Kate: Good afternoon everyone. Please just give us one moment to share our screen. Hello and welcome to today’s webinar titled, VAIRRS How to Series 3: Insight Reports and Running Macros Focused on Expiration Dates and Continuing Reviews. I’m Kate and I’ll be your administrator today. I’d like to go over a few reminders and housekeeping items. First, today’s lecture is being presented in lecture only mode. Therefore, the audience is muted. This presentation is being recorded. Handouts were sent out in advance to everyone who registered.

For those that didn’t receive the handout, you can access it on the SharePoint link that’s located in the Q&A box. Questions will be addressed during the question answer portion of the webinar. When submitting a question, please send to all panelists. Please do not use the chat features to submit questions. The WebEx events platform does not enable attendees to see comments submitted by others. However, questions submitted in the question box will be shared to everyone when we reply, thank you for your question.

You can make the Q&A box larger by undocking it then clicking on the corner of the Q&A box and then dragging it to resize. This is done by double-clicking on the middle of your WebEx events screen. To return to the normal view, simple double-click on the middle of your WebEx events screen. Once you exit the training, a quick survey will pop up in the browser window. We appreciate your feedback regarding today’s presentation to improve future webinars. If you have difficulties running the webinar, some people have had more success using Google Chrome instead of Internet Explorer. Also, if you experience connectivity issues, our live webinars can be accessed using the call in number that’s provided on the slides and in the registration email. And with that, I’ll pass it along to Angie Foster, VAIRRS Program Manager.

Angela Foster: Good afternoon everyone and again, welcome to our third how to series. For this series, we will be focusing on the macros for the expiration date insight report. Next slide please. Next slide please. Presenting today will be our dashboard and macro developer Nelson Vasconcelos from Goldschmitt and Associates. And an overview of our session today, if you joined us for our last how to series, we did a live demo of how to install the macro into your Excel installation. We won’t be going through that process again today. If you need more information on how to implement the macro, you can refer back to the second how to series. That recording is posted on the ORD webinar page.

For this session, we are going to talk about how to access the insight reports, and then we’ll have a live demonstration of the three macros that have been developed so far. And then we will have to conclude, a Q&A session. And with that, we’ll start with our first full question and then I’ll turn it over to Nelson. And for our first question, we’re just interested to know how many of you actually use macros in your day-to-day work? So if you could take a few minutes and respond to that and then when you come back, Nelson will be walking us through the rest of the slides. Thank you.

Nelson Vasconcelos: Alright, thank you Angie. So taking a look first off at the responses to that first poll. It looks like 14 of you have used Excel macros. More than twice of you have not. So in this case, definitely want to refer to the first webinar and the accompanying documentation along with it if you haven’t used macros, as far as getting them installed and ready to go. But the whole point of the macro which we’ll get to shortly is to a lot of the leg work for you. So just to sort of sum up the IRB net insight report, which hopefully most of you have used. They provide a detailed set of data abstracts from there. They provide unique and timely views of the operations at all VHA sites that are online in \_\_\_\_\_ [00:06:29].

And with ORPPE, we’re developing a series of Microsoft Excel macros and I’ll be showing…actually for them…to of them are similar, but I’ll be showing four of them today. That format…excuse me. Those insight reports into a more user friendly format. If you have not access the insight reports, IRBNet can send those reports on a regular basis. Whatever sort of fits your needs. However often you use them. Daily. Weekly. Biweekly. Monthly, et cetera. So to request those reports, you would just email govsupport@irbnet.org. Let them know which reports you’d like and how often you’d like to receive them. And then as Angie mentioned a moment ago, for the supporting documents, you’d want to refer to the VAIRRS SharePoint portal. It includes the IRBNet insight reporting guide. So that will provide a summary of each report and what it does and help provide some context to what might be the useful for your work.

Along with ORPPE, we’ve created a guidance document called, Getting the Most Out of Insight Reports. And that goes through the process of not only receiving those reports, but also setting yourself up so that you can run these macros. And of course the recording of the first webinar, if you didn’t have a chance to attend that one, the recording of the first webinar is also available on the VAIRRS SharePoint portal so you can view that and pause and rewind until your heart is content. So now I’m going to provide just a demo of some of the macros that we’ve created, and basically how they sort of work. So this first report that we have is the active projects report. Hopefully a number of you have used this in the past. And so, a lot of the feedback we’ve gotten is that…I mean, just looking at the report, it is not very easy on the eyes. Often times it’ll include a lot of content that really isn’t relevant to your work.

So what we’ve done is I wrote a macro to sort of make it a little bit easier to use. So breaking it down, removing unused columns, formatting, et cetera. So if you are familiar with macros at all or if you took part in the first webinar, you would have this developer button on Excel. Again, the guidance document that we created will show you how to get the developer button on Excel if you don’t have it already. So then you have little icon for macros. You simply hit that. And now for each of these macros, you’ll see the macro name. And each macro name corresponds to a specific report. So you see this report called active projects.

