



## eRA Program Official Users Group (ePUG)

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**Date:** October 13, 2004, Wednesday  
**Time:** 1:00–3:00 p.m.  
**Location:** Rockledge 2, Room 9100  
**Advocates:** Carlos Caban, Janna Wehrle

**Next Meeting:** Wednesday, November 10, Rockledge 2, Room 9100

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### Actions Items

1. (Chanath Ratnanather) Include requirement to link headers on the *At-A-Glance* page to the respective pages in the *Portfolio* itself.
2. (Chanath Ratnanather) Investigate the possibility of including hotlinks on the *At-A-Glance* page; obtain an estimate of time and feasibility; update ePUG group at the next meeting.
3. (All) Email Chanath Ratnanather any additional content ideas or suggestions for the *At-A-Glance* page.
4. (Chanath Ratnanather) Investigate the possibility of granting PGM users the ability to “hide” individual grants in the *Portfolio*.

### Handouts

1. eRA Program Module/ePUG meeting Presentation:  
[http://era.nih.gov/docs/ePUG\\_Presentation\\_10-13-04.pdf](http://era.nih.gov/docs/ePUG_Presentation_10-13-04.pdf)
2. Sample: Population Tracking Grant Snapshot Report

### eRA and Roadmap

Chanath Ratnanather briefed group members on Roadmap updates and presented how eRA plans to implement the Roadmap initiative in the eRA system (see *Slides #3-15*):

[http://era.nih.gov/docs/ePUG\\_Presentation\\_10-13-04.pdf](http://era.nih.gov/docs/ePUG_Presentation_10-13-04.pdf).

After reviewing these slides, Chanath opened the floor to discussion. Group members provided the following questions, observations, comments, and suggestions:

- *How does a Program Director handle RM grants using the Program Module?—* Users of PGM will have to use the “Include duals” functionality within the system.
- *If you are the lead Program Director will you see the Roadmap grant in your PGM Portfolio?—* If you are the lead Program Director from the lead administering IC, you will see Roadmap grants in your portfolio, like any other grant. If you’re the RM IC Project Team Lead, you will see Roadmap grants in your portfolio only if you select the Include Duals option and refresh the portfolio page by clicking the Search button.

- *Won't the RFA portion of the RM PCC become problematic?*—The group expressed concern about the fifth and sixth characters of an RM PCC, arguing that the system may run into problems because the RFAs characters may not allow for more than a few RFAs. Chanath agreed with the limitations of the PCC system and said that he will try to alert the proper authorities to this potential problem.
- *Will it be possible to query using portions of the RM PCC?*—Chanath explained that the group could use Web QT to query the Theme, Implementation Group, Initiative, and/or RFA of any RM application. This functionality has not been released as of yet, but will be in the near future.
- *Where can we find an explanation of what the RM PCCs mean?*—Janna Wehrle referred the group to the Roadmap Intranet:  
<https://my.nih.gov/nih/communities/community.asp?UserID=1287747&CommunityID=485&intCurrentPageIndex=0>

She also referred the group to the spreadsheet of FY04 PCCs for Roadmap dual assignments:

<https://my.nih.gov/nih/gateway/gateway.asp?GID=1993&CID=485&URL=http%3A%2F%2Fnihroadmap%2Enih%2Egov%2Fintranet%2Fdocuments%2FFY04%5FRoadmap%5FProgram%5FClass%5FCodes%2Exls>.

Janna explained that the Roadmap Intranet requires a NED username and password.

- *Shouldn't the RFA Title be included in the Grant Snapshot?*—The group agreed that the RFA Title should be included in the Grant Snapshot and that the RFA/PA number should be featured right before it.
- *Should we present this to EPMC?*—Carlos Caban thought it would might be a good idea to present the Roadmap updates to EPMC.

## Portfolio At-A-Glance

Chanath presented the group with a revised *At-A-Glance* page—a summary page that will present an overview of all the grants within a PO's portfolio (see *Slide #17*):

[http://era.nih.gov/docs/ePUG\\_Presentation\\_10-13-04.pdf](http://era.nih.gov/docs/ePUG_Presentation_10-13-04.pdf).

