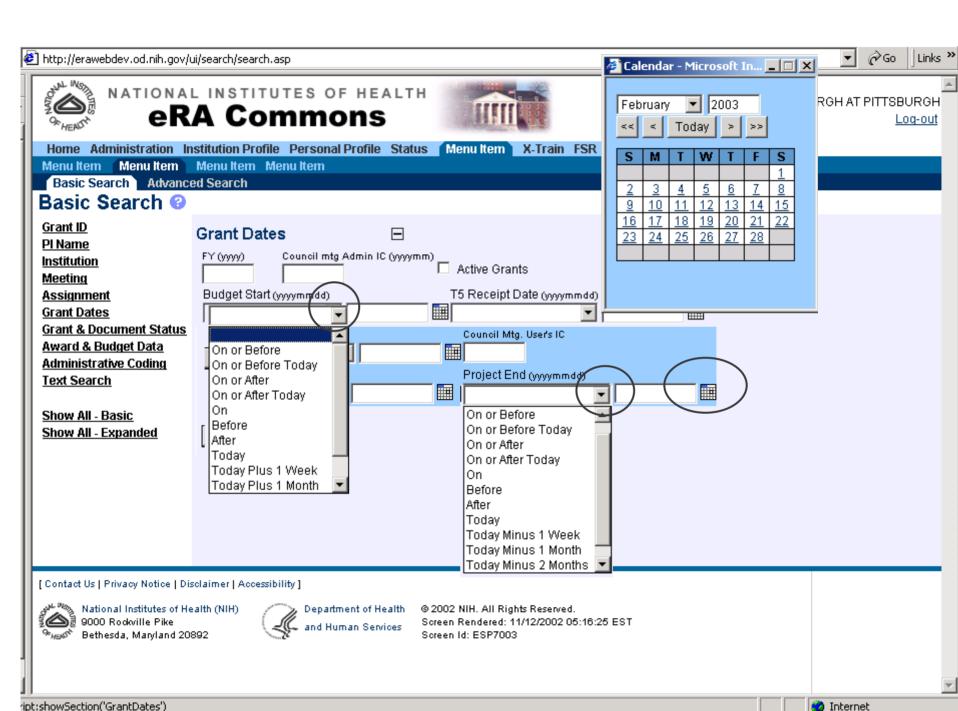


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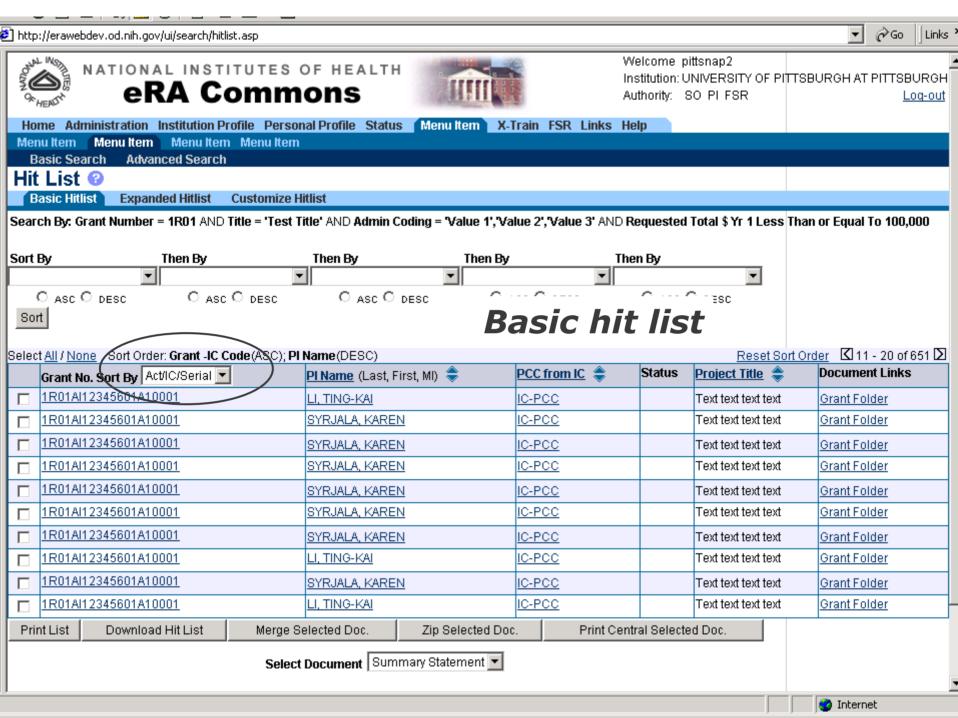


