



# eRA Program Module e-PUG Meeting

Chanath Ratnanather  
Cathy Walker



# Agenda

- ◆ Review Status Codes
- ◆ Revisit Search Page Hitlist Columns
- ◆ Concerns:
  - FY Default, Org Layers & Delegation (formerly clusters), PCC filters, Helpdesk Calls, Subprojects
- ◆ PGM Training
- ◆ Demo Test Version of July 2003 Release
- ◆ October 2003 Release Features
- ◆ October 2003 Prototype UI
- ◆ Winter 2004 Release Features

# Review Status Codes

- ◆ Active Grants page
  - “Award Prepared Not Funded” on this page
- ◆ Non-active post-award grants will have to be searched
- ◆ Unscored grants?

# Revisit Search Page Hitlist Columns

## ◆ March/April Release:

- ◆ PI Name (Last, First), Grant No., Application Title, SRA Name, PA/RFA#, Primary PCC, Type 5 Receipt Date, ICO Approvals, Details

## ◆ July/August Release:

- ◆ "Incl. Grant," Portfolio Name, PI Name (Last, First), Grant Number, Application Title, PA/RFA Number, Prim. PCC, Council Date, Percentile, Priority Score, Type 5 Receipt Date, PGM Approval/PO Checklist, Grant Snapshot

## ◆ Concerns: Type 5 Receipt Date

# Concerns: FY Default

## ◆ An example:

- Grant appeared last week in the Pending SRG pg.
- Today, it is Scored and assigned to the 10/2003 council, making it a 2004 grant.
- The grant should now move to the Pre-Council pg.
- It does, but does NOT show up in your DEFAULT page, b/c it is a FY 2004 grant. You have to add FY=2004 using the filters available in the July 2003 release, and re-query to see this grant.

## ◆ Solution: add FY+1 and FY-1 to default for October 2003

# Concerns: Clusters, N.K.A. Org Layers & Delegation

- ◆ Numerous concerns raised by IMPAC II Coordinators, IMPAC II Tech Reps, eRA mgmt.
- ◆ Met with concerned parties
- ◆ Decisions:
  - ◆ Go ahead w/ proposed solution
  - ◆ Change name to "Organizational Layers and Delegation"
  - ◆ Stress that using Org Layers & Delegation is optional
  - ◆ Develop a UI for Org Layers & Delegation
  - ◆ An IC/OPDIV can permit any user privileges to manage Org Layers & Delegation
  - ◆ Present as an eRA-wide generic solution to Project Team

# Concerns: PCC

- ◆ Missed PCC search requirement for July 2003
- ◆ PCC search parameters will only filter *within* a PD's portfolio

# Concerns: Subprojects

- ◆ Only 2 statuses
- ◆ Remove filter in a future release?



# Concerns: Helpdesk Calls

- ◆ Majority of calls (~95%): "I'm missing grants in my portfolio"
  - Reasons for missing grants:
    - ◆ Assigned to another PO
      - Training: use PGM search & Snapshot to find assignment
    - ◆ Assigned to the next FY
      - Training: use filters on each page, or search to find FY
    - ◆ Withdrawn
      - Training: look in Other/Withdrawn page
    - ◆ Extension system not in sync with eRA/IMPAC II

# PGM Training

- ◆ Request made for lead user(s) from each IC
- ◆ Train lead user(s) prior to August 01
- ◆ Lead user(s) will organize and invite eRA to train at individual ICs/buildings
- ◆ Training led by Amy Burns, with support from PGM Advocates and Analysts

# Demo Test Version of July 2003 Release

- ◆ Still contains bugs
- ◆ Production date: August 01, 2003

# Oct 2003 Release Features

- ◆ New J2EE PGM Approvals page
- ◆ Post Award pg changed to Active Grants
- ◆ Read access to *any* Program Official's portfolio at NIH
- ◆ Org Layers & Delegation
  - Supervisory Director access to view grants of all the PO's assigned to him/her, via My Portfolio
  - Program Assistant access to perform transactions (except approvals), via My Portfolio
  - Peer Program Official access to perform transactions, on grants of all the PO's within his/her "organization layer"

# Oct 03 Prototype UI

- ◆ October 2003 release Menu structure

# Winter 04 Release Features

- ◆ Add own bookmarks to Pre-Submission
- ◆ Program Analysis Tools
  - Select, save journals for searching; research PI's
  - Use tools such as [vivisimo.com](http://vivisimo.com)
- ◆ Custom (user-defined) portfolios
- ◆ DEA/Council functions?
- ◆ MS Outlook Calendar integration
  - Use NCI as an example

# PGM Requirements Gathering

