

eRA Program Module ePUG Meeting

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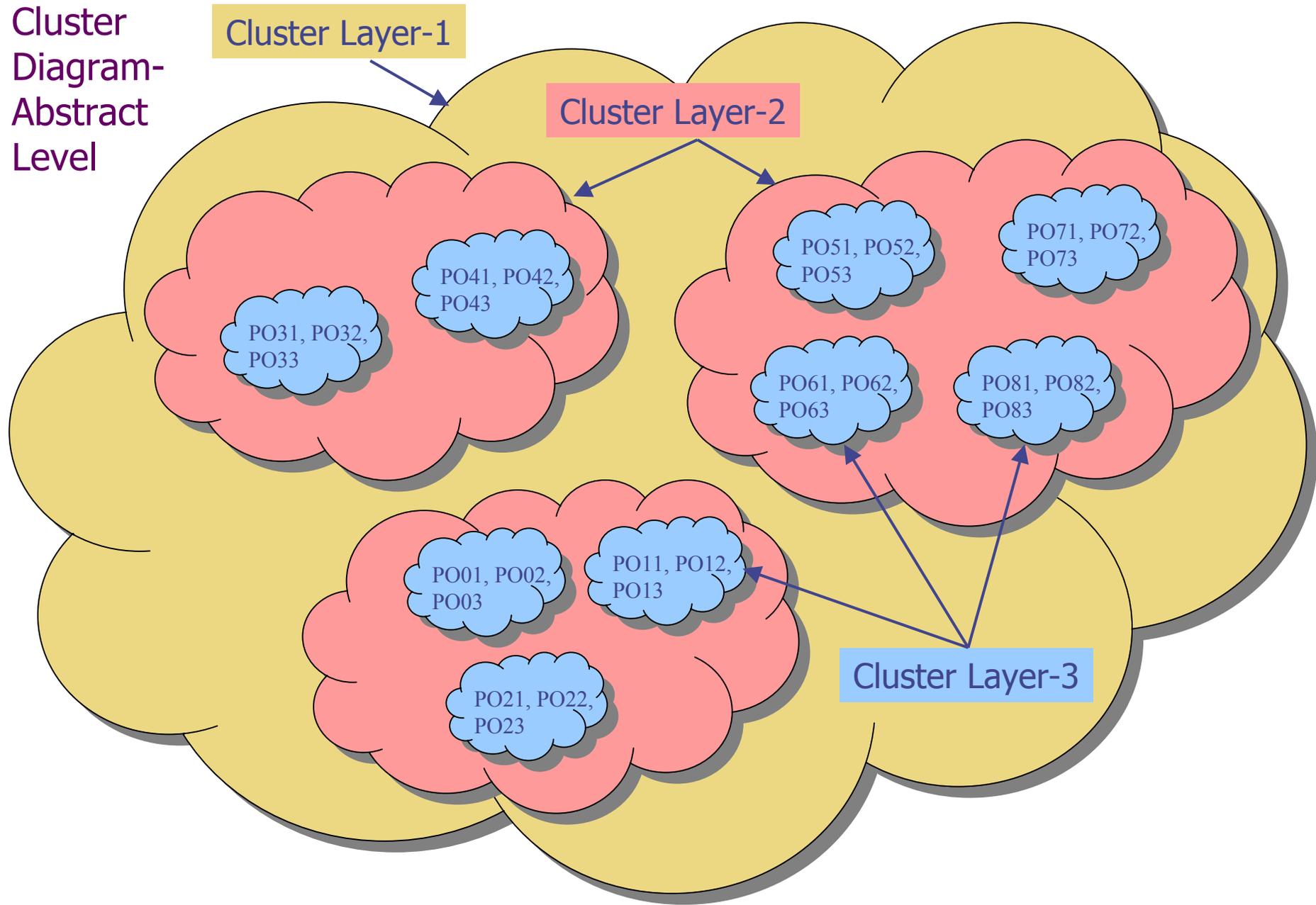
Agenda

- ◆ Introductions
- ◆ Program Assistants/Analysts & PGM
- ◆ Hierarchies and Delegation
 - Clusters, Hierarchies, Delegation
- ◆ Areas of Concern
 - Missing Grants in Portfolios?
 - Grants That Don't Go to Council
 - PI History Reports in Grant Folder
 - T5's That Have a Past Due Date
 - E-Grants
- ◆ Next Steps

Program Assistants/Analysts & PGM

- ◆ Currently, PGM users need an assigned portfolio of grants & an IMPAC-II PO Role
- ◆ Program Assistants/Analysts have no assigned grants
- ◆ Program Assistant/Analyst role will exist in July 03, but they cannot use PGM!!!
- ◆ How do we grant PGM access to Program Assistants/Analysts?

