

# Agenda for CWG Meeting September 18, 2002



1. eRA Project Status – John McGowan
2. Commons V 2.0
  - Status of development/deployment
    - Updated phased deployment plan
  - Review of V 2.0, Release 1 functionality
  - GUI Demo
  - e-Notification
3. X-Train Status
4. e-SNAP
  - Status of development/deployment
  - Screen Shots

# Agenda for CWG Meeting September 18, 2002



## 5. FSR

- Status of development/deployment
- Screen Shots

## 6. Reengineering of competitive application

- Outstanding issues
- Design/development priority

## 7. Other Issues

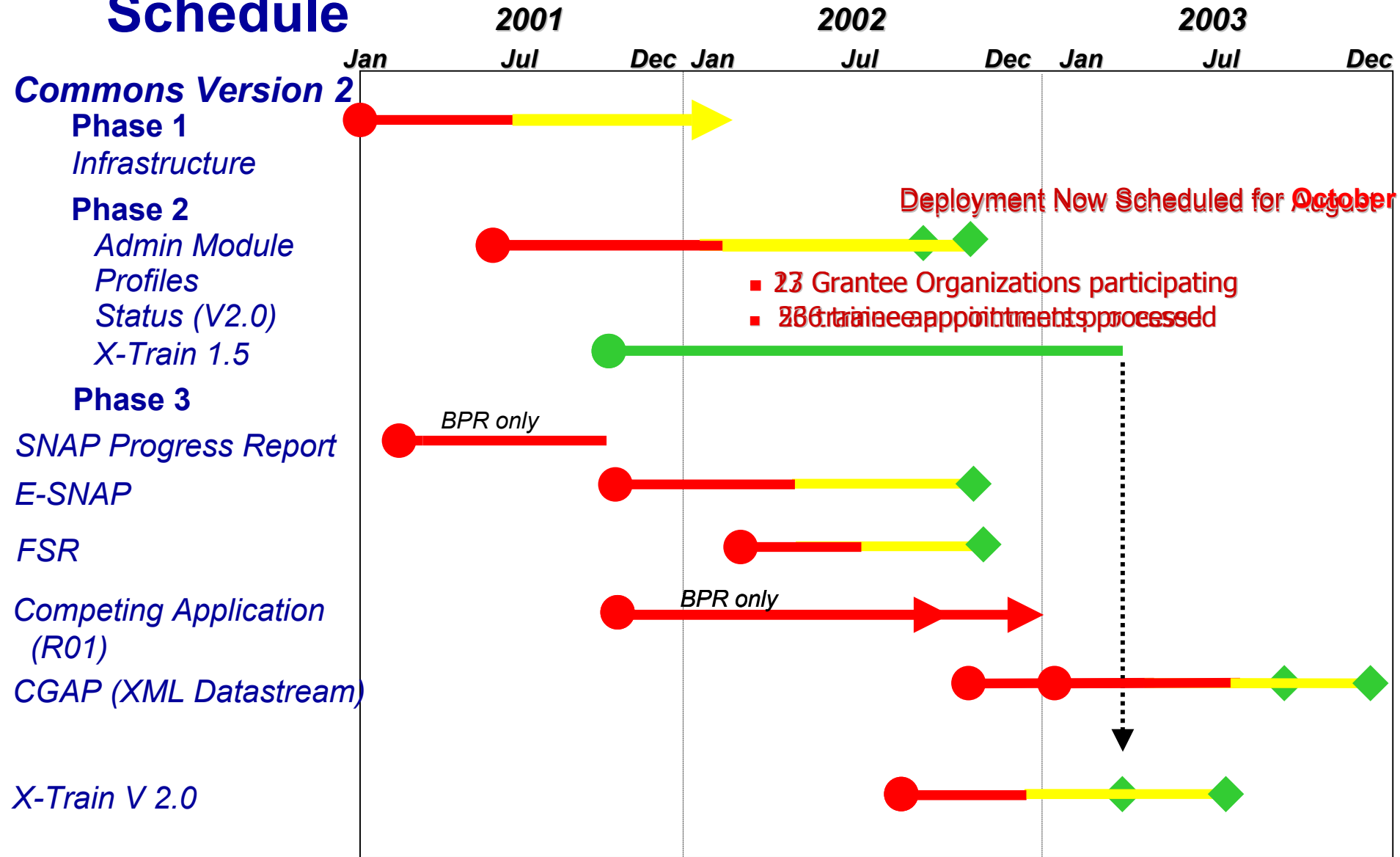
- SBIR RFA Awards
- New Business...

