



ECB/QVR Steering Committee Agenda

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

Date: Wed., April 13, 2005, 10:00 a.m.–noon
Location: Fernwood Bldg., Room 3D-18
Advocate: Pete Morton
Chair: Thor Fjellstedt
Next Meeting: Wednesday, May 4, 10:00 a.m. - noon, Fernwood 3D-18

Opening Items

Thor Fjellstedt began the meeting by leading the group in (re-)introductions of its members. Peter Morton then informed the group that Thor was nominated for the Director's Award for his work in the Roadmap Project. Thor credited the nomination to the entire group that assisted in Roadmap and said that it has been both fun and productive to work with the group.

Presentation of IC Specific Data System

Thor stated that they currently have live data for the John E. Fogarty International Center (FIC) and the National Center for Complementary and Alternative Medicine (NCCAM), and that these organizations are now accessible within a test environment through QVR. Until now, only contrived data from the National Institute of Environmental Health Sciences (NIEHS) has been presented to the group, because there was no previous opportunity to clear this information with NCCAM. Now, however, both they and FIC are comfortable with Thor presenting this data to the group. Thor then walked the group through the IC Specific Codes section of the test site. In production, the ICs that participate within this system only have access to their specific IC codes. For instance, an FIC user would only be able to see FIC codes, and so on. Users can select multiple codes by using the *shift + Ctrl* function. They may search and retrieve numerous codes by employing OR, AND, and AND / NOT statements. The searches also contain fields for Percent Relevance.

Thor said that the first step in creating this system was to implement it with the Altum Corporation's database in order to make it centralized. From here, he hopes to meet with other institutes in order to discuss their potential roles within the system's evolution. He would like more institutes to use the system, comment on it, and in doing so, create a better, more centralized database.

The group came up with the following suggestions for the system:

- Match the percent relevance to dollar amounts.
- Determine exactly what accesses, rights, privileges and authorities specific users should have. There might be a way to ask the individual ICs for a list of authorized personnel,

but for now the Center for Information Technology (CIT) uses IMPACII for security and user administration.

Thor assured the group that this system continues to advance and expand to contain more data with every institute that expresses interest.

NIDDK Project – Initiative Tracking and Checkbook Function

The CIT is working with the National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK) to create a new initiative tracking/checkbook functionality. David Mineo is working with Thor to develop this system. David said that he has known about and worked with QVR ever since its inception and has been very impressed with the budget tracking aspects of the system. He stated that NIDDK, in order to integrate corporate elements to budget tracking within their company, has decided to develop program plans and budget tracking based on the QVR system. They hope this will serve as a model, especially for smaller ICs. While there is nothing tangible to present at this time, Thor stated that the development of this model is an exciting project that will have a lot of applicability for multiple institutes. Some of the actions that this venture will help perform will be to establish initiatives, allocate money to those initiatives, and identify (or tag) whether or not certain grants are initiatives. After this process, the checkbook functionality will show how much money is allocated and how much money is left over. This system uses IMPAC II data.

Cathy Buckley said that they have just received the allocation data, and have made developments to the system based on that information. They have also put together a plan for database structures for the ICs and have specified new search items that are IC specific. The pay scale will also be enhanced based on the different types of grants. The Spending Status Report that they are creating will act like the checkbook function, in that it tracks allocated dollars. Finally, there will also be an Initiative Tracking Report showing how many applications are going towards an initiative, as well as information about funding and allocation. David stated that one of the trickiest steps in these processes is estimating the amount of money that goes into putting forth a grant. He said that Cathy's system increases the accuracy of this process. Thor noted that this system will be presented as a prototype to the committee in the near future.

NIH Roadmap

Thor said that developments on the NIH Roadmap occur on a continuing basis, which is why it continues to stay on the agenda from week to week. He said that they are still adjusting data quality. About two-thirds of the applications received in response to initiative this fiscal year are listed under fiscal year 2006, even though they will be paid off before the end of 2005. He assured the group that they are in the process of correcting this issue.

Q. Have the ICs been notified to change the fiscal year?

A. There are two issues involved in this problem:

1. *When dealing with a secondary (or virtual) institute, authority and responsibility to change fiscal year information needs to be determined*
2. *Actually changing the information is complicated.*

Originally, these changes were going to be made centrally, through the Office of the Director (OD), but they will have to go to the institutes, who have responsibility for that information, and have them change it.