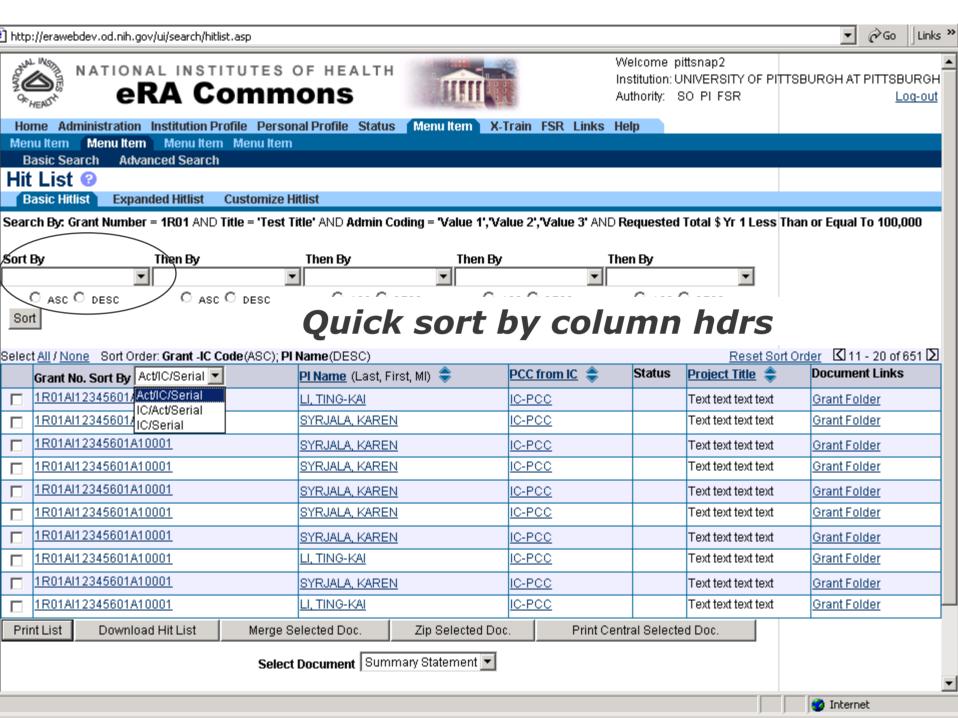


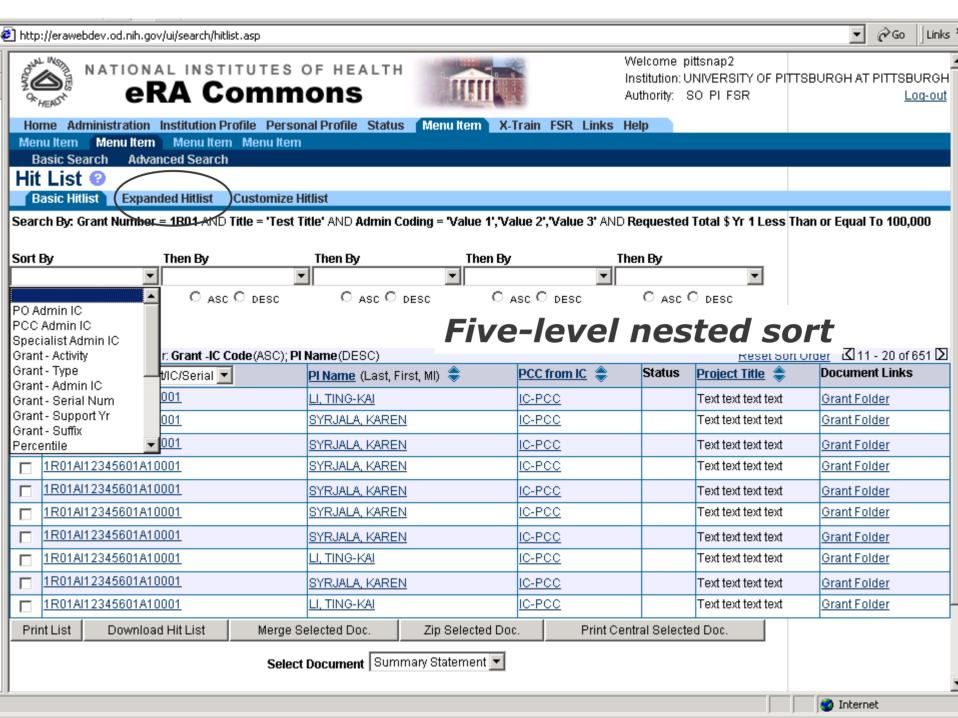
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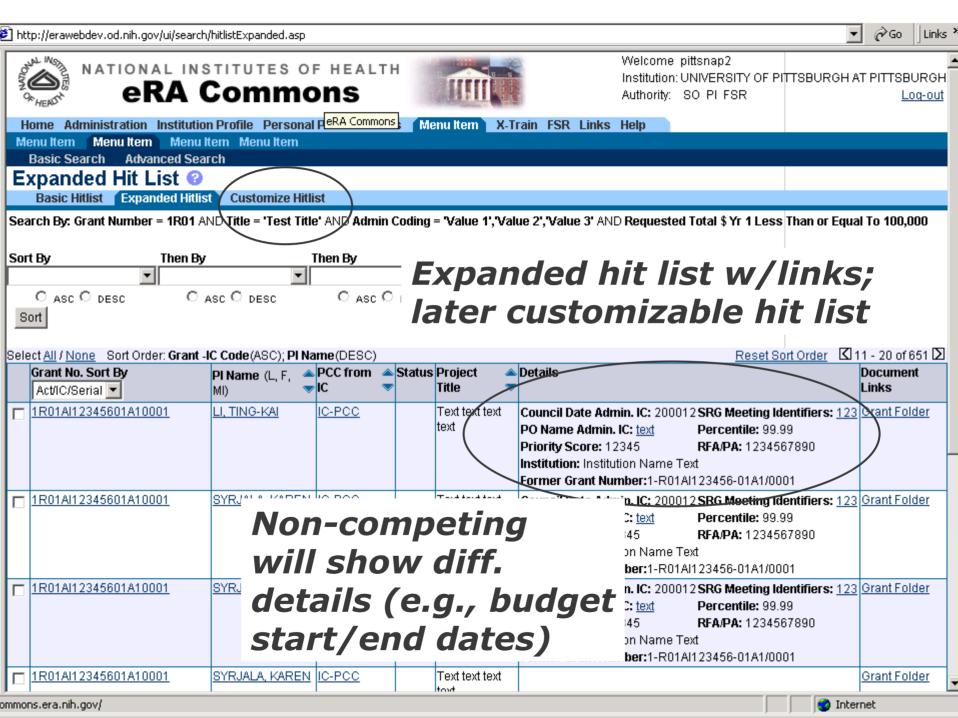
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ΑI	51ER2842	Beisel, Chris B	BeiselC@niaid.nih.gov	301-202-20202	YYYYMM	1 Recommended for funding	CON Concur with IRG			

