



Electronic 901 Working Group Minutes

Date: March 01, Tuesday

Time: 1:00 – 3:00 p.m.

Location: Rockledge 1, 2nd Floor, Room 2198

Advocate: Ellen Liberman

Next Meeting: Tuesday, March 08, 2005. Location RKL 1 – 5th Floor, Room 5147.

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

Action Items

1. (Lana Diggs) Secure place and time for 901 meeting during the week of March 22.
2. (Daniel Fox) Document functionality where the Serial Number blanks out automatically when an IC is changed on the Submit Assignment Change Request screen.
3. (Daniel Fox) Document a warning that appears after a grant number is entered, showing grant numbers with their corresponding PIs.
4. (Daniel Fox / Architects) Make the following changes suggested by site architects: Remove Manage Request screen, move Status to Review Change Request screen, and change Edit Request Data link into a button at the bottom of the page.
5. (Daniel Fox) Add a Send Back (One Step) button, which returns requests back one person in the approval chain.
6. (Daniel Fox) Modify “Route” option to read “Forward,” making changes to functionality as outlined by the group.
7. (Daniel Fox) Change label “Approve” to “Accept” on all screens.

Documents

1. [Requirements Issues Handout](#)

Future Meetings

Lana began the meeting by addressing the amount of times the group will be meeting in the future. Daniel stated that he needs at least four more weeks in order to accomplish the requirements of the group for the first iteration. The group will meet on March 8th, 15th, 22nd and the 29th (provided that Lana can find an open room). She will let the group know the meeting place and time for that week as soon as she can secure that location.

Action: (Lana Diggs) Secure place and time for 901 meeting during the week of March 22.

Review Action Items from Last Meeting

1. (Daniel Fox) Change “Return to DRR” check box label to read “Decline assignment / Refer back to DRR” option. – *Completed.*

2. (Daniel Fox) Create a check box for the last person in the approval chain indicating whether or not a new number should be generated; the check box should read “Generate New Grant Number.” – *Completed.*
3. (Daniel Fox) Come up with a way to change fields with Blank values at submission time. – *Completed:*
 - Daniel suggested to that the Change Request form be pre-populated with current data. When the user clicks Continue, the form will correctly indicate what has been changed. The only confusion exists when a user changes the IC, since that will trigger a change in the Serial Number so XXXX will be shown. Daniel needs a way to blank out the fields, and pre-populating will accomplish this. Currently, there is no function or construct that allows specific fields to be blanked out automatically. Daniel will create functionality where the Serial Number blanks out automatically when an IC is changed on the Submit Assignment Change Request screen.

Action: (Daniel Fox) Document functionality where the Serial Number blanks out automatically when an IC is changed on the Submit Assignment Change Request screen.

When there is a new IC entered (change of grant number with IC), then upon exiting the IC field on the screen, the Serial number will be blanked out.

Action: (Daniel Fox) Create a warning that appears after a grant number is entered, showing grant numbers with their corresponding PIs.

- Daniel and Lana met with and collected suggestions from the architects and integrators of UI on February 28. They made the following suggestions:
 1. *Instead of going through the Manage Request screen, users will be able to directly access the Review Change Request screen. The Status on the Manage Request screen will now be posted on the Review Change Request screen.*
 2. *The Edit Request Data link will now be a button at the bottom of the page.*
 3. *Add a dropdown menu of possible documents types in terms of meeting requirements. If a list of documents is tagged for approval by the user, then it will enter into the Grants Folder automatically without going through Grants Management. The group suggested including a checkbox next to each item that indicates which ones can go into the Grants Folder to more properly order them. They will hold off on this right now and come back to this suggestion at a later time.*

Action: (Daniel Fox / Architects) Make the following changes suggested by site architects: Remove Manage Request screen, move Status to Review Change Request screen, and change Edit Request Data link into a button at the bottom of the page.

- If a user edits the request data and then selects Decline, the Form should revert

back to the previous data and then decline it. The reason for declining will be in the Background Information. On the Submit screen, there will now be a button called “Send Back (One Step)” which will return the request back one person in the approval chain.

Action: (Daniel Fox) Create a two-tiered Comment field, allowing users to edit and view request declines, and a Send Back (One Step) button, which returns requests back one person in the approval chain.

- The group discussed many ways of accessing and returning to the approval change. In the end, members agreed that the “Route” be changed to “Forward.” The Request will be forwarded to the person that the user indicates. The person to whom the request is forwarded will have access to the Submit button. The Request then goes back to the person who has forwarded the request and continues the normal approval chain. The status of the request will indicate “Forwarded” for the person who forwarded and “Reviewed” for person who has clicked the Submit button.

Action: (Daniel Fox) Modify “Route” option to read “Forward,” making changes to functionality as outlined by the group.

Action: (Daniel Fox) Change “Approve” label to “Accept” on all screens.

Requirements Issues Handout

2. Daniel went over the [Requirements Issues Handout](#) with the group.
1. Dual Council Field – Daniel stated that they still need a Dual Council Field on the form, but it does not generate its own transaction.
2. Editing Submitted Requests – When the user performs editing requests in the approval chain, Daniel suggested that the form validate that the request type not change since it would confuse the approval chain. The group stated, however, that sometimes editing within the approval chain is necessary. Data editing will be allowed, thus changing the request type in many instances. If the request type does change, then the approval chain of the new type will begin.

Additional Validation: There will now be a feature where, if the current meeting does not match the IC of the grant, and the meeting is not in the Center for Scientific Review (CSR), a warning will appear.

The Reviewer cannot delete the documents if he or she has ability to edit data.

3. Administrative Deferral - This issue is postponed until a later meeting.
4. Routing – This issue is moot, since routing has become forwarding. See above.
5. Bottlenecks - This issue is postponed until a later meeting.
6. Automatic Approvals – Eventually, there will be auto approval rules stating that approvals will be done automatically within 24 to 48 hours after they are submitted. In the action, these will be marked as automatically approved. The system will be able to

warn the user that an approval will be done automatically within a specified amount of time. There will be no auto approvals within the first release.

Review Grant Number Business Rules, Continue Council Date Discussion, and Dual Council Date

The group was not able to address these topics during this meeting. They will discuss them next time.

General Questions / Issues

1. The acronym ESA does not stand for Extramural Scientist Administrators, but rather Extramural Support Assistant.
2. *Q. Is there a way that a great multitude of people can have access to a non-divided module?*
A. That is the direction that NIH is taking. One View is an eRA program that will unify everything under one site.
3. *Q. Is there a way to get an update during the 901 meeting that helps to educate members on the general processes in the eRA?*
A. Lana told the group about a bi-weekly meeting that the eRA conducts, which goes over project issues.

Attendees

Calderone, Gerald (AHRQ)	Diggs, Lana (OD)	Edwards, Michael (NIDDK)
Fisher, Suzanne (CSR)	Fox, Daniel (NIH/OD)	Hagan, Ann (NIGMS)
Liberman, Ellen (NEI)	Noronha, Jean (NIMH)	Paugh, Steve (OD/LTS)
Roberts, Luci (CSR)	Stesney, Jo Ann (NIAID)	