# Ready Reference Reminders



- eRA site
  - <http://era.nih.gov>
- Commons V 2.0 documentation site
  - <http://commons2.oer.od.nih.gov> (must use MSIE)
    - RUP References
    - Technical Use Cases
- Commons V 2.0 home page
  - <https://eracommons.oer.od.nih.gov/commons/>

# Commons Version 2.0 Implementation Schedule



Deployment Now Scheduled for October

23 Grantee Organizations participating

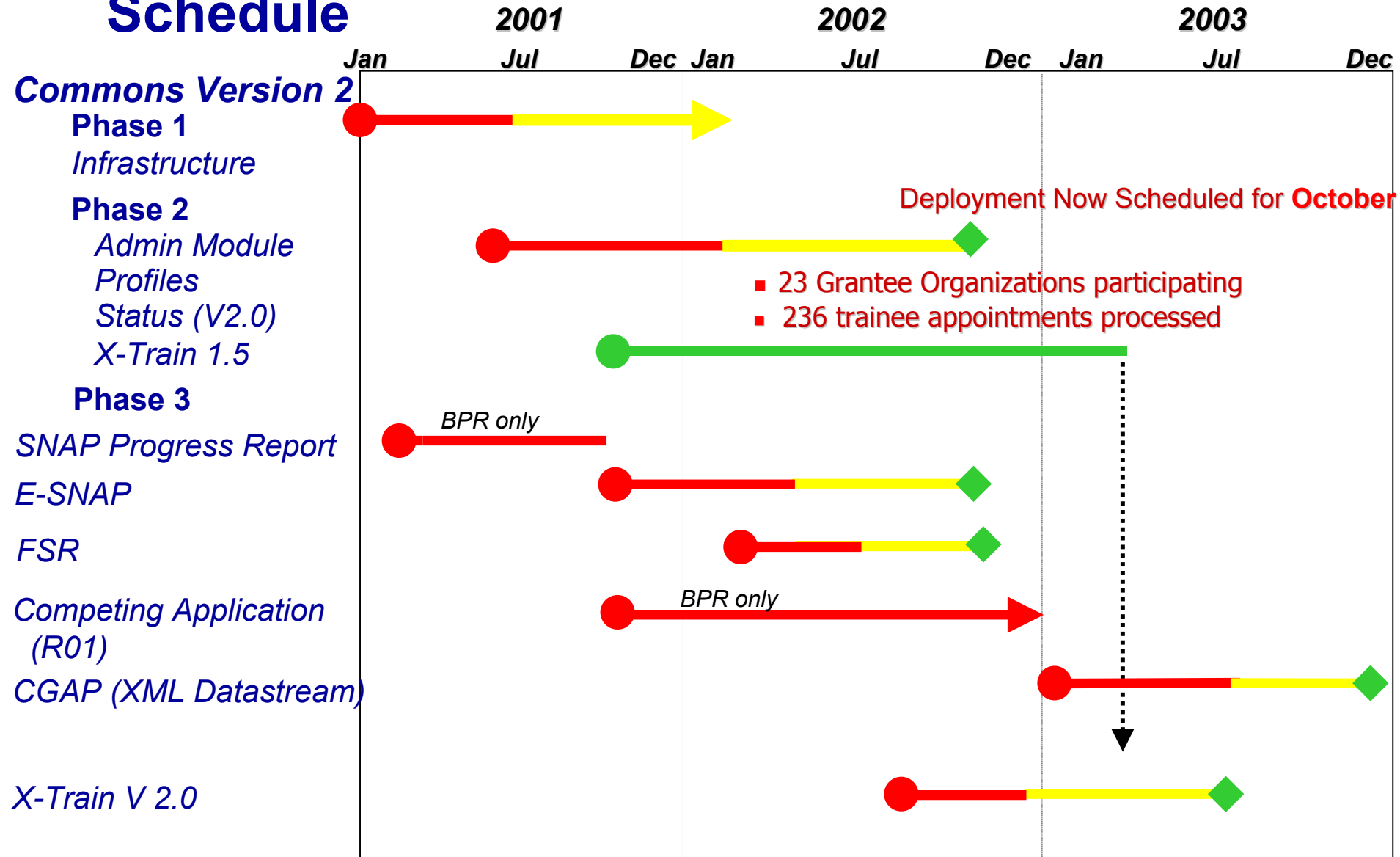
286 trainee appointments processed

Legend: Analysis\* — Development — Deployment —

Start ● Continuing ▶

\* Includes business process reengineering and design

# Commons Version 2.0 Implementation Schedule



■ 23 Grantee Organizations participating  
■ 236 trainee appointments processed

Legend: Analysis\* — Development — Deployment — Start ● Continuing ▲

\* Includes business process reengineering and design

# Commons V. 2.0 Deployment Details



- Stage 1 — 8/22/2002
  - Three external orgs in “Test ”
- Stage 2 — 9/18/2002
  - CWG in “Test ”
- Stage 3 — 10/14/2002
  - CWG in “Production”
- Stage 4 — 11/14/2002 (?)
  - All current orgs in “Production”

# Commons V 2.0 Functionality

## 1. New GUI

- UI being finalized
- Outstanding Issues
  - Use of Cascading Menus
  - Improve graphics
  - Consistency Bugs

## 2. Registration – authentication using IPF#

## 3. Accounts Administration –

- account creation – authentication with IMPAC II profiles
- account maintenance

## 4. IPF

- maintain general IPF information
- assurances/certifications
- full user-defined organizational hierarchy
- assignment of applications to the hierarchy

# Commons V 2.0 Functionality



5. PPF
  - create and maintain profile information
  - user-defined integration of organizational hierarchy within profile
6. Status
  - view status information
  - full contact information
  - links to rosters
  - Link to NGA
  - availability of pre-populated forms for renewals
7. Demo Facility
  - fully functional demo version of the system
8. Single Point of Ownership for PPF and IPF
9. e-Notification



# Commons Training (Soup to Nuts!)



1. On-line help and documentation
2. Computer-Based Training
3. WebEx Training
4. Regional Seminars/Association Meetings
5. On demand (for fee) on site training