Degree: test, test, test

PLINFORMATION

CA | 51ER2842

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Dual, PO

Else, Someone

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suite 1234

more address

more address

more address Cityname, MD 20123

Phone: (301)123-4567

Fax: (301)123-4567

Ext.:123 Email:myEmail@myServer.com

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INSTITUTION INFORMATION

suite 1234 more address

more address more address

Cityname, MD 20123

Phone: (301)123-4567 Fax:(301)123-4567 Ext.:123

Email:myEmail@myServer.com

PREAWARD BUDGET DETAIL

	Req.Total уг. 1: test	Req. Total all угз.::	est Req. Future yrs.:test	Cnl. Fut. yrs.:te	st Req. Mos. Fellowship:test
Туре	Period No.	FY		Direct Cost	Total Cost Cost
REQ	1	1998		123	123
CNL	1	1999		123	123
REQ	2	2000		123	123
CNL	2	2001		123	123
REQ	3	2002		123	123

AWARD DETAIL

Total of the organic	NGA Release:Date / time Signed by:Signee Cofund:test T5 recpt.:Date Future yrs Awd/Remain:999/10	00
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AWARD BUDGET

ш	Period	FY	Bud. start	Bud. end	Direct	Indir.	Fee	Unoblig. Bal.	Non-Fed. Share	Total Cost
П	1	1998	11/30/1999	11/30/1999	123,456	123	123	123	123	123,456
П	2	1999	11/30/1999	11/30/1999	123,456	123	123	123	123	123,456
П	2	2000	11/30/1999	11/30/1999	123,456	123	123	123	123	123,456
П	3	2001	11/30/1999	11/30/1999	123,456	123	123	123	123	123,456
ш	3	2002	11/30/1999	11/30/1999	123,456	123	123	123	123	123,456

AWARD BUDGET BY CAN

P	eriod	IC	CAN	Direct	Indirect	Fee	Unoblig. Bal.	Total Cost
1		CA	8422842	123,456	123	123	123	123,456
2		CA	8422842	123,456	123	123	123	123,456
2		CA	8422842	123,456	123	123	123	123,456
3		CA	8422842	123,456	123	123	123	123,456
3		CA	8422842	123,456	123	123	123	123,456

