



## ECB/QVR Steering Committee

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

Date: Wednesday, January 7, 2004  
Time: 10:00 a.m.–Noon  
Location: Fernwood Bldg., Rm 3D-18 (upper level)  
Chair: Carolyn McHale

**Next Meeting: Feb. 4, Wed., 10: a.m.–Noon, Fernwood Building, Room 3D-18**

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### Action Items

1. (Don Tiedemann, Cathy Buckley) Make the newly developed Quick Search Plus the QVR Main homepage.
2. (Cathy, Don) Make the PI name and institution appear in mixed case and the title in all caps.
3. (Thor Fjellstedt) Send notification of the font standardization in the PI name, institution and title fields to the listserv and ask for feedback and suggestions for standardization of other fields.
4. (Don, Cathy) Make Summary Statements open in a pop-up window that can be closed independently from the program.
5. (Cathy, Don) Move the Budget enhancements to production upon approval by Earl Hodgkins.
6. (Thor) Send an invitation to the meeting regarding the new history capability to the distribution list.
7. (Thor) Post notification of the training class on the QVR homepage.

### ECB System

#### New Features of the Council Administration Module (CAM)

Paul Jordan announced that the CAM is moving to the Cold Fusion server on Monday, January 12, and, consequently, will have a new URL: <http://counciladmin.nih.gov>. Other features available on Monday include:

- Custom downloadable module that allows report creation
- Save Query feature that is available across applications from any screen

On March 1, new security features will be implemented following an agreement with the eRA team regarding specific changes in the Password Policy for ECB users.

## QVR System

### New items to be moved into production

*New QVR screen*—Don Tiedemann, responding to input from the last meeting, developed the Quick Search Plus page, which puts the Quick Search page (designed for new users) at the top of the expanded original main page. This puts the most-frequently used queries at the top and may be less intimidating to new users. However, it also introduces expanded features should new users want to explore them. Don added a Primary Search Criteria list in the left frame with the most frequently used criteria at the top. He added hover text that shows what is available for each item on the list.

The group suggested and agreed that this new screen actually should be the new Main page and that it should replace the old QVR Main page.

**Action: (Don Tiedemann, Cathy Buckley) Make the newly developed Quick Search Plus the QVR Main homepage.**

*PI and PO email*—Cathy Buckley added a mail icon on the standard detail hit list for sending email to the PI and PO. Currently, hover text tells which mail icon is for which. The group suggested that “PI” and “PO” be superimposed on the mail icon itself.

*Report Menu Screen*—Cathy organized the reports by category, e.g., Budget, Program, and included a full alpha list of all reports at the bottom of the screen. She put a “Navigate to Report Sections” in the left frame. Now, for example, a Program person can go directly to all Program reports and can tailor the screen so that only Program reports appear.

Cathy has developed a new PivotTable report template that provides counts of various categories, e.g., PIs.

Cathy pointed out the “All NIH ICs” selection option in the IC pick box, which she added.

*Project Count Hit List*—The 10,000 limit for hit lists is still in place and the group agreed that there is no need to increase the limit at this time.

*Download of FOT*—The “Field of Training” field is now downloadable.

### Items for discussion at meeting

*Use of upper or mixed case in PI Names, Institution Names*—Entries in the eRA System are mixed in that some are in ALL CAPS and others are in Mixed Case. This causes problems when trying to prepare a report. The group agreed that the PI name and institution should be in mixed case and that the title should be in all caps because of the multitude of acronyms. Thor suggested that this change be made. He will then send an email to the distribution list asking for response and suggestions for other fields that might be standardized.

**Action: (Cathy, Don) Make the PI name and institution appear in mixed case and the title in all caps.**

**Action: (Thor Fjellstedt) Send notification of the font standardization in the PI name, institution and title fields to the listserv and ask for feedback and suggestions for standardization of other fields.**

*Open Summary Statement in a new window*—The group agreed that Summary Statements should open in a pop-up window that can be closed independently from the program.

**Action: (Don, Cathy) Make Summary Statements open in a pop-up window that can be closed independently from the program.**

*Update on changes to the budget reports*—Earl reported that there were several suggestions for enhancements at a December 3 meeting with Budget staff. Cathy and Don made the enhancements and sent them to Budget staff for review. However, because this is an extremely busy time of the year for Budget, there has been no response from Budget staff. Earl agreed to review the enhancements in the next day and approve them or not. If they are approved, the group agreed that they should be moved to production.

**Action: (Cathy, Don) Move the Budget enhancements to production upon approval by Earl Hodgkins.**

*Corrupt Summary Statement files cause download PDF to fail*—This failure has been narrowed down to happening when a new server is set up. Don is working with those who set up the computers to be sure the proper version of Adobe Reader is installed so that the PDF files can be downloaded without failure.

*Update on history data*—A test file for querying history files/data is on the server. It provides the capability for querying data back to the early 1970s. There are two subfiles, which provide data from 1986 forward: *awarded grants* and *non-awarded grant applications*. There will be a meeting on Tuesday, January 13, 9 a.m., to introduce the history capability to a wider audience. Thor said that he had asked about eight or nine people to attend but the group agreed that Thor should send an invitation to the distribution list. Thor noted that this will be a hands-on session for the purpose of gleaning feedback.

**Action: (Thor) Send an invitation to the meeting regarding the new history capability to the distribution list.**

*Update on password problems/solutions*—The new password policy implementation went more smoothly than expected. Today is the next expiration day for user names beginning with letters D–L. The best time of the day to change your password is at the end of the day. This allows the time it takes to filter the change through the databases and eRA System modules.

## **Future Plans**

*Publication information*—Paul Jordan and Thor Fjellstedt will meet this week to discuss incorporating SPIRES into QVR for publication data.

## **Training Classes**

Thor is working with Leslie Barden to develop a QVR training schedule for the next quarter. Right now, there is an introductory class scheduled for January 28. Thor will put notification of this class on the QVR homepage.

**Action: (Thor) Post notification of the training class on the QVR homepage.**

There are three levels of class:

- **Introductory**—presentation and lecture; no hands-on
- **Intermediate**—hands-on; shows how to use QVR to increase productivity
- **Advanced**—focus on PivotTables; primarily for Budget staff at this time

Since Budget staff will be extremely busy through most of the first quarter, Earl suggested scheduling the Advanced classes in the second quarter.

## Attendance

Buckley, Cathy (CIT)

Casavant, Don (NIGMS)

Delcore, Sandi (NICHD)

Fischetti, Greg (NCI)

Fjellstedt, Thor (CIT)

Hodgkins, Earl (CIT)

Ikeda, Rick (NIGMS)

Januszewski, Joe (CIT)

Jordan, Paul (NIEHS)

McHale, Carolyn (CIT)

Musson, Bob (NHLBI)

Robbins, Linda (NIMH)

Seppala, Sandy (LTS/COB)

Simmons, Arlene (NINR)

Tiedemann, Don (CIT)