



# ECB/QVR Steering Committee

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

Date: Wed., September 14, 2005, 10:00 a.m.–noon  
Location: Fernwood Bldg., Room 3D-18  
Chair: Thor Fjellstedt  
Next Meeting: Wednesday, October 5, 10:00 a.m. - noon, Fernwood 3D-18

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### Action Items

1. Action: (Thor Fjellstedt) Organize a presentation explaining the NIDDK Initiative Tracking and Checkbook Function to interested ICs.
2. Action: (Thor Fjellstedt) Send a note to the ECB/QVR listserv and to the DEAS team leaders to determine the need for mailing labels for UPS or FedEx.

### NIDDK Project - Initiative Tracking and Checkbook Function

The National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK) Tracking and Checkbook function is in its second phase. Four standard reports currently exist within the system, with another to be added soon. Though this functionality began in NIDDK, it will be available to any interested IC in the near future, as others have expressed interest in it. Thor stated that he will present a show-&-tell explaining this functionality to all interested parties.

**Action: (Thor Fjellstedt) Organize a presentation explaining the NIDDK Initiative Tracking and Checkbook Function to interested ICs.**

### IC Codes Project

The IC Codes project is available in production for the National Center for Complementary and Alternative Medicine (NCCAM) and is in Beta test in the John E. Fogarty International Center (FIC). Both Child Health and the National Human Genome Research Institute (NHGRI) have expressed interest in this functionality. Thor plans to speak with both groups on Thursday, September 15<sup>th</sup>.

### Contracts Data

This is an exploratory project. The intent in QVR is for users to be able to view all obligations, including contracts data, in one report. The QVR team is working to define the data items needed by the ICs for contracts. Information was provided by Steve Hughes and other sources. The list of data items will be circulated to interested ECB/QVR Steering committee members for their comments and suggestions. If this project moves ahead it is planned that IC could provide QVR with their contracts data to populate a table. Once that is in place users from that IC would be able to search on their contracts as well as use the other features of QVR. As this is a possible new initiative, Don Tiedemann said that they are only in the exploratory stages of this process

right now. They are currently looking at what information to use to populate the proposed table and subsequent report.

A second effort is underway that would use the data currently available from Data Warehouse to provide a similar but significantly smaller functionality.

## **NIH Roadmap Update of Roadmap Funded Application Standard Report**

Roadmap is currently going through planning activities for the next year. In addition, there is a lot of activity centered on funding projects for FY 2005 as we approach the end of the fiscal year. They are a few issues that need to be resolved for FY 2005. For example, they had approximately 154 non-competing administrative supplements, of which about 13 have been funded. These did not go through the CSR receipt and referral process and, therefore, did not populate the IMPAC database for each application. Tim Twomey had created work-in-progress (WIP) records for those to be funded. They have been given a grant number and entered into the system. Another problem is that there isn't a procedure established yet to track the new X01 mechanisms. These are applications that do not have funds associated with them but are in essence a means to certify the applicant to use resources of existing, funded projects. In some cases they are considered a form of "approved registry." As new information emerges the committee will be kept up to date.

## **QVR Performance Enhancements**

After moving QVR to a new server on August 17<sup>th</sup>, CIT now wants to gather any feedback on the performance and/or speed of the system. If there are any negative differences between this and the old server, users should report this to the QVR team. The best way is to send an email to the "QVR Help" link on the search screen. There was one issue where, when one user attempted to save a standard report as a spreadsheet, its name changed to an ".ASP" rather than an ".XLS." It is not clear whether this is an issue of the server or is a new setting on the user's computer.

## **Summary Statement Problems in IMPAC**

There was a problem in IMPAC where Summary Statements generated on or around August 8 were showing up like they were in the system, but were not actually there. This caused a failure of the printing process for council books.. The group gave Tim Twomey and the eRA credit for finding and correcting all of the faulty Summary Statements and solving this problem.