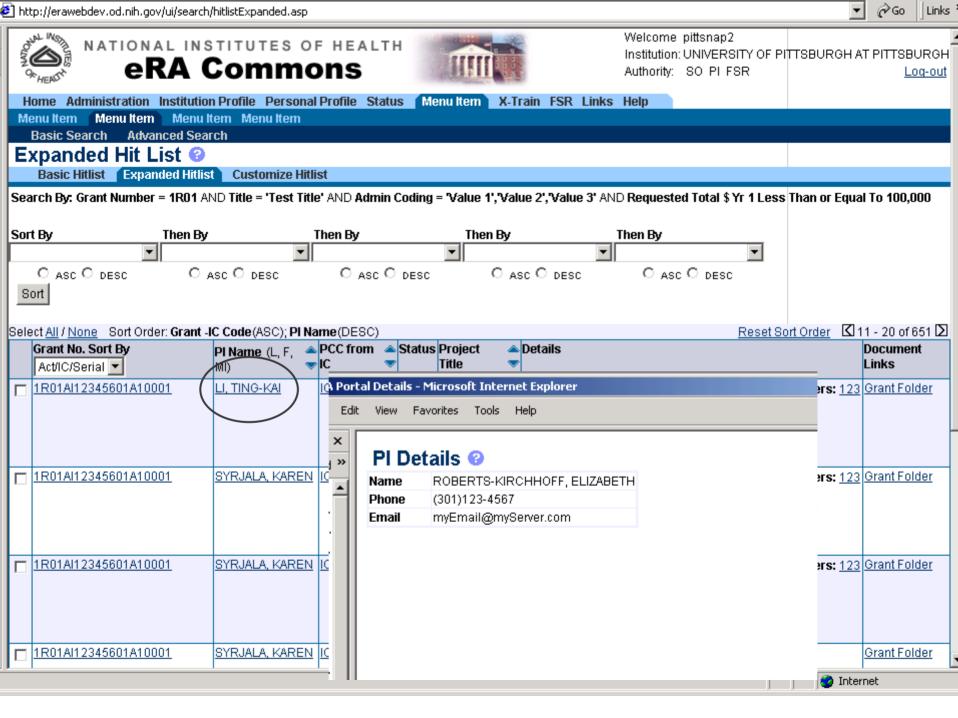
CFY LINE ITEMS

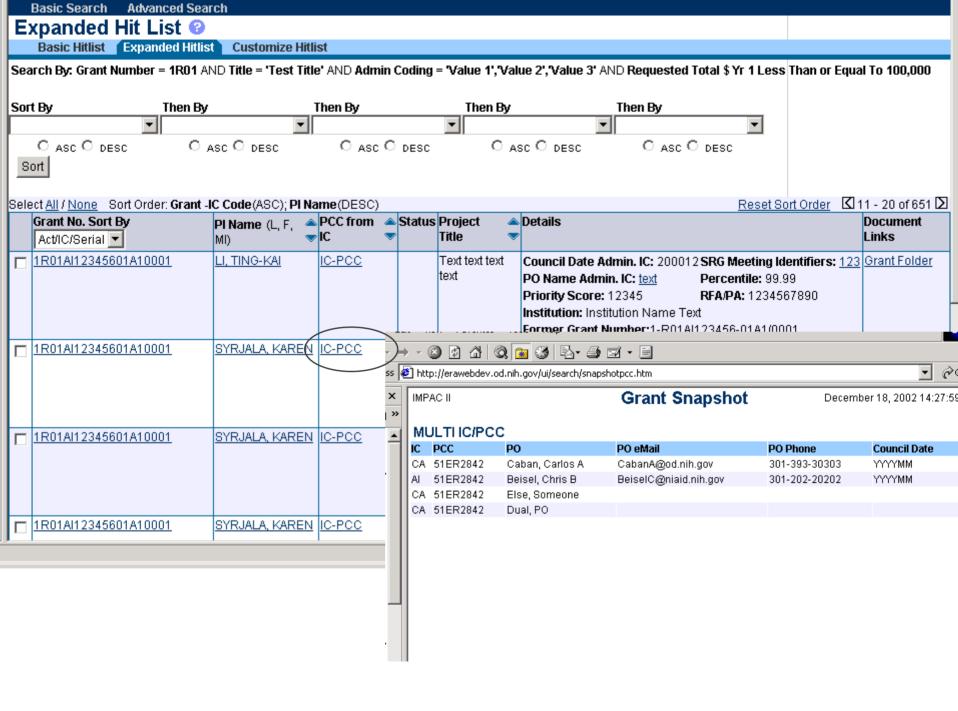
Account Code Line Item Description	Amount	Item Count	
3111 Salaries and Wages	123,456	123	
3112 Fringe Benefits	123.456	123	•

