



## GM Lead Users Group

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**Date:** Wednesday, January 11, 2006  
**Time:** 9:00a.m. – 11:00a.m.  
**Location:** 6101 Executive Building, 2<sup>nd</sup> Floor Conference Room  
**Advocates:** Michael Loewe and Pamela Mayer  
**Chair:** Eddie Myrbeck  
**Next Meeting:** Wednesday, February 8, 9:00 a.m.-11:00 a.m. Atrium Building, 6101 Executive Blvd, 2<sup>nd</sup> Floor Conference Room.

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### Action Items

1. (Cathy Walker) Update the GM bug/fix/workaround list stored on-line.
2. (Pam Mayer) Explore options of breaking down the health insurance option on the Training Grant spreadsheet into two separate fields: Self and Family.
3. (Group) Determine a Co-Chair for the GM Lead User's Group.

### Documents

1. [GM Workbook Homepage](#)

### GM Redesign Changes / Updates

Cathy Walker went over the following changes and updates within the GM redesign:

- The problem where importing a spreadsheet would delete future year Commons Account Numbers (CAN) has been solved. This fix should also resolve the problem where Users receive the following error when the CANs and dollars appear to be correct: *Discrepancy on AWARD screen between CAN segment total costs and summary of support total costs error.*
- If a user changes a single CAN in the first year of a multi-year grant, he or she will now receive a message asking if they want to overwrite future year CANs with the new one. This logic will only take affect if the grant only has one CAN.
- The problems of updating certain human and animal and subject codes have been fixed.
- Users were finding an error when creating supplements on foreign grants. This problem has also been solved.
- The Misconduct in Science (MIS) radio buttons will be removed and the Manage page and will display the MIS expiration date instead. The same business logic will apply; that is, if there is no date, the business rules will allow award, if the date has expired they will not.

- When an individual enters his or her user name on the Login page, the entered name will no longer appear in upper case.
- The eRA continues to work with Oracle on the deadlocking and container crashing problems within the GM Redesign. While these problems concern Oracle software, changes can be made to the eRA framework and GM code to minimize their effects. In addition, Users should wait for one action to complete before they select a new one. This minimizes the deadlocking and container crashing problems until a permanent fix can be found by Oracle. After recently discussing the importance of this issue with Oracle management, some resolution should be found within a couple of weeks. Cathy will keep the group informed with new information about these issues.
- As Testing is a critical step before releasing a program into production, Cathy asked that members of the group step forward to test system changes. The group was reminded that Testing does not take long, but is a great service to the GM community.
- Cathy compiled usage stats of GM Redesign and presented them to the group. The National Institute of General Medical Sciences (NIGMS) and the National Institute of Neurological Disorders and Stroke (NINDS) top the list with 80% or more logins on the newer system. With fewer than 50% logins are the National Institute of Arthritis and Musculoskeletal and Skin Diseases (NIAMS), the National Institute of Drug Abuse (NIDA), the National Library of Medicine (NLM), the National Institute of Deafness and other Communication Disorders (NIDCD) and the Agency for Healthcare Research and Quality (AHRQ). These ICs still predominantly use Client Server. Lead Users should continue to reinforce the need to switch to Redesign.
- Cathy announced that, later this Fiscal Year, subproject data can be uploaded into Impact II.

## User-Reported Issues

The following is a list of issues reported by Users. The group was reminded that Users should continue to contact the Helpdesk for individual errors. Repeated instances of the below issues or new errors affecting use of the system should be reported to Cathy Walker. The known bug/fix/workaround list will be brought up to date shortly:

- Concurrent use of Grants Management and Institute Center Operations (ICO) slow each other down. The reason of this slowdown is not yet entirely understood.
- Some users report slower or faster run times on various machines within their branch. In the future, Cathy will ask for more detailed reporting from the group. Currently it is most important for eRA project staff to continue working on fixes to the module.
- The group mentioned the known bug that allows Users to view and print a Notice of Grant Award (NGA) when the business rules contain errors. This bug will be fixed in a future release. When a Grant Management Officer (GMO) sees the pop-up asking to print the NGA, they think the award was released; however, this is not the case. The status code must be changed to *Award Prepared – Not Funded* to ensure release on new

awards, or the User must make sure that the Release button is grayed out after a release on revisions.

