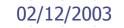
eRA Program Module ePUG Meeting

Chanath Ratnanather Cathy Walker





Agenda Overall PGM Module Features ♦July Release July Prototype Question/Concerns Processes Explained New UI Options Web QT demo Next Steps April Symposium

Overall PGM Module Features Manage Portfolios Add/Remove grants, custom portfolios (Web QT) Review eSNAP/Progress Reports Customizable Checklists/Program Approval Delegation Pre-Submission PGM Analysis Tools Select, save journals for searching; research PI's MS Outlook Calendar integration Interface to shared systems e-Notification e-Requests: ARA, 901s, and other PI requests DEA/Council functions? Hierarchical Portfolios?

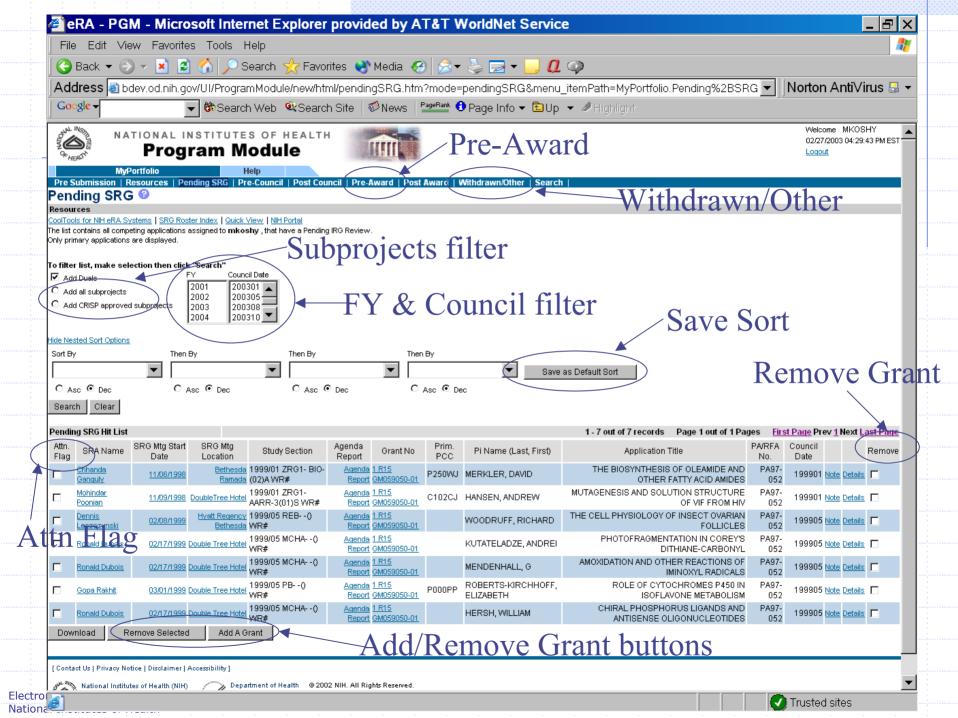
July Release

Pre-Award, and Other/Withdrawn Grants page

Attention Flag column in each list Filter list by FY, Council, & Subprojects Delegation Approvals, sign-offs, and checklists to PAs Add/Remove applications from a portfolio Integration with shared eRA modules J2EE Checklists and Approvals Web QT

July Prototype

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Question/Concerns

Pre-award page Same columns as Post Award page? Other/Withdrawn Grants page What columns to display? Upload notes (e.g., meeting notes) from a user's computer to the system What we can and cannot accomplish Combine all reports in one pop-up window Hierarchical portfolios: options (next slide)

Question/Concerns -Hierarchical Portfolios

Default portfolios at many levels

- ♦ Issue: org structure not captured in eRA
- Options explored to determine org structure:
 - Use PCC
 - Use NBS, NIH human resources, or NEDS system
 - Use budget categories used by EO or Budget Office
 - Assign Division, Branch, and Program Area level Directors to each application
 - Use CANs
 - Recreate org structure in eRA

Processes Explained: Add/Remove Grants

Add/remove grants from a portfolio

- Depending on status, added to a default portfolio
- Only grants from current, future, and 2 past FYs added
- Only grants that aren't in any default portfolios added
- Exception: A grant in the "Other/Withdrawn" stage
 - May be "moved" to a portfolio based on status, by adding
- Only grants added by user can be completely removed
- Grants in "default" portfolio that are removed will be "moved" to the Other/Withdrawn portfolio
 - May be "moved" back to a portfolio based on status, by adding
- Grants with an "unused" status will remain in Other/Withdrawn portfolio for one year

Processes Explained: Delegation

Delegation accomplished by "roles" Role assigned to PO and if needed, to PA All users with role have privileges to: Perform approvals, checklists, PO, and sign notes Signature/approval audited and tracked Currently in ICO and all eRA modules PGM will use similar mechanism

Web QT Demo

New UI Options

Multi-line rows in a list Multiple values in a column within a row Left-side of hitlist remains constant, while right-side has multiple views

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Next steps

Deadlines:

- Requirements Deadline: March 14
- User Interface Review: March 21
- Requirements Freeze: March 28
- Next steps:
 - Accounts in "Staging" environment
 - April symposium: PGM is the highlight!
 - Meet once or twice more before March 28?