



ECB/QVR Steering Committee

Electronic Council Book–Query/View/Reporting System Steering Committee

Date: Wednesday, June 2, 2004

Time: 10:00 a.m.–Noon

Location: Fernwood Bldg., Rm 3D-18

Advocate: Pete Morton

Chair: Thor Fjellstedt

Next Meeting: July 7, Wed., 10: a.m.–Noon, Fernwood Building, Room 3D-18

Action Items

1. (All) Contact Thor Fjellstedt with additional items for Roadmap reports.
 2. (Thor) Send Roadmap test screen URL to Rick Ikeda so that his Roadmap staff can evaluate.
 3. (All) If you want to evaluate the Roadmap test site, contact Thor and he will send the URL.
 4. (Greg Fischetti, Thomas Tatham, Don Tiedemann) Meet to determine best means for retrieving expertise data.
 5. (Don Tiedemann, Cathy Buckley) Research IMPAC II reports to see if there are any value-added reports that QVR could offer regarding Review meetings.
 6. (Thor) Ask the listserv, extramural directors and EPMC if there is a need for a Resume Report.
 7. (Earl Hodgkins) Check with the requestor of the Object Class code report to see if purpose of report and determine if viable.
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Introductions

Pete Morton provided an update on the development of QVR with the eRA project. He met with Israel (Izja) Lederhendler, acting eRA Project Manager, who is encouraging close coordination and communication. Steve Hughes will attend these meetings as the liaison from eRA, and Jim Seach also will work with both groups. Pete attends the new meetings with Izja for Advocates and Operational Division (OPDIV) representatives only. These meetings have increased communication about the project and provided an excellent forum for issues and updates.

QVR Roadmap

Thor showed the new Roadmap items in QVR, that included:

- Roadmap option on search screen
- “Public Queries” designed for Roadmap

- Roadmap Theme, Initiative, Roadmap Implementation Work Group (RIWG) and RFA added to custom download
- Roadmap data items in Standard Reports
- Customization of Standard Reports for Roadmap—Council Funding Plan, Cumulative Funds to Council, IRG notes, etc.

Public queries—There are three public queries constructed for Roadmap. Thor asked for suggestions for other reports.

Standard reports—It was suggested that there be a note or indicator next to each report telling whether or not it is in Excel PivotTable format.

Roadmap Funded Report—This report, sectioned by theme, is ready to move to production. However, Earl pointed out that there is some debate in Building One regarding how funds should be allocated, i.e., intramural, RMS, extramural. One of the issues is that of the assigned CAN. The initial plan to have one Roadmap CAN per IC won't work. Therefore, Earl suggested not releasing this report until Building One makes a final decision, which will affect parts of this report.

Customized Roadmap reports—The listed reports are in production and available for use.

Snapshot Report—The Snapshot Reports has new sections for Roadmap. For the IRG notes, there are four data items that will appear. A “New Investigator” indicator was added as well as secondary degrees (from the PI Person record).

IRG Notes Report—There are areas on the IRG Notes report for four user specified data items. Roadmap identifiers are included in the list of items available for the user fields. There are also now spaces for a fifth reviewer and for child concerns in the appropriate spaces on this report.

Action: (All) Contact Thor Fjellstedt with additional items for Roadmap reports.

Items for Discussion in the “Test” Environment

There is a prototype search screen with additional Roadmap search items. Some new boxes include:

- Roadmap initiated: Directly (response to RFA), Indirectly, No
- Roadmap Funded (based on CAN): Y or N

Screen searches can be done based on how it was initiated and funded.

Action: (Thor) Send Roadmap test screen URL to Rick Ikeda so that his Roadmap staff can evaluate.

It was suggested that there be a section for percentage funded by each IC of Roadmap grants. However, this might be difficult.

Action: (All) If you want to evaluate the Roadmap test site, contact Thor and he will send the URL.

Priority codes—Priority codes are entered in the Priority Code field after Council meetings. The code can be entered through the Grants Management Module. The code can determine the applications ranking. The codes are:

- HPP: Highest Program Priority
- LPP: Lowest Program Priority

RMAPFUND report—This report is ready but will not be released to production until the budget allocations are approved.

Grant count rules—Up to now, the grant count rules were determined and queries implemented to retrieve this data. However, the counting rules need to be changed to accommodate Roadmap. Earl is in a contact with Building One regarding these new rules.

