



Electronic 901 Working Group Minutes

Date: February 15, Tuesday

Time: 1:00 – 3:00 p.m.

Location: Rockledge 1, 8th Floor, Room 8111

Advocate: Ellen Liberman

Next Meeting: Tuesday, February 22, 2005. Location RKL 1 – 5th Floor, Room 5147.

Change Request Prototype Page: <http://erawebdev.od.nih.gov/UI/e901/login.asp>

Action Items

- 1.) (Daniel Fox) Review validation rules for submitting a request and establish an improved list.
- 2.) (Daniel Fox) Modify Submit Request screen based on the suggestions of the group.
- 3.) (Daniel Fox) Edit Confirmation Data screen appearance to make it more user friendly.
- 4.) (Daniel Fox) Modify the Manage Request screen to the specifications outlined by the group.
- 5.) (Daniel Fox) Modify Track Requests screen to add check box so that many requests can be moved to “My Queue” at once.

Review Action Items from Last Meeting

- 1.) Update Prototype Page – *Completed*
- 2.) Define Requirements for Auto-Approval Feature – *In Process*
- 3.) Combine Separate Requests into Assignment Change Form – *Completed*
- 4.) Create Track Requests in Mass 901 UI – *Completed*

Review Prototype Screens in Detail

Daniel Fox showed the group the new UI layout on the eRA page. He presented a tour of the changes he did, based on the suggestions made at the 02/01 meeting. He started by showing the prototype My Notifications Queue and then the My Query screen, on which there is now a Change Assignment option which takes the user to a Manage Request screen. The system now shows the changes the user has made. At the top of the page, the Application information section shows what the current changes are; this information is entered in manually by the applicant.

Q. Will this show everything or simply what is changing?

A. It will list only what is changing, but in batches; for instance, if IRG, Grants Number, and Council change are selected, then the form will show only what is changing within those areas.

The online form also shows current Duals and ICs. Daniel asked the group whether or not there will be an option to change *only* Duals. They agreed that there should be a field to change Duals. Daniel wanted to know why the Dual Council field was on the online form and wanted to know if it was necessary to the process. The group responded that it was necessary since there are occasions when there is a disconnect from one IC to another when the user needs to add an IC. This field does not stand alone, but rather in combination with Grants Number and Duals change. It is also used, on rare occasions, in conjunction with a Dual IC change. A Department of Receipt, Referral (DRR) staff member is the only person who can enter a Dual IC and submit the request. There is no approval chain for Dual ICs; it is an automatic approval.

Q. What kind of checks or validations will there be for this form?

A. The validations should be generally the same for the 901s. The validations show that some changes are impossible, depending on the grouping of change requests. At the data entry section, there should be validations working already. These validation rules for must take into account both RR screens – 901 and Referral Officer Screen. Daniel will review the validation rules and establish an improved list.

Action: (Daniel Fox) Review validation rules for submitting a request and establish an improved list.

Daniel and the group continued to discuss any improvements on the Submit Request Form. In accordance with the suggestions given by the group, Daniel will -

- *Switch the order of the fields marked “Grant Number” and “IRG,” so that Grant Number comes first.*
- *Switch “Submit Supporting Documents” with “Background Justification” so that the latter is on top.*
- *Fix the page so that it all fits without scrolling up or down.*
- *Show a warning and explanation for reasons why a change has occurred to a PI request.*
- *Add an editable Note field at the Confirmation screen.*
- *Make the “Note” field smaller, vertically.*
- *Duplicate information in the “From” field to that in the “To” field for those areas that do not change. Bold the changed values that arise in the “To” field.*
- *Create an Extension Code Field, which will be required for ZRG1 meetings.*
- *Add “Return to DRR” check box for One-Sided 901 requests. A request is one-sided when the ICs do not know where it needs to go, but do know that it does not belong to them. In this case, requests will go to DRR directly, where the staff will fill out the rest of the form to process the request.*

After the request is submitted, the user is brought to the Manage Request Screen where the status of the request is shown with the following elements: Role, Action, Name, E-mail, and Phone. The order of this list goes by date, starting with the most recent status. The data field has an option that allows it to be re-sorted according to the user’s preference.

