



ECB/QVR Steering Committee

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

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

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

Action Items

1. (Paul Jordan) Investigate a way to broadcast a notation of any conflicts of a Council member.
2. (Thor Fjellstedt, Martha Barnes, Anne Hardman, Carolyn McHale) Prepare a scope document that defines the requirements for querying historical data prior to the five years currently accessible in the QVR.
3. (Thor Fjellstedt) If it is not feasible to access historical data prior to the five years currently accessible using QVR, investigate other eRA tools that could be used.
4. (All) If anyone in the group experiences a slowdown in system performance while using QVR, send a notation of it to Don Tiedemann.
5. (Thor Fjellstedt) Discuss with Leslie Barden in CIT of the possibility of offering advanced Excel training at the NIH.
6. (All) Send suggestions and ideas for QVR classes from your IC to Thor Fjellstedt.
7. (All) Send suggestions for Help documents to Carolyn McHale.

Attachments

- Council Administration Module: New Features and Coming Attractions:
http://era.nih.gov/Docs/CAM50_newfeatures_preview.pdf

Council Administration Module: New Features and Coming Attractions

Paul Jordan

Paul reported that two new features will be included in the September 5 release (see presentation):

- Council meeting assignment panels
- Redesigned assignment approval screens

Council meeting assignment panels—These allow you to create subgroups or panels of council members to streamline the creation of meeting assignment data. After creation and assigning one

of these panels to an application, an assignment record is automatically created for each council member belonging to the panel.

Redesigned assignment approval screens—There is an improved and expanded query screen allowing you to query on any of the data items used to create assignments. The new hit list design more clearly indicates approval status with two columns: Works in Progress and Approved.

New features

There are several new features scheduled for version 5.0 in November, including:

- Separate or combined August and October council meetings
- Work with data from multiple council periods

New security policies

NIH has mandated a new password policy to comply with federal security regulations. The new policy, to take effect in November 2003, will affect everyone at the NIH and those using the eRA System in partner institutions. There will be some modifications to accommodate institution users who infrequently use NIH systems. Some of the key changes include:

- Passwords will expire every 180 days.
- IC staff will be able to create and delete accounts and reset accounts. However, council members must reset their passwords to a new one after new login.
- Initial password must be changed within five days of issue.
- Accounts will be locked after five unsuccessful login attempts.
- IC ECB coordinator will be able to reset password and unlock account after failed login attempts.
- There will be a link on the Council ECB login page to assist council members with password resets.

There were some concerns regarding how the new policy will affect council members, who are volunteers and don't log into the system very often. Requiring a new login password and asking them to change it for each council round could be a problem. The group agreed that it wouldn't be practical to lock them out after 180 days since they only log three times a year.

Action: (Paul Jordan) Investigate a way to broadcast a notation of any conflicts of a Council member.

eRA support for the CAM

Thor announced that he would like to get eRA support for the CAM, making it available to all ICs.

Archived Data

The QVR provides access to the past five years of data, currently from 1997 to present. However, it was agreed that there needs to be search and download capabilities for historical data prior to the five years available for the QVR.

Action: (Thor Fjellstedt, Anne Connors, Anne Hardman, Carolyn McHale) Prepare a scope document that defines the requirements for querying historical data prior to the five years currently accessible in the QVR.

Action: (Thor Fjellstedt) If it is not feasible to access historical data prior to the five years currently accessible using QVR, investigate other eRA tools that could be used.

Don Tiedemann proposed to drop the 1997 and 1998 historical files currently accessible using QVR. This would leave five years of data (1999–2003). Having more data slows performance considerably. The group agreed to drop 1997 data.

Performance

QVR has been very slow recently. Current theory is that it is caused by network and firewall issues.

Action: (All) If anyone in the group experiences a slowdown in system performance while using QVR, send a notation of it to Don Tiedemann.

Standard Reports

The End of Year Budget report is now available. The Intent to Pay report is in test. The non-competing report is in production.

It was suggested that there be an analog report for competing grants. Cathy Buckley has made a prototype of one and Mark Rotariu is working with her on it. It may be available for the beginning of FY04. The report will include:

- Direct cost requested
- Total cost requested
- Separate amount for each grant

Earl Hodgkins said that he is investigating developing an API to upload playlists.

Cathy Buckley reported that there is going to be a standard report from which you can get more than 50 snapshots.

Foreign Components of a Domestic Grant

There are no foreign components of a domestic grant available in the eRA System database. The group discussed other ways for mining this information, such as searching for State Department clearance flags. It was noted that when grants are submitted electronically using a data stream, this information will be available. Foreign grants are in the database.

Training

Thor reported that people are starting to use PivotTables and are finding them very useful. He noted that the USDA offers advanced Excel training, which includes developing PivotTables, and he recommended the course. He also suggested that NIH offer a similar course.

Action: (Thor Fjellstedt) Discuss with Leslie Barden in CIT of the possibility of offering advanced Excel training at the NIH.

Thor is working with Leslie Barden to develop a training schedule. Currently, there are two levels of classes: an introductory class to the QVR and an advanced class that teaches Excel PivotTables. The group suggested the following:

- An intermediary class be developed that would build on the introductory class and prepare users for the advanced class and the use of PivotTables.
- Advertise the goals/focus of each class in the training schedule. For example, spell out when a class is geared for Budget staff and not for general NIH staff.
- Put requirements for taking each level of class, including bullets for what will be taught in the class, when you send out the notice of the classes.

Action: (All) Send suggestions and ideas for QVR classes from your IC to Thor Fjellstedt.

Action: (All) Send suggestions for Help documents to Carolyn McHale.

Attendance

Barnes, Martha (NIEHS)	Hodgkins, Earl (CIT)	Musson, Bob (NHLBI)
Buckley, Cathy (CIT)	Ikeda, Rick (NIGMS)	Naron, Steve (CIT)
Connors, Anne (NIAMS)	Jordan, Paul (NIEHS)	Parker, Marie (NIAID)
Fischetti, Greg (NCI)	Kemmerle, Donna (NIDCD)	Rotariu, Mark (NIDCD)
Fjellstedt, Thor (CIT)	McDermott, Julie (NIDDK)	Seppala, Sandy (LTS/COB)
Hardman, Anne (NIA)	McHale, Carolyn (CIT)	Tiedemann, Don (CIT)