

# SHRINE Data Steward Help

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## Introduction

The SHRINE Data Steward is a web application used to submit, review, and approve SHRINE user query topic requests. You can access the Data Steward application from within the SHRINE Web Client query tool by clicking **Request New Topic** in the **Query Tool** view.

## Approval Modes

Each individual SHRINE institution can implement one of three different approval modes. The mode chosen by your institution determines the software configuration and functionality available in the Data Steward application. Consult with your institution's SHRINE contact if you are unsure about which mode is in place for your institution.

- **Manual Approval**—in this mode, every query topic must be manually approved by a Data Steward.
- **Automatic Approval**—in this mode, every query topic is automatically approved, but may be reviewed and manually rejected by a Data Steward.

- **Logging Only**—in this mode, searches are performed without query topics.

NOTE: In the **Logging Only** mode, query topics previously created under a different mode will still display in the **Topics** area. If no topics were previously created, this area will be empty.

## User Roles

The Data Steward application can be used by both:

1. **Researchers** who wish to perform queries in the SHRINE Web Client.
2. **Data Stewards** who manage query topics for an institution or group of institutions.

Users logged in under either role will see (Figure 1, A) a center panel containing lists of query topics and/or queries and a left sidebar (Figure 1, B) which allows you navigate between different areas in the center panel. However, the content of both the left sidebar and center panel will differ slightly depending on your role.



Figure 1

A menu in the upper right (Figure 1, c) displays the username currently logged in and specifies whether the current user has been assigned a Researcher or Data Steward role.

## Using the Data Steward Application as a Researcher

Log into the Data Steward Application with credentials supplied by your institution. You will be listed as a Researcher in the user menu, and see two different options for viewing information about your query topics and history.

### Viewing Query Topics

Select **Topics** in the left sidebar to see a list of all your **Pending**, **Approved**, and **Rejected** query topics.

Click any of the column headings (Figure 2, A) to sort by **Topic Name**, **Date Created**, **Last Updated**, or **State**.

Topic Name	Date Created	Last Updated	State
Chelation therapy in cardiovascular disease	11/2/2015	11/2/2015	Pending
Diabetes in Asian males	11/2/2015	11/2/2015	Pending
Statin therapy post-CVA	11/2/2015	11/2/2015	Pending
Type II diabetes and metabolic syndrome	11/2/2015	11/2/2015	Pending

Figure 2

Click the **view** link (Figure 2, B) next to any topic to view its description and query history. Description information loads by default. If any queries have been performed for this topic, you will be able to see them by selecting the **Query History** tab (Figure 3, A) at the top.

**Description** | **Query History**

**Topic Id:** 4

**Date Created:** 11/2/2015

**Last Updated:** 11/2/2015

**Status:** Pending

**Topic Name\*** \*Required Field

Statin therapy post-CVA

**Please Describe Your Query's Intent\***

Seeking prospective patient population for a study (survey and telephone follow up) about statin therapy post-CVA

**EDIT**

Figure 3

### Submitting New Query Topics

If your institution has implemented either the **Automatic Approval** or **Manual Approval** modes, you will need to submit a query topic before performing any queries in the SHRINE Web Client.

1. Click the **New** link (Figure 2, c) at the bottom of the **Topics** panel.
2. In the **New Query Topic** box, enter a name for your topic and provide a short description of the types of queries you would like to perform.
3. Click Submit.
4. Your new query topic will now appear in **Topics** list.

NOTE: If your institution has selected the **Manual Approval** mode, your topic will be marked with a **Pending** status until a Data Steward has reviewed it. If your institution has selected the **Automatic Approval** mode, your topic will be immediately marked with an **Approved** status, but may be rejected at a later time after review by a Data Steward.

## Editing Existing Query Topics

Any topic that has a **Pending** status may be edited and resubmitted.

1. Click **view** (Figure 2, B) next to any Pending topic.
2. Click **Edit** (Figure 3, B).
3. Make the desired changes.
4. Click **Update**.

After a topic has been either approved or rejected, it can no longer be edited. To make an adjustment to an approved or rejected topic, submit a new topic with the desired changes.

## View Query History

Select **History** (Figure 4, A) from the left sidebar to display a list of all queries you have performed.

Click any of the column headings (Figure 4, B) to sort by query **ID**, **Query Topic**, **Username**, **Query Text**, **Status**, and **Date** performed. In almost all cases, the state will be **Approved**. However, in some cases, a previously approved topic may have been rejected by your institution's Data Steward.



ID	Query Topic	Username	Query Text	Status	Date
1	Chelation therapy in cardiovascular disease	dhh81	Cardiovascular Disease-65-74 y@15:33:38	Approved	11/3/2015
2	Chelation therapy in cardiovascular disease	dhh81	(429.-E1: H-85-89@15:34:56	Approved	11/3/2015
3	Diabetes in Asian males	dhh81	Diabe-R2: A-Male@15:35:45	Approved	11/3/2015

Figure 4

Click the **Query Text** (Figure 4, c) of any query to see a pop up containing the raw XML of the query string performed.

## Using the Data Steward Application as a Data Steward

Log into the Data Steward Application with credentials supplied by your institution or group of institutions. You will be listed as a Data Steward in the user menu, and see three different options (Figure 5, 1) for viewing information about the query topics and queries submitted and performed by researchers at your institution.

## View Query Topics

Select **Topics** (Figure 5, A) from the left sidebar to see a list of all the query topics submitted by researchers at your institution(s).

