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.
Categories of Users

- QuickView & Status Users
- Scientific Query Users
  - Regular
  - Power
- Advanced Query Users
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- Program/IC Portfolio Users
- Peer Review Users
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Query Tools & Methods

- ICSTORe- Tack & Order,
- ICSTORe Book Definition
- ICSTORe Advanced Query
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- 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
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- Business Area Query Screens [ICO]
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Query Tools & Methods

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### Query Tools & Methods

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- Commons Status Reporting
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- Business Area Query Screens (ICO)
Categories of Users

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- IMPP TechView
- Business Area Query Screens

[REV]
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- Business Area Query Screens [ICO]
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

Query & Retrieval Architecture

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

Output Method Components
Print Central
Export to Excel
Zip/Merge, etc.

Output Format Components
Fixed Reports, Discoverer repts.
Documents, 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**

<table>
<thead>
<tr>
<th></th>
<th>QV</th>
<th>ICO</th>
<th>Adv.Q</th>
<th>QVR</th>
</tr>
</thead>
<tbody>
<tr>
<td>custom hitlist</td>
<td></td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Custom Query</td>
<td>○</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Dual PO</td>
<td></td>
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<tr>
<td>save Query</td>
<td></td>
<td></td>
<td>○</td>
<td>○</td>
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</table>
### Sample Task 3 Matrix

**Query Field to Query Tool**

<table>
<thead>
<tr>
<th></th>
<th>IC</th>
<th>PI</th>
<th>PO</th>
<th>PCC</th>
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<tr>
<td>ICO</td>
<td></td>
<td>*</td>
<td></td>
<td>*</td>
</tr>
<tr>
<td>QV</td>
<td>*</td>
<td></td>
<td>*</td>
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<tr>
<td>CRISP</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adv.Q</td>
<td></td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>QVR</td>
<td>*</td>
<td></td>
<td>*</td>
<td></td>
</tr>
</tbody>
</table>

Electronic Research Administration
National Institutes of Health
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

Examples of Requirements:
♦ In addition to samples above, print hitlists directly from Browser without having to generate a report.
♦ Output formats & methods should be available to all applications (e.g., output hit list to Excel shouldn’t be limited to ICSTORe but should be an option for all hitlists).
Purpose:
♦ For facilitating user query

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

Examples of Requirements:
♦ 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’
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.)

Examples of Requirements:
♦ 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
♦ Links to additional data or documents

Examples of Requirements:
♦ 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

Examples of Requirements:
♦ Display sort order on screen & output
♦ Retain user-determined sort order between screens
Most frequently used query parameters
For category appear. To see more Query parameters for same category, Click ‘+’.
User can select individual screens with different categories of query parameters, or 'Show All Basic' or 'Show All Expanded'
### Grant ID

<table>
<thead>
<tr>
<th>Grant No.</th>
<th>Grant Type Grouping</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type</th>
<th>Activity</th>
<th>IC Code</th>
<th>Serial</th>
<th>Number</th>
<th>Support</th>
<th>Year</th>
<th>Suffix</th>
<th>Subproj. ID</th>
<th>FY(YYYY)</th>
<th>Council(YYYYMM)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
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</tr>
</tbody>
</table>

<table>
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<tr>
<th>RFA/PA</th>
<th>Appl. ID</th>
<th>Grant Status Group</th>
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<tr>
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</table>

<table>
<thead>
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<th>Title</th>
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<tr>
<td></td>
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</tbody>
</table>

### PI Name

<table>
<thead>
<tr>
<th>Last</th>
<th>First</th>
<th>Middle Init.</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Institution

<table>
<thead>
<tr>
<th>Institution Name</th>
<th>IPF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Meeting

<table>
<thead>
<tr>
<th>Council YYYYMM</th>
<th>SRG</th>
<th>SRG Flex</th>
<th>SRA</th>
<th>Designator Flex</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Assignment

| FY(YYYY) | Council(YYYYMM) |
|----------|----------------|----------------|
|          |                |                |

<table>
<thead>
<tr>
<th>PCC Admin IC</th>
<th>PC Name Admin IC</th>
<th>Specialist Name Admin IC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Grant Dates

- **FY (yyyy)**
- **Council mtg Admin IC (yyyymm)**
- **Active Grants**
- **Budget Start (yyyymmdd)**
- **T5 Receipt Date (yyyymmdd)**

### Grant & Document Status

- **Grant Status Group**
- **Grant Status Codes (Hold Ctrl key to select multiple statuses)**
  - 1
  - 2
  - 3

