



IMPAC II GM Lead User's Group

Date: February 12, 2003
Time: 9:00–11:00 a.m.
Location: 6001 Executive Building, Conference Room A1/A2
Advocate: Marcia Hahn

Next Meeting: March 12, 2003, 9 a.m., 6001 Executive Blvd., Conference Room A1/A2

Actions Items

1. (Mike Loewe) Send follow-up email to GM Lead Users Group requesting participation in the J2EE Query Tool Focus Group.
2. (All) Email Mike Loewe to participate in the J2EE Query Tool Focus Group.
3. (Mike Loewe) Email list of J2EE Query Tool Focus Group volunteers to Johnnie Pearson.
4. (Cathy Walker) Email the list of corrected Type 5s that no longer issue zero awards to the IMPAC II GM Lead Users Group.
5. (All) Review Cathy Walker's list of corrected Type 5s; ensure data has been correctly restored by looking at the hard copies of the awards.
6. (All) Review the list of Types 5s that are missing receipt dates that Mike Loewe emailed to the GM Lead Users Group; enter the receipt dates for the Type 5s listed.
7. (All) Explain the effect of missing Type 5 receipt dates to your respective ICs and emphasize the importance of entering these dates correctly.
8. (Mike Loewe) Send an email to the GM Lead Users Group asking for a volunteer to chair the TeleWorking Group.
9. (All) Email Mike Loewe to participate in assembling the requirement for a no-cost extension to the NIH eRA Commons.

J2EE Query Tool Demo

Sherry Zucker presented a demonstration of the new J2EE Query Tool for operational and production use. GM has volunteered to pilot this new query tool when it is released in July and Sherry emphasized the importance of working closely with GM to ensure the usability of the product.

The development of a new query and reporting tool is necessary because the NIH is moving from a client-server to a J2EE environment. Although a plethora of query and reporting tools are already available at the NIH (i.e., CRISP Plus, Quickview, ICstore, etc.), there are too many

query and reporting tools to maintain and replicate as the NIH migrates to a J2EE environment. A single Web-based query and reporting tool for operational and production use is more efficient.

Sherry and Cathy Walker presented the group with a series of screen shots of the new J2EE Query Tool User Interface (UI). They explained that the screen shots were assembled after analyzing all the NIH Query Tools and their various aspects (i.e., query parameters, sorting, reporting format options, downloading, etc.) and clustering common features that users need “across the board.”

The UI of the new J2EE Query Tool contains basic categories of query parameters: Grant ID, PI Data, Institution Data, Assignments, Grant Date, Grant and Document Status, Award and Budget Data, Administrative Coding, and Text Search.

When users select one of these parameters or categories, a pop-up window appears containing relevant data fields and a plus sign option for expanded data. Users have the option of viewing all basic data or all expanded data at once. After users select parameters, a hitlist appears displaying data. Users can sort quickly by a column query and customize their hitlist by adding or removing data. This hitlist can be printed, saved on a Zip disk, or downloaded into Excel. When users customize a hitlist, they are creating a unique report.

Sherry guided the group through each parameter screen and Cathy Walker presented user-case scenarios for a variety of tasks, including finding Type 5s with a receipt date of the current week, finding applications for the current fiscal year that have future year commitments, and finding applications for the current fiscal year that are AIDS related that also use human subjects, among others.

Sherry announced the formation of a J2EE Query Tool focus group and asked eight members of the GM Lead Users group to volunteer. The focus group will work closely with Johnnie Pearson, the Process Officer of the J2EE Query Tool; Sherry Zucker, Analyst; Jay Liu, User Interface Designer; and Cathy Walker, liaison between the GM Lead Users Group and the J2EE Query Tool focus group. Members will be asked to visit a URL, review screen shots of the latest developments of the J2EE Query Tool, and provide commentary via email, phone, or in person. Mike Loewe said that he would send a follow-up email to the group, announcing the formation of the J2EE Query Tool focus group. He asked all interested parties to email him directly. Sherry asked Mike to email this list of volunteers to Johnnie Pearson.

Action: (Mike Loewe) Send follow-up email to GM Lead Users Group requesting participation in the J2EE Query Tool Focus Group.

Action: (All) Email Mike Loewe to participate in the J2EE Query Tool Focus Group.

Action: (Mike Loewe) Email list of J2EE Query Tool Focus Group volunteers to Johnnie Pearson.

New Advocate, New Co-Chair

Marcia Hahn announced that she no longer will be the Advocate for the Grants Management (GM) community. She explained that she will be working on the policy end of eRA and hopes to become more of a consultant. Mike Loewe will replace Marcia as the Advocate for GM and will chair the IMPAC II GM Lead Users Group. Mike thanked Marcia for her three long years of service and the group applauded her efforts and strong leadership.

Mike announced that Dave Chicchirichi has joined the eRA Project and that he will no longer co-chair the IMPAC II GM Lead Users Group. Bob Fallwater will be the new co-chair.

GM Module Updates

With the March release, Clinical Trials footnotes will be automatically printed on NGAs and several enhancements will be made to fellowship grants. Enhancements include the following:

- The GM Specialist name will appear on the Fellowship Waiting Activation Report.
- Upon Fellowship Activation, users will be able to enter a project period end date. In July, users will be able to view the project period start and end dates on the activation pop-up screen. Previously, users could only view the budget start and end dates.
- NGAs will be automatically emailed to fellows.
- Users will be able to use a “wild card” (%) in the activity code field of the Search Screen.
- Bugs in the workload report will be fixed. Competing grants that were paid last year will no longer appear on the workload report.

