



ECB/QVR Steering Committee

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

Date: Wednesday, July 7, 2004
Time: 10:00 a.m.–Noon
Location: Fernwood Bldg., Rm 3D-18
Advocate: Pete Morton
Chair: Thor Fjellstedt

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

Action Items

1. (Thor Fjellstedt) Send invitation through the QVR distribution list to budget analysts to join a budget analysts' user group.
 2. (Pete Morton) Investigate the NIH Portal for setting up a blog for Budget users. Be sure OPDIVS can have access (e.g., CDC, AHRQ).
 3. (Thomas Tatham) Check with CSR about the feasibility of a course for Reviewers geared toward using QVR.
 4. (Pete Morton) Investigate the ADP/EP Users Group to see if it would be a group we could work with for training and disseminating information.
 5. (All) Use the new standard report, REVMTG, and send suggestions for changes to Thor Fjellstedt.
 6. (Steve Hughes) Ask Amir Venegas about text search issues on the eRA database and report back at the next meeting.
 7. (Steve Hughes) Find out from the eRA team if the capability to segment the grant image is on the requirements list and, if it is, when it is scheduled for implementation.
-

Announcements

Meeting location—Pete Morton asked the group if they were satisfied with the meeting location. The group agreed that the meeting location worked for them.

Budget Analyst User Group—Chad Wysong proposed forming a budget analysts user group to discuss using QVR for budget, since budget analysts have specific interests and needs. It would provide a place to share ideas and make better use of QVR. The group agreed that a user group might be a good idea but suggested that it be called the “Budget Analysts’ User Group” or some equivalent, rather than the “QVR User Group.” This would allow the group to share ideas and interests beyond the scope of using the QVR for budget reporting.

Action: (Thor Fjellstedt) Send invitation through the QVR distribution list to budget analysts to join a budget analysts’ user group.

Other ideas for helping budget staff and others use the QVR:

- **Blog (Web Log)**—Pete suggested started a **blog** for QVR or for QVR budget analysts that would be available to anyone who wanted to participate. The definition of a blog is:

Blog

[a.k.a. blogger -or- blogrolling -or- weblog -or- Web log -or- blogosphere]

A blog is basically a journal that is available on the Web. The activity of updating a blog is “blogging” and someone who keeps a blog is a “blogger.” Blogs are typically updated daily using software that allows people with little or no technical background to update and maintain the blog.

Postings on a blog are almost always arranged in chronological order with the most recent additions featured most prominently.

Action: (Pete Morton) Investigate the NIH Portal for setting up a blog for Budget users. Be sure OPDIVS can have access (e.g., CDC, AHRQ).

- Perhaps two user groups would be a good idea: one for budget analysts and one general QVR user group.
- FAQs for QVR are on the website. These can supplement a user group.
- Dissemination of information about QVR could be communicated in the following ways:
 - Blog
 - Distribution list
 - User group
 - Newsletter
 - Chat room
 - Tip of the Day
- CSR is setting up a Desktop User Group (DUG), which might be of interest. It is planning to adopt RoboHelp, software in which users can enter issues and solutions. Issues are indexed and can be searched.
- Suggest conducting a QVR crash course for budget analysts.
- Suggest conducting a QVR course for those in Review.

Action: (Thomas Tatham) Check with CSR about the feasibility of a course for Reviewers geared toward using QVR.

- Use Grants Management as a model for: Website, seminars on a topic, self training.
- There is an ADP/EP Users Group.

Action: (Pete Morton) Investigate the ADP/EP Users Group to see if it would be a group we could work with for training and disseminating information.

QVR/Roadmap

Thor reported that there are two committees addressing Roadmap issues and that Thor participates in the Roadmap Working Group.

Program class codes have been developed in Program. However, there are some issues to resolve, including the following:

- Subinitiatives need to be identified.
- Supplements need to be incorporated after the first year. There needs to be a way to build a class code that builds a mapping mechanism. These mechanisms must be in place to provide accurate Roadmap reporting.

QVR Enhancements

- *New standard report, RMAPFUND*, has been moved to production. It is specifically designed for tracking the funding of Roadmap projects. It uses a checkbook-type format showing allocations in a table.
- *New standard report, REVMTG*, has been moved to production. It provides review meeting information and the applications included in the Review (but not in the order of review). It is in PivotTable format and also will allow sorting by any of the columns included in the report. It is organized for Roadmap but it can be used for other applications. It was suggested that there be an option to run the report for Roadmap or not, with the default being “No.” Thor is preparing a tutorial for it.

Action: (All) Use the new standard report, REVMTG, and send suggestions for changes to Thor Fjellstedt.

- *Review meeting location information* has been added to QVR download.
- *Population Tracking Standard Reports*. Thor is working with Carlos Caban on the types of reports that would be useful for Pop Tracking. Thor will make a presentation to the Pop Tracking group.
- *IRG Notes*—Added four optional User fields, which Thor demonstrated. There was a discussion about ways to show a label of the user’s choices in the optional fields on the report. It was agreed that this would be very useful. It was also noted that the term IRG (Initial Review Group) is now known as the SRG (Scientific Review Group). It is also known as a “study section.” The terminology should be changed in the IRGNOTES report.