Cluster
Diagram-
Abstract
Level



Cluster Diagram: Example-1

Division Level cluster

Branch Level cluster A

Program Assistant/
Analyst-1, 4 & 7

PO31, PO32,
PO33

PO41, PO42,
PO43

PO51, PO52,
PO53

PO71, PO72,
PO73

Program Assistant/Analyst-3, 5

PO61, PO62,
PO63

PO81, PO82,
PO83

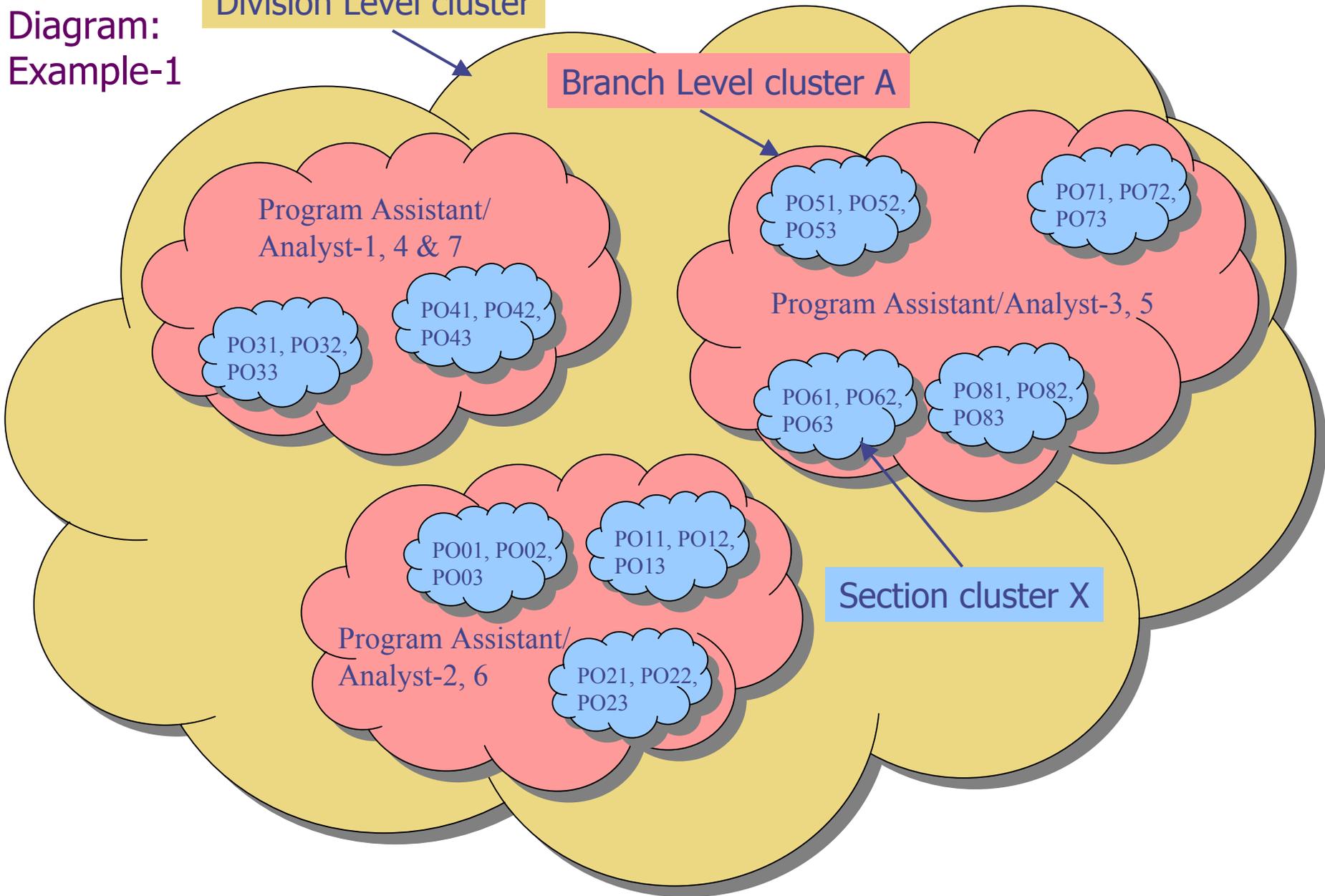
Program Assistant/
Analyst-2, 6

PO01, PO02,
PO03

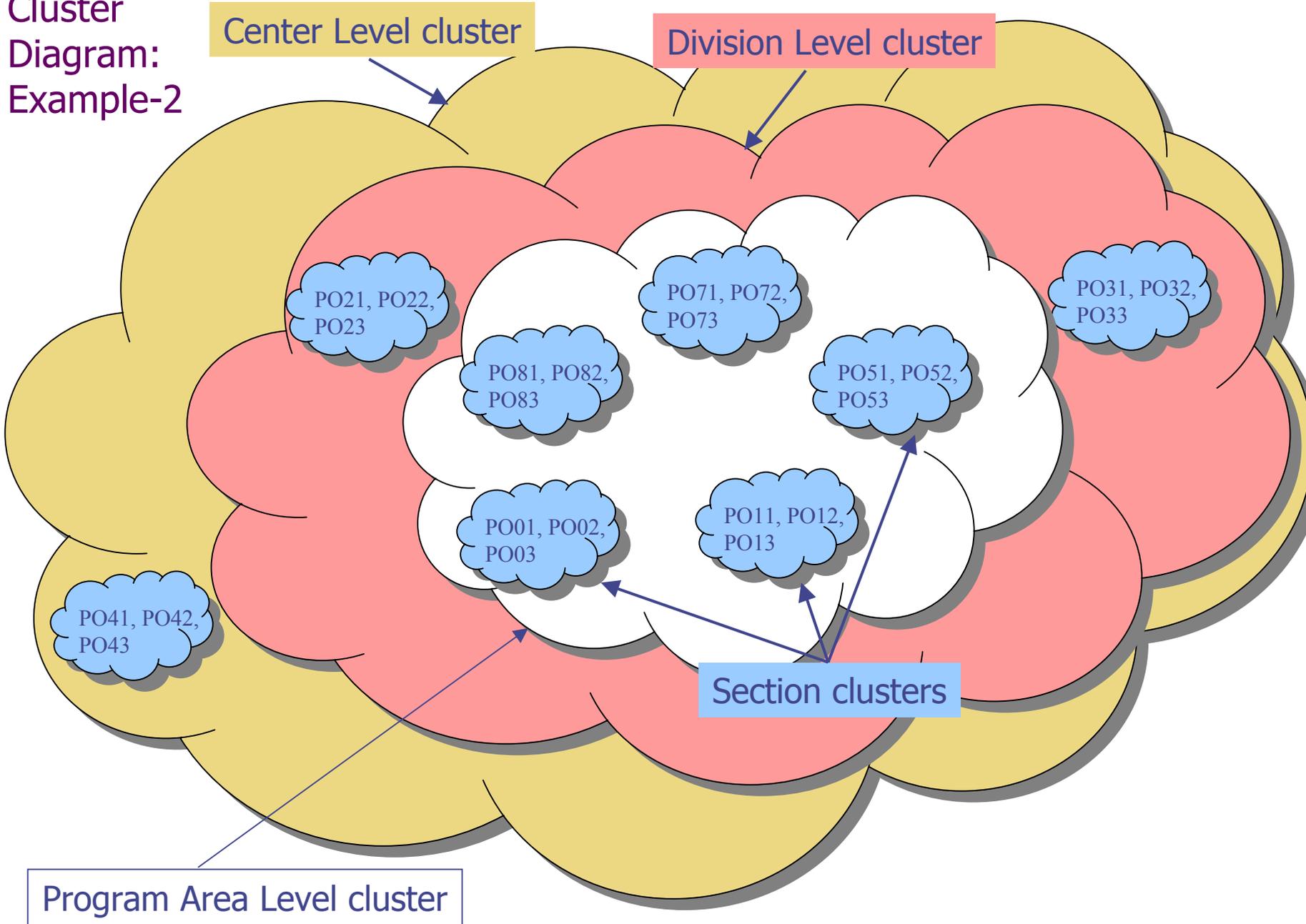
PO11, PO12,
PO13

PO21, PO22,
PO23

Section cluster X



Cluster Diagram:
Example-2



Hierarchies and Delegation: Clusters

- ◆ A cluster is a grouping of PD's
- ◆ PD's in a cluster have authority on peer portfolios
- ◆ A PD can be assigned to more than one cluster
 - Authority on peer portfolios in both clusters
- ◆ Cluster may have *unlimited* layers
 - E.g. (refer to Cluster Diagram Example-1):
 - ◆ Section Cluster X has a supervisory Branch cluster (A)
 - ◆ Branch cluster A has 3 underling Section clusters
 - ◆ Division level cluster has 3 Branch and 9 Section clusters
- ◆ A Program Analyst/Assistant assigned to any ONE cluster level (Branch cluster in e.g.#1)

Hierarchies and Delegation: Clusters (cont.)

◆ Pros:

- IC's have complete flexibility in creating clusters
- Do not have to conform to IC Org structure

◆ Cons:

- IC Admin's have to create clusters to take advantage of this feature
- IC Admin's have to maintain clusters

Hierarchies and Delegation: Hierarchies

- ◆ A user in a supervisory cluster can view the portfolios of all cluster users below him/her, on one page
