Assign_GUP Documentation

Release 0.g1faac9e.dirty

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Assist in assigning APS GUPs to PRP members

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docs http://assign_gup.readthedocs.io

git https://github.com/prjemian/assign_gup.git

PyPI https://pypi.python.org/pypi/assign_gup

TODO list https://github.com/prjemian/assign_gup/issues

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CHAPTER 1

Overview

Assign_GUP is a tool for the Proposal Review Panel of the Advanced Photon Source Small-Angle X-ray Scattering General User Proposal panel. The tool helps the panel chairman to assign the most appropriate reviewers to each panel while balancing the work load across the panel. It replaces a system previously conducted in Excel spreadsheets.

A goal of this software is to automate this process, as much as possible. During the development process of this project, it is expected to discover, identify, and encode the algorithms underlying the proposal assignment process.

The code was first used in the 2011-2 proposal review cycle and was of some, albeit limited, help.

In the 2011-3 cycle, the software was much more useful (although the distribution of panelists amongst the proposals might have contributed) and the entire process was completed within a few hours. Previously, the process would take about a business day.

CHAPTER 2

Contents

2.1 Instructions for the Review Panel Chairman

Outline

- 1. Before the proposal deadline
 - (a) Verify the members of the proposal review panel: List of Reviewers
 - (b) Answer questions from review panel members. CC the APS User Office.
- 2. After the proposal deadline
 - (a) List of Proposals
 - (b) Run the Assign_GUP software.
 - i. Create a new project file
 - ii. Import the proposals (from the XML file)
 - iii. Create the list of reviewers or Import from previous .agup file
 - iv. Edit reviewers to assign topic weights
 - v. Assign topic weights to each proposal
 - vi. Assign Reviewers to Proposals
 - vii. Update the Assignments on the Web site
 - viii. Prepare the boilerplate letter
 - ix. Send emails

2.1.1 List of Reviewers

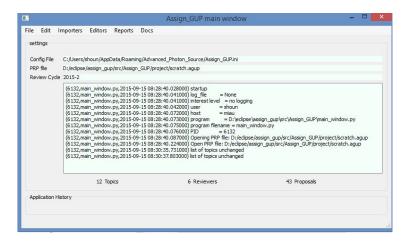


Fig. 2.1: Assign_GUP main window

At least a month before the GUP deadline...

Check the reviewers and verify they all can attend on the review date. (GUP Calendar: http://www.aps.anl.gov/Users/Calendars/GUP_Calendar.htm)

- 1. Identify panel members whose terms expire soon.
- 2. Is a temporary reviewer necessary?
- 3. Identify new candidates to replace expiring panel members. Evaluate panel members strengths in the various topics for review and compare with proposal weights in each topic. This will point out whether the panel has sufficient strength to review proposals on each topic.
- 4. Confirm the list of reviewers for the upcoming cycle.
- 5. Verify that each member can attend.
- 6. Assign values for reviewer strength on each topic. Use a scale from 0 (no strength) to 1.0 (high strength), with 0.1 precision.

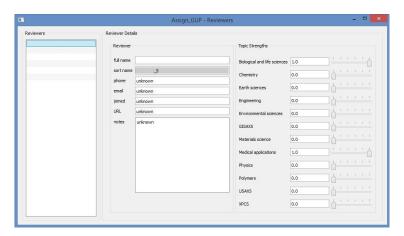


Fig. 2.2: Editor: Reviewers

Note: In various example screen images shown in this documentation, the details of specific individuals or proposals

have been removed or obscured to preserve anonymity.

2.1.2 List of Proposals

Be prompt!

Download the list in XML version of the proposals just after the proposal deadline. Assignments should be received within just a few days. Assigned reviewers must have sufficient to make their reviews.

1. Login to your panel's proposal review web site, and click the "Download the list in XML" link. Each panel has a slightly different URL. Consult the following table or contact the APS User Office:

panel	URL	
small-angle	https://beam.aps.anl.gov/pls/apsweb/gup0008.panel_start_page?i_attrib=	
	246B2411-PNL5	
spectroscopy	https://beam.aps.anl.gov/pls/apsweb/gup0008.panel_start_page?i_attrib=	
	246B2412-PNL6	
proposal system	https://www1.aps.anl.gov/Users-Information/About-Proposals/Apply-for-Time	

You might also consider using the "Print All Proposals" link to generate a single PDF file containing all the proposals and attachments. Any problem attachments will be noted on separate pages at the end of the document. Be sure to save that on-screen image to a file or it will go away when you close your browser.

- 2. When that page appears, it will look unformatted and not like XML. Don't worry, underneath the page is XML but is rendered poorly.
- 3. In your browser, choose "view source" (Control-U on Firefox) and save to a file such as raw-proposals-2015-2.xml (use the name of the proper review cycle).
- 4. This raw file may have characters that break the later XML processing. That's why I save it as raw and then make a working copy next.
- 5. Copy this file to proposals-2015-2.xml and make one change first. Add a period attribute (if not present) to the root element Review_list with a value of the current review cycle, such as:

```
<Review_list period="2015-2">
```

Be on the lookout for:

- proposals that belong on another panel
- PUP or project proposals (they require additional reviewer work)
- identical or related proposals (may not be the same PI or beam line)
- ineligible reviewer(s) (ineligible since reviewer name is on the proposal)

2.1.3 List of Topics

Central to this process is the creation of a list of topics. These topics represent the various scientific or experimental subjects represented by this suite of proposals. Each of the reviewers on the panel will have a different strength in each of the topics. This strength is represented as a decimal topic value, ranging between zero (no strength) to 1.0 (expert

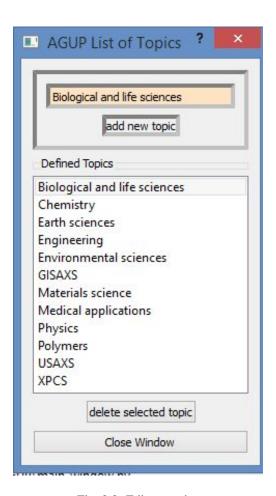


Fig. 2.3: Editor: topics

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or confident). The *dot product* of the topic values between any reviewer and proposal can be used as a measure of how appropriate is that reviewer to evaluate that proposal.

Initially, the list of topics is extracted from the proposals from the list of subjects selected for each proposal by the proposal's author.

The list of topics may be edited to remove such nondescript names as "Other" and to add in instrument-specific techniques such as XPCS for which specific expertise may not be so common amongst the panel reviewers.

Once the list of topics has been modified, check both the list of reviewers and the list of proposals that the topic values are assigned properly. (New topics added will be given topic values of 0.0.)