Other Discussion Topics

Person Search

Don Tiedemann is developing a Person search capability in QVR. It entails a different list of queries and a new screen. Profiles will be classified in a person-data class. Also, these queries, when made, will not interfere with the grant default queries of the user.

Person search will be able to retrieve Person information for Principal Investigators (PIs) who have submitted applications in the last 12 years, and/or persons have served on any Meeting committees in the last 12 years, and will include their expertise and other pertinent information. Eventually, it will include the capability to download query results to spreadsheets and to generate reports.

There has to be a high level of data quality and so this will require extensive testing to be sure that it meets requirements. Person search should be ready for testing in about a month.

It was suggested that there be a “printer-friendly button” so that query results can be printed easily.

It was noted that there is a Person search in eRA, which is accessible through the Review Module.

There is a Knowledge Management (KM) project in eRA, which originally focused on a Person search capability. However, this was a demonstration of the capabilities of the Collexis technology. It was determined that scientific coding would be the first recipient of eRA KM research and resources ; this project is underway.

IC-Specific Data

Thor has been talking with staff at the Genome Institute about joining the IC-Specific QVR project. This project would make available IC-specific data that’s not in the eRA database available to them using QVR. Thor is hoping to find a few ICs interested in participating in a pilot of this program. If it is successful, it would be opened up to all ICs.

Text Search

A year ago, there was a working text-search facility available in QVR. However, text search is no longer working properly and Don Tiedemann is trying to determine the causes of its failure. In particular, some text searches are taking a very long time to complete, and the user’s QVR session times out before the response is returned. He suggested that searchers need to more narrowly define their text-search query because the number of documents has increased. There are a lot more abstracts and other text files in the database now so this could contribute to the problem.

Action: (Steve Hughes) Ask Amir Venegas about text search issues on the eRA database and report back at the next meeting.

Link to Documents: JIT, FSR, Pop Tracking Snapshot

The issue about allowing QVR to retrieve certain data, such as JIT information, from the eRA System database has not been resolved as yet, but the solution may be in the proposed eRA data mart. The data mart will access the OLTP and will include JIT data. Data mart testing is scheduled for August. The definition of a data mart is:

A type of [data warehouse](#) designed primarily to address a specific function or department’s needs, as opposed to a data warehouse, which is traditionally meant to address the needs of the organization from an enterprise perspective. In addition, a data mart often uses [aggregation](#) or summarization of the data to

enhance query performance. However, it is important to maintain the ability to access the underlying base data to enable [drill-down analysis](#) as necessary.

Steve Hughes reviewed several issues raised last month regarding linking to specific documents in the eRA System and gave this status:

- ***Just-In-Time***—If the only data needed for JIT documents is to show whether or not they have been filed, that data can be shown in QVR.
- ***Document organization in the eRA document server***—the documents on the document server are being reorganized to allow better access.
- There was a suggestion that there be an ***API*** to access certain data. However, this would require any API or changes to an API on the eRA side to go through review, release, and the test cycle.
- There was a suggestion that there be some way to segment the grant image, currently in PDF format, so that specific sections could be pulled out, such as—
 - Face page and abstracts
 - Face page and aims
 - Face page and budget

Action: (Steve Hughes) Find out from the eRA team if the capability to segment the grant image is on the requirements list and, if it is, when it is scheduled for implementation.

Steve Hughes was asked to make a presentation on the data mart when there is something substantive to present.

Classes

Several types of QVR classes are offered:

- Three levels of QVR: Introductory, Intermediate, Advanced with focus on PivotTables
- Roadmap: for Budget Officers, Advanced QVR
- Budget

It was suggested that a Roadmap class sans the hands-on feature would be a good class since there is so much to learn about Roadmap.

Thor mentioned that all the classes are full and that there is a waiting list of more than 40 people. He encouraged people to sign up for the classes even if they are put on the waiting list because the size of the waiting list tells him how many classes need to be held in the future.

Attendance

Bashir, Karen (NIA)
Buckley, Cathy (CIT)
Casavant, Don (NIGMS)
Condon, Bonita (NIAID)
Connors, Anne (NIAMS)
Fjellstedt, Thor (CIT)
Floura, Ranvir (CIT)
Haycock, Sue (NIEHS)
Hughes, Steve (OER)

Ikeda, Rick (NIGMS)
Januszewski, Joe (CIT)
Jones, Terry (NIAID)
Mason, Tom (CIT)
McDermott, Julie (NIDDK)
McHale, Carolyn (CIT)
Morton, Pete (CIT)
Musson, Bob (NHLBI)
Poma, Shelly (NIMH)

Robbins, Linda (NIMH)
Seppala, Sandy (LTS/COB)
Tatham, Thomas (CSR)
Thompson, Claudia (NIEHS)
Tiedemann, Don (CIT)
Underwood, Brenda
(NICHD)
Wysong, Chad (NIDCD)