## **Summary Statement Release to PI**

While Summary Statements exist within the system and are available to the staff immediately after they are entered, there should be a delay of 72 hours before they are available to the Principal Investigator (PI). This 72 hour delay was not being recognized, but the situation is now fixed within Commons.

## **Summary Statement Mailing Changes**

Starting on October 1<sup>st</sup>, CSR will no longer mail out Summary Statements that are not scored. The notice received stated that this applies to all ICs and all Summary Statements. In essence, there will be no more paper copies of Summary Statements mailed. However, there seems to be some confusion on the specifics of this policy change and if new information becomes available it will be circulated to the ECB/QVR listserv.

## **Conversion to SF 424 from the 398**

QVR is aware of this conversion, as well as the fact that Multiple PIs will be issued to grants. The QVR system will definitely be able to accommodate both the images and the data items for the Standard Form 424. Another result of this conversion will be all electronic submission through Grants.gov rather than directly to CSR. The schedule for this conversion can be accessed here: [http://era.nih.gov/ElectronicReceipt/files/Electronic\\_receipt\\_timeline\\_Ext\\_09-12-2005.pdf](http://era.nih.gov/ElectronicReceipt/files/Electronic_receipt_timeline_Ext_09-12-2005.pdf). For more general information on the Electronic Receipt of Grant Applications, please visit: <http://era.nih.gov/ElectronicReceipt/>.

## **Creation of Mail Merge Capability**

Any group member who knows a good procedure for a mail merge using the QVR download to Excel should forward that to the QVR team. That will then be posted on the QVR Information pages for others to access..

## **Computing Projects with No-Cost Extensions**

No-cost extensions, where extensions are given on a project to come to an orderly conclusion are not usually a problem. However, there are many situations where a project may be extended without additional funds during the middle of the project period. This may cause the project to skip a year of funding. The QVR team is working on a procedure for identifying these no-cost-extensions. Anyone interested in isolating no-cost extensions or skip years and is interested in that kind of search criteria is advised to send an email to QVR email support.

## **IMPAC Status 70 Report (partial data in IMPAC)**

This issue involves searching grant records early in the receipt and referral process often before they are given grant numbers or assigned to a review committee or institute. There is now a search capability available to do just that. The goal is to identify applications that have the status code of 70. NIH staff would like to be able to identify these projects. The "Status 70" report is in "test" and will be moved to production soon.

## **Mailing Label for UPS or FedEx**

The group was asked whether or not there is a need to create mailing labels specifically designed for FedEx, UPS or other mail carriers. This would be a downloadable item which can be input

into a personal address book. Thor will send a note to the listserv and will collect comments and suggestions about this possible development. He will also contact the DEAS team leaders in order to gauge their level of interest.

**Action: (Thor Fjellstedt) Send a note to the ECB/QVR listserv and to the DEAS team leaders to determine the need for mailing labels for UPS or FedEx.**

## **Searching Pre-Processed Applications for Names, Science, etc. and Extracting Specific Aims from Pre-Processed Applications**

The grant applications that came in on the October round are all pre-processed, and there are other components that each institute staff would like access to. They already have access to information in the first four pages of the application. This included the face page, abstract and Key Personnel. The question was posed to the committee if there are other components of the application that would be desirable to capture (a plan is already underway to extract the specific aims of the application).

There is also the question of whether it would be useful for there to be a text search capability that would search either some or all of the text of the application. Implementing this functionality will allow deeper, more specific text searches on an entire application, which exceeds the current restrictions of searching by summary statements or titles. The group expressed a concern that this action might cause false hits and may be too resource intensive. There was consideration to possibly creating a means by which a text search could be done on certain sections of the applications such as the specific aims section and Human Subjects.

## **Should QVR Download "Last Official Signer for PO?"**

The group agreed that this was not an important issue right now.

## **Electronic Council Book and Early Concurrence**

There is a proposal to develop functionality within the ECB (early concurrence) to change the application status code from pending council to pending award. This is now officially an eRA project.

