



## eRA Program Official Users Group (ePUG)

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**Date:** January 14, 2004  
**Time:** 1:00–3:00 p.m.  
**Location:** Rockledge 2, Room 9100  
**Advocates:** Carlos Caban, Israel Lederhendler

**Next Meeting:** Wednesday, February 11, Rockledge 2, Room 9100

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### Actions Items

1. (All) Continue to brainstorm possible uses of Knowledge Management (KM) tools for the Program Module.
2. (Israel Lederhendler, Carlos Caban, Chanath Ratnanather) Determine how Program can become a part of the Knowledge Management Focus Group at the NIH.
3. (Chanath Ratnanather) Revise PGM Highlights and PGM Training Scenarios documents; post on IMPAC II Web site and place on Help/About page in Program Module.
4. (Chanath Ratnanather) Demo Program Module animated tutorials (Virtual School) at next ePUG meeting.

### Handouts

1. Knowledge Management PowerPoint Presentation  
[http://era.nih.gov/docs/powerpoint\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/powerpoint_EPUG_meeting_01-14-04.pdf)
  2. Description of Program Module (PGM)  
[http://era.nih.gov/docs/handout1\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/handout1_EPUG_meeting_01-14-04.pdf)
  3. PGM Training Scenarios [http://era.nih.gov/docs/handout2\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/handout2_EPUG_meeting_01-14-04.pdf)
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### Updates

*eRA Project Manager*—Israel Lederhendler explained that the eRA team is still without a Project Manager. Jim Cain, Director of Operations, will fill this role until an individual is appointed to the position.

*Maintenance Releases*—Chanath Ratnanather said that the eRA Project team plans to have more frequent maintenance releases in 2004. Large deployments are still planned, but maintenance fixes will be more regular.

*Transition Period*—The eRA Project is in a period of transition. Specifically, the project has just changed over to a new host of development contractors. Chanath said that the changeover may slow down progress in eRA until the contractors are brought up to speed on the project.

*New Program Module (PGM) Focus Group*—Chanath announced the formation of a new focus group responsible for discussing Program Module (PGM) enhancements. Although

ePUG has addressed this task in the past, the number of enhancement requests has become too big for the group to handle, especially since ePUG meets only once a month. Right now, the focus group consists of six members (four Program Directors and two Program Assistants) and will meet the first and fourth Wednesday of the month. The focus group will first address the “Portfolio at a Glance” (a new summary page of the grants in a PO’s portfolio), other user interface enhancements, and suggestions for future improvements of the module. Chanath said that he would also like the focus group to discuss the standardization of the Program Module with other eRA Modules.

*Future ePUG Meetings*—Chanath emphasized that ePUG should be discussing higher-level issues (training, marketing, direction) rather than the finer details of the user interface that the new focus group will be addressing. Future agendas will focus on marketing, training and major requirements for the Program Module; design and enhancement issues will be left to the new PGM focus group to discuss.

## **Knowledge Management**

Israel Lederhendler introduced Mr. David Vera from Mitretek Systems, a company that has been working closely with the NIH to develop and pilot Knowledge Management technology. Israel explained that knowledge management (KM) technology may be very useful to the Program Module and asked ePUG members to consider how KM tools could possibly assist Program staff in the management of their portfolios.

Mr. Vera presented “Knowledge Management for NIH:”

[http://era.nih.gov/docs/powerpoint\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/powerpoint_EPUG_meeting_01-14-04.pdf). He explained that knowledge management is defined as *a process of identifying, capturing, organizing, and leveraging assets within an organization to improve performance and efficiency*. KM refers to the family of text-mining tools for examining vast quantities of data to identify patterns and establish relationships. Given the exponential rate at which the world’s information is growing (estimated at 10<sup>18</sup> yearly), KM has great potential for optimizing the knowledge assets of an organization and saving thousands of labor hours.

Mr. Vera presented a demonstration of the Grant Reviewer Selector (GRS) that was recently piloted at the NIH. It contains a limited database and is not ready yet for general use. GRS is a KM tool that identifies qualified reviewers for an incoming application. The program extracts key information from incoming research proposals and generates a “fingerprint” or profile. The fingerprint is extracted using the National Library of Medicine Medical Subject Headings (MeSH) Thesaurus and then merged to create a proposal archive. MeSH is a database of hierarchical (e.g., “ankle” is subordinate to “anatomy”) and cross-referenced topics (e.g., “for vitamin C, see ascorbic acid”), which permits searching at various levels of specificity. The fingerprint for each research plan comprises the most appropriate MeSH terms (see slide #11).

The other sources of input for the pilot are databases (internal and external) of reviewer biosketches. Once the biosketches are fingerprinted, locating subject-matter experts consists of comparing proposal profiles with expert profiles to produce the best match of application to reviewer (slide #8, 12).

The GRS can also perform a number of other functions:

- Search for similar reviewers
- Search for similar proposals (see slide #13)
- Search for relationships between key terms
- Augment searches based on concept relevance (Slides #16, 17)
- Present data in a variety of formats, including “hot spot” maps, line graphs, bar graphs, bubbles, captions

The ePUG group was most impressed by the ability of GRS to explore relationships of concepts within document sets (slide #22). Mr. Vera explained that any document (e.g., research proposals, publications, HTML, PDF, newspapers) can be mined for relevant terms and compared to another document for relevancy. The relationship between relevant concepts then can be displayed in an interactive bubble cluster that the user can rearrange and reorganize however appropriate.

