eRA Program Official Users Group (ePUG) Meeting Minutes

Date: March 12, 2003
Time: 1:00–3:30 p.m.
Location: Rockledge 1, 3502
Advocates: Bud Erickson and Carlos Caban

Next Meeting: April 9, 2003, Wed., 1:00 p.m., Rockledge 1, Rm. 3502

Actions Items

1. (Chanath Ratnanather) Investigate the purpose of the "Add CRISP approved subprojects" filter parameter requirement.

2. (Chanath Ratnanather) Investigate QVR's council filter, specifically its logic for handling council dates outside the January, May, August, and October council rounds.

3. (Chanath Ratnanather, Carlos Caban, Bud Erickson) Determine the time requirements for the FY filter on the Post-Award page; determine how far back in time the FY filter should permit.

4. (All) Email Chanath suggestions for the user-interface design of the Program Module hitlist and ideas for columns to feature in the Withdrawn/Other page.

Announcements

Additional FY 2003 Funds—Bud Erickson announced that the Board of Governors has granted the eRA Project Team additional funds for FY 2003. This unexpected increase in money will allow the eRA Official Programs Users Group (ePUG) to advance quickly on the development of the Program Module.

Thor Fjellstedt's Retirement—Carlos Caban explained that Thor Fjellstedt, Advocate of ECB/QVR, is retiring at the end of March. Thor will serve as a consultant to the CIT. Carlos hopes to establish Thor as a consultant to the Program Module as well so that he can continue to advise the ePUG on the development of the Program Module. Thor's input would help ensure that the Program Module is as intuitive and user-friendly as QVR/ECB—a system that has been widely popular in the NIH community.

*eRA Symposium—*Carlos reminded the group that the eRA Symposium is on April 30. He will provide additional details later.

March Deployment

Chanath Ratnanather reminded the group that the first version of the Program Module will be released at the end of March. The version will not be advertised to the entire NIH community, but only to ePUG. He will provide additional details at a later point in time.

Program Module Update

Chanath and Cathy Walker presented an overview of the Program Module:

Program Module Presentation: http://era.nih.gov/Docs/ProgramModule_e-PUG_03-12-03.pdf

They highlighted all of the features of the Program Module that have been formally requested by ePUG (*Slide #3*), discussed the July requirements (*Slide #4*), and presented revised screen shots of the Program Module scheduled for the July release (*Slide #6–#10*). Chanath explained that the screen shots reflect the changes suggested at the February 12 meeting. He asked the group to review them and provide further suggestions.

The group made the following requests:

All Pages

- Reconsider "Add CRISP approved subprojects" as a filter parameter. The group found the word "approved" confusing, wondering if it indicated "funded" subprojects. The group was unsure at what point in the grant process the subproject information is entered. Chanath explained that the "Add CRISP approved subprojects" was a requirement approved internally; however, he agreed to investigate the requirement further.

- Change the word "Add" to the word "Include" for the "Add Duals" and "Add all subprojects" filter parameters. The group argued that the word "include" would be more intuitive to users who are trying to view their assigned duals and subprojects. "Add" is confusing because it suggests that another dual or subproject not assigned to the user will be added.

- Indicate to users where a grant was added. That is, when a grant is added (included) to a portfolio, the system should indicate to which portfolio the grant was added.

- Allow users to save specific user-preferred sort lists on each page of the Program Module. Since the Program Module has six lists, the user needs six custom sorts.

- Investigate council dates. Right now, the Program Module provides January, May, August, and October councils in the filter pick list. However, some ICs have council dates outside the January, May, August, and October council rounds (e.g. 2002/03). The group asked how the Program Module's council filter will work in this particular scenario. They recommended checking QVR to see how it handles this scenario.

- Investigate the difference between "dual funded" and "dual interest" and determine if the Program Module dual filters are implementing dual funded or dual interest.

- Since we are unable to provide hierarchical portfolios, add PCC as a filtering mechanism to each page. If PCC is entered, the query should include all grants associated with the PCC, not just those assigned to the logged-in PO. Limit the search to the IC of the logged-in user.

- Expand attention flag to include Special Interest Intent. Need further clarification.

Post Council Page

- Sort on the Program Approval column (signed/unsigned).

Pre-Award Page

- Change Pre-Award tab/title to "Pending Type 5s" or "Non-competing Type 5s." The group thought that "Non-competing Type 5s" label would be more effective.

- Sort on the Program Approval column (signed/unsigned).

Post-Award Page

- Display only the '00 date for the Council Date on this page.

- Reconsider the business rule "Only the current, future, and two past FYS, and associated council dates will be made available." The group felt that this was not an adequate statement for this page. It was agreed that Program Officials need to view information as far back as the last competing grant. Chanath asked the group to determine the time requirements for the FY filter, specifically how far back in time the FY filter should permit.

PO Notes

- Delete requirement to select and save PO Notes from users' local machine. Instead provide a mechanism to combine/append existing PO Notes and display a grant's historical notes to the user. This can be done using a HTML report.

- Provide a capability to search PO Notes (not a mandatory July requirement, but one to consider for the future).

- Provide a textual warning to the user above the PO notes as follows: "Notes entered here are part of the official grant file."

Finally, Chanath asked the group to brainstorm about—

- Columns needed for the **Withdrawn/Other Page** (*Slide #8*). Chanath asked that the group email him with further suggestions.

- The user interface for the Program Module, specifically whether the hitlist should present information in multi-line rows in a list with multiple values in a column (see *Slide #16–17*) or in multiple views on the right-hand side of the hitlist while the left-hand side remains constant.

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Action: (All) Email Chanath suggestions for the user-interface design of the Program Module hitlist and ideas for columns to feature in the Withdrawn/Other page.

Attendees

Armistead, Allyson (LTS)

Asanuma, Chiiko (NIMH)

Caban, Carlos (OER)

Duncan, Rory (NIAID)

Erickson, Bud (NCI)

Fay, Robert (NIDDK)

Fisher, Richard (NEI)

Holmes, Maggie (NCI)

Lederhendler, Israel (NIMH)

Martin, Carol (NHGRI)

Musson, Bob (NHLBI)

Nichols, Paul (NINDS)

O'Neill, Blanche (NIAID)

Seranno, Jose (NIDDK)

Swain, Amy (NCRR)

Tabor, Derrich

Walker, Cathy (OD)