- **Active Grants Incl.**
- **Intent to pay**

### Document(s) Available

- **Sum. Stmt**
- **Grant Image**
- **NGA**
- **eSNAP**
- **FSR**
- **GCAP**
- **Abstract**
- **Resume**
- **Roster**

### Administrative Coding

- **FY(YYYY)**
- **Council(YYYYMM)**

| FY(YYYY) | Council(YYYYMM) |
|----------|----------------|----------------|
|          |                |                |

- **Animal Subject Used**
- **Concerns Animal Subject**
- **Concerns - Human Subject**
- **Concerns - Minority**
- **Concerns - Child**
- **Phase 3 Clinical Trials**
- **AIDS Related**
- **Hum. Emb. Stem Cells Used**
- **Human Subject Used**
- **Concerns - Gender**
- **New Investigator**
- **Exception to Tracking**
### Grant ID

<table>
<thead>
<tr>
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<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant No.</td>
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<tr>
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</tr>
<tr>
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<tr>
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<td>All</td>
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<td>FF</td>
<td></td>
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<tr>
<td>Institution Dept.</td>
<td></td>
</tr>
<tr>
<td>Institution State</td>
<td></td>
</tr>
<tr>
<td>Institution City</td>
<td></td>
</tr>
<tr>
<td>EIN</td>
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<td>SRG Flex</td>
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<tr>
<td>SRA</td>
<td></td>
</tr>
<tr>
<td>SRA Designater Flex</td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td></td>
</tr>
</tbody>
</table>
Expanded hit list w/links

Later customizable hit list

Each data element will appear in Excel in separate column

Non-competing will show diff. details (e.g., budget start/end dates)
Other person-related demographic parameters to be determined.
## Basic Search

**Grant & Document Status**

<table>
<thead>
<tr>
<th>Grant Status Group</th>
<th>Grant Status Codes (Hold Ctrl key to select multiple statuses)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
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- GCAP
- Abstract
- Resume
- Roster
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- No eSNAP
- No FSR

**Summary Statement**

Win/Recev/Submitted

[Search] [Clear]
### Basic Hit List

Search By: Grant Number = 1R01 AND Title = "test title" AND Admin Coding = 'Value 1', 'Value 2', 'Value 3' AND Requested Total $ Yr 1 Less Than or Equal To 100,000

<table>
<thead>
<tr>
<th>Grant No.</th>
<th>PI Name</th>
<th>PCC from IC</th>
<th>Status</th>
<th>Project Title</th>
<th>Document Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>1R01AI12345601A10001</td>
<td>LI, TING-KAI</td>
<td>IC-PCC</td>
<td></td>
<td>Text text text text</td>
<td>Grant Folder</td>
</tr>
<tr>
<td>1R01AI12345601A10001</td>
<td>SYRJALA, KAREN</td>
<td>IC-PCC</td>
<td></td>
<td>Text text text text</td>
<td>Grant Folder</td>
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<tr>
<td>1R01AI12345601A10001</td>
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<td>IC-PCC</td>
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Select Document: Summary Statement
## eRA Commons

**Hit List**

Search By: Grant Number - 1R01 AND Title - 'Test Title' AND Admin Coding - 'Value 1', 'Value 2', 'Value 3' AND Requested Total $ Yr 1 Less Than or Equal To 100,000

Sort By: Grant No. Sort By
Then By: Act/IC/Serial
Then By: PI Name (Last, First MI)
Then By: PCC from IC
Then By: Status
Then By: Project Title
Then By: Document Links

Select: All / None  Sort Order: Grant -IC Code (ASC), PI Name (DESC)

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Five-level nested sort
Expanded hit list w/links; later customizable hit list

Non-competing will show diff. details (e.g., budget start/end dates)
**Grant Snapshot**

**Grant Information**

- **Grant #**: R15 GM059595-01
- **Project Start**: 12/19/1997
- **Project End**: 11/30/2000
- **App ID**: 2372121
- **PCC**: 51ER2842
- **Last Encumbered**: 12/15/1997
- **FY**: YYYY
- **Document #**: R1CA749044
- **RFA/PA**: 1234567890
- **Status**: 05 Awarded. Non-fellowships only
- **Sum.Strmnt.Avail.**: test
- **IGA Avail.**: test

