Erica Aulik: Okay, today we’re going to be covering the document finder’s benefits and capabilities, focusing on how it will help you find answers to policy and guidance questions. We’re going to go over how to access the tool, what the screens look like, and how to conduct searches. This section is mostly for your reference, and it will be saved on the ORPP archived webinars website for your review and download if needed. You will receive an email after this webinar with the link, and I can add it to the chat box…well, I thought I could add it to the chat box, but I’m not exactly sure when I’m in this view. I’ll put it in the chat box when I hand over the presentation to Matthew. Okay, and lastly, we’re going to provide a live demonstration that includes how to conduct searches and to provide feedback. There will also be a time at the very end allotted for questions. I don’t anticipate this taking an entire hour. Just for your information, there’s about 21 slides in total, so it’s not a very large slide doc.

The goal of the document finder tool is to enable VA researchers to efficiently find the most current research document content that contributes to their success and mission. New and modified policies can easily be uploaded over time by administrators, and we are currently working on adding all 398 VHA directors to this tool. A maintenance plan is currently being developed. Maintaining this information is definitely a priority for ORPP&E.

The greatest benefit of this tool is the text-searching capabilities. Replicating many of Google search engine’s features, it enables VA personnel to review relevant research documents in a single portal. Results can also be filtered and viewed by rank order relevance or documents that have been most recently updated. Users will also be able to provide suggestions to improve the tool or suggestions as to what new documents may need to be added by simply clicking a button on the home screen of the tool.

For the development of this tool, we used a contracting company called Titan Alpha, and Matthew Zelt leads this team. It’s a really awesome team. I’m so thrilled to be working with them. Matthew is going to walk us through the overview of this new tool. So I am going to stop sharing my screen, we’re going to give control to Matthew, and then he is going to display his slide set. Here it comes up. Let’s see…yep, there we go. Thanks, Matthew.

Matthew Zelt: Okay, good afternoon or, respectively, good morning to everybody. My name is Matthew Zelt, and I, like Erica said, lead the Titan Alpha contractor team. I’m very excited to be here today and to demonstrate this capability as I do feel it has several different applications for the type of work that you all do within the field. So very pleased for the team coming together and being able to provide guidance on this today.

Once again, the pure intention of this tool is to find documents that are applicable to your specific research needs or queries. When you do receive the access to the slide deck, you’ll see this link right here. We can get that link posted for you as soon as possible. And as of today, everybody within the VA has access to this document tool and should be able to log in and query for documents. Just one housekeeping note here is that this is contingent on you being logged into a VA network user account at all times in order for this to be able to work appropriately.

All right, so from here through the next few slides, I’ll go over just a very quick blitz of helpful tips and generalized design elements of the tool itself. But do keep in mind we’ll do a live demonstration, and I think the live demonstration post these training tutorial slides may add some context if there are questions about the actual design or functionality. Quite simply, this tool is “a Google search for your ORD documents.” Upon opening the search term entry screen, you will be greeted by this very simple search bar where you can input a search term, at which time you will also see relevant searches that have been recently completed in case there are trending topics to help you be more efficient with your search query. Now one note here that you do have to click the search button. Unlike Google, unfortunately, the enter key simply won’t work, so please keep in mind after you input the search term you’ll click the search button. At that time, our algorithms will scan the document in its entirety and return a ranked search result list for you where you can see items number 1-10 with timed results if applicable. You select the document by document type or document title as works for you. To view the document, you’ll see here on the right-hand side that you can actually scroll through, read the documents, zoom in and out, navigate pages, or even search for a key term. And you can see the applicable document simply by clicking the data card, which once again I will demonstrate during the live demonstration. If by chance this document finder does not return the results you were hoping for, have no fear. You can see all of the policies within our repository simply by clicking the see all policies, which is located in the top right-hand side—I’ll do my best to circle that right here—and you would then be taken to a screen which is very similar to this one here except instead of ranked order, you will simply just see the list of all the policies that we input into this repository.

All right. So as far as the left-hand side of the screen—I’ve touched on this a little bit—you will see the type of documents if applicable or if that information is input. You will see the ranked relevancy of the search term based on the searching algorithms that we used to assess your search term across the mathematical outcome of the document itself. And you will also be able to see the VA office in which the policy comes from. On the right-hand side, there is a simple toggle switch if you need to see less information, more of a background functionality not immediately important or contingent on viewing documents. You’ll also see a button right here, the download arrow, which will launch a new browser window and actually open up the PDF document for you to view. And that’s really useful if you need to save or export the document in order to attach it to emails or do any other transformation work outside or inside of the PDF itself. And once again, very straightforward. A scroll bar. Please not that there are multiple results, so as you scroll your scroll wheel down or pull this \_\_\_\_\_ [00:10:06] down, you’ll see multiple results returned for your search query.