# e-Notification Status (T-5 Notification)

## ■ Phase 1—OER Website

[http://era.nih.gov/userreports/pr\\_due.cfm](http://era.nih.gov/userreports/pr_due.cfm)

- Launched August 13, 2002. See Guide Notice OD-02-066
- Searches by IPF. (Includes companion query to search for an IPF)
- Results are listed by Due Date
- Now includes flag for grants entering their final year (LY\*)
- Several months of data is included
- New records added on/about the 30<sup>th</sup> of each month
- Records drop off the list as NIH staff indicate “received” in IMPAC II
- Collecting feedback for improvements

# e-Notification Status (cont.)

## ■ Phase II—NIH Commons

- Status V. 2.0 includes link to pre-populated face pages (PHS2590 & 416-9)
- IPF Registration includes new e-mail address for “push” notifications
- Actual T-5 “push” notification will be addressed after Commons V. 2.0 is fully deployed
- Working with the assumption that the e-mail notification will be the actual monthly list



# X-Train V1.5 Status



- 23 Grantee Organizations Participating
- 236 trainee appointments processed since Oct. 1, 2001
- Outstanding Issue
  - PI (PD) delegation & notification to minimize unauthorized submissions
    - To be implemented with Commons V. 2.0 Release 2 (tentatively November 2002)
- V 2.0 Deployment — mid FY2003 planned

# e-SNAP Release 1: Functionality



- Submission 45 days prior to anniversary
  - Paper submissions 60 days prior to anniversary
- No abstract updating
  - Single abstract submitted on competitive cycle unless scope changes
- Submission of Research Accomplishments
  - Distinct from progress report narrative
- Delegation of Submission to PI
  - Controlled by institution SO
- Reconfiguration of e-SNAP questions
  - Improved usability
- Presentation of Personnel Data Page
  - Summary information for planning purposes
- PPF, IPF, Routing Similar to V. 1.0

# e-SNAP Release 1: Deployment Plan



- Deployment — November
  - Stage 1 — Three grantee institutions in “Test ”
  - Stage 2 — CWG in “Test ”
  - Stage 3 — CWG in “Production”
  - Stage 4 — All Commons V. 1.0 registered institutions in “Production”
  - Stage 5 — Open production deployment

# Commons Logon for e-SNAP

Commons - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://washuu.oer.od.nih.gov:8080/index.jsp;jsessionid=f3dc2983472b4b538501f921776be628>

