



## GM Lead Users Group

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**Date:** Wednesday, February 8, 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  
**Chairs:** Eddie Myrbeck and Pamela Mayer  
**Next Meeting:** Wednesday, March 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, Michael Martin) Create a checkbox on the Manage Page allowing the user to contact a desired individual within the business office.
2. (Cathy Walker) Look into allowing users to preview NGAs after they have been released.
3. (Cathy Walker) Explore reasons why the GM Redesign system has been slow recently.

### New Release of GM Redesign

*Cathy Walker*

Cathy led the group in a demonstration of updates to be made to the Grants Management Redesign. She specifically went over the following enhancements and other changes to be made to the Search Grant Page, Manage Page, Checklist Page, Award page, and CAN (Commons Account Number) page:

#### *Search Page*

- The name and number within the status should be flipped, so that the status name (example “To be Paid – 35”) comes first. The number might fall off in some cases, being at the end, but the group agreed that searching in this way would be easier. This is an easily-made change.
- Options for a user-set attention flag containing a date are currently being explored. This ability will most likely be associated as a user option on the GM Comments section. This capability will provide the user with email notification letting them know that there is a new comment. The text of the email will contain the exact wording of the comment and the grant number, while the subject will read “Comment Follow-Up.”
- The current size of the GM Comments field is 2,000 characters (or about half a page), but it can be doubled if necessary. The group did not see any reason to increase the allowed character amount for this field.
- The GM Comments section now shows historical notes, which contain previous year grant information. These historical notes will appear in the Grant Folder on the prior year’s Award Worksheet Report.

- The “Update” button, which is meant to save any changes in the in the Comments field, will be changed to “Save.”

### ***Manage Page***

- The Award Worksheet Report (AWR) will be added to the header of the page, so that users can print it from any page. This will exist as an AWR hyperlink next to the Grant Folder icon.
- The Joint Funding File (JFF) will now display either the Co-fund or the CAN. If there is no CAN, then this field will be blank.
- Users have requested that the business office email address be shown on the Manage Page. This address is not always associated with an individual person, so Cathy and Michael Martin will look into making a checkbox allowing the user to contact the desired individual within a given business office, such as the Signing Official (SO).

**Action: (Cathy Walker, Michael Martin) Create a checkbox on the Manage Page allowing the user to contact a desired individual within the business office.**

- It is now possible to edit PI information, but this may allow users to change the PI name completely, which can cause an error. Since this function is still important in the event of a necessary edit, the “Edit PI” link label will now be changed to “Edit Current PI Information.”
- For the upcoming summer release, GM will accommodate Multi PIs and the Grant Folder will display them.

### ***Checklist Page***

- In the Checklist “Comments” section, the “Edit” link will be changed to the first few characters of the actual comment. This capability will be available for the next release.

### ***Research Subject Page / Term Page***

- There are no changes on these pages.

### ***Addresses Page***

- When clicking the “Delete WIP” button, the system will now prompt the reader with the following message: “Are you sure you want to delete whip?”

### ***Award Page***

- The Fiscal year (FY), Budget Start/End dates and Project Start/End dates will all be added as a Read Only item to the header so that it will carry over to all pages.
- Users are reminded to save on the release page when previewing and releasing a Notice of Grant Award (NGA).
- Users have complained that it is impossible to preview NGAs after submission. Cathy stated that she will look into making this an exception to the “un-sign-off rule.”

**Action: (Cathy Walker) Look into allowing users to preview NGAs after they have been released.**

- In the expanded search, there will now be a box to choose multiple activity codes and application types. Users will also be able to track multiple (up to 5) applications.
- **Sub-project Import** – Provided the subprojects have already been created, the spreadsheet will create the subprojects based on the subproject ID in IMPAC. Now when the competitive segment is imported, subproject data will also be imported. There will be a new section on the ‘Award’ page above direct costs that shows all of the projects imported in the text file. This list includes parent grants. To change information, users will have to import the information again, since the shown dollars are display-only. The spreadsheet will create sub-projects, provided they exist. Permanent persons will not be imported back. A large part of making this system work is to ensure that the information used is correct. Once the award has been released with the subproject data, the date will be marked awarded and IC approved. Users can re-import the parent data, but sub-project data cannot be reimported on a revision. The group agreed, however, that changing the dollar amounts is an important capability; this can be done within the parent tasks.

#### ***CAN Page***

- All of the budget periods can be viewed down the screen, and all associated CANs with them; these items collapse, but it is not the default view. This is the same functionality as the ClientServer version, but more user-friendly.
- The CFDA field will be on the CAN page.
- The AWR is currently manually running in the Grant Folder; however, this process will be automatic soon.

#### ***General GM Redesign Issues***

- The bug that caused incorrect dollar amounts to be released on NGAs has been fixed. This was not a problem within the redesign, but with ATRS.
- Client/Server’s final shutdown will take place on February 21.
- The GM system has been slow lately. Cathy will look into this issue and get back to the group.

#### **Action: (Cathy Walker) Explore reasons why the GM Redesign system has been slow recently.**

- In order to alleviate deadlocking issues, users should make sure that they are logged out.
- The “My Events” section is taking a very long time to load right now. However, this will automatically be apart of the login page under OneView. This page will no longer exist after the next release.
- **Time Table for Release Schedule** – The above changes, as well as GM being associated with OneView will occur by April. The Multi PI functionality will be ready by July. The next big release is slated for November.
- Sub-project data will be able to be uploaded into IMPAC II.

## Table Talk

Eddie and the group discussed the following, general GM issues:

- **The J2EE web version of GM** is now up and running. The Client/Server version will be shut down in March.
- **The 416 Application Kit** has been getting very good reviews.
- **The new auto text feature for creating Terms and Conditions** is now available. Eddie is in talks with the Center for Information Technology (CIT) to begin training sessions on this capability.
- **The Electronic Competing Applications process** for R01s will begin on February 1, 2007.
- **Training Grant Spreadsheet** – Pam Mayer has updated the training grant spreadsheet to include 8 tuition sections (4 pre/4 post) with drop down menus to select the appropriate tuition type (family/self insurance.) After selecting an item from this menu, that heading populates in the breakdown below so that users will know where to place the correct information. Other than that change, the spreadsheet remains the same.
- **The Co-chair position** for the GM Users Group remains open. Eddie once again invited group members to volunteer for this post.