2.1.4 Assign topic weights to each proposal

Similar to the reviewers, each proposal must be assigned a topic weight. The weight (a floating point decimal number) is the relevance of each topic to the proposal. The scale is 0 to 1 where 0 means *not related* and 1 mean *related*.

When the proposals XML file is imported, a list of topics is created from all the subjects as selected by the proposers. Each topic created is assigned a weight of 1.0. **These topic assessments should be verified** since some proposers put down lots of extraneous topics that are weakly related to the specifics of the proposal.

2.1.5 Assign Reviewers to Proposals

Choose a primary and a secondary reviewer for each proposal. Most likely, these will be reviewers with the strongest topic weighting for this proposal.

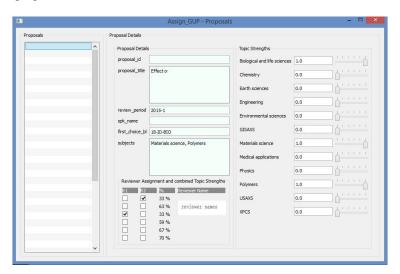


Fig. 2.4: Editor: Proposals

The rules are such that only one reviewer can be a *primary* and a different one can be *secondary*.

If a reviewer is ineligible to review a proposal (usually because they are named on the proposal team), their name will be grey and the checkboxes to select them as either primary or secondary reviewer will be disabled.

Refer to the summary and analysis grid reports when attempting to balance the number of proposals assigned to each reviewer.

2.1.6 Update the Assignments on the Web site

The assignments report gives a listing of the assigned reviewers for all proposals. Looking at this page, enter the same information into the APS Review web site. There is no upload capability possible for this data, you must enter it in from the web form.



Fig. 2.5: Report: Reviewer assignments

2.1.7 Send emails

Send emails to each reviewer listing the proposals on which they are primary or secondary reviewer. CC the APS User Office on each email.

To prepare the template for the emails, open the Edit Email Template . . . from the Editors menu:

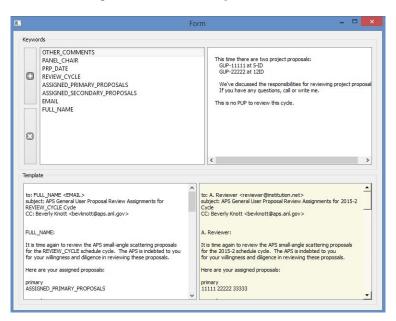


Fig. 2.6: Editor: Email template and substitution keywords

To prepare the email text for each reviewer, select *Email Letters* ... from the *Reports* menu. A new window will appear for each reviewer with details specific to that reviewer. Use this to create an email to each reviewer.

2.2 How to Install Assign_GUP

The basic installation procedure:

- 1. install Python 2.7
- 2. install Assign_GUP

2.2.1 Background

This program requires Python 2.7 (not ready for Python 3 yet) and several additional packages. Most of the package dependencies are met by using a Python distribution (provides Python, the basic package suite, and other popular packages).

The major package requirements are:

- PyQt4: provides the graphical user interface widgets
- lxml: XML support
- pyRestTable: presents information in a sensible table format

2.2.2 Python

It is suggested to use the Anaconda Python 2.7 distribution as it contains most of the packages used by this program.

- 1. use a web browser and visit: https://www.continuum.io/downloads
- 2. select the distribution for your operating system
- 3. make sure to follow links for Python 2.7
- 4. download the installer file
- 5. follow the instructions to install on your computer

2.2.3 Assign_GUP

Install this program from the Python Package Index (PyPI) using the pip command:

```
pip install pyRestTable
pip install --no-deps Assign_GUP
```

The --no-deps option tells pip not to download and attempt to build newer versions of other required packages such as lxml.

It *may* be necessary to install the *lxml* package if your distribution does not already have it installed. You can view all the installed packages using this command:

```
pip list
```

The list may have dozens or more items. To install *lxml*:

```
pip install lxml
```

Updating Assign GUP

To update to a newer version of *Assign_GUP*, use this command:

```
pip install -U --no-deps Assign_GUP
```

The -U option tells pip to search for and install the latest package update.

¹ Anaconda Python 2.7: https://www.continuum.io

Alternative Installation steps

It is possible to install **Assign_GUP** using steps common to Python developers, such as:

```
pip install https://github.com/prjemian/assign_gup
```

or:

```
git clone install https://github.com/prjemian/assign_gup.git
cd assign_gup
python ./setup.py install
```

These are not recommended for regular use.

2.3 Assign_GUP package: source code documentation

2.3.1 Module contents

Source code for the Assign_GUP (AGUP) package

Complete data for a PRP review session

2.3.2 Submodules

```
module: about
show the About box
class Assign_GUP.about.InfoBox (parent=None, settings=None)
     Bases: PyQt4.QtGui.QDialog
     a Qt GUI for the About box
     closeEvent (event)
          called when user clicks the big [X] to quit
     doDocsUrl()
         opening documentation URL in default browser
     doIssuesUrl()
          opening issues URL in default browser
     doLicense()
         show the license
     doUrl(url)
          opening URL in default browser
module: agup data
Data model for a review session: proposals, reviewers, topics, and analyses
class Assign_GUP.agup_data.AGUP_Data (parent_window=None, config=None)
     Bases: PyQt4.QtCore.QObject
```

```
clearAllData()
           clear all data (except for self.settings)
     getCycle()
           the review cycle, as defined by the proposals
     importEmailTemplate(xmlFile)
           import the email template support
     importProposals (xmlFile)
          import a Proposals XML file as generated by the APS or proposals from a PRP Project file
     importReviewers (xmlFile)
           import a complete set of reviewers (usually from a previous review cycle's file)
           Completely replace the set of reviewers currently in place.
     importTopics (xmlFile)
           import a complete set of Topics (usually from a previous PRP Project file)
           Completely replace the set of Topics currently in place.
     openPrpFile (filename)
     setReviewersModel(rvwrs)
           set the data model for the list of reviewers
     write(filename)
           write this data to an XML file
module: auto_assignment
automatic assignment of reviewers to proposals
class Assign_GUP.auto_assignment.Auto_Assign(agup)
     Bases: object
     automatically assign reviewers to proposals
     simpleAssignment (): assign the first two reviewers with the highest scores to unassigned proposals
     getScores (prop)
           generate scores for this proposal
     simpleAssignment()
           assign the first two reviewers with the highest scores to unassigned proposals

    no attempt to balance assignment loads in this procedure

             • score must be above zero to qualify
```

module: editor_email_template

edit the template to send emails, include editor for keyword substitutions

Provide tools to:

- manage list of substitution keywords
- · manage values of substitution keywords
- · display as read-only those substitution keywords defined for each reviewer
- provide editor for email template letter

show example email with substitutions applied

```
The email template is stored in the project file.
```

```
The substitution keyword dictionary is (at present) stored in the settings file.
```

```
class Assign_GUP.editor_email_template.Editor(parent, agup, settings=None)
     Bases: PyQt4.QtGui.QWidget
     closeEvent (event)
     doCurrentItemChanged (widget_item)
     doKeywordTextChanged(*args, **kw)
     doMerge()
     doTemplateTextChanged(*args, **kw)
     onAdd (*args, **kw)
          add keyword substitution
          Keywords are allowed to start with a letter or "_", then can have numbers also. All letters must be upper-
          Substitutions may be any text, including any white space.
          Strings must have a minimum length of MINIMUM_KEY_LENGTH (3) characters.
     onDelete(*args, **kw)
          delete the selected key
          check that self.current_key is not None then delete that one and reset to next in list
     restoreSplitterDetails()
          put the splitters back where they were
     restoreWindowGeometry()
          put the window back where it was
     saveSplitterDetails()
          remember where the splitters were
     saveWindowGeometry()
          remember where the window was
     selectFirstKeyword()
module: email mvc view
MVC View for emails
     see http://www.saltycrane.com/blog/2008/01/pyqt-43-simple-qabstractlistmodel/
     see http://www.saltycrane.com/blog/2007/12/pyqt-43-qtableview-qabstracttablemodel/
class Assign_GUP.email_mvc_view.AGUP_Emails_View(parent=None,
                                                                                     agup=None,
                                                               settings=None,
                                                               hide_email_button=True)
     Bases: PyQt4.QtGui.QWidget
     Show the email to be sent to each Reviewer
```

Parameters

• parent (obj) - instance of main_window.AGUP_MainWindow or None

```
• agup (ob j) – instance of agup_data.AGUP_Data
                • settings (ob j) – instance of settings. Application QSettings
     closeEvent (event)
     doOpenEmail()
          open the email letter in the email tool (does not work too good now)
     index_to_ID (index)
          convert QListView index to sort_name string
     on_item_clicked(index)
          called when changing the selected Reviewer in the list
     restoreWindowGeometry()
          put the window back where it was
     saveWindowGeometry()
          remember where the window was
     selectFirstListItem()
     selectModelByIndex (curr, prev)
          select Reviewer for email display as referenced by QListView index
              Parameters
                   • curr (index) - sort name string of current selected reviewer
                   • prev (index) – QListView index of previously selected reviewer
     \verb"setModel" (model")
     showReviewerEmail()
          select Reviewer for email display as referenced by self.sort_name
class Assign_GUP.email_mvc_view.Email
     Bases: object
     data structure for sending email
     send()
          send the email content to the default email tool
Assign GUP.email mvc view.main()
     simple starter program to develop this code
module: email template
Create email notices to each Reviewer describing specific assignments
class Assign_GUP.email_template.EmailTemplate
     Bases: object
     Support the creation of custom emails to each Reviewer from template and fields
     It is possible to create and use custom fields. Be sure that the custom fields are uniquely identifiable to avoid
     replacing the wrong text.
     importXml (filename)
```

Parameters filename (str) – name of XML file with email template and keywords

```
mail merge(**kw dict)
          create one email with a mail merge of self.keyword_dict and kw_dict into self.email_template
          suggest defining at least these four keywords, to be applied for each reviewer during mail merge step
          (values filled in programmatically):
          FULL_NAME = 'Ima Reviewer',
          EMAIL = 'reviewer@institution.net',
          ASSIGNED_PRIMARY_PROPOSALS = '11111 22222 33333',
          ASSIGNED_SECONDARY_PROPOSALS = '44444 55555 66666',
     mass_merge (reviewers, **kw)
          create emails for all Reviewers, return as a dictionary by sort_name
              Parameters reviewers (ob j) - instance of revu_mvc_data.AGUP_Reviewers_List
     writeXmlNode(root node)
          write email template data to the XML document
              Parameters root_node (obj) – XML node to contain this data
module: event filters
event filters for certain MVC widgets such as QListView
class Assign_GUP.event_filters.ArrowKeysEventFilter
     Bases: PyQt4.QtCore.QObject
     watches for ArrowUp and ArrowDown (navigator keys) to change selection in QtCore.QAbstractListModel
     eventFilter(listView, event)
          custom event filter
module: general mvc model
Generic MVC Model for AGUP
class Assign_GUP.general_mvc_model.AGUP_MVC_Model(data_object=[], headerdata=None,
                                                                parent=None)
     Bases: PyQt4.QtCore.QAbstractListModel
     Generic MVC model for AGUP
     This is an adapter for the actual data object
     columnCount (parent)
     data(index, role)
     rowCount (parent)
module: history
document program history events in a log file
class Assign_GUP.history.Logger(log_file=None,
                                                           level=20,
                                                                        statusbar=None,
                                                                                            his-
                                         tory_widget=None, minor_details=False)
     Bases: object
     use Python logging package to record program history
```

Parameters

- $log_file(str)$ name of file to store history
- **level** (enum) logging interest level (default=logging.INFO, no logs = -1)
- statusbar (obj) QStatusBar instance in main window
- history_widget (str) QPlainTextEdit instance in main window
- minor_details (bool) Include minor details in the logs?

add (message, major_status=True)

log a message or report from the application

Parameters

- message (str) words to be logged
- major_status (bool) major (True) or minor (False) status of this message

first_logs()

```
Assign_GUP.history.addLog(message=", major=True) put this message in the logs, note whether if major (True)
```

Assign_GUP.history.logMinorDetails(choice)

choose to record (True) or not record (False) minor details in the logs

module: main_window

Main code runs the GUI.

class Assign_GUP.main_window.AGUP_MainWindow

Bases: PyQt4.QtGui.QMainWindow

Creates a Qt GUI for the main window

adjustMainWindowTitle()

mark if main window is dirty

indicate in main window title when there are unsaved modifications (i.e., when self.cannotProceed() is True)

cannotProceed()

advise if the application has unsaved changes and should not do the proposed action

closeEvent (event)

called when user clicks the big [X] to quit

closeSubwindows()

close all other windows created by this code

confirmAbandonChangesNotOk()

Ask user to save changes before exit or opening another project.

