



ECB/QVR Steering Committee

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

Date: Wednesday, November 5, 2003
Time: 10:00 a.m.–Noon
Location: Fernwood Bldg., Rm 3D-18 (upper level)
Chair: Thor Fjellstedt

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

Action Items

1. (Thor Fjellstedt) Present the proposal for setting the September/October Council date to October 15 to the ECB/QVR Steering Committee for agreement and implementation in August 2004.
2. (Thor Fjellstedt, Earl Hodgkins) Meet with Helpdesk staff to set up a structure for handling QVR problems.
3. (Kirt Vener) Send the NCI grant statistics report and the annual report to Cathy Buckley.
4. (Thor Fjellstedt) Investigate when data is frozen and what changes can be made to frozen data. Report back to the group next month.
5. (Cathy Buckley, Don Tiedemann) Make the Quick Search interface the default for new users. Monitor and report back to group.
6. (Thor Fjellstedt) Highlight how to use the Navigation Aids on the left margin of the QVR screen during training classes.
7. (Thor Fjellstedt) Send directions via the listserv for how to set personal defaults in the QVR system.

ECB System

CAM, new version

The latest version of the Council Administration Module (CAM) rolled out last weekend. It offers several enhancements, including allowing access to multiple council rounds. Two CAM classes will be taught on November 20 and 21 (see schedule below under Training). The CAM manages what council members see when they go into the council book and allows electronic concurrence outside council meetings (before and after). By providing electronic concurrence prior to a council meeting, for example, council members can give full attention to more problematic grants.

Rollover to January 2004 Council

There are set rollover dates for councils, e.g., November 1 for January council, March 1 for May council. However, most September/October councils now are held in September. This is not true for councils held during two months in the rest of the year (e.g., January/February, etc.). It was suggested that the rollover date be October 15 for the September (and October) council rounds. The group agreed that this would be good idea and to address it for action next August.

Action: (Thor Fjellstedt) Present the proposal for setting the September/October Council date to October 15 to the ECB/QVR Steering Committee for agreement and implementation in August 2004.

QVR System

End-of-year use of QVR for closing the books on 2003

Thor thanked Earl Hodgkins for working so diligently and successfully with the ICs to help them close the books. The budget reports available through QVR have proved to be enormously useful. Earl said that more and more people are taking advantage of the reports to pull down data. Cathy Buckley and Don Tiedemann have worked closely with Earl and the Budget people in correcting and fixing problems they have encountered.

Earl suggested that they build a better relationship with OER to facilitate and initiate changes. The problems that are encountered are a combination of QVR and data problems. If there are coding issues or the data is wrong, they must be addressed by the people who can fix them. Also, many new users having trouble with PivotTables are calling the eRA Helpdesk when they should be been calling Earl. More education must be done so that users are more discerning regarding which questions should be directed to QVR staff and which to the Helpdesk.

Action: (Thor Fjellstedt, Earl Hodgkins) Meet with Helpdesk staff to set up a structure for handling QVR problems.

Another suggestion was to make the list of expert QVR users in each IC (which Carolyn McHale maintains) more prominent on the QVR Web site.

Performance issues

Performance, other than the program crashing during Thor's class, seems to be fine. Any problems seem to occur between 3:30 and 4 p.m. Don said that once the system gets on the new server, performance should really improve.

Reports

There was a request for a report that would simply show grant statistics, such as how many applications were received, RFAs receives, etc., without downloading a list of the grants, RFAs, themselves. Kirt Vener said that his institute (NCI) has an excellent report for showing these statistics. He will send this report and the annual report to Cathy Buckley.

Action: (Kirt Vener) Send the NCI grant statistics report and annual report to Cathy Buckley.

History data using QVR

A committee, chaired by Carolyn McHale, is drafting a plan for a QVR approach for providing relevant historical data. The committee will investigate user needs and identify key data elements. Anyone interested in joining this committee should contact Thor Fjellstedt or Carolyn McHale.

There will be a full update on this project at the December meeting

Security policy update

The new password policy will take effect with the November 7 release. The policy and update can be found at this URL: http://era.nih.gov/Docs/ERA_Password_Policy_update_10-28-2003.pdf. Password aging will begin on a set schedule, with messages to users that provide instructions for changing their passwords, and directions for the new requirements for the passwords themselves, and giving ten logins in which to change them.

Although most of the requests for exceptions to council accounts were not approved, the one providing that council accounts will not be deleted after 45 days of inactivity was approved.

Frozen 2003 data

There continues to be an issue of exactly when, i.e., what date, data is frozen as well as what restrictions and procedures apply for making changes to frozen data. For example, awarded training grants sometimes are refused by the awardee (they may have accepted a grant elsewhere) and that adjustment must be made to data that is frozen. This can make a huge difference in budget figures. The dates and procedures for frozen data should be formalized and widely communicated.

Action: (Thor Fjellstedt) Investigate when data is frozen and what changes can be made to frozen data. Report back to the group next month.

IRDB redesign

The redesign is underway to develop an IMPAC II Reporting Database (IRDB) that works better. IC-Specific Data will be included in the redesign.