 - E.g., all Pending SRG grants of all POs in underling clusters visible to user in the supervisory cluster
- ◆ A supervisory user cannot update underling portfolios
 - Update privileges ONLY on peer portfolios
 - Exception: Program Analyst/Assistant has update privileges on underling portfolios

Hierarchies and Delegation: Delegation

- ◆ Delegation authority is granted by default, by virtue of belonging to a cluster
 - All users in a cluster have authority on peer portfolios
 - No authority on portfolios outside clusters
 - No capability for a PO to individually delegate authority
 - Since clusters are managed by IC Admin, delegation is administered by IC Admin

Areas of Concern: Missing Grants in Portfolios?

◆ Awarded T5's That Are Not Active

■ July 2003 Release

- ◆ T5's that are awarded, but not yet active in the "Post Award" page
 - Pros: If a PO wants to use Pending T5's page as a "work to be done" list, see the correct list.
 - Cons: Post Award could have the active grant + the T5 that's been awarded, but not active for a short period

■ October 2003 Release

- ◆ By default, only show "work to be done" T5's in the Pending T5's page
 - Provide user the option to manually "add" T5's that are awarded, but not yet active to the Pending T5's page
 - In the Post Award page, we only show active grants, and also rename this page to Active (may need Definition for Active Grants page)

Areas of Concern: Active Grants

- ◆ Post Award page currently contains all Awarded, Award Prepared Not Funded, Terminated, and Cancelled grants