We have these other macro that I’ll go over shortly. But you wouldn’t want to use these macros on the active project reports. Because basically, the macro tells Excel, okay, get rid of this column, this column, this column. Format it this way. Change the width. Add calculated columns, et cetera. And so when it does that for another report, it might get rid of stuff that you need and keep stuff you don’t. So you want to make sure that the macro name corresponds to the name of the report. So Active Projects is the name of the report. This is the Active Projects macro and you simply hit run. Now Excel does its work. It shouldn’t take too long. And you can see, for one, we’ve just made the table a little bit easier to read and easier to filter as well. We’ve gotten rid of a few columns that we don’t need. And based on user feedback, we’ve added calculated columns for turnaround time.

So this is basically the difference between the first effective date and the first submission date. Of course submission date here is April 4th, 2011. First effective date, February 12th, 2013. Which gives us a turnaround time of 680 days. Sometimes you might get irregular or no value. That is a case where the effective date is before the first submission date. Yeah, excuse me. Correct. The first submission date. So that is sort of what we’ve done for the Active Project support. I encourage you if you use the Active Projects Report in your work to take a look at it, run the macro, but also to see…and we’ll be collecting feedback on this. See if there are other ways that it could be useful for you. Just want to sort of make it clear that these macros that we’ve written so far are not set in stone.

We’re continuing to solicit feedback and hoping to get more useful and actionable feedback and sort make these macros as useful as possible. Next up, I’ll open up that project expiration report. Again, this is a bigger report. And a lot of what we’ve done is similar, so you go to this developer ribbon and chose macros. And again, you want to make sure that you choose the macro that corresponds to the report you're working on. So we have this macro name is Project Expiration. And again, the formatting is similar just to make it cleaner and easier to read. Again, we’ve removed a few unneeded columns. And then based on some feedback we received, we just created conditional formatting for days to expiration. So you’ll see that these are red. These are expired reports. And so I will sort this way so you can take a look.

The product expiration report includes all projects that are within 30 days of expiration. So for these, we’ve basically created green cells to indicate reports that are between 15 and 30 days from expiration. And then ones that are less than 15 days expiration you see here in yellow. So we have 14 days here, 13, et cetera. And again, if you have feedback, we are more than welcome to hear it. And then finally, the review process file. So this is a \_\_\_\_\_ [00:13:13] file that we receive. So everything I receive is for every site that’s online in IRBNet. So it’s a big file. About 180,000 rows. And we’ve done some formatting here. This one might take a little while longer. Again, this is the review process file, review process macro. And again, because it’s such a big file, it takes a little while to run the macro. It won’t take you quite as long because again, you’re only getting the rows related to your particular site. But for me it takes awhile because it’s a very big file. And it should hopefully be done shortly. I feel like smoke might come out of my laptop at any second. But hopefully we’ll be done soon.

Angela Foster: And nothing on the…if I can…just to reiterate that it takes a while because again, Nelson has every project from every site in his report.

Nelson Vasconcelos: Yeah, exactly. You can see here; I have 186,000 rows of data. You’ll have far, far less than that. But again, we’ve…now it’s complete and we’ve formatted this table. And in this case, there are not sort of calculations or conditional formatting as of yet. Again, this is something you want to build upon. But it’s been formatted, and unnecessary columns have been removed to make it a little bit easier to sort of work with. And then finally, I don’t know if we have folks from central IRB with us today. But there’s a review process file specifically for central IRB and they’ve asked for a couple of little additions. So this is actually quite similar to the review process file and I’ve created a macro called, CIRB Review Process. And again, since this is just central IRB, it’s a much smaller file and it won’t take nearly as long to run. See it’s already done.

So it’s basically the same as the review process file, but in this case, we also just done some sorting by board name and action and the agenda date as well. So once you get going as far as setting yourself up to be able to run the macros, it’s really a snap. So we’ve done sort of all the work there. Basically written all the code. And basically, I don’t know how many of you have used visual basics, but you’re basically just writing lines of code saying, hey, Excel. Do this. Get rid of this column. Resize this column and make it all pretty and a little bit easier to work with. So that is more or less how to run the macros and sort of what they do. They do have considerably more functionality that again, once we get feedback on it, we’re happy to enhance these macros and create new ones as well. So that brings us to the second poll question. Which insight report do you currently use and how can macros make those reports easier to use? So there will the popup window in WebEx and this is a free response.

Angela Foster: And I believe we have a little over a minute and a half to respond. So if you need to put some thought into especially the second portion and how those macros can make your reports easier to use, please do so. We will review the feedback after the webinar and take every suggestion into consideration when we look at how the macros can be refined. And while you all are responding to the poll, I’ll just read off the first question that was submitted and that is, what report gives you the total number of studies regardless of status active or other?