Return True if application should NOT exit.

confirmEditTopics()

confirm before proceeding

doAgupInfo(*args, **kw)

describe this application and where to get more info

```
doAnalysis_gridReport()
     show a table with dotProducts for each reviewer against each proposal and assignments
doAssignmentsReport()
     show a read-only text page with assignments for each proposal
doAutomatedAssignment()
     make automated assignments of reviewers to proposals
doClose (*args, **kw)
     called when user chooses exit (or quit), or from closeEvent()
doEditEmailTemplate()
     edit the template to send emails, include editor for keyword substitutions
doEditProposals()
     edit the list of Proposals
doEditReviewers()
     edit the list of Reviewers
doEditTopics()
     Create Window to edit list of Topics
doImportProposals()
     import the proposal file as downloaded from the APS web site
doImportReviewers()
     copy the list of Reviewers into this project from another PRP Project file
doImportTopics()
     copy the list of Topics from another PRP file into this project
doLettersReport()
     prepare the email form letters to each reviewer with their assignments
doNewPrpFile()
     clear the data in self.agup
doOpenPrpFile()
     open an existing PRP file
doRecalc()
doResetDefaultSettings()
     user requested to reset the settings to their default values
     Note: does not write to the refile
doSave()
     save the self.agup data to the known project file name
doSaveAs()
```

save the self.agup data to the data file name selected from a dialog box

You may choose any file name and extension that you prefer. It is strongly suggested you choose the default file extension, to identify AGUP PRP Project files more easily on disk. Multiple projects files, perhaps for different review cycles, can be saved in the same directory. Or you can save each project file in a different directory as you choose.

By default, the file extension will be **.agup**, indicating that this is an AGUP PRP Project file. The extensions .prp or .xml may be used as alternatives. Each of these describes a file with exactly the same file format, an XML document.

```
doSummaryReport()
          this report is helpful to balance proposal assignments
          show a read-only text page with how many primary and secondary proposals assigned to each reviewer
     doUnassignProposals()
          Remove ALL assignments of reviewers to proposals
     getOpenFileName (*args, **items)
          convenience wrapper for Qt open file dialog
     getReviewCycleText()
     importProposals (filename)
          read a proposals XML file and set the model accordingly
     importReviewers (filename)
          read Reviewers from a PRP Project file and set the model accordingly
     importTopics (filename)
          read Topics from an AGUP PRP Project file and set the model accordingly
     onAssignmentsChanged()
          called when a reviewer assignment checkbox has been changed
     onTemplateChanged()
     onTopicValuesChanged(*args, **kw)
          called when a proposal or reviewer topic value has been changed
     openPrpFile (filename)
          choose the XML file with data for this PRP review
     requestConfirmation (message, informative_text, buttons=None, default_button=None)
          request confirmation from the user about something
     restoreWindowGeometry()
          put the window back where it was
     saveWindowGeometry()
          remember where the window was
     setIndicators()
          show the numbers of topics, reviewers, and proposals, also the cycle
     setNumProposalsWidget(number)
     setNumReviewersWidget(number)
     setNumTopicsWidget (number)
     setPrpFileText (text)
     setRcFileText (text)
     setReviewCycleText (text)
Assign_GUP.main_window.main()
     start the program
Assign_GUP.main_window.process_command_line()
     support command-line options such as `--help` and `--version`
```

```
module: plainTextEdit
show text in a GUI window
class Assign_GUP.plainTextEdit.TextWindow (parent=None, title='window title', text=", set-
                                                        tings=None)
     Bases: PyQt4.QtGui.QWidget
     show text in a GUI window that remembers its geometry, based on supplied window title
          Parameters
                • parent (obj) – instance of QWidget
                • title (str) – to be used as the window title (and settings group name)
                • text (str) - window content
                • settings (obj) – instance of settings. Application QSettings
     closeEvent (event)
     moveEvent (event)
     restoreWindowGeometry()
          put the window back where it was
     saveWindowGeometry()
          remember where the window was
     setText (text)
     setTitle (title)
     settingsGroupName()
          need a group name in the settings file to save the window geometry, based on window title
module: prop mvc data
Proposals: underlying data class for the MVC model
class Assign_GUP.prop_mvc_data.AGUP_Proposals_List(agup)
     Bases: PyQt4.QtCore.QObject
     the list of all proposals
     addTopic (key, value=None)
          add a new topic key and initial value to all proposals
     addTopics (key_list)
          add several topics at once (with default values)
     exists (prop_id)
          given ID string, does proposal exist?
     getByIndex (index)
          given index in sorted list of proposals, return indexed proposal
          note: index is not the proposal ID number
     getProposal (prop_id)
          return proposal selected by ID string
     importXml (filename)
```

```
Parameters filename (str) – name of XML file with proposals
     removeTopic(key)
          remove an existing topic key from all proposals
     removeTopics (key_list)
          remove several topics at once
     setTopicValue (prop_id, topic, value)
          set the topic value on a proposal identified by GUP ID
     writeXmlNode (specified_node)
          write Proposals' data to a specified node in the XML document
              Parameters specified_node (ob j) - XML node to contain this data
module: prop_mvc_view
MVC View for proposals
     see http://www.saltycrane.com/blog/2008/01/pyqt-43-simple-qabstractlistmodel/
     see http://www.saltycrane.com/blog/2007/12/pyqt-43-qtableview-qabstracttablemodel/
class Assign_GUP.prop_mvc_view.AGUP_Proposals_View(parent=None, agup=None, set-
                                                                    tings=None)
     Bases: PyQt4.QtGui.QWidget
     Manage the list of proposals, including assignments of topic weights and reviewers
          Parameters
                • parent (obj) - instance of main_window.AGUP_MainWindow or None
                • agup (ob j) – instance of agup_data.AGUP_Data
                • settings (ob j) – instance of settings. Application QSettings
     closeEvent (event)
          in response to user requesting the window be closed
     details modified()
          OK to select a different proposal now?
     editProposal (prop_id, prev_prop_index)
          select Proposal for editing as referenced by ID number
     index_to_ID (index)
          convert QListView index to GUP ID string
     isProposalListModified()
     onAssignmentsChanged()
          called when a reviewer assignment checkbox has been changed
     onTopicValueChanged (prop_id, topic, value)
          called when user changed a topic value in the details panel
     on_item_clicked(index)
          called when changing the selected Proposal in the list
     recalc()
          recalculate dot products
```

module: prop_revu_grid

widgets of one Reviewer of one Proposal instance

ProposalReviewerRow

adds one row of widgets for possible Reviewer of Proposal

Method	Description
getAssignment()	return which type of reviewer this is $(0, 1, 2)$
setAssignment()	define which type of reviewer this is $(0, 1, 2)$
setValue()	set dotProduct value as percentage
setEnabled()	enable/disable the checkboxes based on Reviewer eligibility
setNumberAssigned()	show the number of assigned proposals with given role (1 2)
dotProduct()	compute and set widget with dot product of reviewer & proposal topics