The PDF view and functionality is also hopefully intended to be extremely simple. We do have an additional search bar where you can dig even deeper into a document, really used for a secondary search upon your search term, and I’ll demonstrate that. You have a page up and down version as well as your indicator window here which will let you know where you are inside of the document and then a zoom in and out button. I do want to note that within the PDFs themselves, if there happens to be embedded hyperlinks such as contact buttons or links to other websites, as long as those are encoded within the PDF policies, those will also be usable and launch new windows as applicable.

Okay. If you do decide that the search term did not respond with the most applicable results for you, you’re able to once again see all policies, at which time you can additionally filter those policies to enter in more search criteria to narrow your results down. Now today if you were to log in to this tool, you’re seeing about 81 documents. But keep in mind, as Erica mentioned, the long-term intention of this tool is also to bring in other VHA directives and additional policies. So while it might be very easy to not filter for those documents today, as we increase the amount of documents—200, 300, 400 documents—these filtering tools will definitely help you efficiently find the documents that you’re seeking.

This is a close-up view of the filter tab. You can see it’s pretty simple today and will be expanded upon as necessary as we increase the amount of complexity of documents and increase the sheer amount of documents that we hold within this tool. Today, the filters are simply the title search word which will search on the title and some other loose metadata that’s stored for each document, but it does not search the document specs. And then also the topic. Topics are predetermined within the maintenance administrative functions of uploading the documents themselves. However, they should be aligned with topics and categories which you are familiar with.

Okay. Here’s the exciting part. Let’s switch gears here and dive into a live demonstration of the document finder tool so we can put some of this into practice here. Upon clicking link, you will be greeted by this screen, which you can see is very basic. You’ve got a feedback button on the left-hand side, which we’ll talk about in a little bit, and then simply you have your search \_\_\_\_\_ [00:13:06]. So let’s say we want to search for the word data and find applicable policies related to data. Our algorithms will go out to our repositories and search for that word and bring back its mathematical best guidance on what policies have the most weight when it comes to just the word data itself. Now if I was looking for a more comprehensive or a more specific ask, I would run this query again. Maybe I need to look at something that says privacy data or data privacy. That would give you a much more specific range of results because it’s using multiple terms instead of, of course, just this very broad term being data, which I’m sure a lot of policies denote. As you can see, the results on the left shoulder are ranked for me, and I’m able to select the next document in the line by clicking and then seeing that document on the right-hand side, at which time I could run a secondary query if I want, and I could search for the word ethics. And then you can see here it’s going to tabulate the amount of results that come back, and then I would be able to go through this document very quickly and find the correct spot for me to copy/paste or reference for additional guidance. However, if this tool is not meeting my needs within this application itself, I could simply click on the arrow and this document would be launched for me in a new window—as long as I’m connected to the VA network, of course—at which time I could do all of the great things you can do with a PDF, so print, highlight, draw squiggly lines, save and export via email, etc.

Let’s run a more specific search here from this window, where this did not return the result that I want. So I’ll say I want a policy on data and on animal research. When I rerun this search, of course, it will rerank my search results, and I can see now that use of animals in research of course is going to be one of my top results for this query. So feel free to run as many queries as you’d like. Think of this, once again, as a Google search. And the more specific you can be, the more likely your results will be more tailored to what you’re seeking. But, for instance, if I did not find what I was looking for, I could simply see all of the policies that are housed and go through and filter these additionally. So let’s say we want to look for the word research. I could click and filter the documents, type in the word research, and then find all of the document titles—once again, this is titles, not text—titles that have research within them. Other navigations such as going back and forth are hopefully intuitive. You’ve got a smart phone–like back button that would take you back to the page you were at previously and then once again back to the main screen.

Keep in mind that searches are logged so that the community of researchers can see what has been searched. So any time that a search is completed, that would be logged within this recent searches index for the community to utilize or to look through what’s trending, etc. If you would like to select a search term directly from recent results, you don’t have to type it. You can simply just click on it like social media and of course return the results from there.

Now keep in mind that depending on the size of your documents—these documents can be rather large—there is sometimes a loading time associated with these documents. And I know that a document is loading by these dots that are moving across my screen. We call them ants marching, and they’re ants that are marching across the top of my screen here until that document loads. Depending on network and resource timing, you may experience a delay of up to five to ten seconds. If you experience a delay any longer than that, something’s probably not right, and we would encourage you to either provide feedback or reach out for support.