NATIONAL INSTITUTE OF HEALTH  
**eRA Commons**

Welcome admin1  
Institution: NATIONAL INSTITUTES OF HEALTH  
Authority: NCAA  
[Logout](#)

[Home](#) | [Administration](#) | [Institution Profile](#) | [Status](#) | [X-Train](#) | [Links](#) | [Help](#)

[Register Institution](#)

## Commons Home

**About the Commons**

- ▶ [Scope and Purpose](#)
- ▶ [Frequently Asked Questions](#)
- ▶ [Grantee Organization Registration](#)
- ▶ [ERA Contacts](#)

**System Notification**

1. Release 1.4.2 of version 1.4.1 has been released.
2. The communication interface

**What's New**  
NIH Commons Version 2.0 is now released. Version 2.0 is open to all institutions previously registered on the NIH Commons. All profile and account information that was provided by grantee institutions for registration on Commons Version 1.0 will remain unchanged and will be migrated to the Version 2.0 system. Institutions that are registered in Version 1.0 are asked to verify that institutional and professional profiles are up-to-date.




Version 2.0 will include a redesigned user interface with improved performance and Version 2.0 feature the following enhancements: Admin module for maintaining institutional profile information, Status module and integration with X-Train interface.

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Screen Rendered: 05/17/2002 03:27:10 EDT      Screen Id: COM0001

Done      Internet

Start    Conn...    User ...    CWG ...    Down...    Relea...    Com...    UI St...    Acro...    3:29 PM

# e-SNAP: Search for Single e-SNAP

 **eRA Commons**  Authority.  [printer friendly](#)

[Home](#) | [Links](#) | [Help](#)

## Manage e-SNAP

Grant Number:

PI Last Name:

Current Reviewer Last Name:

Status:

---

Select Grant Number link to manage the e-SNAP:

Grant Number	PI Name	Project Title	Due Date	Status
<a href="#">5 R01 AA867854-3</a>	Peter Parker	Study of Spider Web	09/21/2003	PI WIP
<a href="#">5 R01 AA123456-3</a>	Bud Weiser	Study of Use Cases	09/01/2002	PI WIP

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Screen Rendered: 09/06/2002 03:57:48 EDT Screen Id:



# e-SNAP: Menu for e-SNAP Preparation



eRA Commons



Institution:  
Authority:



[Home](#) | [Links](#) | [Help](#)

## e-SNAP Menu

**Grant Number:** 5 R01 AA12345

**Institution:** Budweiser University

**PI Name:** Bud Weiser

**Project Title:** Study of Use Cases

**Due Date:** 09/01/2002

**Current Reviewer:** Bean Counter

**Status:** AO WMP

Select Action:

[Edit Science](#)

[View e-SNAP Report](#)

[Edit Business](#)

[View Routing History](#)

[Route to Next Reviewer](#)

[Recall](#)

[Reject](#)

# e-SNAP: Organizational Information, AO and SO



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## eRA Commons



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Institution:  
Authority:



[Home](#) | [Links](#) | [Help](#)

### Organization

[Organization](#) | [Program Income](#) | [Performance Sites](#) | [Key Personnel](#) | [Questions](#)

Title of Project		Progress Report Period	
Study of Spider Web		Start: 12/22/2001	End: 12/22/2003
<b>Principal Investigator</b>  <b>PI Name:</b> Peter Parker  <b>Address:</b> Dr. Michael D. Slater Colorado State University Journalism and Technical Communication Fort Collins, CO 80523  <b>Phone:</b> 303-491-5465 <b>Fax:</b> 303-491-5463  <b>E-mail:</b> becker@colstate.edu  <b>SSN:</b> 343-324-2343 <b>DOB:</b> 2/12/1944  <b>Annual % Effort:</b> <input type="text"/> <b>Degrees:</b> MSCI,MBA		<b>Applicant Organization</b>  <b>Name:</b> Colorado State University <b>Address:</b> Colorado State University Journalism and Technical Communication Fort Collins, CO 80523  <b>EIN:</b> 1545676004A1 <b>Department:</b> Radiology <b>Division:</b> Insects	
<b>Administrative Official</b>  <b>Name:</b> <input type="text" value="John Smith"/> <input type="button" value="v"/> <b>Address:</b> Colorado State University Journalism and Technical Communication Fort Collins, CO 80523  <b>Phone:</b> 303-491-5465 <b>Fax:</b> 303-491-5463 <b>E-mail:</b> jsmith@colstate.edu		<b>Signing Official</b>  <b>Name:</b> <input type="text" value="Money Penny"/> <input type="button" value="v"/> <b>Phone:</b> 303-491-5465 <b>Fax:</b> 303-491-5463 <b>E-mail:</b> mpenny@colstate.edu	
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	