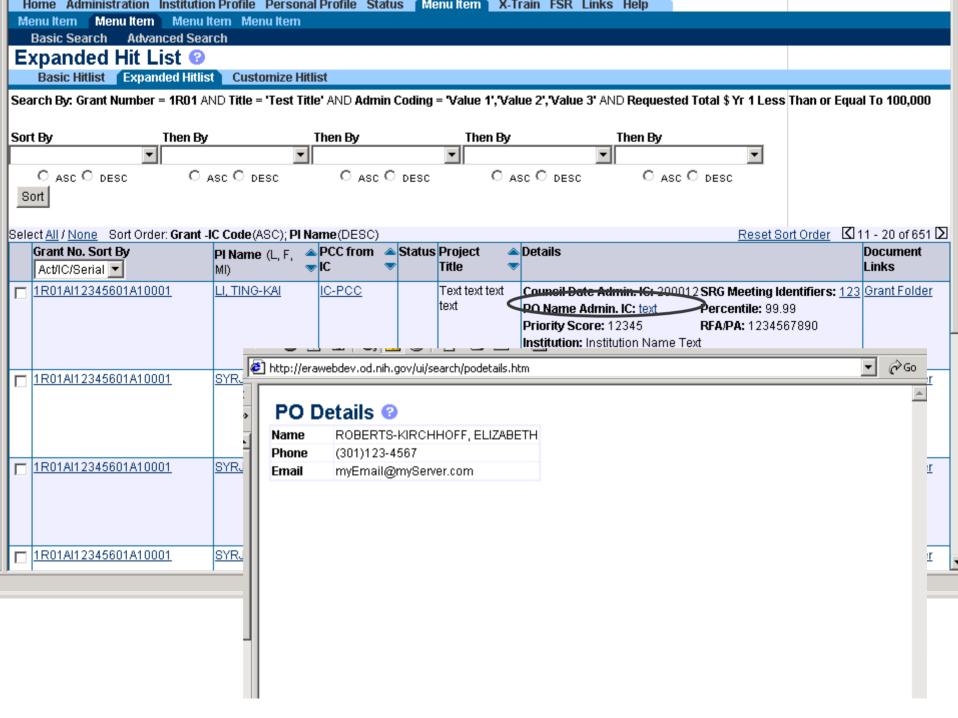


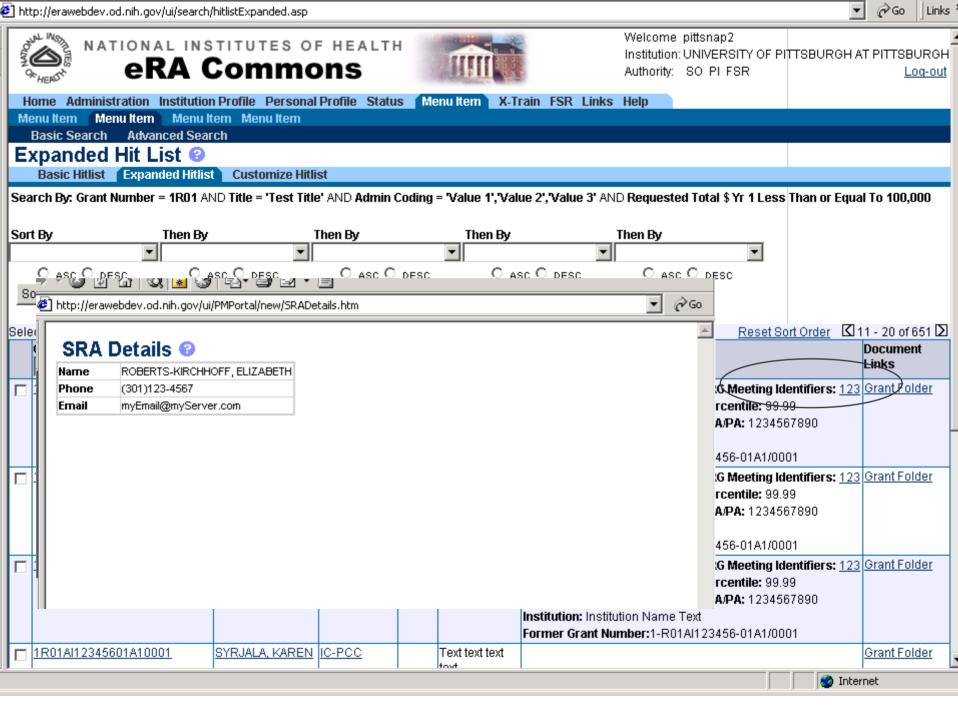
	Account Code	Amoun	it Item Co			
3111 Salaries and Wages					123,45	6
3112 Fringe Benefits					123,45	6
3113 Personnel Costs					123,45	6
3114 Supplies					123,45	6
3115 Travel Costs					123,45	6
& COUNCIL MEETING I	DETAIL for pre	-award competing ap	plications	Total:	123,45	6
		-award competing ap	plications SRA Flex: ?	Total:	123,45 Group: ?	6 Ext.:te
	Flex: ? S		SRA Flex: ?	Total:	,	
RG: IRG IRG Mtg. Date/T	Flex: ? S	RA Desginator: ? SRA: Paniers	SRA Flex: ?	Total:	Group: ?	Ext.: te
RG: ? IRG IRG Mtg. Date/T	Flex: ? S ime: ? tion: Maui Marrio	GRA Desginator: ? SRA: Paniers	SRA Flex: ?		Group: ?	Ext.: te SRA Phone: ?
RG: IRG IRG Mtg. Date/T IRG Loca	Flex: ? S ime: ? tion: Maui Marrio ess: 123 Madeup suite 1234	SRA Desginator: ? SRA: Paniers tt Resort o Street	SRA Flex: ?		Group: ? SRA eMail: ?	Ext.: te SRA Phone: ? IRG Location Phone: ?
IRG: ? IRG IRG IRG IRG Mtg. Date/T	Flex: ? S ime: ? tion: Maui Marrio ess: 123 Madeup	SRA Desginator: ? SRA: Paniers tt Resort o Street	SRA Flex: ?		Group: ? SRA eMail: ?	Ext.: te SRA Phone: ? IRG Location Phone: ?