ID	Topic Name	Username	Date Created	Last Updated	State	
2	Chelation therapy in cardiovascular disease	dhh81	11/2/2015	11/3/2015	Approved	view
6	Neurodegenerative diseases; mental health assessment	mo58	11/2/2015	11/3/2015	Approved	view
3	Diabetes in Asian males	dhh81	11/2/2015	11/3/2015	Approved	view
7	Autoimmune disease in women, 54+ (Pi: Coleman)	gbmh06	11/2/2015	11/3/2015	Approved	view
1	Incidence of low birth weight / mothers with low BMI (<18.5)	gbmh06	11/2/2015	11/3/2015	Approved	view
8	Type II diabetes and metabolic syndrome	dhh81	11/2/2015	11/3/2015	Approved	view

Figure 5

Click any of the column headings (Figure 5, B) to sort by topic **ID**, **Topic Name**, **Username** of the topic creator, **Date Created**, **Last Updated**, and **State**.

By default, only **Pending** topics display when the panel is loaded. To see all **Approved** or **Rejected** topics, select the corresponding tab at the top of the panel (Figure 5, C).

Click the **view** link (Figure 5, D) next to any topic to view its description and query history. Description information loads by default. If any queries have been performed for this topic, you will be able to see them by selecting the **Query History** tab (Figure 6, A) at the top.

NOTE: Since queries can only be performed for **Approved** topics, the **Query History** tab is greyed out on all **Pending** topics. **Rejected** topics may have a query history if they were previously approved.

## Approving and Rejecting Topics

Query Topics should be approved or rejected according to your institution's review process.

1. Click **view** (Figure 5, D) next to any topic.
2. Click **Edit**.
3. Select either **Approved** or **Rejected** from the Status dropdown (Figure 6, B).
4. Click **Update** (Figure 6, C).

**Description** | **Query History** A

Topic Id: 5

Date Created: 11/2/2015

Last Updated: 11/2/2015

Topic Name\* \*Required Field

Autism and ASDs in children and young adults, <25 years

Please Describe Your Query's Intent\*

In preparation for a submission to NIMH, looking for centers engaged with children and young adults diagnosed with autism and other ASDs. Will look for patients under 25 years of ages, diagnosed with one of the disorders.

Status: Pending B

- Pending
- Approved
- Rejected

C UPDATE >

Figure 6

NOTE: Once a query topic has been moved from the **Pending** status, it cannot be moved back to that status. However, Data Stewards can move a topic to the **Approved** or **Rejected** statuses as many times as needed.

## View Query History

Select **History** (Figure 7, A) from the left sidebar to see a list of all queries performed at your institution(s).

Click any of the column headings (Figure 7, B) to sort by query **ID**, **Query Topic**, **Username**, **Query Text**, **Status**, and **Date** performed. In almost all cases, the state will be **Approved**. However, in some cases, a previously approved topic may have been rejected after queries were run for it.

ID	Query Topic	Username	Query Text	Status	Date
1	Chelation therapy in cardiovascular disease	dhh81	Cardiovascular Disease-65-74 y@15:33:38	Approved	11/3/2015
2	Chelation therapy in cardiovascular disease	dhh81	(429.-E1: H-85-89@15:34:56	Approved	11/3/2015
3	Diabetes in Asian males	dhh81	Diabe-R2: A-Male@15:35:45	Approved	11/3/2015
4	Neurodegenerative diseases; mental health assessment	mo58	Parkinson's dis@16:27:36	Approved	11/3/2015
5	Incidence of low birth weight / mothers with low BMI (<18.5)	gbmh06	(V85.0) Body Ma@16:29:08	Approved	11/3/2015
6	Incidence of low birth weight / mothers with low BMI (<18.5)	gbmh06	(V85.51) Body M@16:29:29	Approved	11/3/2015
7	Autoimmune disease in women, 54+ (Pt. Coleman)	gbmh06	55-64-Femal-AutoI@16:30:55	Approved	11/3/2015
8	Autoimmune disease in women, 54+ (Pt. Coleman)	gbmh06	55-64-Femal-AutoI@16:31:39	Approved	11/3/2015

Figure 7

Click any **Query Text** link to see the raw XML of that particular query string (Figure 7, C).

## View Query Statistics

Select **Statistics** to see the number of query topics in each state (Figure 8, A) and the number of queries performed by each user (Figure 8, B) at your institution(s).

The screenshot shows a web interface for viewing query statistics. At the top, there are two date input fields: 'Start Date:' with the value '10/27/2015' and 'End Date:' with the value '11/3/2015'. A calendar pop-up is open over the 'End Date' field, showing the month of November 2015 with the 3rd day selected. An 'APPLY RANGE' button is located to the right of the date fields. Below the date fields, there are two tables. The first table, labeled 'A', shows 'Query Topic Count' by status. The second table, labeled 'B', shows 'Query Counts By User'.

Start Date:	End Date:
10/27/2015	11/3/2015

APPLY RANGE >

Status	Query Topic Count
Approved	6
Pending	2
Total:	8

User	Query Count
dhh81	3
gbmh06	4
mo58	1
Total:	8

Figure 8

The default view covers a period of one week previous. To see statistics for another time period, select different dates in the **Start Date** and **End Date** fields (Figure 8, c).

1. Click the icons next to the date fields to select the desired start and finish dates from the calendar (Figure 8, D).
2. Click the **Apply Range** button (Figure 8, E) to update the statistics shown below.