

National Science Foundation

Electronic Research Administration Forum



April 27, 2016



Welcome to NSF webinar for updates on ERA activities

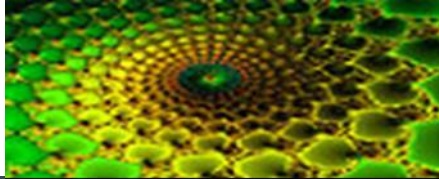
First Forum Topic:

Proposal Submission Modernization

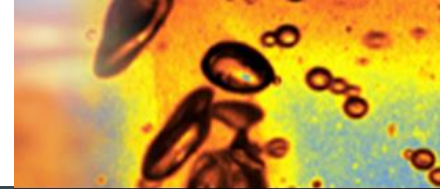
Meeting materials and forum information can be viewed at :

https://www.nsf.gov/bfa/dias/policy/era_forum.jsp

Speakers



Office of Budget, Finance and
Award Management (BFA)



Office of Information &
Resource Management

Erika Rissi

Deputy Division Director,
Division of Institution and
Award Support

Jean Feldman

Head, Policy Office,
Division of Institution and
Award Support

Jeff Vieceli

Head, Systems Office,
Division of Institution and
Award Support

William Daus

Project Manager, Division of
Information Systems

Agenda

- Introduction
- Forum Logistics
- Proposal Submission Modernization (PSM) Initiative
- PSM Survey Summary Findings
- ERA Forum Discussion Topic:
 - Tailoring the Proposal Interface
- 2016 Notional Event Timeline
- Next Steps

Introduction

Forum Background

NSF's engagement with user community

Forum Purpose

- Collect Individual opinions and perspectives on ERA activities
- Gather topics of interest for future forums
- Solicit volunteers for usability studies

Forum Logistics

Participation and engagement

Please use the chat feature to engage in our forum today

Submit questions, feedback and topics of interest via:

- [Emails](#)
- [Listserv](#)
- [Survey](#)

