◆ ECB/QVR Steering Committee

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

Date: Wed., February 26, 2002

Time: 10:00 a.m.–noon

Location: Rockledge 2, 9th Floor Conference Center

Advocate: Thor Fjellstedt

Next Meeting: Wed. March 26, 10:00 a.m.–noon, Rockledge 2, 9th Floor Conference Center

Action Items

1. (All) Contact Thor if you interested in testing queries for intramural data.

Attachments

- J2EE Query Tool (Sherry Zucker): http://era.nih.gov/Docs/Query_Tool_02-24-03.pdf

Announcements

Thor's Retirement—Thor announced that he will retire from the NIH at the end of March. However, he will continue to lead the QVR effort, working for CIT.

Training—Thor announced that he conducted QVR training classes at the CIT. Both classes were over-subscribed, so two more classes are scheduled for March 12 to accommodate those on the waiting list. There are still 35 on the waiting list so more classes will be scheduled later. Thor is willing to come to any IC upon request to conduct training classes.

Early Concurrence—There will be a training session on Early Concurrence on March 11.

J2EE Query Tool

Sherry Zucker

Pete Morton introduced Sherry Zucker and the new J2EE query tool by saying that he saw her presentation at the eRA Project Team meeting and thought it appropriate for this meeting. The QVR is meant for decision-making and it queries the IRDB. The J2EE Query Tool is for operational and production use for business-area support and it will query the OLTP. However, because it will query the OLTP, there may be some performance issues.

Sherry said that there is a plethora of eRA query tools and access methods currently in use (e.g., ICSTORe, QuickView, CRISP Plus, IQR, ICO, QVR/ECB). Sherry explained that having too many choices is often confusing for users and the duplicative functionality and maintenance are inefficient uses of resources. Other drivers for the J2EE query tool implementation were the project decision to migrate from client/server to J2EE architecture, the desire to update and improve tool appearance to a real Web user interface and the desire to provide the same interface for some reporting functions to internal and external users.

Sherry described the many types of tool users, which included:

- Quick View Users

- Scientific Query Users

- Advanced Query Users (ICSTORe)

- Business Area Specific Users

- Document Tracking Users

- Program/IC Portfolio Users

- Finance and Budget Users

- Program Analysis Users

Different categories of users have different requirements for query and retrieval, making a single user interface impractical. The challenge that faces the team is to retain the unique requirements of each interface/access method while eliminating unnecessary duplication. To meet this challenge, a detailed analysis to identify requirements for different query and retrieval interfaces and their common components is needed. The next step is to use that analysis to build a draft user interface and pilot the J2EE Query Tool. Business areas must be selected and focus groups convened. The target timeframe for a pilot is July and the target for rollout is October.

Sherry demonstrated the J2EE Query tool and showed the flexibility of the basic, advanced and nested search mechanisms. Search field categories (Grant ID, PI Name, Institution, Meeting, Assignment, Grant Dates, Grant & Document Status, Award & Budget data, Administrative Coding and Text Search) are found in the left frame. Users have the choice of filling out the fields by category or using the "Show All Basic" or "Show All Expanded" views. Later, users will have the option of customizing search templates. Sherry ran through several sample queries, pointing out key parameters and result fields. She reviewed the basic hit list screen and sorting options.

In July, the budget tables will be available in Excel, and then will be available as frozen data. Earl Hodgkins and Nancy Vess, Advocates for Budget, have researched and defined these budget tables.

Sherry announced that she plans to assemble a JAD with representatives from many ICs to further define requirements in preparation for the development of a prototype. The first goal is for this new J2EE Query Tool to replace ICSTORe and QuickView. Plans are to release a final version in October 2003.

After Sherry left, one person in the group asked what the development of the J2EE Query Tool means to QVR. Thor responded that there is room for more than one query tool and that QVR is widely used. He wants to continue expanding QVR's capabilities to meet users' needs.

QVR Status

Website—A QVR website is now available at this URL: http://qvr.nih.gov/qvr/login.cfm. All of the training materials Thor has prepared is posted on it. Thor asked the group to send him suggestions for improving the website.

Review/Program Search Criteria—There is a new Review screen with a pick box. You can now search on reviewing institutes. Also, CSR extension codes were dropped.

Subprojects—Search capabilities were added. You can now enter a specific person's name to find all his/her grant applications/projects and subprojects. The search results returns a list of the parent grant with a subproject hyperlink to all of the subs for the parent.

Budget Queries—Thor presented his QVR training to Budget Officers on December 10. At their suggestion for specific screens and queries for their group, the analysts developed and delivered them in two months.

Data Warehouse Data—You now can query elements for data that is stored in the Data Warehouse. You can download particular data for each CAN.

PI History—You can click on the PI's name and get their review history. It includes links to the rosters and SRAs for each of the review meetings. It includes all Review committees in all institutes.

Application Dates—An application's receipt and due dates have been added. However, the receipt dates are not searchable, as was suggested during the meeting. Should this be feasible, Thor will notify the group by email.

Pick Lists—The group agreed that RO1 and PO1 grants should be listed first on pick lists since they are the most frequently searched. Below them would be an alpha list of all grant types, with RO1s and PO1s also listed in alpha order.

RPG—The group asked that, after clicking on RPG that only those elements are listed and then you should be able to pick all or specific elements. Thor will investigate.

Intramural Projects—Thor and the analysts are looking into intramural project data, such as contracts. The queries would not include any dollar amounts. Dollar amounts only would be available to the originating IC. Thor asked that anyone interested in testing this project to contact him. He also mentioned that there is an intramural database in CIT that might be accessed.

Action: **(All) Contact Thor if you interested in testing queries for intramural data.**

R&D Contract Data—Would like to make this data available but there doesn't seem to be a central place where the data resides. They are also looking into interagency agreements, but so far have not found a central depository.

IRDB—The IRDB is going to be redesigned. Pete Morton is leading the project.

Attendance

Buckley, Cathy (CIT)
Fay, Rob (NIDDK)
Fjellstedt, Thor (OER)
 Advocate
Florance, Valerie (NLM)
Hardman, Anne (NIA)
Ireland, Christine (NLM)

Januszewski, Joe (CIT)
McDermott, Julie
 (NINDS)
Morton, Pete (CIT)
Robbins, Linda (NIMH)
Seppala, Sandy
 (LTS/COB), Recorder

Sorensen, Roger (NIAAA)
Tiedemann, Donn (CIT)
Williamson, Mary Ann
 (NIDCR)
Zucker, Sherry (OD)