All right. So say you love or hate this tool and you would like to provide feedback to the team. We encourage all types of feedback, and it’s very informative and helpful for us to drive to the next level. So you do have an option of clicking this have feedback form. When you select this button, it will launch a Microsoft forms survey where you can input, of course, the information applicable to your experience with the document finder tools, any trouble that you have, any suggestions that you have, any generalized comments. We monitor this frequently, and once again, it’s very informative to the progression as we continue to iterate and improve and expand upon this capability moving forward.

All right, back to my slides here. I will share this. Okay, so we talked about giving feedback. Highly encouraged, folks, to do that. Once again, we love your feedback. Good or bad, it’s very, very helpful. And then within the deck, when you do receive the PowerPoint, you’ll have some generalized troubleshooting in case you run into some common technical challenges upon loading the application. So if this does happen, we have some pretty straightforward generalized guidance where we found that if people close and reopen their browser, it sometimes fixes their problems. If your screen looks very zoomed in, you can use the application zoom settings to zoom out. This application resizes based on your monitor settings, so we have it hopefully fitting to your monitor. But if there’s a challenge there, a browser challenge, refreshing, closing and reopening, or using zoom settings are the best and quickest remedies for you. And then if you still experience trouble, we encourage people to use the Edge and the Chrome browsers on either government-furnished equipment or within some sort of Citrix or \_\_\_\_\_ [00:20:00] access. Edge and Chrome browsers are typically our most reliable to overcome any sort of technical glitches that you might receive. If you do have any other technical challenges, feel free to use the feedback form and we will triage those and contact you as soon as possible.

As far as next steps, we encourage everybody to use this tool in their everyday work. Truly the more we have individuals such as yourselves utilizing this tool within their everyday work will help us improve and expand upon its capability as we see how you search and what you search for and how we can fine-tune our algorithms if they’re not returning results that are applicable to you. Number two, I’ve hit on this so many times, so I’ll say it one last time and I won’t say it anymore. Feedback is really fantastic. Fill it out as many times as you want. If you want to give us feedback every day, that’s great. If you want to give us feedback once, that’s okay too. But certainly we want to encourage the communication as we work together to make this a strong tool. And then there’s a reminder to provide the feedback from the ORPP&E apps team biweekly, and that’s on Tuesdays throughout July and August. And then I promised I wouldn’t say this again, so number four I’ll leave for you. It involves the feedback form and just filling that out again.

All right. So at this time, I’ll open it up to the entire panel, Erica, unless you have any closing comments before we open up for questions from the group.

Erica Aulik: I have no other comments for you.

Matthew Zelt: Okay, great. So with that, we’re open to all questions and we’re happy to dialog as much as the group would like. Yes, I believe this is Brandon’s question. When will the application be available for everyone? As of today. The link is available. We will make the link available within this chat or subsequently right after this presentation, and it is embedded within the PowerPoint as well. And everybody on this call has access beginning today.

Erica Aulik: I just put it in the chat, so everyone should have the link to the app.

Matthew Zelt: That’s a great question. Thank you, Brandon. Do you recommend using quotation marks or any Boolean search tools? So this will support Boolean searching and quotation marks and other common research methods up to an extent. Just note that if a document or policy also references those, I would say, search indicators like exclamation points, ampersands, etc., that it does go into the algorithm as part of a consideration, although it’s not weighed very heavily. I hope that answers this question.

What types of data is available? That’s a good question. If it’s in regard to policy, the policies are predetermined by the project lead on what is shared within the tool, so that would be Erica, and I would let her speak to that. As far as the data that’s tagged on the documents themselves, we are maturing that capability to be able to provide you information such as approval dates, policy number, document title, the authoring department. Depending on the consistency of authority, we could add in authority as well. So I think that would be a good feedback mechanism. If you do find that there is data associated with policies that you would like to move through faster, such as release dates or policy number or governing authority, certainly that would be fantastic feedback for us to prioritize within the next iteration.

Oh, great, I’m actually seeing cues in the chat now. Sorry about that. I see the next one from Estella [PH]. Will the regulatory FAQ list be moved to this location? Erica, is that something you want to talk about?

Erica Aulik: Yeah, I mean, I think we can talk about that because it’s kind of what’s coming up next and what’s going to be really cool about this tool. So go ahead, share away, Matthew.

Matthew Zelt: Sure. So within the next iteration and what is being planned right now is the inclusion of regulatory FAQs directly within this tool itself. So within the Phase 2 of this document, you will be able to not only search for all of the published FAQs that come in through the ORD regulatory inbox that have been answered and of course published, but you’ll also be able to look at the policies that are associated with the FAQs themselves and vice versa. So if you do begin…if it makes more sense for you within your business practice to look through FAQs and then see associated documents or policies within this tool, that will be a technical possibility within Phase 2. Conversely, if you would like to look at a document first and then look at published FAQs or associated frequently asked questions that have been connected to that document, that will be available as well. So very excited for that potential. Right now just as far as expectation setting, we are still working through the final stages of the administrative tool that allows the regulatory team to answer FAQs and make those data connections. And as soon as they begin to use that tool is when we can open up the potential for this group—the public group within this tool—to start seeing the connected dots that they make when they document an FAQ. Just note that the real value of this tool will occur over time, so not all FAQs will likely be connected to documents from day one. However, any time that a regulatory FAQ administrator makes that connection, it will transfer through to your tool simultaneously. So you will have up-to-date information within this document finder tool over time.

