



eRA Program Official Users Group (ePUG)

Date: June 11, 2003
Time: 1:00–3:00 p.m.
Location: Rockledge 1, Room 3502
Advocates: Carlos Caban, Israel Lederhendler

Next Meeting: June 25, 2003, Wed., 1:00 p.m., Rockledge 1, Rm 3502

Actions Items

1. (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Discuss timeline for advertising the Program Module pilot URL to the NIH Program community.
2. (Chanath Ratnanather) Bring status code descriptions to next ePUG meeting and include as a discussion item on the agenda.
3. (Chanath Ratnanather, Carlos Caban) Include discussion of columns on the *Search* page hitlist on next meeting agenda.
4. (Chanath Ratnanather) Confirm that Program Assistants/Analysts can use a Program Assistant role to access PGM.
5. (All) Invite Program Analysts/Assistants to attend ePUG meetings.
6. (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Meet with IC User Administrators to discuss cluster solution for Program Module.

Announcements

Program Module Outreach—Carlos Caban, Israel Lederhendler, and Chanath Ratnanather presented the Program Module (PGM) at the National Heart, Blood, and Lung Institute (NHBLI) last month. The presentation was similar to the one given at the April 30 Symposium. Carlos plans to present the PGM to the National Cancer Institute (NCI) this Friday and to the National Institute of Neurological Disorders (NINDS) on June 20.

URL for Program Module Pilot—The new URL for the PGM pilot has been fixed. The old URL for the PGM pilot is no longer in effect and does not redirect users to the new URL. The group asked Carlos if it was appropriate to start advertising the URL to the NIH Program community. Carlos said that he will discuss this issue further with Chanath.

Amy Burns—Carlos introduced Amy Burns, a new member of the Communications and Outreach Branch (COB). Amy will help promote the PGM to the Program community. To learn more about the Program Module, Amy will be a regular attendee of the ePUG meetings.

October Requirements Deadline—The requirements for the October release are due at the end of June.

Action: (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Discuss timeline for advertising the Program Module pilot URL to the NIH Program community.

Overall Suggestions for the Program Module

The group recommended the following changes for the Program Module:

- ❑ Add signatures on reports in addition to assignments (GMO, PO, etc.).
- ❑ Reconsider columns on the *Search* page hitlist. Chanath said that he would like to discuss this topic at the next ePUG meeting.
- ❑ Consider adding the Notice of Grant Award (NGA) date on *Post Award/Active Grants* page.

Finally, the group asked if Chanath could bring the status code descriptions to every ePUG meeting. He agreed to bring them to the next meeting.

Action: (Chanath Ratnanather) Bring status code descriptions to next ePUG meeting and include as a discussion item on the agenda.

Action: (Chanath Ratnanather) Include discussion of columns on the *Search* page hitlist on next meeting agenda.

Program Assistant/Analyst Role in PGM

After the July release, ICs and Program Officials will be able to assign individuals to either the Program Official or Program Analyst/Assistant role using the eRA User Administration module.

Although the Program Assistant/Analyst role will be available in July, the Program Assistants/Analysts are currently unable to log into and access the Program Module (PGM). Currently, to access PGM, users must have an assigned portfolio of grants and an IMPAC II Program Official role. Program Assistants/Analysts do not have an assigned portfolio of grants and therefore cannot access the PGM.

Chanath emphasized the importance of resolving this access problem. He requested that a few Program Assistants/Analysts regularly attend ePUG meetings so that he can understand how Program Assistants/Analysts are accessing and logging into their current IC-extension systems. He said that many Program Assistants/Analysts seem to use a Program Official role, but he is unsure and needs confirmation. Everyone agreed to invite Program Assistants/Analysts to the next ePUG meeting.

Action: (Chanath Ratnanather) Confirm that Program Assistants/Analysts can use a Program Assistant role to access PGM.

Action: (All) Invite Program Analysts/Assistants to attend ePUG meetings.

Hierarchies and Delegation in PGM

Chanath said that the Program Module needs to—

- ❑ Allow Program Assistants/Analysts to log in and view the portfolios of all the Program Directors they work for.

- ❑ Allow branch or supervisory directors to view the portfolios of everyone who is working in their section.
- ❑ Allow delegation to a limited number of users as opposed to everyone within an IC.

Chanath explained that clustering would meet all of these requirements. He presented a series of slides (*Slides #4–10*) explaining the concept of clustering and how it would meet the needs of the Program Module: http://era.nih.gov/Docs/e-PUG_PGM_Mod_06-11-03.pdf.

The group agreed that clustering was the best possible solution. Members asked Chanath if it was possible for users to view the portfolios of not only peers in a cluster, but of any Program Official in eRA. Chanath said that he could add this capability.

Carol Martin commented that the only drawback to clustering is maintenance. However, Thor Fjellstedt argued that maintenance would be greatly reduced if the IC Administrators received in-depth training on how to avoid the creation of unnecessary hierarchical layers.

Israel suggested the possibility of assembling a focus group of IC Administrators to develop a few real-world scenarios using clustering. Chanath agreed that a focus group was a good idea but said that the group would have to meet before the October requirements deadline at the end of June.

Action: (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Meet with IC User Administrators to discuss cluster solution for Program Module.

Awarded Type 5s That Are Not Active

The group expressed concern about keeping “Awarded Type 5s That Are Not Active” on the *Post Award* page. They argued that these particular Type 5s may “get lost in the cracks” of the Program Module until they become active.

Chanath recommended moving these particular Type 5s to the *Pending Type 5s* page and providing users the option to manually “sort” them via a hidden column sort. With the option to sort “Awarded Type 5s That Are Not Active,” it will be less likely to lose these grants in the cycle of the Program Module.

Finally, since users mainly use the *Post Award* page to view active grants, Chanath suggested renaming the *Post Award* page to the *Active Grants* page. The group agreed to this revision.

Active Grants Page

Renaming the *Post Award* page to the *Active Grants* page will require the relocation of several grants that are currently present in the *Post Award* page, but are not active. These grants include “Terminated” and “Cancelled.” Chanath proposed moving these grants to the *Withdrawn/Other* page. “Award Prepared Not Funded” grants will continue to remain on the *Active Grants* page. The group agreed with these suggestions.

Grants That Don’t Go to Council

Chanath asked the group where Fellowships, Minority Supplements, and grants with under \$50,000 direct costs per year should be displayed. The group recommended leaving these grants in the *Pre-Council* and *Post-Council* pages.

PI History Reports in Grant Folder

The original Grant Folder contained two reports: the brief and the detailed Principal Investigator (PI) history. The newest version of the Grant Folder does not contain these two reports and all requests to re-add them have been denied. Chanath asked the group if these reports are useful to the Program community. The group said that these reports are incredibly helpful and suggested the creation of a PI Folder for PI-related data that would be accessible from all modules. The group also agreed that it would be very helpful if users could click on a PI name anywhere in eRA and instantly view PI information, including phone, email, and a list of reports and documents. Chanath said that he would investigate these suggestions further.

Attendees

Armistead, Allyson (LTS)

Asanuma, Chiiko (NIMH)

Burns, Amy (LTS)

Caban, Carlos (OER)

Duncan, Rory (NIAID)

Finkelstein, David (NIA)

Fjellstedt, Thor (CIT)

Florance, Valerie (NLM)

Heath, Anne (NCI)

Martin, Carol (NHGRI)

Ratnanather, Chanath
(OD)

Sorensen, Roger (NIAAAA)

Swain, Amy (NCRR)

Tabor, Derrick (NIGMS)