**Title**: ROLE OF CYTOCHROMES P450 IN ISOFLAVONE METABOLISM

**Peer & Council Review Summary**

- **IRG/MEP**: IRG Flex: test
- **SRA Designator**: :185
- **SRA Flex**: ?
- **Group**: ?
- **Ext**: ?
- **IRG Action**: 1
  - Scored (SC) or Positive recommendation by ICD staff in the absence of IRG Review

**Admin Codes**

- **Human Code**: 10
- **Animal Code**: 10
- **Minority Code**: ?
- **Gender Code**: ?
- **Tracking Exception**: ?
- **Phase 3 Clinical Trial**: X
- **HS Assurance**: # test
- **HS Assur. Filed**: ?
- **IRB Date**: test
- **IRB Cert. Filed**: ?
- **Animal Subj Assurance**: ?
- **IACIC Date**: test
- **Child Code**: SA
- **New Investigator**: X
- **FDP**: X
- **Carryover Auth.**: ?
- **SNAP Awarded**: ?
- **AIDs released**: ?
- **Hum.Emb.Stem Cells**: ?

**Admin. IC Assignment**

- **Admin. IC**: GM
- **PCC**: 10
- **PO Name**: test
- **PO Email**: test
- **PO Phone**: X
- **Council**: test
- **Specialist**: test
- **Spec. Email**: test
- **Spec. Phone**: X

**MULTIC/PCC**

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**PI INFORMATION**

- **PI**: ROBERTS-KIRCHOFF, ELIZABETH
- **Degree**: test, test, test
- **Address**: 456 Madeup Street
- **suite 1234**
- **more address**
- **more address**
- **Cityname, MD 20123**
- **Phone**: (301) 23-4567
- **Ext**: 123
- **Fax**: (301) 23-4567
- **Email**: myEmail@myServer.com

**INSTITUTION INFORMATION**

- **Institution**: DETROIT R AND D, INC.
- **IPF Code**: 820104
- **EIN**: 152602036A1
- **Submitting Dept.**: PHARMACOL & EXPERT THERAPEUTICS
- **Address**: 456 Madeup Street
- **suite 1234**
- **more address**
- **more address**
- **Cityname, MD 20123**
**PI INFORMATION**

Name: ROBERTS-KIRCHHOFF, ELIZABETH

Address: 456 Maplewood Street, Suite 123

City: Name, MD 20123

Phone: (301) 234-4567

Fax: (301) 234-4567

**INSTITUTION INFORMATION**

Institution: DETROIT R AND D, INC.

IPF Code: 20104

EIN: 1526802036A1

Submitting Dept: PHARM/IMM & EXPERT THERAPEUTICS

Address: 456 Maplewood Street, Suite 1234

City: Name, MD 20123

Phone: (301) 234-4567

Fax: (301) 234-4567

**PREAWARD BUDGET DETAIL**

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NGA Release Date / Time: Signed by: Signature

Cofund: Test

T5 Receipt Date: Future yrs Award Remaining: 99991000

**AWARD BUDGET**

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### SRG & Council Meeting Detail for Pre-Award Competing Applications

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Admin. IC Council Meets on: ??????
### Expanded Hit List

**Search By:** Grant Number = 1R01 AND Title = 'Test Title' AND Admin Coding = 'Value 1', 'Value 2', 'Value 3' AND Requested Total $ Yr 1 Less Than or Equal To 100,000

**Sort By:**
- Grant No. Sort By: ActIC/Serial
- PI Name (L, F, M)
- PCC from IC
- Project Title
- Details

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### PI Details

- **Name:** ROBERTS-KIRCHHOFF, ELIZABETH
- **Phone:** (301)123-4567
- **Email:** myEmail@myServer.com
### Grant Snapshot

**Council Date Admin. IC:** 20001

**SRG Meeting Identifiers:**

- **Percentile:** 99.99
- **RFA/PA:** 1234567890

**Institution:** Institution Name Text

**Funder:** Funder Name Text

**Project Name:** Project Name Text

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Query Scenarios of Interest to GM
Find Type 5s with a receipt date of this week

- **Grant Type Grouping**: Non-Competing
- **T5 Receipt Date**: Today Minus 1 Week
Find applications for current FY with future year commitments
Find applications for current FY with ‘intent-to-pay’ but not yet awarded for which the specialist signed off at least 1 week ago.
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 < 19; get their summary statements
Find applications for a particular council with a percentile ≤ 19; get their summary statements, continued
Download all the NGAs for a particular council
Download all the NGAs for a particular council, cont.