ECB/QVR Steering Committee

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

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

Next Meeting: December 1, Wed., 10:00 a.m.–Noon, Fernwood Building, Room 3D-18

Action items

1. (All) Email Thor Fjellstedt with any suggestions regarding QVR priorities for 2005.

2. (Cathy Buckley) Change label of NRFC to NRFC/NS (not scored).

3. (Carolyn McHale) Include in the document that Type 5 needs to work with the budget start date; it could also be displayed as a Quick Tip on the blog.

4. (Cathy Buckley) Add ability to pull on multiple names under Scientific Review Administrators (SRAs) in Review Section

5. (All) Email Thor if you want to participate in a test run of the QVR blog before it becomes operational.

QVR Priorities for 2005 and beyond

Thor Fjellstedt

Thor stated that he wanted input from the group on the major priorities the QVR team has outlined for QVR for 2005. He stated that he plans to present these priorities to the NIH Information Technology Working Group (ITWG) to which the QVR team reports. The QVR priorities are attached: QVR Future Enhancements

Additional Roadmap items—Thor stated that he anticipates there will be several new requirements identified for Roadmap. He stated that there is a process underway at eRA to capture information about theme, working group initiative, RFA and to place it in the IMPAC II database. Right now, the QVR team creates the linkage to this information.

Major Systems Expansion—Contracts data is expected to be incorporated into the IMPAC II database this winter. Thor stated that he hopes to tap that data for QVR.

IC-Specific Data—The project with Altum is waiting to get started. The Center for Information Technology (CIT) is working with Fogarty International Center and the National Center for Complementary and Alternative Medicine (NCCAM) to develop a prototype for scientific indexing of grants with the help of Altum, a Reston, Va. Company. Once the centralized indexing prototype is complete, the goal is for QVR to access that data, so that QVR users will be able to search on scientific codes and other IC specific data.

Paylist/Checkbook functionality—Thor said that in response to a request from the National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK), the QVR team had given them a proposal for a funding or pay plan model. This model will enable them to match data on projects they intend to fund against the budgets they have for that area, similar to the way a checkbook functions. Thor stated that he has also had preliminary discussions with a few other Institutes interested in this checkbook functionality.

Discussion: Tom Tatham asked if these initiatives marked a major philosophical shift for the QVR team because it had not previously created specific datasets. Thor stated that this was not a departure because QVR was not creating a dataset. If the proposal goes forward, the NIDDK would be creating the dataset and QVR would be accessing it for NIDDK staff.. As for the IC-specific data, CIT and Altum were staging the Institute-specific data set while QVR was merely accessing for them. Cathy Buckley noted that QVR was still not creating data but pulling data from another source.

Expanded Search Capabilities

- Add other parameters to search to hone down query
- Have access to international studies through Fogarty International's new application
- Enhance text search by incorporating Boolean logic

Standard Reports

- Add items to standard reports
- Have, for instance, IRG notes as easy to find items

New Standard Reports

- Paylist report
- IC Specific Data Report
- Additional "History Search" Standard Report
- Additional "Person Search" Standard Report

Enhancements to hitlist

- Ability to save hitlist
- Previous summary statement
- JIT, PDF, FSR, Pop tracking snapshot
- Additional training reports

Downloadable data elements (currently over 250 items)

- Key personnel
- Award details
- Foreign components
- Other data elements as needed

Discussion: Tom Tatham suggested that the QVR team have an explicit goal to support the transition to electronic grant applications. He noted that there is a huge endeavor underway at NIH to move from paper to electronic receipt of grants that is transforming the way business is done. He noted that the transition to electronic will take a number of years, depending on when a policy decision is made that it is politically acceptable to turn paper off. As this transition plays out, NIH needs to take advantage of the opportunities that lie ahead by, for instance, developing Optical Character Reading (OCR) techniques—that is, going through scanned applications and extracting text. That would enable reviewers scanning a grant application to break it into PDF sections. Rick Ikeda stated that there was a cost involved in developing those techniques so eRA management has stated they will not do it. Tom stated that it would be tremendously beneficial if for the draft summary statement, a boilerplate existed for animal subject coding and one could insert the abstract, instead of cutting and pasting the abstract. Tom stated that he was raising the issue in several venues to bring attention to the fact that these techniques are needed. Thor stated that the ability to break up application images was a logical necessity and he had brought up the issue with eRA management but had not gotten a positive response.

Training Tools

- Enhancing tutorials and training information on QVR homepage
- Blog
- Developing online training tools

System maintenance

- Move to MX
- Hosting QVR system

Thor noted that this was a general list of priorities and if anyone had any suggestions, they should let him know. He stated that QVR operated on a limited budget that was more like a maintenance budget and it was a tribute to Don Tiedemann and Cathy Buckley that they had managed to do so much with so little. The goal is to get additional staff for the QVR team so that they can accelerate the process of getting additional functionalities to QVR users.

Action: (All) Email Thor with any suggestions regarding QVR priorities for 2005.

QVR Enhancements

Items being tested:

- Under Project Status, an include/exclude button has been added.