Future events and related items

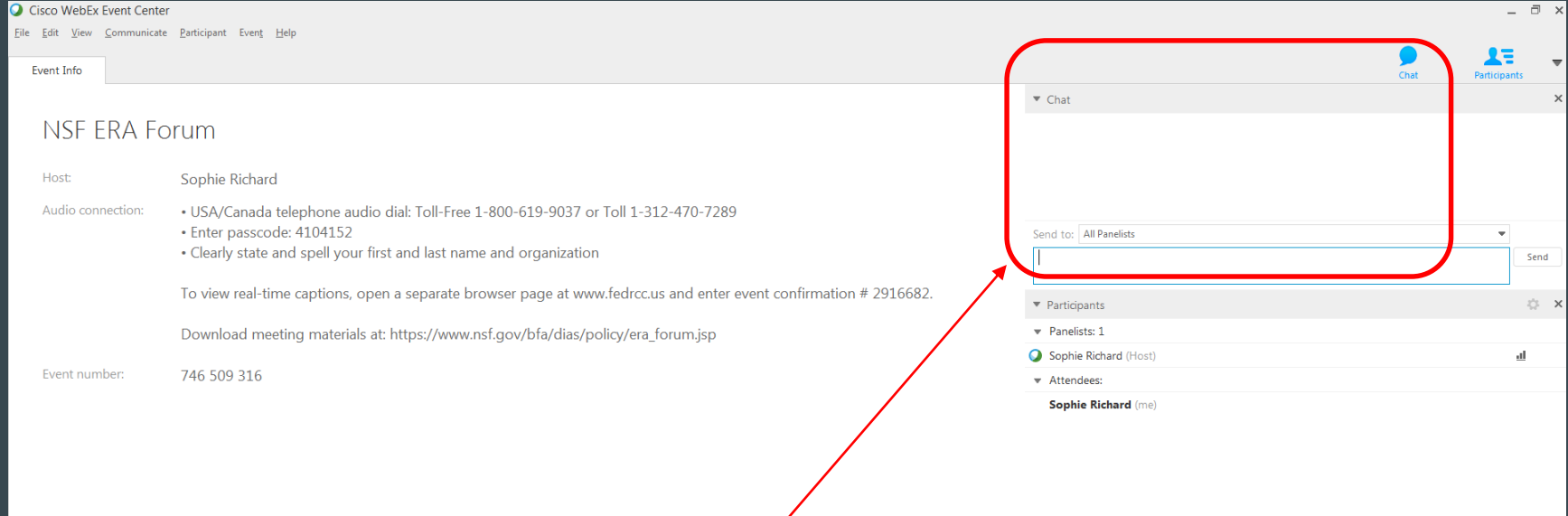
Agile approach

Frequency

Feedback

Topics of Interest

Chat Feature and related items



The screenshot displays the Cisco WebEx Event Center interface. On the left, the 'Event Info' tab is active, showing details for the 'NSF ERA Forum'. The host is Sophie Richard. Audio connection options include USA/Canada telephone audio dial (Toll-Free 1-800-619-9037 or Toll 1-312-470-7289), passcode 4104152, and instructions to clearly state names and organizations. Real-time captions are available at www.fedrcc.us with confirmation # 2916682. Meeting materials are at https://www.nsf.gov/bfa/dias/policy/era_forum.jsp. The event number is 746 509 316.

On the right, a chat window is open, highlighted with a red rounded rectangle. The chat window shows a 'Send to:' dropdown menu set to 'All Panelists' and a text input field. Below the chat window, the 'Participants' list is visible, showing 'Sophie Richard (Host)' and 'Attendees: Sophie Richard (me)'. A red arrow points from the bottom-left text area to the chat window.

- Click on the chat icon on the top-right corner
- In the chat window, select “All panelists” to send your questions and feedback

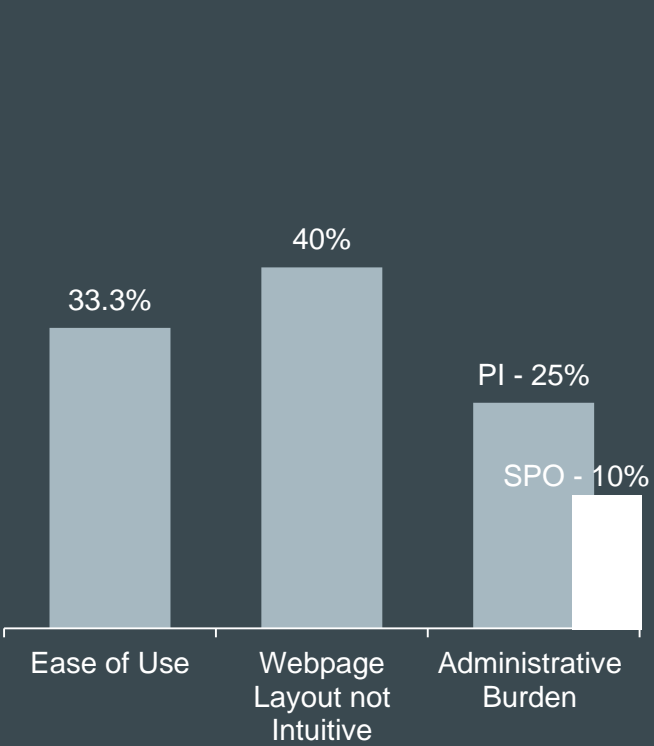
Proposal Submission Modernization Initiative

History and Overview

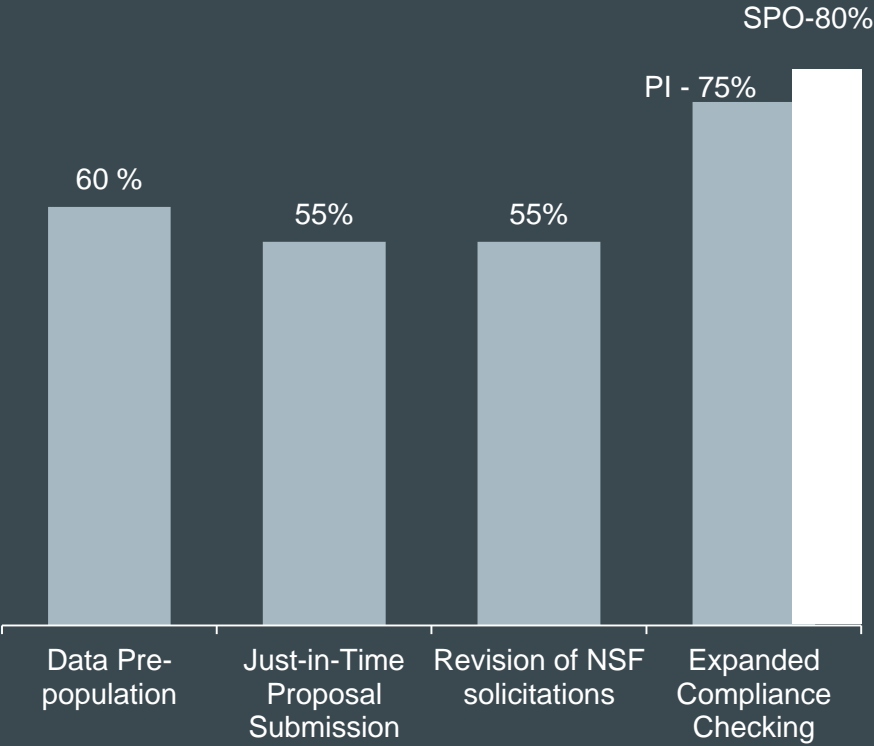
- FastLane and the Proposal Process
- PSM Initiative