ReviewerAssignmentGridLayout

QGridLayout of possible Reviewers of Proposal

Method	Description		
addReviewer()	add controls for one Reviewer to the grid		
addReviewers()	add list of Reviewers to the grid		
setEnabled()	enable/disable one Reviewer		
setProposal()	specify the Proposal associated with this grid		
setAssignment()	define the type for a named Reviewer		
onCheck()	ensure only one reviewer is either primary or secondary		
setValue()	set dotProduct value of a named Reviewer as percentage		

Bases: PyQt4.QtCore.QObject

Adds a row of widgets to an existing grid layout for one Reviewer of one Proposal instance

dotProduct()

dot product of Proposal and Reviewer topic strengths, $\vec{p} \cdot \vec{r}$

Computes $\vec{p} \cdot \vec{r}$ where:

- \vec{p} is array of topic value strengths for Proposal
- \vec{r} is array of topic value strengths for Reviewer

getAssignment()

report which type of reviewer this is

returns	description		
0	unassigned		
1	primary reviewer (#1)		
2	secondary reviewer (#2)		

onCheckBoxClick (widget)

either check box was clicked

rowCheck (checkbox)

ensure at most one checkbox (primary or secondary) is checked for this reviewer

Parameters checkbox (obj) – instance of QCheckBox

setAssignment(code)

define which type of reviewer this is

code	description			
0	unassigned			
1	primary reviewer (#1)			
2	secondary reviewer (#2)			

Parameters code (int) – integer code (0 | 1 | 2)

$\verb"setNumberAssigned" (number, role")$

show the number of assigned proposals with given role

$\verb"setProposal" (proposal")$

define the proposal to be used with this row

setValue (percentage)

set the percentage value

Parameters percentage (int) – dot product of reviewer and proposal topic strengths

update()

display and manage the assignment checkboxes and reported percentages for each reviewer on this proposal

addReviewer (rvwr)

add this reviewer object for display

```
addReviewers (reviewers)
          add a list of reviewers
     onCheck (row_widget)
          ensure only one reviewer is either primary or secondary
     setAssignment (sort_name, code)
          define which type of reviewer this is
              Parameters
                   • sort_name (str) – reviewer's identifying key
                   • code (int) – integer code (0 | 1 | 2)
     setEnabled(sort_name, state=True)
          enable (True) or disable (False) a Reviewer identified by sort_name
          All eligible Reviewers are enabled. Reviewers become ineligible when they are named as part of the
          Proposal team.
     setProposal (proposal)
          declare which proposal is associated with this grid
     setReviewersValues (reviewers)
          set the widget values for all Reviewers
     setValue (sort_name, percentage)
          set the percentage value
     update()
     updateNumbersOfAssignedProposals()
          update the numbers of assigned proposals shown for each reviewer and each role
Assign_GUP.prop_revu_grid.developer_main()
     create QGroupBox + QGridLayout and run the panel
```

R1	#1	R2	#2	%	Reviewer Name
[x]	1	[]	0	100%	Joe User
[]	0	[x]	1	80%	Second Reviewer
[]	0	[]	0	22%	Some Panel Member
[]	0	[]	0	1%	Another Panel Member

module: proposal

Data for one General User Proposal

```
class Assign_GUP.proposal.AGUP_Proposal_Data(xmlParentNode=None, xmlFile=None)
     Bases: object
     A single General User Proposal
     addTopic (topic, value=None)
          declare a new topic and give it an initial value (default value=0.0)
          topic must not exist or KeyError exception will be raised
     addTopics (topics_list)
```

declare several new topics and give them all default values

each topic must not exist or KeyError exception will be raised

getAssignedReviewers() return a list of assigned reviewers for this proposal getExcludedReviewers (reviewers) return a list of excluded reviewers for this proposal **Parameters** reviewers (obj) – list of all available reviewers getKey (key) get the item from self.db identified by key getSubjects() return the list of subjects as specified in the Proposal getTopic (topic) return the value of the named topic getTopicList() return a list of all topics hasTopic (topic) does the named topic exist? importXml (proposal node) Fill the class variables with values from the XML node Parameters proposal_node - lxml node of the Proposal removeTopic(key) remove the named topic removeTopics (key_list) remove several topics at once setAssignedReviewer (reviewer, role=None) assign a reviewer to this proposal as primary (role=1) or secondary (role=2) or None (unassigned) setTopic (topic, value=None) set value of an existing topic topic must exist or KeyError exception will be raised

writeXmlNode(specified node)

write this Proposal's data to a specified node in the XML document

Parameters specified_node (obj) - XML node to contain this data

module: proposal_details

QtGui widget to edit one Proposal instance

AGUP_ProposalDetails

adds one row of widgets for possible Reviewer of Proposal

Method	Description
addReviewer()	add a Reviewer to the panel

```
class Assign_GUP.proposal_details.AGUP_ProposalDetails (parent=None,
                                                                                         set-
                                                                    tings=None, agup=None)
     Bases: PyQt4.QtGui.QWidget
     QtGui widget to edit one Proposal instance
     addReviewers (reviewers)
         Add the list of Reviewers to the details panel
     addTopic (topic, value)
     addTopics (topic_list)
     clear()
     getProposalId()
     onAssignmentsChanged()
         called when a reviewer assignment checkbox has been changed
     onTopicValueChanged(topic)
     restoreSplitterDetails()
     saveSplitterDetails()
     setAll (prop_id, title, period, speaker, choice, subjects)
     setFirstChoiceBl(value)
     setProposalId(value)
     setProposalTitle(value)
     setReviewPeriod(value)
     setSpkName (value)
     setSubjects(value)
     setTopic (key, value)
     setupProposal (proposal)
         install proposal data in the editor's widgets
     update()
module: qt utils
Helper routines for Qt
Assign_GUP.qt_utils.setButtonBackground(widget, color='#efefef')
Assign_GUP.qt_utils.setWidgetBackground(widget, color='#efefef')
     change the background color of a Qt widget
         Parameters color (str) – specified as name (mintcream), hex RGB (#dea)
module: report_analysis_grid
show a table with dotProducts for each reviewer against each proposal and assignments
class Assign_GUP.report_analysis_grid.Report (parent, agup, settings)
     Bases: Assign_GUP.plainTextEdit.TextWindow
```

```
makeText()
    generate the text of the panel
update()
```