Action: (Daniel Fox) Modify Submit Request screen based on the suggestions of the group.

Discuss Routing from Grant Number and Components

Daniel stated that the Approval Chain regulates how the Grant Number change is routed through the system. The route does not break the Approval Chain, as person A delegates to person B, who delegates to person C, so that it never comes back to person A. There is a specific chain of command that starts with the Program Official, goes to the Referral Liaison, then to the IC. The Referral Liaison can route this to someone else.

Daniel stated that, for right now, Request Tracking was only concerned with 901 requests. The group had some concerns with the amount of unused white space on the screen and asked if Daniel would try rotating the Confirmation Data by 90 degrees to make it more user friendly. Daniel said he did have to comply with certain UI standards, but that he will see what he can do about rotating the page.

Action: (Daniel Fox) Edit Confirmation Data screen appearance to make it more user friendly.

Under the main Search heading, users will have two options: *Request Search* and *Application Search*. Group members will be more concerned with the Request Search field, since there can be more than one request for an application. Daniel will also add more information to the Request Search including request type, the person that submitted the request, the person it was assigned to, and the date of the request. Daniel will also add a Request History option to the Application Information section of the Manage Requests. Users will see this if at least one request already exists for the application. They will now be allowed multiple application movement to My Queue via a “Mass Move” check box, and will be able to move the option to “Move to My Queue” at the bottom of the screen. The group asked if there could be a sorting feature on the screen so that the user will only have to see pertinent information. He will add a Hide (hidden by default) or nested sort option with a (+) / (-) button. Once the query is saved, a sort field will show the user back to the request search. The default of the sort hitlist will show the most recent requests at the top.

Action: (Daniel Fox) Modify the Manage Request screen to the specifications outlined by the group.

Daniel then talked about Submitting Mass Requests. Only the IRG changes will be handled for right now. Under submitting a Mass request, there is a simplified version of the 901 page, where a list of applications is given.

On the regular Submit Assignment Request Form there must be rules to govern and specify a new meeting. Daniel will add an “SRC (99)” button to populate meeting fields automatically. The form of this will be Z + a two letter abbreviation of the IC (as entered in the Admin IC field). The Scientific Review Administrator (SRA) will be SRC, while Group Code will be 99.

The group asked for a validation logic and corresponding warning screen, which shows why certain applications (councils, RFAs, etc.) cannot be grouped together. The Validation logic for the list of applications within a Mass Request should validate that the Council Date of all selected applications is the same. The Council Date will require a search field when looking for applications to submit Mass Requests. There will be a new Mass Request tab in My Notifications with a counter showing how many requests there are. These Mass Requests must be approved or

rejected for the entire list of applications.

Action: (Daniel Fox) Modify Track Requests screen to add check box so that many requests can be moved to “My Queue” at once.

Discuss Request Initiation (Table Handout)

Daniel began going over the Request Initiation Handout. The meeting ran out of time without his being able to cover anything except the Grant Number Change section. The group reviewed this section and required more time to approve it. Daniel asked that the group take home the handout to look over and bring up any issues at the next meeting on February 22.

Attendees

Calderone, Gerald (CSR)	Diggs, Lana (OD)	Edwards, Michael (NIDDK)
Faenson, Inna (OD)	Fisher, Suzanne (CSR)	Fox, Daniel (NIH/OD)
Hagan, Ann (NIGMS)	Hayunga, Gene (NICHD)	Melchior, Christine (CSR)
Noronha, Jean (NIMH)	Paugh, Steve (OD/LTS)	Roberts, Luci (CSR)
Stesney, Jo Ann (NIAID)		