PSM Survey Summary Findings

The problem statement



Suggestions for potential solutions



ERA Forum Discussion Topic:

Tailoring the Proposal Interface

PSM Vision

- Modernize the applications supporting the merit review process and the user experience via the development of a new application
- Reduce the administrative burden to the research community and NSF staff associated with preparation, submission, and management of proposals
- Increase efficiencies in proposal preparation, submission, and management
- Improve data quality
- Capture proposal content in a way that supports data analysis

PSM Agile Concept Development

- PSM is following an agile process to develop, review, and refine wireframes (webpage mockups) that leverages knowledge of the existing pain points
- External users will be engaged throughout the process to ensure the overall approach, workflows, and wireframes are consistent with user needs
- Development of features and enhancements will be deployed incrementally

Identify Pain Points and Draft Improvements

- Leverage helpdesk, PSM survey, etc. to identify improvement opportunities and create initial concepts/mockups

Review Concepts with NSF Staff Working Group

- Review initial concepts and discuss at Working Group sessions
- Refine as needed

Review Wireframes with External Users

- Present and test wireframes with external users to validate and refine
- Usability sessions, Forum, etc.

Internal Validation and Execution

- Brief Working Group, elevate/resolve issues and begin development
- Deliver enhancements incrementally

Tailoring the Proposal Interface: Demonstration

[Home](#) > Proposal Preparation

Proposal Preparation

What would you like to work on?

Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

[Create Proposal](#)

[? What information will need to be provided?](#)

- After logging in, the user may start a new proposal or access draft and submitted proposals
- This discussion will focus on creating a new proposal

In Progress Proposals

Continue working on a previously created proposal, that has not yet been submitted to NSF.

[Work with In Progress Proposals](#)

5 In Progress Proposals are available

Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

[View Submitted Proposals](#)

17 Submitted Proposals are available

- Help text provides upfront clarification of information needed to setup the proposal

Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

Select Funding Opportunity

Show 10

Filter by number or keyword

Showing 1 to 10 of 46

« < PREV 1 2 3 4 5 NEXT > »

Select	Funding Opportunity Number ?	Funding Opportunity Title
<input type="radio"/>	NSF 16-000	Grant Proposal Guide - GPG
<input type="radio"/>	NSF 16-400	Division of Integrative Organismal Systems
<input type="radio"/>	NSF 16-500	Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES)
<input type="radio"/>	NSF 16-505	Division of Integrative Organismal Systems
<input type="radio"/>	NSF 16-507	Exploiting Parallelism and Scalability (XPS)
<input type="radio"/>	NSF 16-509	Long-Term Ecological Research (LTER)
<input type="radio"/>	NSF 16-510	Big Data Regional Innovation Hubs: Establishing Spokes to Advance Big Data Applications (BD Spokes)
<input type="radio"/>	NSF 16-511	EPSCoR Research Infrastructure Improvement Program: Track-2 Focused EPSCoR Collaborations (RII Track-2 FEC)
<input type="radio"/>	NSF 16-518	NSF/CASIS Collaboration on Fluid Dynamics Research on the International Space Station to Benefit Life on Earth
<input type="radio"/>	NSF 16-529	Petascale Computing Resource Allocations (PRAC)

Show 10

Showing 1 to 10 of 46

« < PREV 1 2 3 4 5 NEXT > »

Previous

Next

• Indicator shows setup process steps

• Search feature enables faster ID of funding opportunity

• Only “live” funding opportunities are available

Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

Select Program(s)

Funding Opportunity: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES)

Division: Integrative Organismal Systems

Select Program 

Activation

[+ Select additional program](#)

- In cases where there are multiple divisions/programs, user makes choice

Previous

Next

Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

Select Submission Type and Funding

What would you like to prepare?