Thor assured the group that they are in the process of getting this problem fixed.

Local Performance Problems

Don Tiedmann stated that there have been scattered errors within the system. He asked the group for user feedback, inquiring if there were any specific, repetitive errors that they had noticed. Both he and Cathy have noticed multiple, randomly occurring *unknown exception* and *Oracle timeout* errors. These errors are brief and temporary and usually go away just as quickly as they appear. Many of these issues can indeed be attributed to the greater IMPAC II system, as is evident with the issues brought about by firewall problems.

The group mentioned that there were certain downloading delay issues, but that these too were random. Cathy suggested that using the *select all* option makes downloads go more quickly. Don stated that if a member should receive the aforementioned, randomly-occurring errors, he or she should simply try again later. If, however, there is another, more serious error, users can report problems to the QVR Support link on the site.

Posting Questions in QVR Forum

Thor stated that so far, these questions are contrived and act as model questions that users may ask. They exist primarily as Frequently Asked Questions (FAQ) and tips for users. Thor and Cathy invited group members to look around this section of the site and come up with any amendments or additions. Users can access the QVR Forum by clicking on the *QVR Information* link at the top of the search screen. At the top of the information screen, there is a link to the forum.

Q. Is there a way to add a button that directly connects to the QVR Forum?

A. Yes, there will be a direct connection button added soon.

Upgrade and Maintenance of System

Peter Morton reminded the group that there are behind-the-scenes occurrences that happen mostly without the knowledge of the greater user community. For example, currently they are changing versions of Cold Fusion, which necessitates keeping current with the latest macromedia version of Cold Fusion (Cold Fusion MX). This type of effort goes unnoticed for the most part, especially with testing, but they do provide the user community with notifications. The same kind of thing happens when there are system flaws with things like J2EE, IMPAC II, etc. He acknowledged the importance and speedy responsiveness of those workers who maintain these systems and perform

fixes on them when they are needed. He ended by saying that the fact that they almost never bring it up is a good indication that it is working well.

Zip Code + 4

Thor acknowledged a question regarding zip codes, where users have requested a nine digit zip code (11111 - 22222) to easily drop that information into an address field. Should this be on the list of priorities for right now or should it be moved up or back in priority? Don said that whenever he encounters the nine digit form of a zip code, he enters the above represented (5 – 4) appearance, and whenever there is a call for a five digit zip code, he simply enters the first five numbers in and leaves the dash at the end. This makes the system treat the field as an alphabetic rather than a numeric and does not truncate the zeros. The custom, downloaded item is the 5 – 4 system, which is right justified.

SBIR-STTR Standard Report – Identification of Allocation Problems

Thor stated that the Small Business Innovation Research (SBIR) office has been working with QVR to create an SBIR public query as well as a custom download, which is a publicly saved list. Both of these will assist SBIR in organizing data items in the correct order for their office. They have also requested a standard report format that they can use to present this information to their central office and then organize into a central spreadsheet.

There is also an issue with SBIR concerning the allocation between their company and the research institution with which they are affiliated. They would like to have a report that pulls the data, makes a calculation on what the allocation should be on the total award, and compares that with what was awarded to the institutes. These all have to be reconciled before the end of the year. The creation of this report is in discussion phase right now, but will come into fruition sometime in the near future.

Request for Budget ARAC for some (2) Standard Reports

Thor said that the Administrative Restructuring Advisory Committee (ARAC) may be interested in developing certain standard reports in QVR. The QVR development team will be meeting with them to discuss these plans.

Enhancements in CAM and ECB

Paul Jordan stated that they are working on a stripped down version of the Early Concurrence Module that will essentially be a step-by-step guide showing users how to set up early concurrence. The original model was very complex and hard to understand for a lot of users, so this new version will act as an easier, better method. He also reminded the group about the new Saved Queries feature within the council ECB. Here, users can create saved queries in CAM (Council Administration Module) and make them visible as a list of saved query council numbers, which are automatically configured. He urged group members to try this application.