module: report_assignments

show a read-only text page with assignments for each proposal

GUP#	reviewer 1	reviewer 2	excluded reviewer(s)	title
11111	A Reviewer	Ima Reviewer		Study of stuff

```
class Assign_GUP.report_assignments.Report (parent, agup, settings)
    Bases: Assign_GUP.plainTextEdit.TextWindow
    makeText()
        generate the text of the panel
    update()
```

module: report_summary

show a read-only text page with how many primary and secondary proposals assigned to each reviewer

```
total number of proposals: #
primary proposals per reviewer: #.#

Overall topic strength: TBA

Primary assignments:
reviewer1 ##: ##### #####
reviewer2 ##: ##### #####
reviewer3 ##: ##### #####

Secondary assignments:
reviewer1 ##: ##### #####

reviewer2 ##: ##### #####

Unassigned proposals: #
```

```
class Assign_GUP.report_summary.Report (parent, agup, settings)
    Bases: Assign_GUP.plainTextEdit.TextWindow
    makeText()
        generate the text of the panel
    update()
```

module: resources

(internal) support for items in resources folder, such as forms defined in .ui files

```
Assign_GUP.resources.get_forms_path(path=None) identify our resources directory
```

```
Assign_GUP.resources.loadUi (ui_file, baseinstance=None, **kw) load a .ui file for use in building a GUI
```

Wraps uic.loadUi() with code that finds our program's resources directory.

See http://nullege.com/codes/search/PyQt4.uic.loadUi

See http://bitesofcode.blogspot.ca/2011/10/comparison-of-loading-techniques.html

inspired by: http://stackoverflow.com/questions/14892713/how-do-you-load-ui-files-onto-python-classes-with-pyside? lq=1

Basic Procedure

- 1. Use Qt Designer to create a .ui file.
- 2. Create a python class of the same type as the widget you created in the .ui file.
- 3. When initializing the python class, use uic to dynamically load the .ui file onto the class.

Here is an example from this code:

```
from PyQt4 import QtGui
   import resources
   UI_FILE = 'plainTextEdit.ui'
   class TextWindow(QtGui.QDialog, form_class):
       def __init__(self, title, text):
           QtGui.QDialog.__init__(self, parent)
q
           resources.loadUi(UI_FILE, baseinstance=self)
10
           self.setWindowTitle(title)
           self.plainTextEdit.setPlainText(text)
12
13
   import sys
14
   app = QtGui.QApplication(sys.argv)
15
   win = TextWindow('the title', __doc__)
17
   win.show()
   sys.exit(app.exec_())
```

Assign_GUP.resources.resource_file (filename, dir=None) absolute path to file in resources directory

module: reviewer

Data for one Reviewer of General User Proposals

```
class Assign_GUP.reviewer.AGUP_Reviewer_Data(xmlParentNode=None, xmlFile=None)
    Bases: object
    A Reviewer of General User Proposals
```

```
addTopic (topic, value=None)
```

declare a new topic and give it an initial value

topic must not exist or KeyError exception will be raised

```
addTopics (topics_list)
          declare several new topics and give them all default values
          each topic must not exist or KeyError exception will be raised
     getAssignments (proposals, role)
          find all proposals assigned to this reviewer with the given role
     getFullName()
     getKey(key)
     getSortName()
     getTopic (topic)
          return the value of the named topic
     getTopicList()
          return a list of all topics
     importXml (reviewer)
          Fill the class variables with values from the XML node
              Parameters reviewer - lxml node node of the Reviewer
     removeTopic(key)
          remove the named topic
     removeTopics (key list)
          remove several topics at once
     setKey (key, value)
          save a value to a known key
          example:
          self.setKey('full_name', 'Pete Jemian')
     setTopic (topic, value=None)
          set value of an existing topic
          topic must exist or KeyError exception will be raised
     writeXmlNode (specified_node)
          write this Reviewer's data to a specified node in the XML document
              Parameters specified_node (obj) – XML node to contain this data
module: reviewer_details
QtGui widget to edit one Reviewer instance
class Assign_GUP.reviewer_details.AGUP_ReviewerDetails(parent=None,
                                                                                                set-
                                                                         tings=None)
     Bases: PyQt4.QtGui.QWidget
     QtGui widget to edit one Reviewer instance
     addTopic (topic, value)
     addTopics (topic_list)
     getEmail()
     getFullName()
```

```
getJoined()
     getNotes()
     getPhone()
     getSortName()
     getUrl()
     onTopicValueChanged(topic)
     restoreSplitterDetails()
     saveSplitterDetails()
     setEmail(value)
     setFullName (value)
     setJoined(value)
     setNotes (value)
     setPhone (value)
     setSortName (value)
     setTopic(key, value)
     setUrl (value)
module: revu mvc data
Reviewers: underlying data class for the MVC model
class Assign_GUP.revu_mvc_data.AGUP_Reviewers_List(agup)
     Bases: PyQt4.QtCore.QObject
     the list of all reviewers
     addTopic (key, value=None)
          add a new topic key and initial value to all reviewers
     addTopics (key_list)
          add several topics at once (with default values)
     exists (sort_name)
          given sort_name string, does reviewer exist?
     getByFullName (full_name)
          return reviewer selected by full_name string
     getByIndex (index)
     getReviewer (sort_name)
          return reviewer selected by sort_name string
     \verb"getReviewerAssignments" (sort\_name, role=None)
          find all proposals assigned to the named reviewer
              Parameters
                  • sort_name (str) – key for reviewer name
                  • role (int) – one of [None, 0, 1, 2], where None or 0 mean get both roles
```

```
importXml (filename)
              Parameters filename (str) – name of XML file with reviewers
     inOrder()
     keyOrder()
     removeReviewer (full name)
          remove named reviewer
     removeTopic(key)
          remove an existing topic key from all reviewers
     removeTopics (key_list)
          remove several topics at once
     setTopicValue (sort_name, topic, value)
          set the topic value on a reviewer identified by sort_name
     writeXmlNode (specified_node)
          write Reviewers' data to a specified node in the XML document
              Parameters specified_node (obj) – XML node to contain this data
module: revu mvc view
MVC View for reviewers
     see http://www.saltycrane.com/blog/2008/01/pyqt-43-simple-qabstractlistmodel/
     see http://www.saltycrane.com/blog/2007/12/pyqt-43-qtableview-qabstracttablemodel/
class Assign_GUP.revu_mvc_view.AGUP_Reviewers_View (parent=None, agup=None, set-
                                                                   tings=None)
     Bases: PyQt4.QtGui.QWidget
     Manage the list of Reviewers, including assignments of topic weights
          Parameters
                • parent (ob j) - instance of main_window.AGUP_MainWindow or None
                • agup (ob j) – instance of agup_data.AGUP_Data
                • settings (obj) – instance of settings. Application QSettings
     closeEvent (event)
     details modified()
          OK to select a different reviewer now?
     editReviewer (sort_name, prev_index)
          select Reviewer for editing as referenced by sort_name
     index_to_ID (index)
          convert QListView index to sort_name string
     isReviewerListModified()
     onDetailsModified(*args)
     onTopicValueChanged(sort_name, topic, value)
          called when user changed a topic value in the details panel
```

```
on item clicked(index)
          called when changing the selected Reviewer in the list
     restoreWindowGeometry()
          put the window back where it was
     saveReviewerDetails()
          copied Reviewer details from editor panel to main data structure
     saveWindowGeometry()
          remember where the window was
     selectFirstListItem()
     selectModelByIndex (curr, prev)
          select Reviewer for editing as referenced by QListView index
              Parameters
                  • curr (index) - sort_name string of current selected reviewer
                  • prev (index) – QListView index of previously selected reviewer
     setModel (model)
Assign_GUP.revu_mvc_view.main()
     simple starter program to develop this code
```