And then out on the SharePoint folder, there is an insight reporting guide which is basically a menu of all of the available insight reports. But to respond to this question in particular, I believe it would be the project status report. And that gives you a list of every project and every board in your workspace. Okay, so it looks like the poll has concluded. So in a minute, we’ll see the results. So while we’re waiting for that, let’s go ahead to the next question. Once you setup the macros and associate them with the specific report, do you have to do it every time you run the report? Do they stay with the user or the file? When you save the file, is the macro part of it? Nelson, do you want to take that question?

Nelson Vasconcelos: Sure. So to answer the first part of the question, no you don’t have to run the macro every time you use the report. And basically, if you save the file after running the macro that it will stay in the form…the sort of post macro form. Keeping in mind, again, if you’re getting these insight reports regularly, say you get it every week, when you get your fresh insight report with fresh data, then you’d want to run that macro again. So basically, the macros do sort of…they help the user, but you would need to…you would run them whenever you would want to run them is essentially the question. But if you run the macro then save the file, it will remain in that sort of altered or sort of updated form.

Kate: And this is Kate…I’m just going to read some of the results that…some insight reports that are currently being used. I’m seeing some expiration reports, active projects, registered users, unpublished and with packages.

Nelson Vasconcelos: Okay, that’s great. So it's encouraging because we’ve already created macros for some of those that we \_\_\_\_\_ [00:21:36] active reports…active projects. Excuse me. And project expiration. If you do use those, I still encourage you to sort of take a look at those reports and run the macro and see if they can be enhanced anyway and then get back to us with feedback. Like I mentioned, we’re always looking to sort of enhance these to make your job just that little bit easier. And for those reports that we don’t currently have macros for, I encourage you to reach out and to take a look at those files. See how a new macro can be helpful and to reach out to us with your suggestions so we can get started on those as well.

Angela Foster: Great. So we have one other question. We aren’t able to open the file in ZZS format. Is there any way to change the ZZZ format to a Zip file? Yes. And Nelson, if you want to describe your process which converting the ZZZ to a Zip.

Nelson Vasconcelos: So it’s pretty straightforward. We basically rename the file extension to a Zip. So the way IRBNet sends those files to us for data security purposes, they come in that ZZZ format and you basically would just rename the file and change the extension to a Zip. It’s an additional step. It’s mentioned also in the guidance document that we created. So if you follow that guidance document, that’ll show you step-by-step how to go about that as well.

Angela Foster: Any other questions, please type them into the Q&A window. Otherwise, I think we can move forward to the next slide.

Nelson Vasconcelos: Okay. So we have as we mentioned before the VAIRRS SharePoint portal. So up there is a dedicated folder for these webinars and all the documents related to last month’s webinar, the first part in this series are included in that folder. So the insight reporting guide, that again is the guide published by IRBNet and it has a paragraph summary of each report and what it does. So if you’re new to insight reports, I strongly recommend you take a look at that. There may be files that you didn’t really know were available and you could find helpful in your work.

Then the guidance document which I just mentioned, that will sort of walk you through that whole process from basically enabling your system to be able to run the macros is that first piece. You only have to do it once to be clear. And then how to actually run the macros. Also getting those files from IRBNet and getting them in the right format then all that. So the macro file itself is in that folder. So it's an Excel file. The file name is personal.excelsb. Again, that’s covered in the guidance document. So that is constantly updated. So when I write a new macro or update an existing macro, will update that file.

So that’s also something we can also notify folks once the file is updated, but that is something that you’d want to also sort of check on. So if we notify the group that there have been new macros written. You want to make sure to go into SharePoint and load the new file onto your machine to overwrite the existing file. And then the recording is live from both today’s webinar and the first webinar and that link is at the bottom. And that’s also on the VAIRRS homepage. And then if you have questions regarding the insight reports themselves.

So basically, receiving reports that emails…the same one I mentioned if you don’t currently receive the reports. You would just email govsupport@irbnet.org and just ask them to add them to the…add you to the distribution list. Say, I would like to add project support every week or every month or whatever the case may be. And they will add you to the distribution list and you’ll start receiving those shortly. And then if you have questions regarding sort of the technical aspects of opening the insight reports, getting your machine read to use the macros, and running the macros, you can email me. And there’s my email address there. Nelson.vasconcelos@va.gov. Also, if you have…we have a Q&A section coming up but if you think of something tomorrow that you find might be helpful, please email me.

