



ECB/QVR Steering Committee

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

Date: Wednesday, February 4, 2004
Time: 10:00 a.m.–Noon
Location: Fernwood Bldg., Rm 3D-18 (upper level)
Chair: Thor Fjellstedt

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

Action Items

1. (Thor Fjellstedt) Send announcement to distribution list about accessing and using the History screen, and ask for suggestions. Also announce that the system will not remember a History screen when logging off and logging back on.
2. (Cathy Buckley, Don Tiedemann) Investigate the retrieval of JIT data.
3. (Thomas Tatham) Send a request to Cathy Buckley and Don Tiedemann for a new report listing specified PIs' current membership on committees along with dates of service.

QVR System

History Data—Thor demonstrated the new History screens, which are in beta. There are not as many options because the data is limited. Queries on this screen produce a hitlist (up to 10,000 hits with a note there are more if there are more than 10,000). The data goes back to 1970 for Current History and to 1986 for Pub Files. The further back you go the less data is available in the eRA database. To find the History screen:

1. Click *Switch Search Screen* in left frame
2. Click *Others*
3. Click *History*

QVR remembers what screen you last used and takes you to that screen the next time you log on. It was agreed that an exception should be made for the History screen. Users should be taken back to the last non-History screen.

Action: (Thor Fjellstedt) **Send announcement to distribution list about accessing and using the History screen, and ask for suggestions. Also announce that the system will not remember a History screen when logging off and logging back on.**

QVR New Main Screen—Thor showed the new QVR Main Screen, which now includes the most frequently used queries at the top, making it easier for new users, in particular, to use the system. All of the fields that were on the old Main Screen fall below the “Quick Search” top section.

Project Totals Standard Report—This is an *ad hoc* PivotTable for getting project counts and dollar sums by different break categories. This report is available for standard QVR queries and history. The report appears in the “Grant Info Reports” section of the Standard Reports menu. Thor is preparing a tutorial.

Thor showed these new reports and demonstrated the Excel PivotTable.

Score and Percentile Ranges—It was suggested that there be a breakout for score and percentile ranges. However, the ranges will change according to use and IC.

Project CAN Total Standard Report—This version of the *ad hoc* PivotTable report counts and sums at the CAN level. This report is available for standard QVR queries and history. The report appears in the “Grant Info Reports” section of the Standard Reports menu. It was prepared for Budget people primarily. Thor is preparing a tutorial.

Roadmap—A version of QVR is in Test that allows retrieval of applications submitted in response to Roadmap announcements. Several of the PivotTables have been modified to accommodate this feature. All Roadmap items have this sub-code: RMOD. There now is a Roadmap field on the screen under Test Search Criteria. Using these criteria, you can find Roadmap RFAs. Thor is making a presentation in Building 1 on Friday because this could be a very useful tool for them.

Archive Reports—There is a new enhancement to QVR to fulfill a need for “frozen” reports, without the corresponding query and PivotTable. This is particularly useful for comparison purposes. It was agreed that it was a good idea to save many reports for later use.

Thor will send this option out to a few more people to use. He is interested in whether or not all files should be saved or if there should be an option for “save and retrieve.” Currently, a “save and retrieve” option is on one or two reports. It is in the test environment only. The save-and-retrieve option can be added to all reports, or there can be a determination as to which reports should have the option.

IC-Specific Data—Thor plans to go ahead with this project, but on a limited basis. He will ask one IC to work with him to create a prototype. Once it is operational, he will present it to the new Steering Committee.

Access to Publication information—Currently, Principal Investigator review experience can be queried but there is no query for retrieving their publications. This is a very complicated query.

IPF Look-up Feature—Paul Jordan developed a tool that allows you to click on a CAN and it brings up the associated IPF code. Thor is investigating the possibility of using it within the context of QVR.

JIT Data—It was suggested that a query be developed to retrieve just-in-time (JIT) data.

Action: (Cathy Buckley, Don Tiedemann) Investigate the retrieval of JIT data.

MEO—Operating procedures and standard practices are being defined. Rick Ikeda said that he is recommending the use of the CAM for early concurrence.

Notices—It was suggested that notices be retrieved within QVR. However, after some discussion, it was agreed that this would not be possible. Each IC stores this data in a different

way, sometimes only on paper or in a spreadsheet, so that there is no uniform way to retrieve this data. However, Thor suggested that these might be perfect for the IC-Specific Data project.

Current Membership Report—It was suggested that there be a report listing a possible reviewer’s current membership on committees along with dates of service (i.e., start–end dates). This query would be very useful in CSR when a Review group is being assembled.

Action: (Thomas Tatham) **Send a request to Cathy Buckley and Don Tiedemann for a new report listing specified PIs’ current membership on committees along with dates of service.**

Profile Information—It was suggested that there be a report with key PI information retrieved from the Profile on the Commons. The Commons Profile should contain the most accurate, up-to-date information.

Commons Registrations—As of January 11, 2004, there have been the following Commons’ registrations as presented at the Commons Working Group:

- 750 organizations registered (43% increase from August)
- 8,431 “affiliated” and “active” registered persons

Training Classes

Paul Jordan will teach a series of training classes in March. The titles, course numbers and dates are below. The workshop is a new course and the description is also included.

QVR Training Classes

740	<u>New and Advanced Features of Council Administration Module Version 5</u>	March 16
731	<u>Introduction to Using the ECB Council Administration Module</u>	March 16
732	New! <u>Hands on ECB Early Concurrence Workshop</u>	March 17

Workshop Course Description

This totally redesigned course will present the student with a truly hands on experience related to configuring and managing ECB Early Concurrence data. Students will create ad hoc and batch queries, create assignment panels, manage the voting process and process their completed Early Concurrence applications. The majority of the class time will involve hands on exercises. Staff who have attended previous Early Concurrence training are encouraged to join us for a new perspective on this complex topic.

This is an advanced topic suitable for staff already familiar with the basic operating concepts of the ECB Council Administration Module.

Attendance

Buckley, Cathy (CIT)
Delcore, Sandi (NICHD)
Fjellstedt, Thor (CIT)
Hodgkins, Earl (CIT)
Ikeda, Rick (NIGMS)

Januszewski, Joe (CIT)
Pinchotti, Steve
(NIMH/Altum)
Poma, Shelly (NIMH)
Seppala, Sandy (LTS/COB)

Simmons, Arlene (NINR)
Ta, Loan (NIA)
Tatham, Thomas (CSR)
Tiedemann, Don (CIT)
Walters, James (NINDS)