IC-Specific Data initiative

Jack Jones gave his approval to convene a workgroup to focus on the IC-Specific Data initiative. Pete Morton will be the NIH liaison for the project. Thor currently is recruiting volunteers to serve on the workgroup. A possible name for the initiative is Extended Reporting and Analysis (EXTRA) System, but that is not final.

Thor's strategy for rolling out this project is to develop a prototype for a limited number of ICs, smooth out any problems, and then present it to other ICs to get their buy-in. Scientific coding, indexing terms and budget data specific to each IC are among possible types of information that would be included in the initiative.

2004 as Current Fiscal Year?

The group discussed the rollover date for when the “Current” button on the interface changes from 2003 to 2004. For QVR purposes, the group agreed that the rollover date should be November 7. It was noted that “current” can be problematic because this timeframe can be different for budget and ICs.

User interface update

The group discussed the two interfaces available to users: Quick Search and Full. The Full interface, while formidable with almost an overload of information and choices, provides all the tools for querying the system. Most thought that it should remain the same. However, the group agreed that 70 percent of searches probably can be made from the Quick Search page.

The group agreed that new users should be presented with the Quick Search page (as default), with an option to go to the Full interface. The Full interface is too intimidating for new and inexperienced users.

Action: (Cathy Buckley, Don Tiedemann) Make the Quick Search interface the default for new users. Monitor and report back to group.

The group also discussed the Navigation Aids on the left margin of the QVR screen. Most people don’t know about or understand them.

Action: (Thor Fjellstedt) Highlight how to use the Navigation Aids on the left margin of the QVR screen during training classes.

Recent Enhancements

QVR Homepage

Thor asked the group to check out the QVR homepage, which Carolyn McHale has enhanced with the addition of, among other things, tutorials and presentations, FAQs, and a link to the training sign-up page. Carolyn is planning to add voice and videocasting functionality, and make training sessions available.

Update of Standard Reports

Cathy Buckley said she made the following changes:

- Changed the name of the *Budget—Total Awards Frozen (AWDFROZN)* report to *Budget—Total Awarded & Out Year Commitments (AWDCOMM)* and added the grant counts for both the awarded fiscal year and the out years. For out years, the grant is counted if it got the count in the awarded fiscal year.
- Added **PCC** and **FY** to the Trainee Degrees on Institutional Training Grants (TRAINDEG) report.
- Changed the Support Year column to indicate the specific FY(s) covered by the listed Trainees on the Trainees on Institutional Training Grants (TRAINAPT) report.

Thor reported that he has created a format for an abstracts report with one version for private (NIH) use that includes dollars and one version for public use (Building 1). The report is in the standard format so that it meets the Building 1 requirements and makes it easier to assemble data from it.

Thor presented two ideas:

- A report that lists contacts, based on a scientific topic query, to consider for a review committee. The list would include their phone numbers and email addresses.
- Consider a “Primary Project only” query as default. However, the group agreed that, at this time, a simple query for “Primary Project only” can be saved as a user’s default.

Action: (Thor Fjellstedt) Send directions via the listserv for how to set personal defaults in the QVR system.

Future Plans

R&D contracts

There is no R&D contract data in the eRA System at this time. Consequently, while the reports generated for budget are good, they are missing contract data. ICs have contract data on their databases so the IC-Specific Data initiative has the potential for capturing this data and making it available for standard reports. Thor noted that Building 1 only wants to see awarded, funded (not pending) contract data.

Another issue regarding contracts is the use of IC coding on co-funded contracts. Currently, the coding of all ICs is included, which makes it difficult to sort out electronically. Thor hopes to facilitate an agreement whereby the primary IC’s coding is the one that is tracked in the system.

The last item that was addressed is the issue of “taps,” which are funds not connected to a grant that the NIH allows ICs to assign as appropriate, e.g., to training expenses. Currently, the eRA System does not track or recognize these funds. The IC-Specific Data initiative may provide a means to recognize and mine this data.

Publication information

Thor still wants to implement a solution for collecting publication information. However, the project is on hold because there are no resources at present.

Training Classes

The classes listed below are all in the Fernwood Building, Lower Classroom.

- **Intermediate QVR**, Nov. 4, Tues, 1:30–4:00 p.m.
- **The NIH Grants Process**, Nov. 5, Wed., 1:30–4:00 p.m.
- **New and Advanced Features of Council Administration Module**, Version 5. Nov. 20, Thurs., 1:00–4:00 p.m.
- **Introduction to Using the ECB Council Administration Module**. Nov. 21, Fri., 9:00 a.m.–Noon
- **Advanced QVR**. December 2, Tuesday, 1:30–4:00 p.m.

Attendance

Barnes, Martha (NIEHS)
Buckley, Cathy (CIT)
Chacko, George (CSR)
Fischetti, Greg (NCI)
Fjellstedt, Thor (CIT)
Hodgkins, Earl (CIT)

Ikeda, Rick (NIGMS)
Kemmerle, Donna (NIDCD)
McDermott, Julie (NIDDK)
Musson, Bob (NHLBI)
Parker, Marie (NIAID)
Poma, Shelly (NIMH)

Robbins, Linda (NIMH)
Seppala, Sandy (LTS/COB)
Tiedemann, Don (CIT)
Vener, Kirt (NCI)