Problem with Type 1 Fellowship Grants

Mike Loewe asked Cathy Walker about the problem with Type 1 Fellowship Grants. Apparently, when the award is made, there is a budget period end date that is populated in IMPAC II. This causes the system to think that the Type 1 is activated and therefore remove the activation button. This is problematic, especially when trying to activate a new Type 1 record that has never been activated before. Cathy said that she is trying to fix the problem; however, until the problem is remedied, she advised users to blank out the budget end date when it appears on new Type 1 records that have never been activated. Blanking out the budget end date allows the system to function properly.

Problem in Type 5 Records

Cathy explained that several Type 5s are either missing from IMPAC II or have incorrect data. The grants that are affected were awarded in 2001 with 2003 commitments. Most of these grants are fellowships. Developers are currently writing a script to identify and check 2001 Type 5s that have 2003 commitments. Once the script is complete, the developers will run a job to create Type 5s records for 2003. This should straighten out the affected records.

The group also asked about the problem that causes the system to send out a good award and then a zero award a few hours later. Cathy said that this problem was caused by corrupted data. The problem will soon be remedied. She explained that she has a list of awards that have been corrected. Marcia Hahn asked Cathy to email her and the IMPAC II Lead Users Group this list. Cathy agreed. Marcia instructed the group to leave zero awards alone until Cathy emails the list. The group should review the list and make sure that the data in the system has been correctly restored. Marcia said the best way to ensure that the data is correct is to compare it to the hard copy of the award.

Action: (Cathy Walker) Email the list of corrected Type 5s that no longer issue zero awards to the IMPAC II GM Lead Users Group.

Action: (All) Review Cathy Walker's list of corrected Type 5s; ensure data has been correctly restored by looking at the hard copies of the awards.

Type 5 Receipt Dates/Pending Progress Reports Query on Web

Mike emphasized the importance of entering the Type 5 receipt date correctly. Last week, Mike emailed the group a list of Type 5s that have an issue date but no receipt date. He asked the group to review this list, enter the receipt date for these Type 5s, and monitor these Type 5s closely. Marcia Hahn explained that without a receipt date, reports will show that Type 5s were never received, even though they were submitted on time. This is problematic for the NIH and the grantee community. Mike said that the group needs to explain to their respective ICs the effect of missing Type 5 receipt dates and to be extra careful that these dates are entered correctly.

Action: (All) Review the list of Types 5s that are missing receipt dates that Mike Loewe emailed to the GM Lead Users Group; enter the receipt dates for the Type 5s listed.

Action: (All) Explain the effect of missing Type 5 receipt dates to your respective ICs and emphasize the importance of entering these date correctly.

Edit Checks Working Group

Debbie Hendry announced that a document of edit checks ensuring the consistency of language used in the GM Module has been compiled. The document will be sent to selected individual members of the GM community for review. Debbie hopes to have the reviewed document to Marcia Hahn by Friday, February 14.

Standardized Spreadsheet Working Group

Pam Mayer announced that the working group has trained approximately 200 specialists on the GM standardized spreadsheet. Two more training sessions are scheduled for February. After these two classes, all specialists who requested training will have been successfully trained.

The working group is still meeting with developers on the second Friday of every month to discuss enhancements, bugs, and directions for the future. The group is still clarifying installation instructions for each time the spreadsheet is revised, working on D43 for subprojects, the modular view, and adding salary lines. Mike Loewe encouraged anyone with questions about spreadsheets to email Pam directly.

Closeout Working Group

Currently, over 9,000 records are in the closeout system. Last month, there were only 7,000. Many ICs are actively using the system. NIDCR and NCI are using it most frequently. Mike Loewe said that the ultimate goal is to have every IC using the closeout system 100 percent of the time.

Mike Loewe invited all interested parties to the Closeout Working Group Meetings, held on the second Wednesday of every month at 11 a.m.

Marcia Hahn encouraged all ICs to use the Closeout system because it will soon be mandatory for all ICs. The NIH looks to this system as "the answer" for closeout.

Foreign Components Module Working Group

The first meeting of the Foreign Components Working Group is Tuesday, February 18. Mike Loewe noted that the Foreign Components Module will use the Subprojects Module to allow users to create foreign subprojects and to enter this data into IMPAC II. The Foreign Components Module will include the completion and electronic routing of the 1820 form for approval. The Working group will focus on the complexities of this module.

TeleWorking Group

Mike Loewe asked if anyone would be willing to chair the TeleWorking Group. This group focuses on the possibility of a work-at-home option and surrounding issues (i.e., connectivity, workspace, access to the GM Module, etc.). Mike said that he is not sure where the work-at-home option stands in terms of eRA priorities. Tim Twomey said that, as of now, the work-at-home option is not on the planning schedule. He recommended that the GM community rely on VPN for all telecommuting. Mike said that he would continue to investigate the work-at-home option. In the meantime, he will send an email asking for a volunteer to chair the TeleWorking group.

Action: (Mike Loewe) Send an email to the GM Lead Users Group asking for a volunteer to chair the TeleWorking Group.

FSR System

Mike asked the group to limit the number of times they contact grantees about missing FSRs. Mike suggested using all of the NIH resources to locate an FSR: the old IMPAC system, IMPAC II, and OFM. Marcia emphasized the importance of not bothering grantees about FSRs they have already submitted.

Marcia also announced that in late March, after the scheduled deployment, all history data will be moved into IMPAC II. Also, all FSRs will be generated and stored in IMPAC II. GM finally will be able to use a single system to locate data rather than relying on both the old IMPAC system and IMPAC II.

No-Cost Extension to the NIH eRA Commons

Cathy Walker is currently submitting a July requirement for a no-cost extension or an e-request to the NIH eRA Commons. Mike asked if anyone was willing to work on this requirement with Cathy and a few key people in eRA. Mike encouraged all interested parties to email him directly.

Action: (All) Email Mike Loewe to participate in assembling the requirement for a no-cost extension to the NIH eRA Commons.