



## eRA Program Official Users Group (ePUG)

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**Date:** October 12, 2005, Wednesday  
**Time:** 1:00–3:00 p.m.  
**Location:** Rockledge 2, Room 9104  
**Advocates:** Carlos Caban, Janna Wehrle

**Next Meeting:** Wednesday, December 14, 2005, Rockledge 2, Room 9100

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### Action Items

1. (Vickie Fadeley) Send out lists of defects to group.
2. (Group) Submit lists of defects that need fixing to Vickie Fadeley.
3. (Vickie Fadeley) Verify link to Scientific Review Group agenda in the production database.
4. (Vickie Fadeley) Check with Cathy Walker on the availability of the J2EE Population Tracking module in the Program Module.
5. (Vickie Fadeley) Add a link to the Population Tracking Program Approval page, if possible.
6. (Carlos Caban) Meet with Grants Management Users Group to begin developing the competing RPG checklist.
7. (Group) Send any checklist questions to Carlos Caban. Anyone wishing to volunteer to help develop the checklist should also contact Carlos.
8. (Vickie Fadeley) Make radio buttons on checklist larger.
9. (Group) Submit lists of defects that need fixing to Vickie Fadeley.

### Handouts

- Public Access Presentation  
[http://era.nih.gov/docs/ePUG\\_Public\\_Access.ppt](http://era.nih.gov/docs/ePUG_Public_Access.ppt)

### Welcome

Janna Wehrle welcomed the group back after a long hiatus with the following updates:

- The program module now has a new grant folder with the following new features:
  - A view to NIH eRA Commons.
  - The ability to open to a particular grant with other years available on the sidebar.
  - Grant numbers for Commons users hyperlinked to the user's profile.

- The program module now links correctly to the Query, View, Report (QVR) tool.
- The Checklist Administration Unit is complete. It is now possible to create a checklist for any grant mechanism or type.

## PGM Task Order Update

*Vickie Fadeley*

Vickie Fadeley delivered an update on the status of the new PGM Task Order. The team will begin by fixing the top 10 identified defects. She asked that volunteers make sure the defects are fully fixed, which will help get them to production sooner.

*Q: Can testing be done from the desktop?*

*A: Volunteer testers will need testing accounts, which will serve for the top 10 defects. More involved testing will have to be done in a test environment.*

The defects fixes already underway are:

1. Send an email to Principal Investigator from a link using the PI name, with the subject line, "Re: NIH Grant 1R01GM13456-02."
2. Add an indicator beside PI name to indicate that PI has an eRA Commons account.
3. All excel downloads now "match" individual portfolio tabs.
4. Use upper case for all names (SRG and PI).
5. Un-scored applications are now indicated by "UN."
6. A Checklist "status" is indicated in portfolio pages (Complete/Started).
7. A Checkbox will be added to all portfolio pages for inclusion of co-funded grants.
8. A Checkbox has been added to all portfolio pages for duals.
9. The "Withdrawn by IC" codes (status code 30) will be included in portfolio tab Withdrawn/Other.
10. Remove IRG Action text description from all pages.

The PGM team will soon identify the next 10 defects for fixing. Suggestions should be sent to Vickie.

**Action: (Vickie Fadeley) Send out lists of defects to group.**

**Action: (Group) Submit lists of defects that need fixing to Vickie Fadeley.**

The schedule for the PGM development team is as follows:

1. Complete testing of current defect fixes.
2. Enable Program Approval of Resource awards (X01s)

### 3. Create Portfolio-at-a-Glance *or* Save Preferences.

The group needs to arrive at a decision about which one of the two options to pursue, either Portfolio-at-a-Glance or Save Preferences. Vickie will give a two-week notice before a decision is required. Either option will take 8 to 9 weeks to complete.

The Portfolio-At-A-Glance is a summary of all assigned portfolios, with a separate tab for each one. It will not be customizable.

In the future, work on the PGM module will consist of a combination of defect fixes and new work.

## MyPortfolio

PI names are *mailto:* links used for sending E-mail from the program module. Names without a link indicate that the PI did not provide an E-mail address. Names with three asterisks (\*\*\*) next to them have an eRA Commons account.

*Q. Is it possible to send E-mail to more than one PI at a time?*

A. Not in this release. All of the names will either have to be made public in the *To:* and *CC:* fields; otherwise, all names must be in the *BCC:* field to protect privacy.

Other new features include:

- Noting un-scored items in the priority score column instead of leaving them blank
- The ability to download data to Excel through Internet Explorer. All columns in Excel will match the hit list. Names will be in ALL CAPS for easy sorting
- A direct link to the new checklist from the approval page
- Two new check boxes to filter: co-funded projects and sub-projects
- Automatic notification upon logout if all mandatory questions are not answered
- The number of records per page will be increased.

The group noted that the link to the Scientific Review Group agenda was missing.

**Action: (Vickie Fadeley) Verify link to Scientific Review Group agenda in the production database.**

The PGM team will have to check on the availability of the Population Tracking module through the PGM module.

**Action: (Vickie Fadeley) Check with Cathy Walker on the availability of the J2EE Population Tracking module in the Program Module.**

**Action: (Vickie Fadeley) Add a link to the Population Tracking Program Approval page, if possible.**

## Public Access

*Tim Hays*

Tim Hays delivered an update on the NIH Public Access initiative. Manuscripts must be submitted to peer-review journals before they can be accepted into the NIH repository. Program Administrators should inform grantees about the policy and remind them that it is voluntary.

There are 3 benefits to this submission process:

1. For PIs, submission will lead to increased citations in other research without additional administrative burden.
2. For Program Administrators, Public Access fulfills requirements for the Program Report.
3. For NIH, storing articles in the repository will enable data mining through knowledge management tools.

## Table Talk

**Training** – Carlos Caban noted the need for an introductory training course for the Program module. The group agreed that any training should be Web-based so that everyone can access it. Thomas Hilton agreed to work with Carlos on developing the course.

**T1 and T2 Checklists** – Carlos noted the need for standard questions across NIH for the T1 and T2 checklists. Several ICs already use the National Cancer Institute checklists. Carlos asked for volunteers to help develop the questions for the checklists.

**Action: (Carlos Caban) Meet with Grants Management Users Group to begin developing the checklist.**

**Action: (Group) Send any competing checklist questions to Carlos Caban. Anyone wishing to volunteer to help develop the checklists should also contact Carlos.**

**Wish List** – The group brought up the following requests for future versions of the program module:

- Display the updated review schedule in the PGM module.
- Add a link to the conference call information for review.
- Make radio buttons larger on the checklist.

**Action: (Vickie Fadeley) Make radio buttons on checklist larger.**

**FY 2006 Meetings** – The group will on the following dates in Fiscal Year 2006:

- December 14, 2005
- February 8, 2006
- April 12, 2006

- June 14, 2006
- Other dates to be announced.

## **Attendees**

Asanuma, Chiiko

Avashia, Kashyap

Bean, Carol

Bupp, Jane

Caban, Carlos

Chand, Sushma

Delcore, Sandy

Evans, Frank

Fadeley, Vickie

Finkelstein, David

Goldman, Stephen

Heath, Anne

Hilton, Thomas

Kinley, Teresa

Koepke, Kathy

Piquet, Barbara

Shah, Sachin

Sim, Hua-Chuan

Song, Min

Sorensen, Roger

Wehrle, Janna