Recently Requested Items

Person search—CSR now is using QVR to search for Reviewers. It is useful to see a person's Review history and Study Section in the Nomination packages. Right now, users can only locate persons who are or have been PIs. The QVR Team is investigating the possibility of adding a new "Person Search" which will allow users to find any person that has been involved with NIH grants. It was suggested that expertise data be included. However, expertise data is not complete so the data, at this time, is not reliable. It was suggested that Reviewers and PIs enter their expertise in Commons so that the information could be retrieved. There is a Knowledge Management (KM) effort in eRA that will be able to determine a person's expertise by their publications. This is a very sophisticated program. It was noted that if PIs put their expertise in the Commons, they own the data. People are already using Advanced Person Search and from the results are evaluating the quality of the expertise data.

It was suggested that one could do a "reverse" search in PubMed by searching on an expertise key word, retrieving the resulting list of people and then seeing if those people are registered in the Commons. However, it is still a problem to make an exact identification (e.g., George Smith with no middle initial would be hard to match).

Action: (Greg Fischetti, Thomas Tatham, Don Tiedemann) Meet to determine best means for retrieving expertise data.

Review information as a report or download item—There is a request for a Standard Report of a series of people attending a meeting that includes their contact information. However, Thomas Tatham noted that CSR is not going to put their Reviewer list in a database. However, in the Program Module, one can pull up a hitlist with the date, time and place of meetings, but only for one's own account. This is a problem because often another person has to substitute at a meeting.

There are reports already available in IMPAC II that show all the grants for a specific meeting. QVR does not need to duplicate reports that are already available.

Action: (Don Tiedemann, Cathy Buckley) Research IMPAC II reports to see if there are any value-added reports that QVR could offer regarding Review meetings.

Resume as a downloadable item or report—It was suggested that the resume be available as a downloadable item with a picklist to pull it. You can get a hitlist now.

Action: (Thor) Ask the listserv, extramural directors and EPMC if there is a need for a Resume Report.

Object Class code—There was concern that the Object Class codes do not correlate directly to grant types. Some Type 6 and 7 grants are regarded as Type 5 grants for budget purposes. Consequently, Type 5 grants numbers get overstated.

Action: (Earl Hodgkins) Check with the requestor of the Object Class code report to see if purpose of report and determine if viable.

Update on link to documents—The request for QVR to retrieve data for JIT, FSR and Pop Tracking Snapshot from the eRA System has been on the table since January. Steve Hughes explained that, while he is more than willing to approve the request, there are system security restrictions that have to be resolved before the request can be approved and implemented. Rick Ikeda said that he will present this issue to the eRA Project Team.

Users of QVR would like access to as much information as possible in the eRA System to allow them to do their job. It was determined that the technical issues need to be addressed and a smaller group should meet and discuss.

Security—There were some questions about new rules for security. Council members are selected by the institute. They sign a confidentiality agreement and do not require a background check at this time. However, new security HHS directives say that all extramural staff, IC staff, etc., who have access to grants in future must have a security clearance. How to apply this to the eRA System has yet to be determined.

Training

- The QVR Roadmap training classes last week were very successful. The classes were designed to show how to use the new Roadmap features and to get input for additional features. There will be a QVR Roadmap class in July that targets Budget staff.
- Paul Jordan is presenting a series of classes for ECB.
- Thor said that he will use the voice feature of PowerPoint to update and enhance training modules.

Attendance

Bashir, Karen (NIA)	Hodgkins, Earl (CIT)	Musson, Bob (NHLBI)
Brown, Mark (NIMH/Altum)	Hughes, Steve (OER)	Parker, Marie (NIAID)
Buckley, Cathy (CIT)	Ikeda, Rick (NIGMS)	Poma, Shelly (NIMH)
Casavant, Don (NIGMS)	Januszewski, Joe (CIT)	Ratnanather, Chanath (OD)
Condon, Bonita (NIAID)	Kemmerle, Donna (NIDCD)	Seppala, Sandy (LTS/COB)
Connors, Anne (NIAMS)	Levenson, Darlene (NIAID)	Tatham, Thomas (CSR)
Fischetti, Greg (NCI)	Mason, Tom (CIT)	Thompson, Claudia (NIEHS)
Fjellstedt, Thor (CIT)	Morton, Pete (CIT)	Tiedemann, Don (CIT)