- There are rare cases where released awards don't actually get released or encumbered. Lead Users from NIGMS, the National Cancer Institute (NCI) and the National Institute of Dental and Craniofacial Research (NIDCR) reported seeing this. Some of these cases were user error, but any future instances should be sent to Cathy.
- Group members reported "Animal Assurance Invalid" pop-ups on the Research Subjects. This issue was thought to have been remedied in the December release. Entering the assurance again at a later date does not result in the pop-up. Users were told to send reports of this to Cathy.
- Reports of having Works in Progress (WIP) deleted after importing a spreadsheet appear to be isolated and rare. The same was said for grayed-out Accept buttons after importing a spreadsheet.
- GM's hitlist was said to sometimes contain different information than what was on the Manage page. For instance, a record might show as WIP = N on the hitlist, even though the record is WIP = Y.

## **GM Workbook – New Features**

Pam Mayer stated that even though there are new functionalities and an updated appearance of GM Workbook spreadsheets, the overall feel is the same. She noted that even the menu page has received updates, including a more streamlined appearance (many buttons have been removed) and clearer notification that the workbook is an NIH functionality. Group members were encouraged to download the Complete GM Workbook Package, which will allow Users to test these spreadsheets at their own ICs. This package can be found at the following web address: <http://apps.nhlbi.nih.gov/gmworkbook/installation-downloading.asp>.

There is a type 5 spreadsheet that automatically incorporates the 2.35 cut to categorical grants. The developers of these spreadsheets are not yet comfortable in releasing these spreadsheets, since there have been significant changes made within them. Pam maintains, however, that the spreadsheets are already in use by NINDS. The group agreed with her that the best way to test the system and catch any existent bugs is to have Users play with it. Users are able to choose where to store their text files. The group was also reminded by Pam that the Import function to IMPAC II does work.

She then led the group in a visual, working demonstration of the Fellowship, Training Grant and Type-5 Categorical Spreadsheets. While the official User Guide and walkthroughs are available at the GM Workbook website (<http://apps.nhlbi.nih.gov/gmworkbook/default.asp>), she made the following notes:

### ***Fellowship Spreadsheet***

- Pam pointed out the 7-step instructions viewable on the spreadsheet, noting that they can be hidden and that Users can choose whether or not to print them out with the spreadsheet.

- The Institutional Allowance field's truncation is based on an exact number of months. However, Users may edit this and most other fields manually to allow for individual IC needs.
- The Fellowship spreadsheet can be imported into IMPAC II.

### ***Training Grant Spreadsheet***

- Information in the header portion of the spreadsheet must be correctly entered to ensure that the resultant data on the spreadsheet is accurate.
- There is no designation between Self and Family health insurance, so there is only one field for this area. These must be averaged together before entering them into the field. Pam will look into breaking this down into two fields for more accurate results.

**Action: (Pam Mayer) Explore options of breaking down the health insurance option on the Training Grant spreadsheet into two separate fields: Self and Family.**

- The Training Grant Spreadsheet can be imported into IMPAC II.

### ***Type-5 Categorical Spreadsheet (with built in 2.35 reduction)***

- This is a more condensed version of the "RPG" spreadsheet.
- The user guide does not cover this type of spreadsheet yet since it is not in production. It will hopefully be up soon so that Users can play with it.
- The Categorical (and Modular) Spreadsheets can be imported into IMPAC II.

Pam reminded the group that anyone working with grants or interested in the GM Workbook is more than welcome to come to the meetings. Many representatives from the ICs are usually present. They are looking for a new place for this meeting, which meets the first Thursday of every month at 10:00a.m. All information, including meeting times, places and minutes are posted on the GM Workbook website.

## **Table Talk**

Eddie asked the group to respond via e-mail whether their I/C uses a shadow system to assign PCCs. He also mentioned that they still need to establish a Co-Chair for the GM Lead User's Group. He assured group members that it is not a time-consuming position and invited them to think about taking up the position.

**Action: (Group) Determine a Co-Chair for the GM Lead User's Group.**