



GM Lead Users Group

Date: Wednesday, October 12, 2005
Time: 2:00 p.m. – 4:00 p.m.
Location: 6101 Executive Building, 2nd Floor Conference Room
Advocates: Michael Loewe and Pamela Mayer
Next Meeting: Wednesday, November 9, 9:00 a.m.-11:00 a.m. Atrium Building, 6101 Executive Blvd, 2nd Floor Conference Room.

Action Items

1. (Cathy Walker) Explore the existence of unauthorized individuals in the GMO box on the search page.
2. (Cathy Walker) Look into the extra script error when printing out the Notice of Grant Award.

Documents

1. High Priority Fixes
2. [GM Users Guide, Quick Reference, Client Server screen comparison, new Redesign features](#)
3. [GM Training Seminar Link](#)

General Announcements

Eddie Myrbeck

Eddie Myrbeck began the meeting by congratulating everyone on finishing the fiscal year. As there were no issues raised regarding the July 13 meeting minutes, Eddie briefly spoke about the following issues:

- **J2EE Issues** – Members were previously asked to compile and send in any J2EE redesign issues to Cathy Walker in order to get them resolved. He thanked the group for sending helping them with this process. He reiterated the fact that Client Server will be shut off soon.
- **Animal Coding** – This was an issue in August about which group members raised their voices, effectively informing the greater User community. Eddie thanked the group for being so vocal yet respectful.

Eddie stated that the group is nothing without the strong, collective voice of its members. He stated that as long as each voice kept its strength without causing bickering and in-fighting, then constructive progression can be achieved. As was shown with Client Server, many issues arise when building and implementing a new system. He told the group that there would probably be some bumps along the path with the J2EE redesign,

but that working together and staying positive and productive will help them overcome these issues.

- **November GM Meeting** - The November meeting, which was to be held on the 9th, will be rescheduled to another Wednesday that month. Eddie will inform the group of this meeting via email.
- **424 (R&R) Training Session** – The 424 (R&R) electronic receipt training session was held earlier in the day and broadcast via video-cast. Eddie reminded the group that December 1 is the deadline for SBIR and STTR grants to be submitted electronically.
- **Progression** – The goal in FY2006 is to have over 75% of all grants go through Grants.gov. This action will save over 200 million sheets of paper a year. Eddie shared the following eReceipt progression chart with the group:

Type of Grant	Mechanism	Target Submission Date for Non-AIDS Applications	Target Submission Date for AIDS Applications
Small Business Innovation Research/Small Business technology Transfer (SBIR/STTR)	R41, R42, R43, R44	December 1, 2005	January 2, 2006
Support for Conferences & Scientific Meetings	R13	December 15, 2005	January 2, 2006
Academic Research Enhancement Award (AREA)	R15	February 25, 2006	May 1, 2006
Small Grant Programs; Exploratory/Developmental Research Grant Awards	R03 ; R21 , R33	June 1, 2006	September 1, 2006
Research Project Grant Program	R01	October 1, 2006	January 2, 2007
Transition remaining mechanisms*		May 2007	

GM Redesign Discussion

Cathy Walker

Cathy stated that they implemented the Grants Management redesign on Monday, October 10. Client Server is still up, but should be shut off in the next few days. There are still some issues on which Cathy and Pam Mayer continue to work. While there are no showstopper problems, they do want to get these bugs fixed sooner rather than later. The problems affect the following areas:

- **Checklist page**
- **Manage page**

- **Release page**
- **Preview NGA**
- **Search page** – Some group members told Cathy that some roles in their Grant Specialists (GS) box do not appear, while individuals in the Grants Management Officer (GMO) box show up without that designated GMO authority. For some reason, they are also unable to delete these unauthorized names. Cathy said that she will check on this problem and instructed affected group members to tell their IC administrators to contact the helpdesk.
- **Hit-list/Manage Page**
- **CAN page**

Action: (Cathy Walker) Explore the existence of unauthorized individuals in the GMO box on the search page.

All of these problems will be solved next week. Group members were instructed to follow Cathy's outlined workarounds. She then went over some general troubleshooting tips for PC setups when trying to run reports. She again detailed these tips on the websites below. Users can use any version of Acrobat needed when following these tips.

In order to accentuate her training classes up to this point and to assist in understanding the seminar held on Thursday, October 13 from 2:00 to 5:00 p.m., she provided the following links for the group:

- [GM Users Guide, Quick Reference, Client Server screen comparison, new Redesign features](#)
- [GM Training Seminar Link.](#)

Cathy reminded the group that the training session held on the 13th would be video-cast for the benefit of group members and all other interested parties. All users are invited to attend. Additional training will be offered soon, though she does not yet have an exact date .

Checklist Page Problem Expanded - Cathy explained the Checklist problem further. Users can now create and edit Checklist questions and apply them to specific activities. These new questions, despite the issue going on within Checklist, will not disappear. Cathy said that anyone who wants to try this out in IC Admin should contact her.

Training for this will be provided, once the bug in Checklist is fixed sometime in November. This will apply for all application types (1-9) and every activity. In Grants Management, users will need the GM Rule Manager role, while Program questions require the ICO Data admin role. These roles can be requested through the user admin at each individual IC. The checklist bug should be fixed by Monday, October 17 or Tuesday, October 18. The Animal Subjects code issue also affects this bug. Group members were reminded to *please avoid using the Checklist page at all at this point.*

Award Worksheet Report - Cathy told the group that, from now on, every time a user creates a Notice of Grant Award (NGA), Initial Award or Revised Grant Award, the system will create and store in the Grant Folder an award worksheet report. This Checklist report has everything that the GM and Committee Management (CM) awards have. All applications, summary statements, PO

and GM award worksheets and NGAs are stored electronically with this functionality, effectively eliminating printouts other than spreadsheets.

There is a format problem when printing NGA text when extra script appears on the read out. Cathy had not heard of this problem, but will look into this once she gets examples sent her by the group.

Action: (Cathy Walker) Look into the extra script error when printing out the Notice of Grant Award.

Early Terms for Fellows – When creating an early term for a Fellow, after creating a fellowship and choosing WIP, the page does not allow any editing in the *years* field. Cathy stated that this and all early terms-related problems should be solved in the second iteration of GM redesign. In general, they are trying to minimize pop-ups and java script, but the group suggested having some sort of confirmation that will make the user aware of this inability to save after creating a WIP.

Lead User Role - Eddie stated that, after Cathy's training session, Grants Management will have to deal with a greater volume of questions regarding the system. The role of the Lead User should be to collect information at the IC level. Members should store these issues and send them *directly* to Cathy, who will update a Current Issues document. Lead Users should not send repeated items in order to keep the list from being repetitive. They should also include the APPL ID and/or grant number for proper identification.

Timeout Problem – The Kumeron conversion had some problems with timeout and automatic log-out problems. Cathy stated that the offensive converted code has been cleaned-out. Log-out will now occur after 45 minutes, since it would be potentially harmful to keep it open for 4 to 5 hours.

Create/Save Queries Bug – If users save a query with a date in it, they will get an error. The workaround for this is to simply run the date again and it will be okay. This is only a temporary workaround, but it is necessary for now since so many people use this function. The proposed date for the second release that this bug fix will be on is sometime in January 2006.

Award Worksheet Report - There used to be two Checklist reports – a PO worksheet report and a GM worksheet report. This was combined into one document called the Award Worksheet Report, which is now automatically stored in the Grant Folder. The old reports, however, still exist within the system and are not working correctly, causing blank reports. Grants Management has decided to get rid of the reports at the next iteration. Anyone experiencing these problems should send the list of pertinent APPL IDs to Cathy.