# e-SNAP: Submission of Admin. Information



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## eRA Commons



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### Key Personnel List

<a href="#">Organization</a>	<a href="#">Program Income</a>	<a href="#">Performance Sites</a>	<a href="#">Key Personnel</a>	<a href="#">Questions</a>
------------------------------	--------------------------------	-----------------------------------	-------------------------------	---------------------------

#### Personnel

Name	Degree(s)	Role(s)	Action
Peter Parker	MBA	AA;SO	<a href="#">Edit</a>   <a href="#">Delete</a>
John Smith	PHD	PI	<a href="#">Edit</a>   <a href="#">Delete</a>

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Screen Rendered: 09/06/2002 04:03:52 EDT

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# e-SNAP and Other Admin. Questions



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## e-SNAP Questions

### e-SNAP

Has there been a change in the other support of key personnel since the last reporting period?\*

No  Yes

If yes, please justify:

Will there be, in the next budget period, a significant change in the level of effort for key personnel from what was approved for this project?\*

No  Yes

If yes, please justify:

Is it anticipated that an estimated unobligated balance (including prior year carryover) will be greater than 25% of the current year's total Budget?\*

No  Yes

If yes, please justify:

### Human Subjects

Does the proposal involve human subjects?\*

No  Yes

Has the involvement of human subjects changed since the previous submission?\*

No  Yes

Is the research exempt? \*

No  Yes

If yes, Exemption Number:

Has phase III Clinical Trial\*

No  Yes

Full IRB Review?

Yes


Assurance No.: 345643544

Human Subject

Education:



# e-SNAP: Progress Report Upload, Pubs.

 [printer friendly](#)

[Home](#) | [Links](#) | [Help](#)

## Edit Science

**PI Name:** Jane Doe  
**Institution:** Budweiser University  
**Project Title:** Study of Use Cases


### Files


**Progress Report File:** [Upload](#) Uploaded


**Research Accomplishments File:** [Upload](#) Not Uploaded

### Publications

Associate with this e-SNAP	NLM Assession #	Citation Information
<input type="checkbox"/>	12345	citation number 1
<input checked="" type="checkbox"/>	34556	citation number 2
<input type="checkbox"/>	65464	citation number 3

 [printer friendly](#)

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## Upload File

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# e-SNAP: Routing



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## Route to Next Reviewer

### Next Reviewer

Reviewer Name	Roles
<input type="radio"/> John Smith	PI
<input type="radio"/> Jack Nicholson	AO

Comments:



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## View Routing History

### History List

Reviewer Name	Decision	Notification Sent	Decision Rendered
John Smith	Approve	2/23/2002 18:24:10	3/12/2002 17:24:10
Mary Jane	Reject	4/11/2002 18:24:10	4/21/2002 17:24:10

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# e-SNAP: PI Delegation



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## Delegate PI Access

You are delegating PI Access for: Jack Wrinkle

Current PI Delegates	Current Insitution Users
<input type="radio"/> John Smith	Jeff Gordan <input type="button" value="Delegate"/>
<input type="radio"/> Jenny Craig	
<input type="radio"/> James Jone	
<input type="button" value="Remove"/>	

