



ECB/QVR Steering Committee

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

Date: Wed., July 16, 2003
Time: 10:00 a.m.–Noon
Location: Fernwood Bldg., Rm 3D-18 (upper level)
Chair: Thor Fjellstedt

Next Meeting: Sept. 3, Wed. (note change), 10: a.m.–Noon, Fernwood Building, Room 3D-18. All meetings will be held the first Wednesday of the month.

Action Items

1. (Earl Hodgkins) Send query for a report for incoming funds to Don Tiedemann for incorporation into the QVR as a report.
 2. (Cathy Buckley) Evaluate whether or not a discrepancy report between awarded and obligated grant funding is feasible. If so, make one available.
 3. (Mary Ann Williamson) Email Thor the degree information she would like to have incorporated into a PivotTable.
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Early Concurrence—Mary Ann Williamson inquired whether others could see a need to set up one panel for primary and duals. Thor said that early concurrence and panels are outside the normal grant process procedures. One IC or a group of ICs can designate a group of grants eligible for early concurrence. There was a discussion regarding primary, secondary and tertiary “ownership” of grants. The primary IC takes the grant to council for action. Dual ICs also can take it to their councils, yet there is no common council that tracks multiple consideration of grants. It has happened that the primary IC, for example, makes an award but a dual IC does not. It was agreed that there should be some means to coordinate the award decisions for grants with multiple IC consideration, but any changes would change the current process and procedures.

Future Meetings—There will be no meeting in August. Starting in September, this group will meet on the first Wednesday of the month, 10:00 a.m.–noon, in the Fernwood Building, Conference Room 3D-18, which is on the upper level. The next meeting will be held on September 3.

Budget—Developers continue to add new functionality to accommodate the needs of the Budget group. Budget staff has taken an active interest and role in testing the new functionality and their response to the new Budget functionality in QVR has been excellent. In addition, Earl Hodgkins has been providing outreach and training to budget officers and staff regarding QVR. Consequently, he has brought much useful input to the developers for improvements. His efforts are much appreciated.

Training Reports—In response to a discussion at the last meeting, Cathy Buckley has put onto the production server two reports that were deemed appropriate for the training group: *Training Degree Report* and *Training Appointment Report*. Thor has been training people how to use them.

Rick Ikeda reported a good response from the training community. He noted that the training community was not clear as to what capability it wanted from the QVR and that these two reports now provide them with some ideas. He thanked Cathy Buckley for making these reports available.

Publications Information—This information and corresponding standard reports are available in ICO and QVR. The IC can decide which tool to use.

Security—There will be some changes made regarding the use of firewalls to secure NIH eRA data that will have some impact on ECB/QVR. Currently, the ECB and QVR are outside the NIH firewall, which makes usability fairly simple. However, it is probable that both will be moved inside the firewall to satisfy new security regulations regarding access to eRA data. However, breaching the firewall to access ECB, for example, should not be a problem. It requires providing user information for those authorized to use the ECB, which will allow Council members access to the ECB. There is some question about whether or not security will be an issue for the Staff ECB/QVR. However, it will be dealt with when security firewalls are in place.

Suggested New Reports—Today, there is a report showing what funds are going out, noted Danielle Bielenstein. However, there also is a need to show what funds are coming in. Earl Hodgkins said that he has developed a query to satisfy this need and will give the query to Don Tiedemann for incorporation into QVR.

Action: (Earl Hodgkins) Send query for a report for incoming funds to Don Tiedemann for incorporation into the QVR as a report.

Danielle also suggested making available a discrepancy report between awarded and obligated grant funding. There is often a discrepancy between fund totals in the Central Accounting System (CAS) and data warehouse data. The group agreed that this report, in a spreadsheet format, would be a good addition.

Action: (Cathy Buckley) Evaluate whether or not a discrepancy report between awarded and obligated grant funding is feasible. If so, make one available.

Program Evaluation—Today, Program Evaluation can be charged to any one of several activity codes, depending on where the data is sourced. If the data is in the Data Warehouse, the data is okay. However, there are problems if it is in the CAS. One major issue is that the Program Evaluation is listed as a document number and not a grant number, and, therefore, is not accessible in IMPAC II. Some ICs have assigned special Common Account Numbers (CANs) for Program Evaluation obligations. It was noted that Budget takes grant data and adjusts it upward for Program Evaluation and other obligations.

Training—Thor has conducted advanced PivotTable classes with great success. The core of the classes is Excel PivotTable functionality directly related to NIH processes, augmented by examples tailored to the NIH. Thor said that his goal is to use the functionality of QVR to take advantage of the power of Excel PivotTables.

Action: (Mary Ann Williamson) Email Thor the degree information she would like to have incorporated into a PivotTable.

There are some changes in dates for classes. Thor noted that the classes, *Introduction to Using the ECB Council Administration Module 4.0* and *Configuring and Managing ECB Early Concurrence Data* will be held in July, not August, as was listed in his email to the group. He will send out the corrections.

The classes are as follows:

- *Introduction to Using the ECB Council Administration Module 4.0* (Course # 731)—July 23, 9 a.m.–noon, Fernwood Bldg.
- *Configuring and Managing ECB Early Concurrence Data* (Course # 732)—July 23, 1:30–4:30 p.m., Fernwood Bldg.
- *Advanced QVR System Training* (course 734C)—August 13, 1–3:30 p.m.
- *Advanced QVR System Training*—August 20, 9 a.m., (NIEHS, RTP, NC)
- *Advanced QVR System Training* (Course 734d)—August 27, 1–3:30 p.m., Bldg. 12A, (Main Campus, Bethesda)

To register for these courses, visit: <http://training.cit.nih.gov/>.

Future Plans

R&D Contracts—Including intra- and intermural contract data will be investigated for the future.

IC-Specific Data—This project is still under consideration.

Attendance

Bielenstein, Danielle (FIC)
 Casavant, Don (NIGMS)
 Fischetti, Greg (NCI)
 Fjellstedt, Thor (CIT)
 Hudgings, Carole (NINR)
 Hardman, Anne (NIA)

Ikeda, Rick (NIGMS)
 Jones, Terry (NIAID)
 Mason, Tom (CIT)
 McDermott, Julie (NIDDK)
 Musson, Bob (NHLBI)
 Robbins, Linda (NIMH)

Seppala, Sandy (LTS/COB)
 Tiedemann, Don (CIT)
 Walters, James (NINDS)
 Williamson, Mary Ann
 (NIDCR)