- Letter of Intent
- Preliminary Proposal
- Full Proposal
- Full Proposal related to a Preliminary Proposal
- Renewal
- Accomplishment Based Renewal

What funding mechanism will be used? ?

- Research
- Conferences
- EAGER
- Equipment
- Facility / Center
- Fellowship
- Ideas Lab
- International Travel
- RAPID

• User chooses relevant submission type and funding mechanism

Previous

Next

Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

Proposal Title & Collaborative Information

Proposal Title

Test 123

Is this proposal collaborative?

- Yes, a collaborative proposal from one organization ([GPG II.D.4.a](#))
- Yes, a lead collaborator for a proposal from multiple organizations ([GPG II.D.4.b](#))
- Yes, a non-lead collaborator for a proposal from multiple organizations ([GPG II.D.4.b](#))
- No, not a collaborative proposal

- User provides proposal title and indicates collaborative status

Previous

Create Proposal

Navigation Link 1

Navigation Link 2

Navigation Link 3

Home > Proposal Preparation > Create New Proposal

Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

Proposal Title & Collaborative Information

Proposal Title

Is this proposal collaborative?

- Yes, a collaborative proposal from one organization (GPG II.D.4.a)
- Yes, a lead collaborator for a proposal from multiple organizations (GPG II.D.4.b)
- Yes, a non-lead collaborator for a proposal from multiple organizations (GPG II.D.4.b)
- No, not a collaborative proposal

Previous

Create Proposal

Your proposal interface and compliance rules are being customized based on your responses...

- After providing setup data, PSM will customize the proposal interface and rules

Full Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES) [Change]

Funding Opportunity: NSF 16-505 - Division of Integrative Organismal Systems [Change]

Division: Integrative Organismal Systems [Change] Programs: Activation, Animal Behavior, Modulation [Change]

Funding: Research [Change] Collaborative: Lead [Change]

Proposal Actions

Allow SPO Access

Check Proposal Compliance

Print Proposal

Invite Collaborators

Add/Delete Non Co-PI Senior Personnel

Delete Proposal

Helpful Links

[View submitted proposals](#)

[Contact IT Help Central](#)

[Grant Proposal Guide](#)

Proposal Sections

Status

Last Updated

Compliance Status

Core Proposal Sections

[Submitting Organization](#)

Not started

Not checked

[Senior Personnel](#)

Not started

Not checked

[Additional Proposal Information](#) ⓘ

Not started

Not checked

[Project Summary](#)

Not started

Not checked

[Project Description](#)

Not started

Not checked

[References Cited](#)

Not started

Not checked

[Budgets](#)

Not started

Not checked

[Budget Justification](#)

Not started

Not checked

[Facilities, Equipment, and Other Resources](#)

Not started

Not checked

[Data Management Plan](#)

Not started

Not checked

[* Collaborators & Other Affiliations](#)

Not started

Not checked

Supplementary Documents ⓘ

[Postdoctoral Mentoring Plan](#) ⓘ

Not started

Not checked

[Letters of Support](#)

Not started

Not checked

[Collaboration Plan](#)

Not started

Not checked

- Proposal setup details may be adjusted, if needed

- Reorganized forms and indicators aim to show proposal progress

- Proposal actions are contained within this main proposal page

PSM Questions and Feedback

- Time at the end of this meeting for Q&A
- Brief PSM-specific survey will be available for you to provide additional feedback and to volunteer for other PSM usability activities

2016 Notional Event Timeline (Subject to change)



Next Steps

Survey

[Forum Feedback survey:](#)

https://www.surveymonkey.com/r/NSF_ElectronicResearchAdmin_Forum
[PSM-specific survey](#) will be emailed to forum registrants

Email

nsferaforum@nsf.gov

Listserv

NSF-ERA-FORUM@listserv.nsf.gov

NSF ERA Forum
website

https://www.nsf.gov/bfa/dias/policy/era_forum.jsp

Q&A