Population Tracking Users Group

Date:　Thurs., August 19, 2004
Time:　9:00–11:00 a.m.
Location:　Rockledge 2, 9th Floor Conference Center
Chair:　Carlos Caban

Next Meeting: September 16, Thurs., 9–11 a.m., Rockledge 2, 9th Floor Conference Center

Action Items

1. (All) Try out the QVR reports and send suggestions for changes to the current reports in QVR and possible new Pop Tracking reports to Carlos Caban.

2. (Karen Bashir) Distribute instructions for how to start using QVR for Pop Tracking reports to this group.

3. (Kim Witherspoon) Distribute her PowerPoint tutorial aimed at PIs, showing them out to fill out the Inclusion Tracking Report, to the group.

Attachments

Tutorial showing PIs how to fill out the Inclusion Tracking Report:
http://era.nih.gov/Docs/Inclusion_Report_for_PIs_08-19-04.pdf

Pop Tracking Reports in QVR

Thor Fjellstedt

Thor Fjellstedt now is a CIT contractor focusing on QVR. However, before he retired from the NIH, he spearheaded the development of QVR (http://qvr.cit.nih.gov/login.cfm). He demonstrated how to use QVR to retrieve data in two reports specifically designed for Pop Tracking data:

- Enrollment Counts for Grants Awarded FY

- Applications with Discrepancies or Missing Items

He asked the group to use the reports and to think about other useful reports. All suggestions should be sent to Carlos Caban, who will compile them and send them on to Thor for possible development. Thor will provide a copy of his PowerPoing presentation for distribution to the user group.

Thor pointed out that Excel security must be set to medium so that the macros will work properly. From Excel, go to **Tools**, **Macro**, **Security**, and set to **medium**.

Action:　**(All) Try out the QVR reports and send suggestions for changes to the current reports in QVR and possible new Pop Tracking reports to Carlos Caban.**

Karin Bashir offered to share her bulleted instructions for how to start using QVR Pop Tracking reports.

Action: (Karen Bashir) Distribute instructions for how to start using QVR for Pop Tracking reports to this group.

Thor explained that QVR has a number of capabilities that might be useful for Pop Tracking:

- *Save queries*—Queries can be saved for future use and they can be designated as a "public" query so that others in the IC can use them. Both the criteria and the data are saved.

- *Save reports*—Reports are automatically saved as a static file, which can be used at a later date to compare with a more current report.

- *Tutorials*—Thor has prepared tutorials for many groups using QVR and he can prepare them for Pop Tracking reports.

- *PivotTables*—These flexible tables provide increased functionality to Excel. They require training in their use because they are fairly complex. Thor offers this training his advanced QVR classes, offered through CIT (http://training.cit.nih.gov).

The group made the following suggestions for additions and changes to the reports:

- Break out the left column so that the PI name and Project Number are in separate columns and can be sorted

- Break out the report further by ethnicity

- Provide a summary report

- Show the percent of population participation by women and minorities for each project

Comparison of Two Reporting Tools—Web QT and QVR both are reporting tools and are funded by eRA. QVR runs off the IMPAC II Reporting Database (IRDB) database, which is updated overnight. Web QT runs off the On-Line Transaction Processing (OLTP) database providing real-time data. QVR has a shorter development time than Web QT because it is outside the eRA workflow system. Web QT in the short run will replace QuickView, and in the long run, ICSTORe and CRISP Plus. They both perform similar functions and act as data access tools for eRA System data.

We will discuss QVR at the next ePTUG meeting as a follow-up to determine what will be most useful.

Division of Extramural Activities Support (DEAS)

There was some discussion about the role of the new DEAS staff in relation to Pop Tracking. According to Mary Lou Prince, the DEAS Liaison to ePTUG, the DEAS statement of work includes specific data entry for Pop Tracking but not protocol data entry. It is expected that IC staff will provide DEAS staff with the population tables from which data will be entered into the system. Protocol data entry and approval of DEAS data entry must be done by IC staff.