module: settings

Support for AGUP program settings

A settings file is used to preserve certain values of the application (such as window positions and full path to the project file). The name of the settings file is given in the main window. Note, the settings file may have the suffix ".ini" on some operating systems. Remove the settings file to clear any settings. There is also a menu item to clear this file and reset it to defaults.

This module uses QSettings (http://doc.qt.io/qt-4.8/qsettings.html).

Note: Multi-monitor support : method restoreWindowGeometry()

On multi-monitor systems such as laptops, window may be restored to offscreen position. Here is how it happens:

- geo was saved while window was on 2nd screen while docked
- now re-opened on laptop display and window is off-screen

For now, keep the windows on the main screen or learn how to edit the settings file.

```
class Assign_GUP.settings.ApplicationQSettings
    Bases: PyQt4.QtCore.QSettings
    manage and preserve default settings for this application using QSettings
    Use the .ini file format and save under user directory
    getEmailKeywords()
        return the email substitution keywords as a dictionary
    getKey (key)
        return the Python value (not a QVariant) of key or None if not found
```

```
Raises TypeError – if key is None
getPrpFile()
getReviewCycle()
keyExists(key)
    does the named key exist?
resetDefaults()
    Reset all application settings to default values.
restoreSplitterDetails (window)
    put the splitter back where it was
        Parameters window (ob j) – instance of QWidget
restoreWindowGeometry (window, group=None)
    put the window back where it was
        Parameters window (ob j) – instance of QWidget
saveEmailKeywords (keyword dict)
    remember the email substitution keywords
saveSplitterDetails(window)
    remember where the splitter was
        Parameters window (ob i) – instance of QWidget
saveWindowGeometry (window, group=None)
    remember where the window was
        Parameters window (obj) – instance of QWidget
setKey (key, value)
    set the value of a configuration key, creates the key if it does not exist
        Parameters key (str) – either key or group/key
    Complement: self.value(key) returns value of key
setPrpFile (prp_file)
setReviewCycle (review_cycle)
updateTimeStamp()
```

module: signals

Custom Qt4 signals

signal	args	comments
changed		template editor
checkBoxGridChanged		reviewer assignment
closed		topics_editor
recalc		dotProduct
topicValueChanged	str, str, float	reviewer or proposal

class Assign_GUP.signals.CustomSignals

Bases: PyQt4.QtCore.QObject

custom signals

module: tools

common tools used in various places

for more information on the various codepoints, see https://docs.python.org/2/library/codecs.html#standard-encodings

```
Assign_GUP.tools.text_decode (source)
try decoding source with various known codepoints to unicode
Assign_GUP.tools.text_encode (source)
encode source using the default codepoint
```

module: topic_slider

add label, slider, value to a QGridLayout

Coordinate the action of a slider with the topic value:

```
label value slider
bio 0.7 |---|---|[-]|---|
phys 0.2 |--[|]---|---|
```

widget	type	description
label	QLabel	mnemonic name (no white space)
value	QLineEdit	string with floating point value: $0 \le value \le 1.0$
slider	QSlider	graphical adjustment of value

These three widgets will be added to the *parent* widget, assumed to be on the same row of a QGridLayout.

A *topic* (known here as *label*) is some scientific area of interest to the PRP. Such as, for the SAXS review panel, some of the proposals are for XPCS (X-ray Photon Correlation Spectroscopy).

Each proposal will have a strength value assigned for each topic, indicating how important that topic is to the proposed experiment.

Each reviewer will have a strength value assigned for each topic, indicating the strength of that reviewer in the particular topic.

The strength values will be constrained to the range [0...1]. A QValidator() object will be used to color the background of the QLineEdit to indicate whether or not the entered text is acceptable. The value of the slider will update with acceptable values from the text entry. The background color indicates acceptable or invalid input. The slider will be updated for acceptable values. The validator will also constrain the input to a precision of 2 decimal places.

```
class Assign_GUP.topic_slider.AGUP_TopicSlider (parent, row, label, value)
    Bases: PyQt4.QtCore.QObject
    add topic, slider, value_entry to a QGridLayout
    getSliderValue()
    getValue()
    onSliderChange (value)
        update the QLineEdit when the slider is changed
    onValueChange (value)
        update the QSlider when the value is changed
```

```
setSliderValue(value)
           set value of the slider indicating strength of this topic (0:low, 100: high)
                Parameters value (int) - 0 \le value \le 100
           This routine sets the text value.
      setValue (value)
           set strength of this topic (0:low, 1.0: high)
                Parameters value (int) - 0 \le value \le 100
           This routine sets the slider value.
module: topics
Support AGUP topics
class Assign_GUP.topics.Topics
      Bases: object
      manage the list of AGUP topics (known here as key)
      add (key, value=0.0)
           define a new topic (known here as key)
      addTopics (key_list)
           add several topics at once (with default values)
                Parameters key_list ([str]) - list of topics (strings) to be added
      clearAll()
           remove all keys from the list of topics
      compare (other_topics_object)
           compare topics in self.topics with the other_topics_object, return True if identical
           compares sorted list of topics between each object
                Parameters other_topics_object (obj) - instance of Topics()
      diff(other_topics_object)
           differences in list of topics between self.topics and other_topics_object
           Comparison assumes that self.topics is the final result. Returned result shows topics added and removed
           from other_topics_object to obtain current list.
                Parameters other_topics_object (obj) - instance of Topics()
                Returns ([],[]) first list is topics added, second list is topics removed
      dotProduct (other)
           normalized dot product of Proposal (self) and Reviewer (other) topic strengths, \vec{p} \cdot \vec{r}
                Parameters other (ob j) – instance of Topics()
                Returns \sum \vec{p} \cdot \vec{r} / \sum \vec{p}
              • \vec{p} is array of topic value strengths for Proposal
              • \vec{r} is array of topic value strengths for Reviewer
      exists (kev)
```