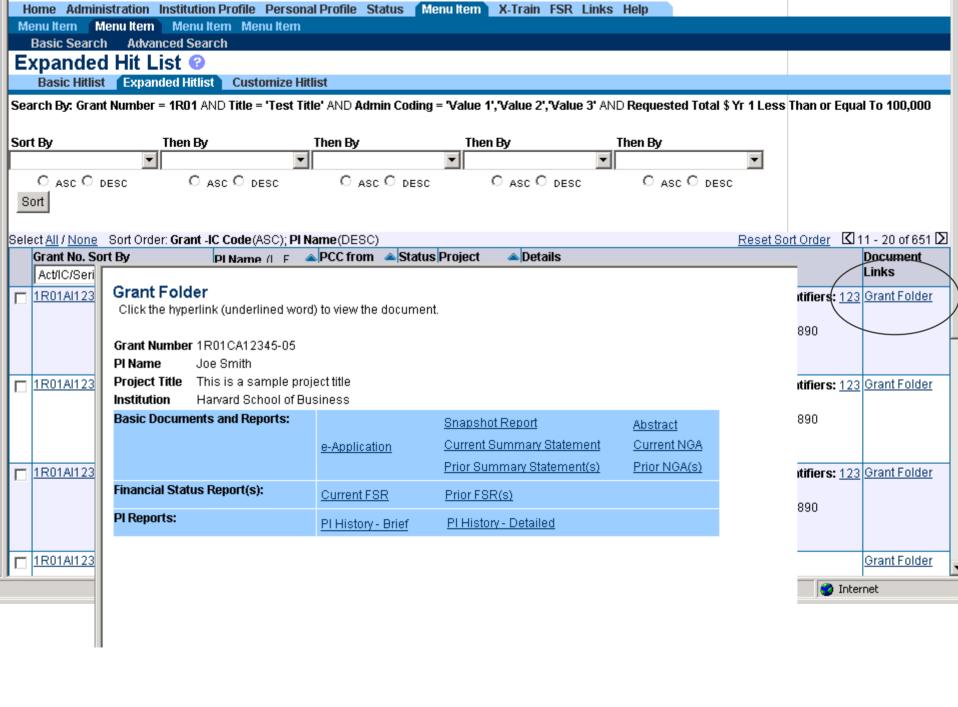
Internet









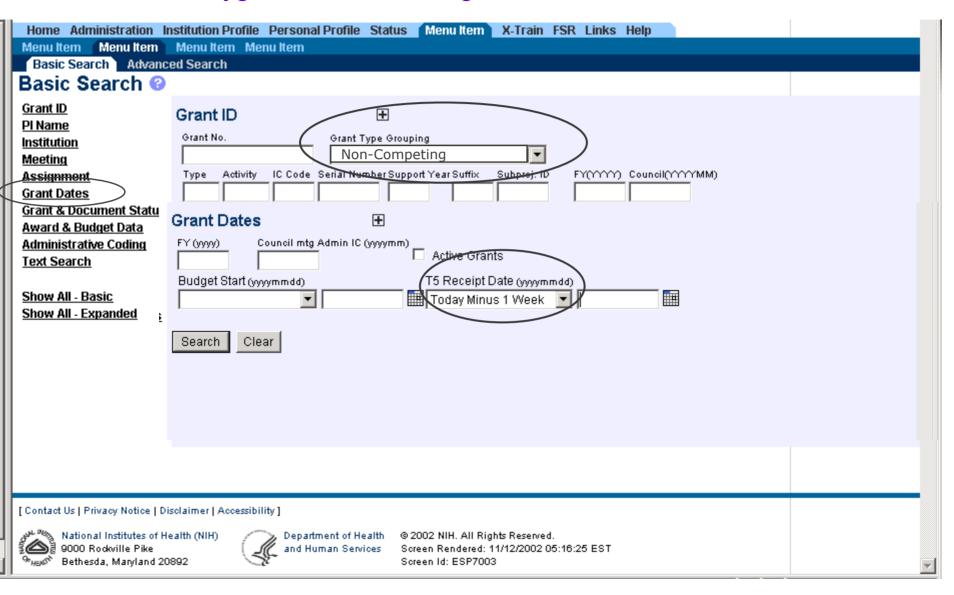




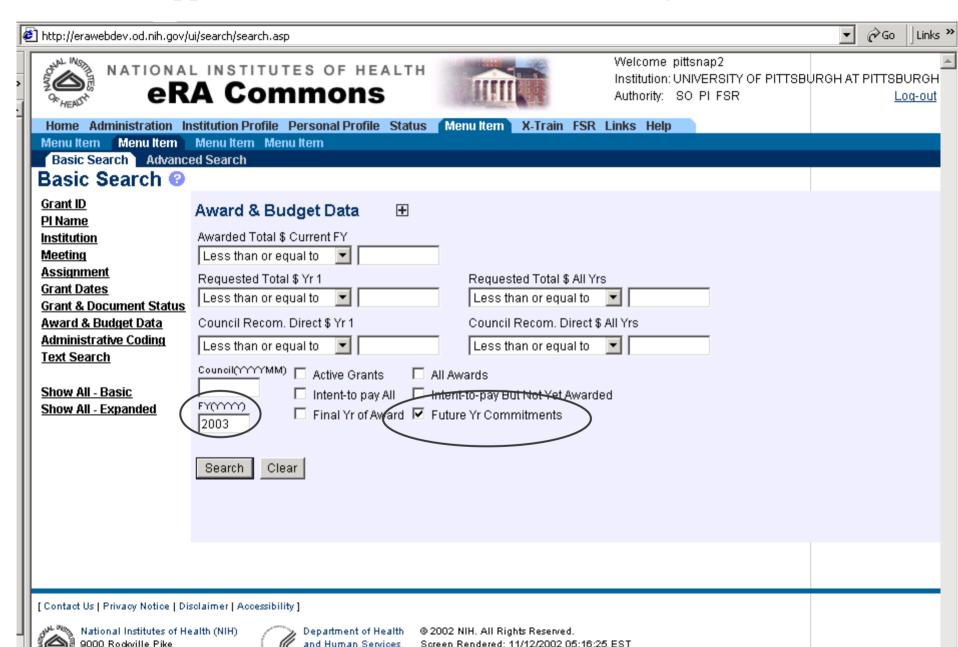
Query Scenarios of Interest to GM



Find Type 5s with a receipt date of this week



Find applications for current FY with future year commitments

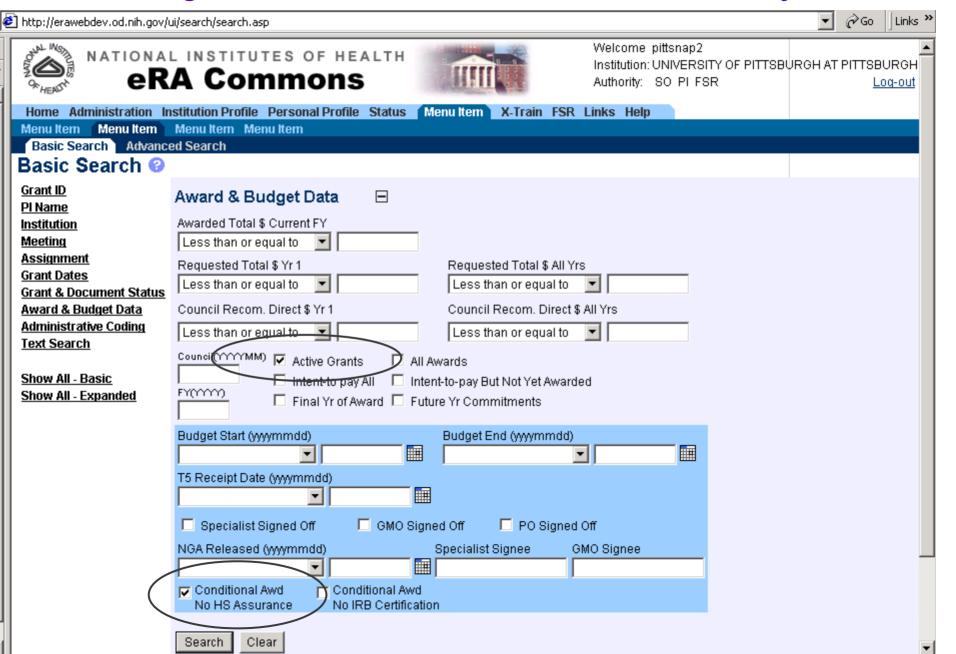


Find applications for current FY with 'intent-to-pay' but 🎒 http://e not yet awarded for which the specialist signed off at least 1 week ago Administration Institution Profile Personal Profile Status Menu Item X-Train FSR Links Help Menu Item Menu Item Menu Item Menu Item Basic Search Advanced Search Basic Search Grant ID Award & Budget Data PI Name Institution Awarded Total \$ Current FY Meeting Less than or equal to **Assignment** Requested Total \$ Yr 1 Requested Total \$ All Yrs **Grant Dates** Less