



Workgroup on Extramural Training Systems (WETS)

Date: April 10, 2003
Time: 10:00–Noon
Location: Rockledge 1, Room 3502
Advocate: Dr. Walter Schaffer
Incoming Advocates: Rick Ikeda, Barbara Huffman

Next Meeting: **May 8, 2003, 10 a.m.–Noon, Rockledge 1, Rm. 3502**

Action Items

1. (Steve Fitzgerald) Distribute updated X-Train Release 2 enhancement list to WETS.
 2. (Steve Fitzgerald) Distribute the Requirements Document and Use Cases to WETS and post them on the website.
 3. (Steve Fitzgerald) Write a proposed workflow for termination notices and present it at the CWG meeting on April 30.
 4. (Steve Fitzgerald) Send to WETS the proposed changes to business rules for the July release in regard to how educational degrees will be designated, captured and categorized.
 5. (Steve Fitzgerald) Ask Tim Twomey why the degrees in the Personal Profile (PPF) and stored in the OLTP are not being bridged correctly to the IRDB.
 6. (Elaine Sirkis) Prepare some prototypes of reports so that they can be submitted to QVR and Web QT teams for inclusion in these query tools.
 7. (Steve Fitzgerald, Carin Sprick) Ask Jim Tucker if he can get QRC involved in cleaning up fellowship records, in particular the degree data.
 8. (Lisa Chen, Steve Fitzgerald) Investigate how to resolve the pre-doc/post-doc issues in T35 training grant records. See if QRC can change the “post doc” designation in T35s to “pre doc.”
 9. (Steve Fitzgerald) See if it is feasible to do a “sweep” to close T35s prior to a set date.
 10. (Steve Fitzgerald) See if it is feasible to “sweep” F31 records so that they are categorized as “pre doc” instead of “post doc.”
 11. (Steve Fitzgerald) Define required fields for processing training grant awards.
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Attachments

- X-Train Release 2 Enhancement List: http://era.nih.gov/Docs/TA-X-Train_Enhancement_Requests.pdf ; http://era.nih.gov/Docs/X-Train_ver2_Supplementary_Spec.PDF
- X-Train Scope Document: http://era.nih.gov/Docs/X-Train_2.0_Scope_Document.PDF
- X-Train Use Cases: http://era.nih.gov/Docs/Amend_Trainee_Appointment.PDF ; http://era.nih.gov/Docs/Create_New_Trainee_Appointment.PDF ; http://era.nih.gov/Docs/Display_Roster_of_Trainees.PDF ; http://era.nih.gov/Docs/Display_Trainee_Summary.pdf ; http://era.nih.gov/Docs/Reappoint_Trainee.PDF ; http://era.nih.gov/Docs/Select_Grant.PDF ; http://era.nih.gov/Docs/Select_Project.PDF ; http://era.nih.gov/Docs/X-Train_2.0_Use_Case_storyboard.PDF ; http://era.nih.gov/Docs/X-Train_2.0_Use_Case_Survey.PDF ;

Introducing the New Advocates

Wally Schaffer introduced Barbara Huffman (NIAID) and Richard (Rick) Ikeda (NIGMS) who have agreed to become Co-Advocates for WETS. They have been transitioning into this new position and will be introduced at the next Project Team meeting. Wally will continue to participate in the group. Meetings will continue at the same time each month.

Barbara said that she is a very strong advocate for X-Train, has been involved in training activities, including Payback, for a long time, and served on the TA JAD. Rick has experience with training grants in his job and is interested in working on TA issues as the modules evolve into the new architecture. Both Barbara and Rick have been working with Steve Fitzgerald, the analyst, in the development of requirements for future system enhancements.

Update on X-Train

Steve Fitzgerald reported that X-Train is being redesigned for the J2EE architecture, which will align it with NIH eRA Commons, provide an improved look and feel, and have a common interface for internal and external users. The first release, scheduled for July, will be the old module in the new architecture with a few enhancements and changes to take advantage of the new environment. However, it will be a more stable product and more user-friendly. It will also provide a base for bringing in other functions, such as the TA and Payback systems. The requirements for that release are approved and in the development process.

Steve is now gathering requirements for the second release, scheduled for October, which will include enhancements to the current system. He distributed an enhancement list to review.