- The include/exclude button has also been added under the Advanced Project Status Codes.

Discussion: Thor noted that the association of the 'not scored' status code under the grouping of NRFC is inappropriate. He noted that there is no separate grouping of 'not scored.' Thor stated that they could construct a query that would allow you to pull 'not scored' applications or the NRFC without the 'unscored.' For now, just changing the label of NRFC to NRFC/NS (not scored) should suffice.

Action: (Cathy Buckley) Change label of NRFC to NRFC/NS (not scored).

- Under the Review Program Section, under the 'Applications received since' date, a 'Type 5 not yet received' check box has been added.

Discussion: Thor asked if the current fiscal year should be added to the check box. Don Tiedemann noted that the Type 5s are usually combined with the budget start date. Thor stated that there needs to be some mention in the document that Type 5 needs to work with the budget start date; it could also be displayed as a Quick Tip on the blog.

Action: **(Carolyn McHale) Include in the document that Type 5 needs to work with the budget start date; it could also be displayed as a Quick Tip on the blog.**

Under the Review Section, the ability has been added to search for the name of the alternate Grants Specialist or Grants Management Officer. A member asked if they could add the ability to pull on multiple names under Scientific Review Administrators (SRAs). Cathy Buckley stated that it could be done; Don Tiedemann said it could be incorporated relatively easily and they would look into doing it if possible. This request was expanded to include all name searches.

Action: **(Cathy Buckley) Add ability to pull on multiple names under SRAs in Review Section (also Sponsor, GMO, GS, PO)**

Discussion: Rick Ikeda asked if the search for department could be narrowed down in the Principal Investigator /Institute section. He cited the specific instance of searching for chemistry and getting a stack of returns for biochemistry. Don Tiedemann replied that he would look into department names and discuss the issue before getting back to the group.

QVR Blog

The prototype QVR Blog —a bulletin board on the Web for posting comments and questions and accessing information about the ECB/QVR system— is now ready for people to try out. Thor Fjellstedt stated that he had sent the URL for the test site to a couple of people. Those interested should email him He urged users to use their IMPACII identity and password to log in; that would allow the QVR team to check and know who is on the blog. Cathy Buckley noted that using the IMPAC II password would also provide the security that people want on the blog, once an additional security feature of the Blog software has been enabled.

Action: **(All) Email Thor if you want to participate in a test run of the QVR blog before it becomes operational.**

Problem with retrieving saved queries resolved

Thor Fjellstedt noted that a problem that QVR users were having in retrieving queries has been solved. The problem affected only those using Internet Explorer, not Netscape. In retrieving a saved query, QVR users saw a search screen open that had the desired search parameters but was missing the buttons at the top of the screen and the navigation bar on the left side of the screen. The problem has been fixed. Users will no longer get a pop up window when retrieving a saved query. If a user selects a saved query, the system will populate the search screen with the expected parameters. However, if a user decides not to use the saved query and wants to return to

the search screen, they can either click on the "back" button or select "search" or "new search" on the blue line at the top of the screen.

eRA Symposium

Thor stated that the Fourth Annual eRA Symposium focusing on the theme 'Electronic Receipt of Applications' will be held Dec. 2 at the Natcher Conference Center on the NIH main campus in Bethesda from 8 a.m. to 1 p.m. He has been invited to present QVR. The symposium will feature an array of speakers as well as displays by the Web QT team and Service Providers (the private companies that provide the interface with NIH for grantees to submit their applications electronically). For information, go to http://era.nih.gov/eraworkshop4/

Table Talk

Nifty application from Fogarty— Thor noted that Bruce Butrum of Fogarty International had developed a "nifty tool" to enter and track all foreign projects that require State Department clearance. He noted that more people ought to know about this application. Thor stated that he had spoken to Bruce about allowing QVR to have access to the data in their database and Bruce had told him that he is willing to work with the QVR team on that. Rick Ikeda noted that the data was available for a limited set of countries such as Great Britain, Canada and Italy.

ECB/QVR and Related Training Classes

- 735   **New QVR Advanced Topics** November 4 *Cancelled*

- 731   **Introduction to Using the ECB Council Administration Module** November 9

- 740   **New and Advanced Features of Council Administration Module Version 5** **November 9**

- 732   **Hands on ECB Early Concurrence Workshop** November 10

 Additional QVR classes will be scheduled soon and announced on the listserv.

Attendance

Buckley, Cathy (CIT)	Jones, Terry (NIAID)	Rich, Linda (NCCAM)
Condon, Bonita (NIAID)	McDermott, Julie (NIDDK)	Subramanya, Manju (PCOB/OD)
Fischetti, Greg (NCI)	Musson, Bob (NHLBI)	
Fjellstedt, Thor (CIT)	McHale, Carolyn (CIT)	Tatham, Thomas (CSR)
Hodgkins, Earl (CIT)	Peng, Lisa (NIDCR)	Tiedemann, Don (CIT)
Ikeda, Rick (NIGMS)	Poma, Shelly (NIMH)	Woodland, Rayseen (NCRR)