



Web QT Users Group

Date: Tuesday, September 14, 2004
Time: 2:30–3:00 p.m.
Location: Rockledge 1, Room 8111
Chair: Patti Gaines

Next Meeting: TBD

Action items

1. (Daniel Fox, Patti Gaines) Discuss with Tim Twomey the issue of access rights to the external Commons screens for selected internal users.
2. (Tina Milner) Make Web QT easily available by sending out email with a shortcut icon to put on users' desktops (include instructions on how to do it – and instructions on how to bookmark it).
3. (Patti Gaines, Tina Milner) Write articles about Web QT for *Inside eRA* and the *CSR Rock Ledger* newsletters.
4. (Tina Milner) Create a PowerPoint presentation that clearly explains benefits on migrating QuickView to Web QT. This presentation can be reused every time someone is asking that question. Make sure presentation includes end-user benefits, not the technology benefits from the eRA management perspective.
5. (Daniel Fox, Tina Milner) Once completed, update everyone on Contracts querying and display in Web QT.

Attachments

- Meeting Agenda and Updates: http://era.nih.gov/docs/Web_QT_User_Group_09-14-04.pdf
- Web QT Enhancement List and FY2004 Plans: http://era.nih.gov/docs/WebQT_Enhancement_List-FY2004_plans.pdf

Introductions

Patti Gaines welcomed the group and explained that there had been a work group previously. Now that Web QT has been released, the group has been revived as a user group and the number of participants increased. The purpose of the group is to discuss Web QT and provide suggestions and input for making it a better tool.

Patti noted that the Web QT team has spent the last several weeks doing outreach, including making presentations to user groups and teaching classes.

One of the reasons for getting Web QT widely used is so that QuickView can be retired. Eventually, ICSTORE also will be retired. From a cost perspective, the eRA team determined that

it was too costly to maintain multiple query tools. Web QT, when it is fully developed, will offer the functionality of many of the current query tools. It also fully complies with the J2EE architecture of the eRA System and, with its being a central tool, its maintenance across the eRA System will require less cost.

There was some discussion of access rights to the eRA Commons. Often, internal staff members are called by PIs and other partner institution staff to help them upload or enter data into the Commons. However, most internal users do not have the same access rights as external users and so cannot see the same screens. This makes it very difficult to help external users. Helpdesk staff has rights to see internal and external screens. However, it was noted that the Helpdesk staff is not as proficient or knowledgeable as some internal staff members in answering many questions of the PI. It was suggested that more internal staff be given access rights to external views of the Commons.

Action: (Daniel Fox, Patti Gaines) Discuss with Tim Twomey the issue of access rights to the external Commons screens for selected internal users.

Web QT Update

(See Meeting Agenda and Updates link above)

Patti Gaines reviewed the accomplishments and enhancements for 2004 and 2005.

Accomplishments

Accomplishment	Status/Notes
Ended pilot and deployed	Fully deployed Web QT to the internal community.
Added the ability to query on the PI only	Previously, one had to query for other information along with the PI.
Increased the number of hitlist rows	The number of hitlist rows now has a default of 50.
Increased the document merge limit	The limit has been increased to 500 abstracts and resumes.
Added "between" operator	This permits the user to search between two (from/to) dates or numeric values. There is a dropdown menu with "between" as a choice.
Modified Abstract header	The Abstract header was modified to include Project Title and Institution Name.
Admin IC appears on top of PCC code details screen	This makes the Admin IC more prominent.

Upcoming 2004 Enhancements

Enhancement	Status/Notes
Ability to search for duals.	This is a bug fix.
Roadmap Search and hitlist	This enhancement is in development so should be available soon. There will be a separate screen for Roadmap data. The hitlist also will include the implementation team and other relevant data.
Animal Subject code changes	The changes area result of an enterprise-wide requirement.
Ability to search for multiple PCC Admin ICs	
Ability to search contracts	The team is investigating this. Bridging of contracts from DCIS to the eRA System will begin in December. Modification numbers also will be included.

2005 Enhancements

Enhancement	Status/Notes
New user interface (UI)	Revise the UI to mimic the QuickView screen and decrease the number of sections. QuickView will be retired when all of its functionality is available in Web QT.
Add Maintain layouts	Add the ability to customize and save hitlist layouts. This allows the user to create and save hitlists.
Deploy to Commons	Institutions will have access to data from their institution only. They will be able to access a limited number of fields appropriate to the external community.

Web QT Usage

Web QT was released to all users on July 13. In the days after an *Inside eRA* newflash, there was a decided spike in usage—472 hits, up from 145 the week before.

The advantages of Web QT for eRA are that it is easier to maintain one enterprise query tool and it is less costly. Also, Web QT accesses the OLTP (OnLine Transaction Processing) database, which is a real-time database and changes as users use it. QVR accesses the IRDB (IMPAC II Reporting Database), which is updated daily so the data isn't up to date except just after it is

updated. However, it was agreed that for some types of reporting, where a stable database for a period of time is an advantage, QVR might be the better tool.