All right. Melissa, I see a question. Is there any thought on adding a section for interpretation, kind of like case law? And I think I skipped a question. I’ll come back to that question next, Brandon, that’s shown on the screen. Melissa, for your question, I think that’s an interesting comment. I don’t think this has been a discussion yet, but it’s certainly something that we’re happy to discuss as a team if this makes or expands the functionality of this tool for you. But Erica, correct me if I’m wrong. I don’t think we’ve formally thought through yet anything like adding interpretation or case law sections.

Erica Aulik: We have not. However, Melissa, I’ll reach out to you later today or after the holiday and get back with you on this idea, because we want to make this usable for all research people, and this could be \_\_\_\_\_ [00:28:36 – cross talk].

Unidentified Male: Erica, if I could just jump in. The FAQ tool includes interpretive statements or interpretive paragraphs, not just simply citing policy or regulation back. So while we don’t have case law like examples, this tool will, once you access the FAQs, include lots of interpretive statements about policy and regulation.

Matthew Zelt: Okay, that’s great to know. And I see Melissa I think is concurring on that as well in the chat. So yeah, look forward to that soon. Very excited about bringing that capability online. It’s in the pipeline. We want to get this part right first and then absolutely we’ll bring in the FAQ for you to see the formal responses to those questions which sounds like will include some interpretive language.

Erica Aulik: Yeah, if you ever have a hot-button topic, something hot comes up and all of a sudden you have a ton of questions, sometimes it’s great to make an FAQ sheet or a quick tip guide or something like that, and then we can easily link those FAQs to your document. So yeah, that’s something we could definitely collaborate with in the future.

Matthew Zelt: Okay, great. And Kay Block [PH], going back to your question on information on interagency agreements. So I believe there is an interagency agreement policy within the tool itself, but if you’re speaking on additional information beyond what would be a policy or a directive or that would be included within an FAQ, then I’m not sure at this time. Erica, any thoughts there?

Erica Aulik: No thoughts, but good suggestion. We can take a look at it and…because, you know, we’re at baseline right now, so we’re up for any sort of suggestions. And I will also take a note of this as well. Thank you.

Matthew Zelt: All right. And Kay, you’ve got another fantastic question about really the maintenance routine of the documents and how we’re going to keep these up to date to avoid confusion. And you’re absolutely right. That is probably the most essential part of this entire process. A maintenance routine has been developed and is being matured as we speak to have staff consistently review with the stakeholders these policies and their formal locations to make sure that they’re the most up-to-date documents. We’re also exploring automation processes—and we’ll continue to explore automated processes—that way, when the source of truth is actually updated itself, the maintenance piece is streamlined and automated to avoid the human error element of policies and procedures getting out of date. So definitely a critical conversation that we’ve had a lot of and will continue to have to make sure that we are keeping this tool absolutely up to date. So great question.

All right, Estella. Will the new state law research legal application tool reference as a tool? And I apologize, Erica. I’m going to have to hand this one to you because I’m not a hundred percent sure the new information on the state law research tool.

Don Workman: Matthew, this is Don. Let me jump in. The state law explorer is a separate tool, and it pulls together state laws that are of relevance to topics in research. Those are not the documents that the document finder will be looking at. The document finder is pointing towards VA policy and regulations and not toward state laws. So those will be separate tools and it won’t be part of the document finder.

Matthew Zelt: Thanks, Don. Yeah, and if there’s opportunity here where it would make sense for us to add a button to take you straight to that tool, we’re happy to be synergistic here to give you as few bookmarks as necessary to navigate all these tools. So if that makes sense, feel free to input that feedback and we’ll prioritize it as applicable.

Erica Aulik: Okay, anyone else have a question? All righty. So I think in the chat we’ve put the link in there a couple times. Everyone should have the link now. So please, start using it. Try to break it. Give us feedback, feedback, feedback. You got anything else, Matthew?

Matthew Zelt: Oh, no. We encourage feedback. We thank you so much for your participation. Fantastic questions. And yeah, we look forward to having people go into the tool and we look to see it start improving your daily lives. So thank you very much.

Erica Aulik: All right. Thanks, everyone.