



eRA Program Official Users Group (ePUG) Meeting Minutes

Date: November 8, 2002
Time: 9:00–10:30 a.m.
Location: Rockledge 2, Room 9104/9100
Advocate: Bud Erickson
Chair: Carlos Caban

Next Meeting: Dec. 13, Friday, Rockledge 2, Rooms 9104/9100

Actions Items

1. (Carlos Caban, Bud Erickson) Schedule a meeting with Thor Fjellstedt and Pete Morton to continue the discussion regarding the integration of the Program Portal and ECB/QVR.
2. (All) Review the Pilot Program Portal at portal.era.nih.gov/8087/.
3. (Carlos Caban, Bud Erickson) Meet with JJ McGowan to discuss FY2003 possibilities for the Program Portal (creating architecture, establishing a support staff, better programming).
4. (Carol Martin) Post the IMPAC II Reporting Database (IRDB) Release Notes to the IRDB listserv.
5. (Carlos Caban, Bud Erickson) Determine key groups that the eRA Program Users Group (ePUG) should meet and interact with to ensure a more usable version of the next Program Portal Pilot.

eRA Project Team Retreat

Bud Erickson recapped the eRA Project Team Retreat, held October 10–11 at the Airlie House in Warrenton, Virginia. Bud reviewed the objectives of the retreat: identify essential cross-cutting business practices; explore future initiatives and directions for eRA; learn about upcoming technological advances that could benefit eRA; and promote team building and open communications. He presented the team with handouts distributed at the retreat, including lists of eRA accomplishments.

Bud shared highlights from retreat speakers, Charlie Havecost (E-Grants representative), Jack Jones (Chief Architect for CIT), and various members of the Project Team.

Charlie Havecost discussed the E-Grants' mission to fulfill the President's management agenda and goals of PL 106-107 to process all government grants electronically by October 2003. In response to this message, E-Grants is adopting a "storefront" approach through which PIs can apply for research funding at any government agency, not just NIH. The E-Grants engine would work as a "trusted broker" or "electronic middleman" processing these grants. This will be possible using an integration tool kit. It looks as though the data stream standard between the extramural community and the NIH will be XML. XML is an optimal choice because it would allow the NIH to accept data in various formats. XML works on a variety of platforms.

Jack Jones discussed how eRA fits into the CIT architecture and the integration into the NIH Business System (NBS).

The Project Team also discussed eRA architecture, Receipt and Referral, communications, the “paperless office,” and the use of Knowledge Management technology.

Joining Forces with ECB/QVR

Since the retreat, Bud and Carlos Caban have spoken with Thor Fjellstedt and Pete Morton about combining the efforts of the Program Portal with those of ECB/QVR. QVR is a highly popular and useful system tool—one that the JAD considered as a solid model for the Program Portal. As such, it may be a good idea to combine efforts and join forces with Thor Fjellstedt. Bud and Carlos suggested meeting with Thor and Pete to discuss future directions for the Program Portal and QVR.

Action:(Carlos Caban, Bud Erickson) Schedule a meeting with Thor Fjellstedt and Pete Morton to continue the discussion regarding the integration of the Program Portal and ECB/QVR.

Grants Folder and Review Module

Carlos observed that the grants folder contains much of the same information that should be in the NIH eRA Commons for Principal Investigators (PIs). Carlos suggested making the grants folder have cross-cutting functionality with the Review Module. This way, the information in the grants folder would be available to both the internal and external communities. Carlos suggested establishing a JAD to define the information that should be included in the grants folder, the modules that should share the information available in this folder, the communities that should have access to this information, and the technology required. Bud said that JJ McGowan has indicated that 2003 will be a “big year” for the Program Portal and that a new JAD may be feasible; however, he has no details at this time.

First Phase of Program Portal

After two weeks, Carlos finally received the URL to the first phase of the Program Portal: www.portal.nih.gov/80807/. Carlos would like the team to review the Pilot before releasing it to the ICs and to think about ways to improve the portal. Carlos expressed a desire to “put more utility” into the Pilot by March.

Bud described the features of the Pilot Program Portal. The new screen contains tabs for **My Portfolio**, **Calendar**, **Resources**, **Yahoo**, **NIH eRA Commons**, and **SSL Portlets**. **My Portfolio** allows users to access any stage of the grant process (Pre-Submission, Pending SRG, Pending Council, Post Council, Post Award, and Notes). Bud said that the grant listing should correspond to the stage of the grant process (e.g., Post Council, Post Award, etc.).

Password Requirements for Program Portal

In response to a question regarding password access to the Program Portal, Carlos responded that this decision has yet to be made. Originally, the JAD envisioned users logging on to the Portal and entering an ID. The users would then see their grants and make revisions. Carlos explained that this idea is similar to QVR. However, to accomplish this, a new architecture needs to be created for the Program Portal.

Program Portal Architecture

Carlos and Bud are recommending a new Program Portal architecture, a support staff and better programming to move the development of the Portal along more quickly. They will meet with JJ McGowan to discuss these issues. Bud said that discussing the direction of the Program Portal with Thor Fjellstedt and Pete Morton would also prove helpful. However, Bud said that the Program Portal may be a lower priority right now, because key eRA efforts are being focused on assisting the extramural community.

Action: (All) Review the Pilot Program Portal at portal.era.nih.gov/8087/.

Action: (Carlos Caban, Bud Erickson) Schedule a meeting with JJ McGowan to discuss FY2003 possibilities for the Program Portal (creating architecture, establishing a support staff, better programming).

IMPAC II Reporting Database (IRDB) Release Notes

Carol Martin handed out copies of the IMPAC II Deployment Release Notes for IRDB. She said that the ePUG may be particularly interested in the new materialized budget view described on page six of the release notes: PV_BUDGET_ADMIN_MV. Carol also said that more POP Tracking views were added. Carol Martin said she would post the IRDB Release Notes to the IRDB listserv.

Action: (Carol Martin) Post the IMPAC II Reporting Database (IRDB) Release Notes to the IRDB listserv.

Future Meetings

Bud Erickson asked the team to consider the focus of future meetings. Carlos suggested that the team schedule meetings that allow interaction with others (such as QVR) as the team is developing the next version of the Pilot Program Portal. Interaction with key groups would ensure that the next version of the Pilot is more usable.

Action: (Carlos Caban, Bud Erickson) Determine key groups that the eRA Program Users Groups should meet with to ensure a more usable version of the next Program Portal Pilot.

Attendees

Armistead, Allyson (OCO)	Finkelstein, David (NIA)	O'Neill, Blanche (NIAID)
Asanuma, Chiiko (NIMH)	Heath, Anne (NCI)	Sorendon, Roger (NIAAA)
Caban, Carlos (OER)	Lederhendler, Israel (NIMH)	Swain, Amy (NCRR)
Erickson, Bud (NCI)	Musson, Bob (NHBLI)	
Fay, Rob (NIDDK)	Nichols, Paul (NINDS)	