Is key already known?

```
get (key)
          return value of an existing topic (known here as key)
          topic must exist or KeyError exception will be raised
     getTopicList()
          return a list of all topics
     importXml (xmlFile, read_values=True)
              Parameters
                   • filename (str) – name of XML file with Topics
                   • read_values (bool) - import topic values?
     importXmlTopics (parent_node, read_values=True)
          make this common code segment reuseable
              Parameters
                   • parent_node (ob j) - XML parent node
                   • read_values (bool) - import topic values?
     inOrder()
     remove (key)
          remove the named topic
              Parameters key(str) – topic to be removed
     removeTopics (key_list)
          remove several topics at once
              Parameters key_list ([str]) - list of topics (strings) to be removed
     set (key, value)
          set value of an existing topic (known here as key)
          topic must exist or KeyError exception will be raised
     valueOrder()
          sort by topic values
     writeXml (specified_node, write_values=True)
          write Topics' data to a specified node in the XML document
              Parameters
                   • specified node (ob i) - XML node to contain this data
                   • read_values (bool) – write topic values?
Assign_GUP.topics.checkTopicValueRange(value)
     topic values must be 0..1 inclusive: standardize this check
          Parameters value (float) – topic value to be checked
Assign_GUP.topics.diffLists (new_list, old_list)
     differences between two lists, return tuple([items added], [items removed])
     assumes each list had only unique entries, no redundancies
          Parameters
                • new_list ([str]) – new list of strings to be compared
```

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• old_list ([str]) - old list of strings to be compared

Assign_GUP.topics.sortListUnique(the_list)

sort list and eliminate redundant items

- · make a dictionary with each list item
- redundancies will be overwritten

Parameters the_list ([str]) - list of strings to be sorted

 ${\tt Assign_GUP.topics.synchronizeTopics} \ (a_list,b_list)$

make the topic names in each list be the same

- assumes each topics list had only unique entries, no redundancies
- modifies objects in place

Parameters

- a_list (obj) instance of Topics()
- **b_list** (obj) instance of Topics()

module: topics editor

GUI to edit the list of topics

```
class Assign_GUP.topics_editor.AGUP_TopicsEditor(parent=None, topics_list=None, set-
                                                                tings=None)
     Bases: PyQt4.QtGui.QDialog
     add topic, slider, value_entry to a QGridLayout
     closeEvent (event)
     getTopicList()
          when all editing is complete, call this method to get the final list
     onAdd (*args, **kw)
          add the text in the entry box to the list of topics
     onCloseButton(event)
     onDelete(*args)
          remove the selected item from the list of topics
     restoreWindowGeometry()
          put the window back where it was
     saveWindowGeometry()
          remember where the window was
```

module: xml_utility

XML utility methods

```
exception Assign_GUP.xml_utility.IncorrectXmlRootTag
    Bases: lxml.etree.DocumentInvalid
    the root tag of the XML file is incorrect
```

exception Assign_GUP.xml_utility.InvalidWithXmlSchema

Bases: lxml.etree.DocumentInvalid

error while validating against the XML Schema

exception Assign_GUP.xml_utility.XmlSyntaxError

Bases: lxml.etree.XMLSyntaxError

Xml Syntax error

Assign_GUP.xml_utility.getXmlText(parent, tag, default=None)

Read the text content of an XML node

Parameters

- reviewer lxml node node
- **default** default value is no node text

Returns node text or None

Assign_GUP.xml_utility.readValidXmlDoc (filename, expected_root_tag, XML_Schema_file, alt root tag=", alt schema=None)

Common code to read an XML file, validate it with an XML Schema, and return the XML doc object

Parameters XML_Schema_file (str) – name of XML Schema file (local to package directory)

Assign_GUP.xml_utility.validate (xml_tree, XSD_Schema_file) validate an XML document tree against an XML Schema file

Parameters

- **xml_tree** (obj) instance of etree._ElementTree
- XSD_Schema_file (str) name of XSD Schema file (local to package directory)

2.4 History of Source Code Changes

2017.4.0

- #72 build for RTD in conda virtual environment
- #25 pick up GitHub release info using python-versioneer
- 2017.3.1 fixes (issue #69) resolve conflicting reviewer assignments on XML import
- 2017.3.0 fixes (issue #67) call setModel() after importing reviewers
- **2016.1025.0** standardize versioning kit with pyRestTable
- **2016.0312.0** fixes (issue #58) excluded reviewers are not auto-assigned, fixes (issue #63) save changes before opening another project
- 2016.0311.1 (fixes #57) codepoint conflicts resolved
- 2016.0309.1 (fixes #50) window objects need to be None after disposal
- **2016.0309.0** (fixes #51) topic strengths not assigned automatically
- **2016.0308.4** (fixes #55) unhandled non-ASCII character(s)
- 2016.0209.0 added missing imports
- 2016.0208.0 (#33) validate number entry in topic slider
- 2016.0205.0 (#44) reports update after auto-assign

```
2016.0203.2 fixes (issue #36)
2016.0203.1 fixes (issue #21)
2016.0203.0 fixes (issue #19), fixes (issue #32), fixes (issue #35), fixes (issue #41), fixes (issue #42)
2016.0201.1 provide an "un-assign all proposals" capability (issue #37)
2016.0201.0 announce that auto assign has completed (issue #36)
2016.0114.1 described program installation
2016.0114.0 added simple auto-assignment of proposals (issue #20), report window focus problem fixed
2016.0113.4 remove search for legacy .xsd file
2016.0113.3 assignments report window re-displays on demand now
2016.0113.2 resolved errors when building the documentation due to versioneer
2016.0113.1 #24 apparently fixed by previous work
2016.0113.0 added versioneer support, LICENSE GUI now displays (#24 fixed also)
2015.0921.0 first release of new Assign GUP application
2015.09.rc1 first pre-release using PyQt4, resolving issues 1-9, provides every capability in previous
     wxPython version
2013.11.0 last release using wxPython
```

2.5 Source Code License

```
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2
   All Rights Reserved
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   Advanced Photon Source, Argonne National Laboratory
   OPEN SOURCE LICENSE
10
11
   Redistribution and use in source and binary forms, with or without
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