than or equal to Less than or equal to **Grant & Document Status** Council Recom, Direct \$ Yr 1 Council Recom, Direct \$ All Yrs Award & Budget Data Administrative Coding Less than or equal to Less than or equal to **Text Search** Council(^^^^MM) 🔲 Active Grants All Awards Show All - Basic ☐ Intent-to pay ► ☐ Intent-to-pay But Not Yet Awarded FY(YYYY) Show All - Expanded ☐ Final Yr of Award ☐ Future Yr Commitments 2003 Budget Start (wwwmmdd) Budget End (yyyymmdd) T5 Receipt Date (yyymmdd) GMO Signed Off PO Signed Off Specialist Signed Off NGA Released (wwmmdd) Specialist Signee **GMO Signee** Conditional Awd Conditional Awd No HS Assurance No IRB Certification

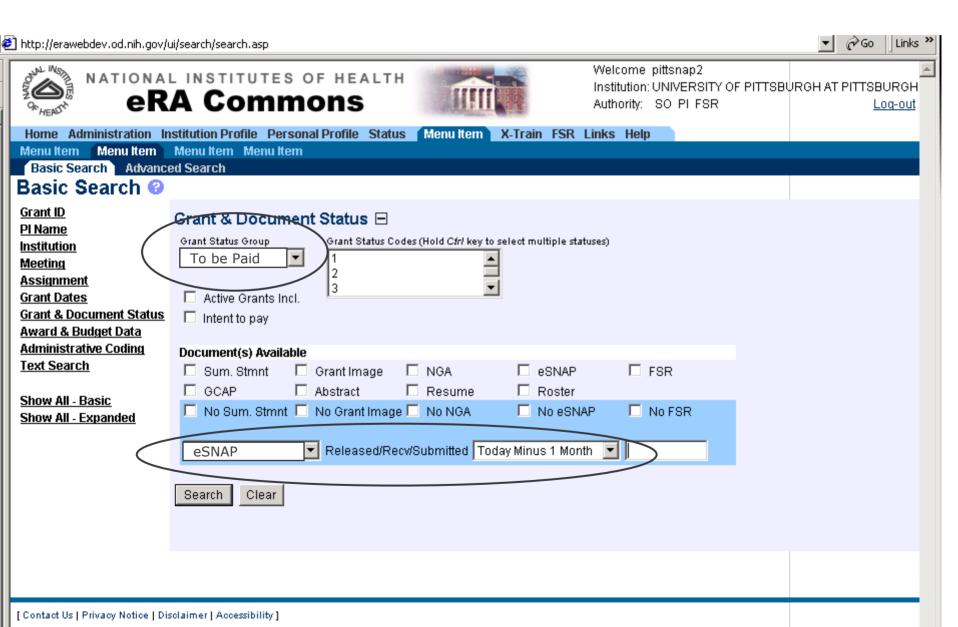
Clear

Search

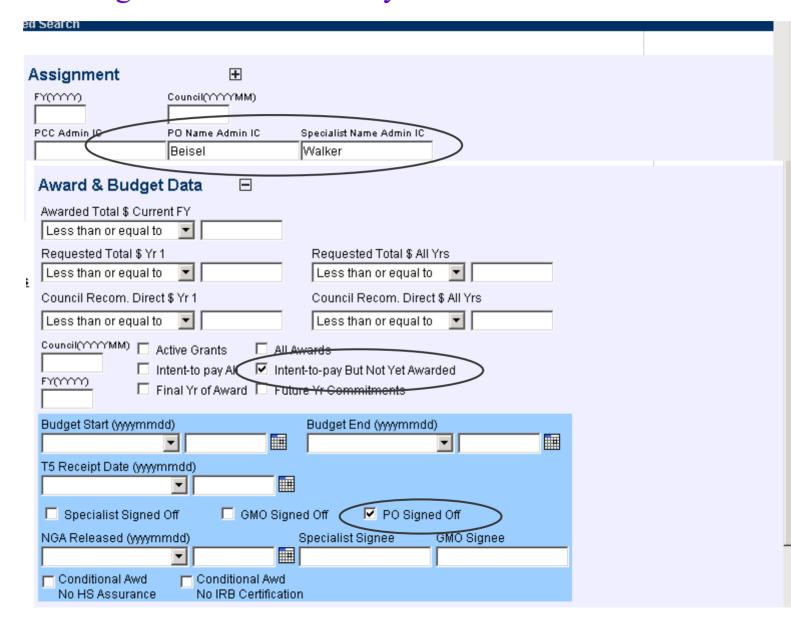
Find active grants with conditional award & no human subj. assurance