Action: (Steve Fitzgerald) Distribute updated X-Train Release 2 enhancement list to WETS.

Action: (Steve Fitzgerald) Distribute the Requirements Document and Use Cases to WETS and post them on the website.

Requirements Group—Steve also distributed a list of external users associated with training programs who use X-Train the most often. He has contacted many of them to see if they would be

interested in participating on a committee to determine enhancements and requirements for upcoming releases. He noted the need to coordinate with the Commons Working Group even few CWG members are likely to be involved in training activities. No definitive plans for convening this group were made. Wally encouraged early engagement of the external users in discussion about system design.

CWG—Dan Hall and David Wright, who work on the NIH eRA Commons, suggested that Steve write a proposed workflow for termination notices that could be presented to the CWG at their April 30 meeting.

Action: (Steve Fitzgerald in collaboration with Barbara Huffman and Rick Ikeda) Write a proposed workflow for termination notices and present it at the CWG meeting on April 30.

October Release

The group discussed enhancements and requirements for the October release.

Termination Notices—NIH staff will use the same interface as external users to accept or reject appointments.

FOT—The field of training is mandatory on the electronic version of the 2271 in X-Train. On the paper form, the FOT field is grayed so this information only comes in with new appointments.

Degrees—Steve noted that the business rules and requirements for degrees—how they are designated, captured and categorized—are being changed for the July release.

Action: (Steve Fitzgerald) Send to WETS the proposed changes to business rules for the July release in regard to how educational degrees will be designated, captured and categorized.

Action: (Steve Fitzgerald) Ask Tim Twomey why the degrees in the Personal Profile (PPF) and stored in the OLTP are not being bridged correctly to the IRDB.

Reporting—It was agreed that providing a reporting function would be useful. Today, there are reporting tools for individual awards but there is a need for a more broad reporting process to pull out data for statistical reports. Rick Ikeda recommended that the group work with the QVR group, which is headed by Thor Fjellstedt in CIT, to develop queried reports specifically for training. Wally said that the new query tool, Web QT, being developed by Sherry Zucker and her group, would also be an option for querying a report.

Action: (Elaine Sirkis) Prepare some prototypes of reports for discussion by WETS for eventual submission to QVR and Web QT for inclusion in these query tools.

Data Quality—Carin Sprick commented that for reports to be accurate, the data has to be accurate. Unfortunately, the data is still not “clean”, and includes many duplicates as well as empty data fields.

Action: (Steve Fitzgerald, Carin Sprick) Ask Jim Tucker if he can get QRC involved in cleaning up fellowship records, in particular the degree data.

T35 Records—Prior to 1993, it was not required to issue termination notices for these 3-month training grants for pre-docs only. Consequently, there are hundreds in the system that are listed as open appointments. It was suggested that programmers do a “sweep” and terminate all T35

appointments prior to a particular date. Also, many T35 records show the grantee as “post doc” when they should be “pre doc.” This also needs to be fixed.

Action: (Lisa Chen, Steve Fitzgerald) Investigate how to resolve the pre-doc/post-doc issues in T35 training grant records. See if QRC can change the “post doc” designation in T35s to “pre doc.”

Action: (Steve Fitzgerald) See if it is feasible to do a “sweep” to terminate T35s prior to a set date.

Action: (Steve Fitzgerald) See if it is feasible to “sweep” F31 records so that they are categorized as “pre doc” instead of “post doc.”

Required Fields—It was agreed that certain fields—degree, date degree awarded, field of training (FOT)—should be mandatory data fields for processing the award or appointments. For the data degree awarded, there should be a code for undergraduates, which could be HS so that there is something to add.

Action: (Steve Fitzgerald) Define required fields for processing training grant awards.

Attendees

Chen, Lisa (NGIT)

Dean Maxwell, Tammy (OD)

Fitzgerald, Steve (RN
Solutions)

Huffman, Barbara (NIAID)

Helmsen, Ralph (NEI)

Ikeda, Richard (NIGMS)

Knipple, Joy (NIMH)

Schaffer, Wally (OER)

Seppala, Sandy (LTS/COB)

Shreffler, Carol (NIEHS)

Sirkis, Elaine (NCI)

Sprick, Carin (DEIS)

Stone, Sara (NIDCD)

Trunnell, Diana (NIMH)

Venable, Beverly (OD)

Willett, Marie (OER/OD)