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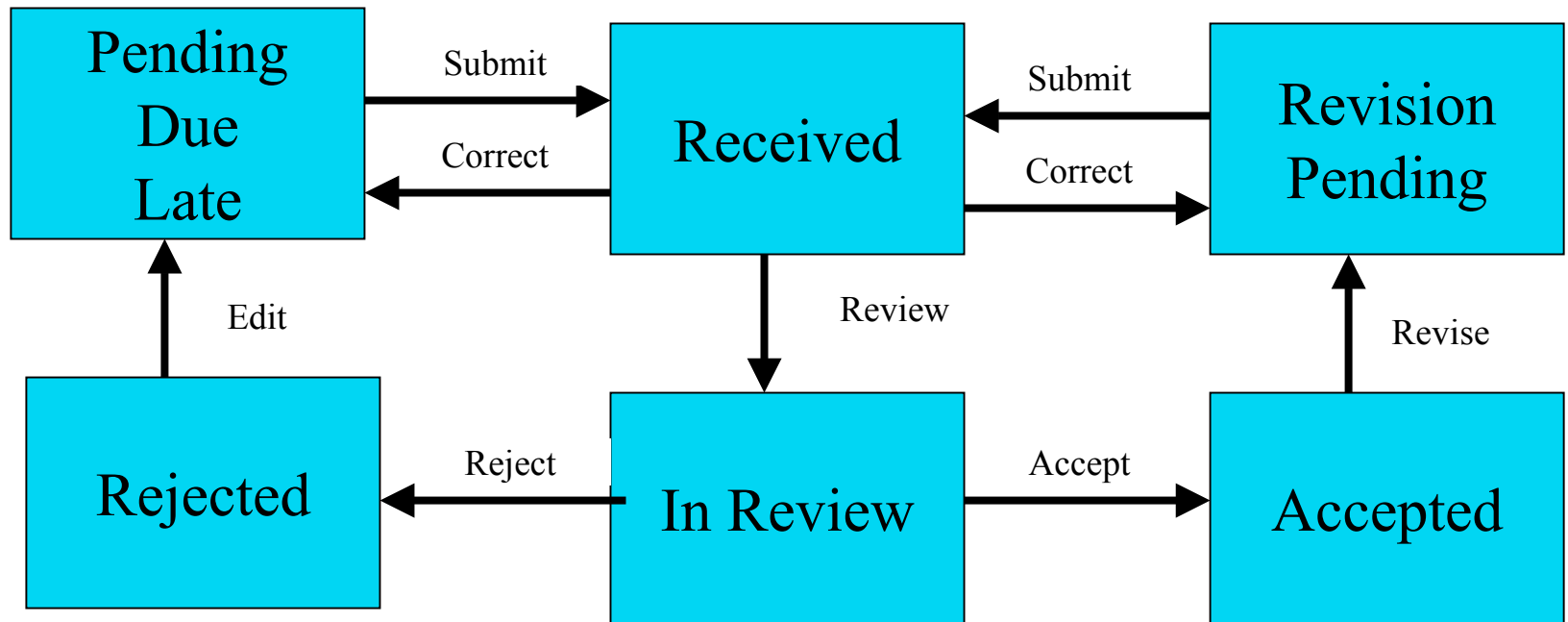
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Screen Id:



# FSR Workflow



# FSR Interface: Search for Single FSR



Search FSR - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print

Address C:\fsr\_screens\fsr\_screens\FSRSearchG.htm Go

Links Customize Links Free Hotmail Windows Windows Media

 NATIONAL INSTITUTES OF HEALTH  
eRA Commons 


Welcome: NIH  
Institution: NIH  
Authority: SO  
[Log-out](#)  [printer friendly](#)

## Financial Status Report Search

	T	ACT	IC	Serial#	Year	Suffix
Grant Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Org Name	<input type="text" value="Budweiser University"/>					
Due Date Range:	From (MM/DD/YYYY)	<input type="text"/>				
	To (MM/DD/YYYY)	<input type="text"/>				
EIN	<input type="text"/>					
Status	<input type="text" value="All"/>					

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Screen Rendered: 08/28/2002 09:23:42 EDT Screen Id: STA4010

Done Internet

Start  70 81° 4:16 PM

# FSR Interface: FSR Hit List

**FSR Search Results - Microsoft Internet Explorer**

File Edit View Favorites Tools Help OIT

← Back → Forward × Stop Home Search Favorites History [Print] [Mail] [Print] [Print]

Address [C:\fsr\\_screens\fsr\\_screens\FSRSearchResultsOne Institution.htm](C:\fsr_screens\fsr_screens\FSRSearchResultsOne Institution.htm) Go

Links [Customize Links](#) [Free Hotmail](#) [Windows](#) [Windows Media](#)

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**eRA Commons** Authority: SO  
[Log-out](#)  [printer friendly](#)

[FSR New Search](#)

## Financial Status Report Search Results

**Summary Totals**

Status	Total	Pending	Due	Late	Revision Pending	Received	In Review	Accepted
Count	5	1	1	0	0	1	1	1