The group provided the following feedback:

- Make all the headers (e.g. *My Pending SRG*, *My Pre-Council*, etc.) hotlinks to the actual corresponding pages within the portfolio. Chanath agreed that this would be an easy requirement for the next release.
- Include the link “At-A-Glance” (currently in the top navigation bar next to *Portfolio*) as a link in the subnavigation bar under *Portfolio*. The group agreed that users would be more likely to take advantage of this feature if it was included as a link within the portfolio subnavigation. Chanath agreed that this would be an easy fix for the next release as well.
- Allow users to click on individual entities within the *At-A-Glance* page and have that link present users with the actual content item. For instance, group members said that

they would like to be able to click on *Human Concerns* under a Council Round and have the system list all the grants under *Human Concerns*. Group members said that with this functionality, the *At-A-Glance* page would allow users to work solely off this page without ever having to visit the *Portfolio* pages themselves. Chanath said that this approach seems to remove the necessity of the individual *Portfolio* pages. The group disagreed, suggesting that the *Portfolio* pages were still essential, but that an *At-A-Glance* page with hotlinks to all required information would provide users with an alternative means of accessing their data and working with system. Not all users think and work alike. Chanath said that this may prove difficult, particularly for the next release. However, he will start investigating the feasibility of such a request.

- Consider featuring the *At-A-Glance* page as the defaulted page for each Portfolio “tab.” In other words, when users click on the *My Portfolio* tab, users will be presented with the *At-A-Glance* page. Chanath asked if providing too many links to the *At-A-Glance* page would make the system even more confusing. The group disagreed, suggesting that Program staff needs different information at different points in the grant process; as such, the system needs to be flexible enough to access information in different ways.
- Allow users to view the *At-A-Glance* page in another PO’s portfolio.

Chanath said that he will work, first and foremost, on linking the headers on the *At-A-Glance* page to the respective, corresponding pages in the *Portfolio*. This will be a huge improvement, the group agreed, to the PGM system. If anything, the *At-A-Glance* page offers Program staff a useful report to monitor activity. Chanath said that the first “go” at an *At-A-Glance* page will be released in five months; however, this is only an estimate.

Chanath will then try to get an estimate on how long it will take to implement hotlinks on the page. He will update the group at the next meeting.

Finally, Chanath encouraged group members to forward him any additional feedback regarding the *At-A-Glance* page.

**Action:** (Chanath Ratnanather) Include requirement to link headers on the *At-A-Glance* page to the respective pages in the *Portfolio* itself.

**Action:** (Chanath Ratnanather) Investigate the possibility of including hotlinks on the *At-A-Glance* page; obtain an estimate of time and feasibility; update ePUG group at the next meeting.

**Action:** (All) Email Chanath Ratnanather any additional content ideas or suggestions for the *At-A-Glance* page.

## **New User Settings/Preference Pages**

Several months ago, the group had requested the ability to set user settings and preferences on each *Portfolio* page. In response to this request, Chanath presented the group with a sample user setting/preference page for the *My Pre-Council* page (see *Slide # 18*):

[http://era.nih.gov/docs/ePUG\\_Presentation\\_10-13-04.pdf](http://era.nih.gov/docs/ePUG_Presentation_10-13-04.pdf).

After presenting the example, the group provided the following feedback:

- *Do users have the ability to “hide” a particular grant?*—The group felt that being able to “hide” a grant from time to time would greatly reduce “clutter.” Chanath said that “hiding” a grant would be possible, but such a requirement may pull away from other more important requirements at this time. However, he agreed to investigate the matter.

**Action:** (Chanath Ratnanather) Investigate the possibility of granting PGM users the ability to “hide” individual grants in the *Portfolio*.

- *Do users have the ability to set how many PCCs they’d like to query?*—Chiiko Asanuma said this functionality would greatly assist her IC. The absence of this feature is the sole reason why NIMH is not currently using PGM. Chanath said that this functionality is not feasible at this time, but that there are workarounds in the system to achieve the same results. The multiple filters in the new “preferences” for each page will hide grants by category, though not individual records.

## **Population Tracking Update**

Carlos distributed a handout containing a sample of the new Population Tracking Snapshot. This snapshot will be featured in the Grant Folder for only those grants that will be tracked in the population tracking module. This feature should be available this week in the Population Module and subsequently in the Grant folders of the various business areas.

## **Conversion of eRA Client-Server Applications to J2EE**

Janna announced that eRA is converting all client-server applications to J2EE to ensure that all eRA modules and applications are uniformly web-based. The client-server applications will not be shutdown until the community has adequately adjusted to the new J2EE look and feel of the modules/applications. The new J2EE modules are only the first step in a complete redesign of the client-server modules. The Program Module is already a J2EE application.