The group agreed that if QuickView is indeed going to be turned off in 2005, that fact and the sunset date should be advertised now. This might be an incentive to get people to switch to Web QT. The same goes for when Web QT includes all functionality for ICSTORE.

There was much discussion regarding marketing Web QT to NIH users. Some of the suggestions included the following:

- Make Web QT easily available by sending out the icon to put on users' desktops.

Action: (Tina Milner) Make Web QT easily available by sending out email with a shortcut icon to put on users' desktops (include instructions on how to do it and instructions on how to bookmark it).

- Publish a news stories in *Inside eRA*.
- Send out a notice of *Inside eRA* stories along with a shortcut to the on-line newsletter and to the request page for receiving the newsletter.
- Publish an article in the *CSR Rock Ledger* newsletter. This is a newsletter for training.

Action: (Patti Gaines, Tina Milner) Write articles about Web QT for *Inside eRA* and the *CSR Rock Ledger* newsletters.

- Send the link to Web QT Release Notes and other documentation (found on the IMPAC II website: <http://impacii.nih.gov/>)
- Send the link to the eRA website: <http://era.nih.gov/> . Information on Web QT is on the User Support business page: <http://era.nih.gov/areas/user/> .
- Create a flyer that shows the advantages and benefits of Web QT as opposed to QuickView. Some of the items that could be included that were mentioned at the meeting are:
 - Web QT remembers saved queries and hitlist parameters.
 - Web QT can create a query and can designate a default layout. However, the user also can select other layouts of the same query.
 - Web QT includes private queries, for the creator's use only, and shared queries, which can be used by others.
 - Web QT can export hitlists to Excel. It also provides a "Print Hitlist" button which makes the hitlist available in HTML.

Action: (Daniel Fox, Tina Milner) Create a PowerPoint presentation that clearly explains benefits on migrating QuickView to Web QT. This presentation can be reused every time someone is asking that question. Make sure presentation includes end-user benefits, not the technology benefits from the eRA management perspective.

Preview of Updated User Interface

Daniel Fox showed the new user interface, pointing out many changes and enhancements. The following are comments and suggestions from the discussion.

RFA/PA—The group suggested added “RFA/PA” to the screen.

Roadmap Contracts—The group suggested adding Roadmap contracts as a query choice. Another suggestion was to have a checkbox, “Include Contracts,” making the default to not include contracts. Bridging of these contracts into the eRA System will begin in December.

Action: (Daniel Fox, Tina Milner) **Once completed, update everyone on Contracts querying and display in Web QT.**

Dual ICs—It was pointed out that the term “dual” is misleading because there may be several “duals” and they are not a “secondary.” The terminology probably should be “multiple ICs.” Daniel agreed to add this change to the list of future possible enhancements.

SRA—There was a suggestion to add “SRA Name” on the assignment search.

Multiple Meetings—The group suggested adding the ability to pull up all the meetings that are assigned to them, which may be different types of meetings.

Output Source—The group thought that having the output source icon always visible from anywhere on the screen would be an advantage. However, because the business rules do not allow frame architecture, which would make this suggestion an easy addition, Daniel said that he would investigate the feasibility and necessity of adding it.

Other IC—Users can choose to select to see data from a different IC by selecting an IC from a dropdown list. When the new IC is selected, the POs from that IC are available dynamically in another dropdown list.

Hubs—With the new infrastructure as seen by the DEAS group, there has been some discussion about dividing ICs into “hubs.” This would allow overall supervisors to better see the workflow for the ICs within their hubs. It was suggested that the team consider including “hubs” in their query parameters when they are defined in the database.

Reporting—Up until now, the Web QT team has been very user-centric and has not focused on providing reports. The queries with defined layouts can be considered “reports” but they still are very changeable depending on the user. There probably could be a number of defined, most-used reports available. It was suggested that the team investigate what the most-used reports in QVR are to use as a benchmark. Additionally, it was suggested that Excel PivotTables, which are widely used to much advantage in QVR, be considered for some of the standard reports in Web QT.

Announcements

Training—There will be a Web QT training course on October 1 and it still has openings.

Next Meeting—The group agreed to meet sometime in November when the next version of Web QT goes to test. Tina Milner and Patti Gaines will notify the group of the meeting date.

Attendance

Caban, Carlos (OD)

Casavant, Don (NIGMS)

David, Bobbie (CSR)

David, Tracey (CSR)

Fox, Daniel (OD)

Gaines, Patti (OD)

Lingham, Angela (NIA)

LoMonico, Anita (NCI)

Milner, Tina (OD)

Seppala, Sandy (LTS/PCOB)

Waybright, LaVerne

(NIGMS)

Wehrle, Janna (NIGMS)