Please click on the Grant Number to view all existing FSRs for the Grant

**1 - 5 out of 5 records** [Prev](#) [Next](#)

**Institution Name:** Budweiser University

Grant Number	Budget Start Date	Budget End Date	FSR Due Date	Latest FSR
<a href="#">1R01CA12345-04</a>	05/01/2001	06/15/2002	09/15/2002	In Review
<a href="#">2T41CA123456-02</a>	06/11/2000	07/11/2002	10/11/2002	Due
<a href="#">5F32GM00175-02</a>	05/03/2000	06/13/2002	09/13/2002	Accepted
<a href="#">2R05IA39827-01</a>	08/19/2001	08/18/2002	11/18/2002	Received
<a href="#">R02MH334354-01</a>	07/15/2001	07/14/2002	10/14/2002	Pending

Done Internet

Start [Taskbar icons] 4:19 PM

# FSR Interface: Menu for FSR Detail

FSR Details - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print Mail

Address C:\fsr\_screens\fsr\_screens\Grant existing FSRsG.htm Go

Links Customize Links Free Hotmail Windows Windows Media

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Welcome: NIH  
Institution: NIH  
Authority: SO

[Log-out](#)  printer friendly

[Back to Search Result](#) [FSR New Search](#)

## Financial Status Report - Details

### Grant Number 1R01CA12345-04

1 - 3 out of 3 records Prev 1 Next

Created Date	Status	Actions
09/01/2002	Due	<a href="#">View</a> <a href="#">Edit</a>
08/20/2002	Rejected	<a href="#">View</a>
07/02/2002	Rejected	<a href="#">View</a>

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Done Internet

Start [Taskbar Icons] 70 81° 4:21 PM

# FSR Interface: FSR Detail – View/Edit

FSR Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address Links **OUT**

[Back to Search Result](#) [FSR New Search](#)

## Financial Status Report

<b>1. Federal Agency and Organizational Element to Which Report is Submitted</b>		<b>2. Federal Grant or Other Identifying Number</b>	
NATIONAL CANCER INSTITUTE		1R01CA12345-04	
<b>3. Recipient Organization (Name and complete address, including ZIP code)</b>		<b>4. Employer Identification Number</b> 1246000376A3	
Budweiser University 1 Suds Blvd. St. Louis, MO 33333		<b>5. Recipient Account Number or Identifying Number</b> 417-14HY	
<b>6. Final Report</b>		<b>7. Basis</b>	
<input type="radio"/> Yes <input type="radio"/> No		<input type="radio"/> Cash <input type="radio"/> Accrual	
<b>8. Funding/Grant Period</b>		<b>9. Period Covered by this Report</b>	
<b>From</b> 04/01/1998	<b>To</b> 03/31/2002	<b>From</b> 07/01/2000	<b>To</b> 03/31/2002
<b>10. Transactions:</b>	<b>Previously Reported</b>	<b>This Period</b>	<b>Cumulative</b>
<b>a. Total outlays</b>	0	167,911.38	167,911.38
<b>b. Refunds, rebates, etc.</b>	0	0	0
<b>c. Program income used in accordance with the deduction alternative</b>	0	0	0
<b>d. Net outlays (Line a, less the sum of lines b and c)</b>	0	167,911.38	167,911.38
<b>Recipient's share of net outlay, consisting of:</b>			
<b>e. Third Party (In-kind) contributions.</b>	0	0	0
<b>f. Other Federal awards authorized to be used to match this award</b>	0	0	0

Done

Internet

Start


4:32 PM

# FSR Deployment Plan



- Deployment — November 2002
  - Stage 1 — Three grantee institutions in “Test ”
  - Stage 2 — CWG in “Test ”
  - Stage 3 — CWG in “Production”
  - Stage 4 — All Commons V. 1.0 registered institutions in “Production”
  - Stage 5 — Open production deployment

# Reengineering the Competitive Application

- 
- November 2001 meeting
    - Streamlining data requirements
      - Advantages offered by implementation of profiles
      - Advantages offered by recategorizing of information
      - Opportunities to question need for information
  - January 2002 meeting
    - Streamlining business process
      - Receipt, referral, review
      - Just-in-time submissions
      - Application schedule and content
  - May 2002 meeting
    - Summary list of NIH action items
      - CWG input on overlooked items.... **NO Progress...**

# eRA SBIR Initiative Status



- NIH issued RFA for eRA SBIR Initiative January 29, 2002
- Six Awards will be made by 9/30/2002
- eRA SBIR initiative will be a collaborative process
- Initial meeting with awardees to establish initial milestones — October 2002
- Program Contact: Dr. Amy Swain, NCRR <SwainA@NCRR.NIH.GOV>