- ◆ If we make it Active Grants page,
 - Where do "Award Prepared Not Funded", Terminated, and Cancelled grants go?
 - Proposal: Withdrawn/Other page?
 - Need training/education!

Areas of Concern: Grants That Don't Go to Council

- ◆ Where do we put grants that don't go to council?
 - A Competing Special Initiatives page?
 - ◆ Include all Fellowships, Minority Supplements, and grants with under \$50,000 direct costs per year

Areas of Concern: PI History Reports in Grant Folder (GF)

- ◆ Old GF contains two reports
 - PI history – detailed
 - PI history – brief
- ◆ Dev missed adding these to new GF
- ◆ Request to add it to new GF denied
 - Only available in Peer Review in future
- ◆ Do PD's use these reports

T5's That Have a Past Due Date

◆ T5's That Have a Past Due Date:

- Remain on the Pending Type 5's page for current FY
- Status of the grant does not change b/c the progress report has not been received
- By default, page only shows Pending T5's for the current FY
 - ◆ Starting July '03, user has option to add more than one FY
- If the grant is withdrawn, it will be moved to the new Withdrawn page starting July 2003

Areas of Concern: e-Grants

- ◆ Assume paper grant folder is replaced by the electronic Grant Folder
 - What existing paper/manual processes do we need to automate?
 - What's mandatory, what's optional?
 - Let's postpone the bells and whistles in PGM
 - ◆ Focus on the core requirements to move away from paper processes

Next steps

- ◆ Next steps:
 - Status of July Release