Mary Lou noted that, in response to IC requests for support now, 125 DEAS staff were hired and dispatched to the ICs. They are considered on detail and report to a designated person in each IC. They have not been trained so the IC is expected to train and make the best use of their time. This

staff will report directly to DEAS staff on October 3 when DEAS officially is operational. DEAS training for staff will begin in mid-September.

Initially, DEAS staff will be sent to each IC and their functions will not be centralized. However, in the long run, it is envisioned that the functions of DEAS staff will be centralized.

A new system for requests and workflow for the DEAS function has been developed and will go live at the end of September. Called ECARES, it will be used to enter needed, one-time tasks as well as repetitive tasks (e.g., something that is requested to be done every month).

Group members agreed that they would like to have a presentation made about DEAS and how it will work with Pop Tracking. Angela Bates suggested that this be a topic at the September Inclusion Tracking Meeting, which would cover this group and other IC members. The group also recommended that DEAS staff make presentations at each IC. Mary Lou Prince said that requests for presentations can be made by sending an email to "DEAS Management," which is on the global directory.

There was some discussion regarding the difficulties that have been encountered in regard to the Old and New Forms. For DEAS data entry, the tables must be correct but it was estimated that 50 percent of the forms, including the tables, are not correct. This will not encourage POs to send the tables for data entry to DEAS since it is easier for them to work out the issues as they are encountered. Kim Witherspoon said that she has a PowerPoint tutorial aimed at PIs, showing them how to fill out the Inclusion Tracking Report. It may be possible to make this an NIH tutorial and have it available to PIs as well, e.g., with eSNAP.

Action: **(Kim Witherspoon) Distribute her PowerPoint tutorial aimed at PIs, showing them out to fill out the Inclusion Tracking Report, to the group.**

Table Talk

Program—There is some talk about linking Pop Track to Program so that Program Officers can approve Pop Tracking data as part of the checklist. This would work well with the concept of data entry by DEAS staff and approval by the Program Officer. It would also eliminate switching between two programs since they would be linked. The details for implementing this have not been worked out as yet.

eSNAP—Grantee institutions determine which PIs are eligible to submit eSNAPs. Carlos had distributed a list of eligible eSNAPs for 2005 to the group in an effort to help staff be prepared for them. He reminded the group that there is no guarantee that all those on the list will become eSNAPs.

OHRP—Carlos sent out an Office of Human Resource Policy (OHRP) document, which delineated new rules. He is analyzing the new rules now to see how they affect current data processing in Pop Tracking.

Pop Track Override—Only one or two people have override authority for Pop Track in each IC. Most everyone in this group has been given this override authority.

eRA System Made Easy brochure—This brochure was distributed to the members. It is a good overview of what is in eRA; however, the URLs do not link directly to the modules. Should anyone want copies of the brochure, they can contact Sandy Seppala or Scarlett Gibb.

Attendance

Anyfriyeva, Viktoriya (OER/ORA)

Barnes, Martha (NIEHS)

Bashir, Karen (NIA)

Burge, Lori (NIGMS)

Caban, Carlos (OER)

Chan, Ivy (NCMHD)

Corbett, Dawn (NIMH)

Delcore, Sandi (NICHD)

Doherty, Margaret (NIAMS)

Douglas, Clarissa (NCI)

Gutierrez, Martin (NIAID)

Koshy, Maria (OER/eRA)

Lee, Delores (NCRR)

Manischewitz, Jack (NIDA)

Palagi, Sharry (NHLBI)

Prince, Mary Lou (DEAS)

Richardson, Carmen (NIAAA)

Roca, Catherine (NIMH)

Schafer, Susan (NIAID)

Seppala, Sandy (LTS/PCOB)

Turkeltaub, Madeline (NIAID)

Witherspoon, Kim (NCI/CTEP)

Yee, Frances (NINDS)