Let me know what reports you’re using. How macro can save you some time and effort and all those sort of things. Please reach out to me. I am the one developing these macros and I am happy and excited to help you in any way possible. And as Kate mentioned at the beginning of this webinar that \_\_\_\_\_ [00:27:45] and handouts will be on the education and training website. And there is the link as well to \_\_\_\_\_ [00:27:55] of this webinar, which again will be available next week and all the other webinars. We have some time, so if any questions you might you have, you can put them in the Q&A box. Also, if you have suggestions, if something has already come to mind, please let us know. We’ll be collecting all of these questions and suggestions in the comments. And this is going to be the platform for which we’ll create new macros and updated existing ones.

Angela Foster: Alright, so I’ll pick up where we left off in the Q&As. The next question is, if you run a report let us say exempt studies, can we see how long from submission to approval for metric purposes? So this is a great suggestion on how a macro can help you be…really whether or not we would be able to have a calculated column that says what the turnaround time is from submission to approval was dependent on the columns that exist in the insight report that you’re using. So if the particular report that’s used to see the exempt studies has the submission date as well as the effective date of the board action, then yes, we can put in a calculated column that will tell you what that turnaround time is.

Next question. Can IRBNet generate an insight report with active projects separated by board in separate tabs? So currently, the project report does not separate the projects by board and IRBNet does not customize these reports. They are canned reports. However, Nelson can certainly take a look and see if the macro can do that formatting for you. I’m not sure from my end if that’s possible, but Nelson would certainly be able to take a look at that. Next question. Can you also see time in IRB \_\_\_\_\_ [00:30:18] versus time in PI \_\_\_\_\_ [00:30:20] when revisions are requested again, for metric purposes?

So I do believe the review process report tells you exactly how long a package has been unlocked and how many times it has been unlocked. And generally, we would take that, the time that the package has been unlocked and subtract it from the turnaround time. But you can take a look at that review process report and let us know if on a record level it gives you the information that you’re looking for. And then if so, we can take a look at the macro and see if we can put that calculated column together for you. And also as a side note, we are starting the field level dashboard focus groups and those meetings will begin this week. And part of the purpose of those focus groups is going to be to identify what metrics would be helpful on your dashboards.

So up on the board now we have the…well, I think we’ve already answered this question. Can IRBNet generate the insight report with active projects? Can you see the time in IRB \_\_\_\_\_ [00:31:37]? We’ve answered this one with the review process report. I think that was the last question that we just discussed. So we have an hour. There’s no rush to get off of the webinar so we’ll hang out here for a few minutes longer to see if there are any more questions. But that was the…what we wanted to demo today; the new macros that have been developed. Please also Nelson has said, send us your feedback. You can email Nelson directly you can email the VAIRRS box with your suggestions and we will certainly incorporate everything that’s suggested into our next round of macros. So we have not gotten any other questions yet and I’ll just wait a few more minutes. Nelson, did you have any final words to close us out while we’re waiting for any last minute questions?

Nelson Vasconcelos: Yeah, just to reiterate. I’m confident we’ll have more questions and more thoughts and ideas once you can actually sort of take a look at the insight reports. It’s a little bit tougher in the \_\_\_\_\_ [00:33:36] right now. But next time you’re looking at the active projects report, you may notice something that…whether it’s a calculation on your end or just making it easier to read or what have you just to encourage everyone to please reach out. If you have any questions about the reports themselves or about macros or any suggestions, you might have.

Angela Foster: And really quickly, did get one more question. Do you have reports or macros you’re currently working on that are not currently listed on the SharePoint site? I’ll hand that over to you Nelson.

Nelson Vasconcelos: Yeah. So we’ve received some feedback. We haven’t currently started writing macros because sometimes when we get feedback from multiple sources, that affects what we sort of decide to do. But there will be a macro for probably status report at some point for example. And if you have any feedback or suggestions on that one, please let us know we’re all ears.

Angela Foster: Alright, so we’ll just stay on a couple more minutes to see if there any last minute questions. And if not, then that will conclude the webinar for today. Alright, Kate. I think that is it. You can close us out now.

Kate: Oh, I think we just…

Angela Foster: Oh, I see. Do the reports catch your tags? So there is an insight report that you can request that…I can’t remember the exact name of it. But it does pull the tags. So if you use that report and a macro would make formatting or adding columns to the report helpful for you, let us know. And that can certainly be in the next round of macros that we develop.

Nelson Vasconcelos: Yeah, would that be Global Tags Report Angie?

Angela Foster: Yes, I believe so.

Nelson Vasconcelos: Yeah. So again, I would recommend you take a look at IRBNet’s insight reporting guide and you can find a summary of exactly what that report entails. But yeah, it would be called the Global Tags Report.

Kate: Alright, and we’ll give everyone just one last chance to submit any questions. Thank you to everyone for your questions and participating. And thank you to Angie and Nelson for all of this knowledge. Yep, and just as a reminder, we will have recording up pretty quickly and thank you to everyone again.

Angela Foster: Thanks everyone. Have a great afternoon.

Nelson Vasconcelos: Thank you everyone. Take care.