Carlos and the group thanked Mr. Vera for his time. Mr. Vera said that he would distribute the URL for the GRS demos to the group as soon as possible.

Carlos emphasized the importance of becoming involved in the NIH Knowledge Management focus group if ePUG hopes to incorporate KM technology into the Program Module (PGM). He has spoken with Richard Morris, Advocate of Knowledge Management, and has expressed ePUG’s interest in KM tools for PGM. He will update the group on any future developments. Carlos asked the group to continue brainstorming possible uses of KM for the Program Module for discussion at a later meeting.

Finally, Carlos announced that the eRA project has taken advantage of a substantial price reduction and the opportunity to put Collexis software (a critical component of the knowledge management efforts at NIH) on every NIH desktop with five years of support. With the tools in place and a commitment from Dr. Zerhouni, it seems that Knowledge Management at NIH is well underway.

**Action: (All) Continue to brainstorm possible uses of Knowledge Management tools for the Program Module.**

**Action: (Israel Lederhendler, Carlos Caban, Chanath Ratnanather) Determine how Program can become a part of the Knowledge Management Focus Group at NIH.**

## **PGM Training Scenarios**

At the last ePUG meeting, the group decided that before a training plan for the Program Module (PGM) could be implemented, it was necessary to—

- Develop a list of real-world scenarios that can be performed using the Program Module (PGM).
- Assemble a document highlighting the features of PGM.

Chanath created both documents and presented a draft of each for the group for review:

- PGM Highlights: [http://era.nih.gov/docs/handout1\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/handout1_EPUG_meeting_01-14-04.pdf)

- PGM Training Scenarios: [http://era.nih.gov/docs/handout2\\_EPUG\\_meeting\\_01-14-04.pdf](http://era.nih.gov/docs/handout2_EPUG_meeting_01-14-04.pdf)

The group made the following suggestions:

*PGM Highlights Document*

1. Include a description of the eRA Project. Place this before the “Introduction to the Program Module” section. This will put the Program Module in the context of the entire eRA Project.
2. Include “Design Goals” as part of the “Introduction to the Program Module” section.
3. Consider moving the “History” section toward the end of the document. Consider incorporating the “History” section into the section that contains both the description of the eRA Project and the content in the “Introduction to the Program Module” section.
4. Edit the heading “What can the current release of PGM do for you?” to “What can the Program Module do for you?”
5. Include headings for each “tab” (e.g., Pending SRG, Pre-Council) in the “What can the Program Module do for you?” section.
6. Include description of how the Program Module interacts with other eRA Modules. Include links to the IMPAC II Web site for each eRA Module discussed. The IMPAC II Web site will provide additional information about the various eRA Modules.
7. Replace the word “Reports” in the first bullet in the “Design Goals” section with “display predefined reports.”
8. Include (e.g., sign grants, etc.) after the word “Transactions” in the first bullet under “Design Goals” section.
9. Include eSNAP in the fifth bullet on the second page: “Allows you to complete your Program Checklist (Green sheets) on Type 5 grants and eSNAPs.”
10. Rewrite the second to the last bullet on the second page: “Lets you conveniently view your portfolio and another PO’s portfolio.”
11. Add the feature of two possible roles (Program Assistant and Program Director) to the list of bullets in the “What can the Program Module do for you?” section.

*PGM Training Scenarios Document*

1. Add a heading titled “Getting Help.” Place appropriate scenarios under this heading (e.g., how to report bugs). Include scenario #27 and #28 under this new heading.
2. Replace “extension system” with “IC-specific program” or “IC-specific system.”
3. Bold or italicize the names of tabs or links (e.g., Agenda Report).
4. Consider incorporating a generic screen shot that labels all the major tabs, buttons, and links.
5. Re-title document to “Self-Guided Tutorial.”

The group suggested placing the PGM Training Scenarios document as a link in the Program Module. Chanath said that for now he intends to place it on the *Help/About* page and to post it on the IMPAC II Web site. The group suggested additional possibilities, such as placing the document on the *Sign-On* page or creating a “Tutorial” button that can be accessed from any page in the PGM.

Finally, the group agreed that the Training Scenarios document would be very useful for training purposes, especially coupled with the animated tutorials that the eRA Communications and Outreach Branch is developing for inclusion in the eRA Virtual School. Chanath said that he plans to demo the animated tutorials at the next ePUG meeting.

**Action: (Chanath Ratnanather) Revise PGM Highlights and PGM Training Scenarios documents; post on IMPAC II Web site and place on Help/About page in Program Module.**

**Action: (Chanath Ratnanather) Demo Program Module animated tutorials (Virtual School) at next ePUG meeting.**

## Attendees

Armistead, Allyson (LTS)	Goldman, Stephen (NHLBI)	Schwartzback, Sheri (NICHD)
Asanuma, Chiiko (NIMH)	Heath, Anne (NCI)	Sorenson, Roger (NIAAAA)
Bartlett, Virginia (NIMH)	Holmes, Margaret (NCI)	Swain, Amy (NCRR)
Burns, Amy (LTS)	Hilton, Tom (NIDA)	Volman, Susan (NIDA)
Caban, Carlos (OER)	Lederhendler, Israel (NIMH)	Wehrle, Janna (NIGMS)
Delcore, Sandy (NICHD)	Miller, Roger (NIDCD)	Whalin, Michael (NICHD)
Duncan, Rory (NIAID)	Mullins, Chris (NIDDK)	Wong, Shan (NCCAM)
Finkelstein, David (NIA)	Ratnanather, Chanath	
George, Janet (NHLBI)	(OD/eRA)	