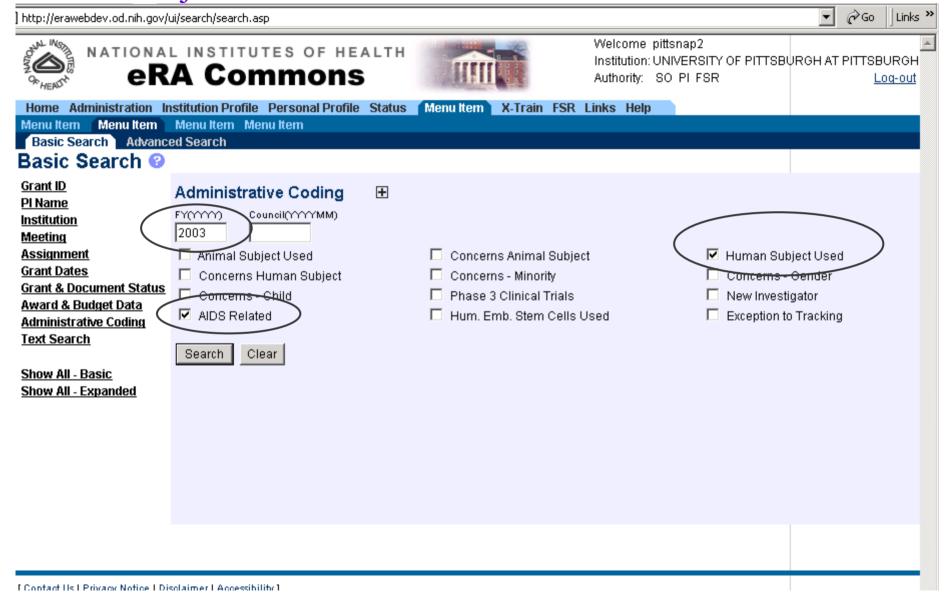
Find non-competing applications 'to be paid' where their eSNAP was received this month.



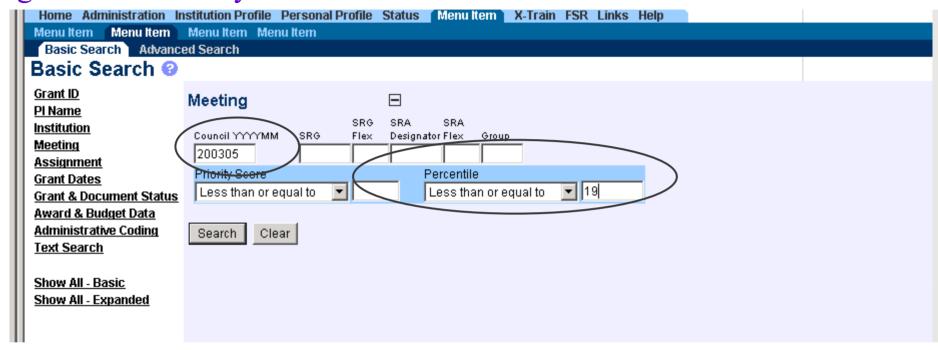
Find 'intent-to-pay' applications for a particular specialist for which a particular PO has signed off that are not yet awarded.



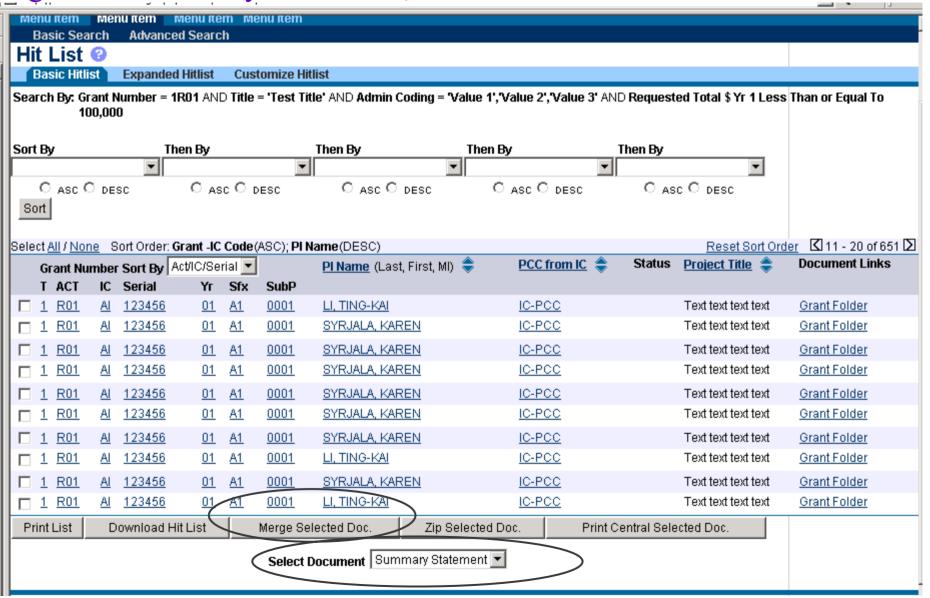
Find applications for the current FY that are AIDS related that use Human Subjects



Find applications for a particular council with a percentile \leq 19; get their summary statements



Find applications for a particular council with a percentile \leq 19; get their summary statements, continued



Download all the NGAs for a particular council

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Home Administration In	nstitution Profile Personal Profile Status	Menu Item X-Train FSR	Links Help	
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Download all the NGAs for a particular council, cont.