Electronic Council Book is now collecting requirements from users for a complete ECB redesign. While this is not an official project, they simply want to know if it would be more efficient to rebuild the system from scratch rather than constantly fixing problems and/or issues piecemeal. Those areas that would change would be mostly back end and administrative in nature. This change should remain simple.

The issue was raised regarding shutdown of the Staff ECB. All of the functionality of the Staff ECB is available in the QVR and it is an issue of maintaining a redundant system. The group agreed that a plan should be developed to shut down Staff ECB and transition users to the QVR. They suggested implementing a shared interface between the two, because of their similarities. Those workers not familiar with QVR will receive training on the new system. This is part of a larger project to simplify the security structure of the ECB administration. There does appear to

be more early concurrence activity this summer than in previous years. Early concurrence is a great tool for Roadmap.

There will be a “stripped down” version of early concurrence, which is basically setup so that it automatically uses a set of common defaults. Areas within the system can still be updated in the regular version, but this may help those users who might be intimidated by the original system. Early concurrence and ECB training will take place on November 2<sup>nd</sup> and 3<sup>rd</sup>.

The question was raised about incorporating the IPF code feature in the CAM into the QVR. This would allow users of QVR to conveniently identify specific institutions on the search screen.

## Discussion of Items Recently in Production

All items that have recently gone into production can be seen at <http://qvr.cit.nih.gov>.

- 09-08-05 - New Search Item: Scores Released Since
- 09/07/05 - Enhanced Search Item: Summary Statement Release Date Range
- 09/01/05 - Commons Userid available on Person Information Page (top right)
- 08/29/05 - Application Image Pgs1-3 Pre-processed for FASTER retrieval
- 08/29/05 - Application Image Download and Application Image Extract - new filename feature
- 08/29/05 - Department Name Search Criteria Now Available
- 08/24/05 - GM and PM Checklist Statuses added to Custom Download
- 08/21/05 - Resume download to XLS/CSV added to Standard Reports
- 08/11/05 - PAYLIST Template -- DDF columns removed
- 08/09/05 - Application Status added to Detailed Hitlist
- 08/08/05 - Text Searching -- more search term options in text searching SS/Abstracts/Titles
- 08/03/05 - PIML Report - added option to include or exclude PI Degree(s)
- 08/03/05 - Accession number added to Application Abstract Extract (APPIMGABST), and Key Personnel Extract (APPIMGKEYP) reports.
- 07/29/05 - POPCNTS Report - added Protocol and Foreign/Domestic Indicator to pivot table
- 07/22/05 - INCURR and INFROZN Reports - added Project Title to raw data
- 07/19/05 - New Program Reports - SBIR and STTR Discrepancy Reports

## ECB/QVR and Related Training Classes

- **729 Understanding the Grants Process, September 13, 1:00PM to 4:00PM, Natcher Conference Center (Bldg. 45), Balcony C**

- **730 Introduction to the QVR System, Sept. 15, 9:00 AM - Noon, Natcher Conference Center (Bldg. 45), Balcony C**

## **Attendees**

Allison, Heather (CIT)

Buckley, Cathy (CIT)

Forney, C. Lynn (NIMH)

Hsu, Lydia (NIDCD)

Lindquist, Tere (CSR)

Paugh, Steven (OD/LTS)

Schultz, Sue (NIMH)

Wong, JoAnne (NIMH)

Bailen, Rich (OD)

Connors, Anne (NIAMS)

Geddes, Lorena (NIGMS)

Ikeda, Rick (NIGMS)

Lo, Cathy (NIDCD)

Peng, Lisa (NIDCR)

Ta, Loan (NIA)

Bashir, Karen (NIA)

Fjellstedt, Thor (CIT)

Hodgkins, Earl (CIT)

Jones, Terry (NIAID)

Mechanic, B. (NIAID)

Poma, Shelly (NIMH)

Tiedemann, Don (CIT)