eRA Program Official Users Group (ePUG) Meeting Minutes

Date:	January 8, 2003
Time:	1:00–3:30 p.m.
Location:	EPN, Conference Room H
Advocate:	Bud Erickson
Chair:	Carlos Caban

Next Meeting: February 12, 2003, Wed., 1:00 p.m., EPN, Conference Room H

Actions Items

1. (Chanath Ratnanather, Cathy Walker) Meet with ECB/QVR analysts to discuss selecting and defaulting to council round for **Pending Council** page and providing default query criteria for all pages.

2. (All) Brainstorm about what information should be included in the *Grant Snapshot Report*. Bring ideas to next ePUG meeting.

Requests for Changes to My Portfolio Page

Cathy Walker and Chanath Ratnanather presented revised screen shots of the **My Portfolio** page, including a revised Grant Snapshot Report, for the March release. The screen shots can be viewed at (http://era.nih.gov/Docs/Screenshots_ePUG_meeting_01-08-03.pdf) and the Grant Snapshot Report can be viewed at (http://era.nih.gov/Docs/Grantsnapshot_ePUG_meeting_01-08-03.pdf). Chanath explained that the revision reflects the changes suggested at the December 16 meeting. Carlos Caban asked the group to review the revised screen shots and provide further suggestions. Chanath emphasized that all the changes requested by the group will not be implemented in time for the March release but will definitely be considered for, if not reflected in, the July and October releases.

The group requested the following changes:

All Pages

- Provide default query criteria for each page. Use status codes. The group advised looking at how ECB/QVR presents users with default query criteria. Chanath agreed to meet with Thor Fjellstedt's group to discuss ECB/QVR and to obtain any necessary technical documentation.

- Provide a default sort criteria above the hitlist. Allow users to customize and save default sort criteria.

- Remove the vertical lines separating the **Type, Activity Code, IC, Serial Number, Year, Start**, and **Subproject** columns under the **Grant Number** column.

- Provide an option to include/exclude the **SubProjects** column under the **Grant Number** column. The group agreed that Program Officials would rarely use this column. Therefore, this column should be optional.

- Include a leading zero in the column **Support Year**, and a dash between **Serial Number** and **Support Year**, under the **Grant Number** column.

- Select a single term to refer to the grant in process. Right now, the various pages alternate between the terms "Application," "Grant," and "Project." The group said that these are the traditional terms used at NIH; they refer to the grant at different stages in the grant process. However, the group also said that it may be less confusing to maintain a single term throughout the pages featured in **My Portfolio**.

- Provide users the option of adding or removing grants from their individual portfolio.

- Provide users the option of creating and customizing their own portfolios where they can choose and delete grants at will. The group agreed that Program Officials should have the capability to create and choose from two different portfolios for different functions and work tasks.

Pending SRG page

- Add a column labeled **Study Section** (concatenated). This column should feature all documents and information relevant to the study section (i.e. meeting location, agenda, review order report, meeting start date, the name of the study section, etc.). The group agreed that users need to be able to sort by SRG name and meeting date quickly.

- Eliminate the column **Agenda Report**.

- Relocate the hyperlink to the Agenda (originally featured under the column **Agenda Report**) to the column **SRG Mtg. Start.** Chanath reminded the group that the column **SRG Mtg. Start** already features a hyperlink to the *Review Order Report*. The group agreed that this column should feature both the *Review Order Report* and the *Meeting Agenda*, as it would prove more intuitive for users.

Pending Council Page

- Change the column labeled **Summary Statement Released** to **SS Released**.

- Provide a hyperlink from **SS Released** column to the *Summary Statement*.

- Add column labeled **IRG Recommendation** or **IRG Action.**

- Default list to the next council round. At the NIH, grants are cycled through three council rounds. Without defaulting to the next council round, grants will "fall through the cracks," and users will not be able to efficiently track the grant. The group also said that users should be able to select a council round. Thor said that ECB/QVR allows users to select a council round and recommended that Chanath speak with the ECB/QVR analysts and obtain necessary technical documentation.

Post Council Page

- Change the column labeled **Project Start Date** to **Requested Start Date**.

Grant Snapshot Report

- Redesign *Grant Snapshot Report* so that users can select sections of interest. The group agreed that the current format of the report, where users are presented with a long list of information, is not effective and is difficult to read. Also, the group said there may be

information missing in the report that should be included. Carlos Caban asked the group to consider what information should be added.

Action: (Chanath Ratnanather, Cathy Walker) Meet with ECB/QVR analysts to discuss selecting and defaulting to council round and providing default query criteria.

Action: (All) Brainstorm about what information should be included in the *Grant Snapshot Report*. Bring ideas to next ePUG meeting.

Attendees

Armistead, Allyson (OCO)	Fay, Rob (OD)	Nichols, Paul (NINDS)
Asanuma, Chiiko (NIMH)	Finkelstein, David (NIA)	Ratnanather, Chanath (OD)
Caban, Carlos (OER)	Fisher, Richard (NEI)	Sorensen, Roger (NIAAA)
Cole, John S. (NCI)	Fjellstedt, Thor (OER)	Swain, Amy (NCRR)
Duncan, Rory (NIAID)	Lederhendler, Israel (NIMH)	Walker, Cathy (OD)
Erickson, Bud (NCI)	Musson, Bob (NHLBI)	