Paul told the group about a meeting he had with the Committee Management officers the day before the ECB/QVR meeting, and he reported that they would be making improvements to the Conflicts Managements portion of CAM that will officially allow users to use it for the entire conflicts list. This will also add code in order to distinguish between the 502 and 208 forms.

He also said that they are working with the electronic Research Association (eRA) in order to create an Application Program Interface (API), which will update the after status codes when an application achieves early concurrence. This is only for early concurrence right now, but the long term goal is to achieve an API structure that will tightly integrate the ECB with the eRA database. Paul does not know exactly when this will happen, but he hopes it will occur within the next six months.

Finally, ECB is working on a gadget that will allow users to implement the council ECB for IC specific web pages. Council members will not have to go to another site to view the information, and will only have to authenticate once. Paul hopes to have this system out within the next six to nine months. They hope to have this swept and integrated into IMPAC II. Paul told the group that the Extramural Program Management Committee (EPMC) has recently mandated that studying be done on council operating procedures across all of the ICs. All of this information has been collected and turned into a report showing information on everything in the operating procedures from end-to-end.

Items in Test

The *Application Received Between Dates* feature is now in test and available to view. Once this goes into production, Thor will ask the listserv for comments and suggestions.

Items in Production – Feedback

- Enhanced Search Criteria: Animal and Human Subjects
- Review Meeting End Date/Time and Classification available in Review Meeting Report
- Beta Release - Standard Report: Key Personnel - Extract and download from application image (APPIMGKEYP) – *This is basically the same thing as extracting abstracts from scanned application images. This is not kept as a data item within a database and would be very helpful in identifying conflicts. Tom Tatham stated that there is currently a problem with data quality in this application. Until the electronic Competitive Grant Application Process (eCGAP) starts associating key personnel with Commons profiles, automation will go unrealized. Thor stated that even if the data is dirty, it is still, at very least, somewhat helpful.*
- New Search Items: No PO Assigned and blank PCC Components
- SBIR-STTR "Public Saved Query" and "Public Saved List"
- Modular Grant Flag in Snapshot – *Thor reminded the group that, when looking at a snapshot, the grant might not have been awarded as a modular grant. The Type 1s and Type 2s define how the grant comes in only. Basically, this is simply a “status at time of submission” flag.*

- Contact name option added to PI Mailing Label report for Institution and business official addresses - *The PI Mailing Label terminology will be changing soon.*
- New Custom Download items:
 - Review Meeting End Date/Time and Classification
 - Renaming of "Joint IC" to "Dual IC"
 - MAS Budget Description
 - Inst Contact
 - Institution Business Official Contact

Group members requested that another Download item be created. In NCCAM, many degrees are listed as “other degrees.” It is desired that these be headed.

Q. Is there a flag for score available?

A. Inclusive score ranges are already available. There is a “Scores Release Date” report in Peer Review as well.

ECB/QVR and Related Training Classes:

733A Intermediate QVR Training, April 28, 1:00PM to 4:00PM, Fernwood Classroom

733B Intermediate QVR Training, April 29, 9:00AM to noon, Fernwood Classroom

734A Advanced QVR Training, May 4, 1:00PM - 4:00PM, Fernwood Classroom

734B Advanced QVR Training, June 1, 1:00PM - 4:00PM, Fernwood Classroom

729 Understanding the Grants Process, May 2, 1:00PM to 4:00PM, Natcher Balcony A

Thor stated that all of these classes are now full, so more will be setup soon.

Attendees

Bashir, Karen (NIA)	Bateman, Karen (NINDS)	Buckley, Cathy (CIT)
Connors, Anne (NIAMS)	Fjellstedt, Thor (CIT)	Geddes, Lorena (NIGMS)
Ikeda, Rick (NIGMS)	Jones, Terry (NIAID)	Lindquist, Tere (CSR)
Mason, Tom (CIT)	McDermott, Julie (NIDDK)	McHale, Carolyn (CIT)
Mineo, David (NIDDK)	Monseni, Ilze (MCCAM)	Morton, Pete (CIT)
Paugh, Steve (OD/LTS)	Poma, Shelly (NIMH)	Rich, Linda (NIMH)
Tatham, Thomas (CSR)	Tiedmann, Don (CIT)	Woodland, Rayseen (NCRR)
Wong, JoAnne (NIMH)		