

NSPIRES
Release 5.3
Enhancements
to
Proposal Processing &
Peer Review



External User Guide
May 2011

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Overview

Release 5.3 of NSPIRES provides enhancements to existing processes involving the preparation, submittal and review of proposals. The forms preparation and submittal processes, for both Program Specific Data proposal questionnaires and Peer Review evaluation forms, have added clarity and flexibility with increased system validation and error processing.

Summary of Enhancements

Proposal Preparation and Submittal

- The system will automatically block submittal to NASA, e.g. create an 'error', of a proposal containing unanswered required questions for the Program Specific Data element (PSD).
- Work-in-progress can be saved on PSD questionnaires, even if there are required questions not yet answered. This section of proposal preparation will no longer have to be completed in one session.
- Increased error checking will apprise the user if *non-required* PSD questions are unanswered.
- The system will now issue a warning for uploading proposal attachments greater than 17 megabytes.

Peer Review

- Individual and panel evaluations can be 'Saved as Draft' without addressing any required evaluation criteria.
- The system will prevent Individual and Panel Evaluations from being 'Saved as Final' if *required* evaluation criteria are not addressed.

This Guide will show you examples of:

- ✓ **Saving Work-in-Progress with Validation Override**
 - Program Specific Data (PSD) Questionnaires
 - Individual and Panel Evaluations
- ✓ **New Validation for Final Forms**
 - Blocking Submittal of Proposals with PSD Errors
 - Preventing Saving Evaluations with errors as Final

Proposal Processing Enhancements

Program Specific Data (PSD) Validation

The most important area of PSD validation is the answering of **required questions**. Prior to Release 5.3, the user could not save a draft of the PSD questionnaire without answering all required questions. Now the user is given the option to override validation enabling the user to save portions of the questionnaire as work-in-progress. The following examples show what happens when a user tries to save a questionnaire with errors.

Example: User attempts to save with errors and then overrides validation

Account Mgmt Organization Mgmt Proposals Reviews Awards

Temporarily Enable Saving of Form with Unanswered Required Questions

Validation Error. You must correct the following error(s) before proceeding:

- Team member question must be answered

User attempts to save document with one required question still unanswered. Validation issues an error with an override checkbox.

Program Specific Data Questionnaire

This is a new Questionnaire element called a Label. It is intended to give the form more flexibility by providing information and instruction outside the question framework. It is ideal for expository or navigational text.

Account Mgmt Organization Mgmt Proposals Reviews Awards

Temporarily Enable Saving of Form with Unanswered Required Questions

Validation Error. You must correct the following error(s) before proceeding:

- Team member question must be answered

User checks override checkbox to save work in progress. Note: this and all required questions will eventually have to be answered to allow proposal submittal.

Program Specific Data Questionnaire

Optional questions: element checking is enhanced to make unanswered optional questions more difficult to overlook. The Check Elements program will now issue Warnings for unanswered optional questions as well as Errors for unanswered required questions from the proposal preparation process through submittal. Note that check elements can be run on-demand by the user.

Example: Check Elements output with Errors and Warnings for unanswered questions.

The screenshot shows a web interface for 'View Proposal: Check Elements Report'. The navigation bar includes 'Account Mgmt', 'Organization Mgmt', 'Proposals', 'Reviews', and 'Awards', with 'INSPIRES Time' on the right. The page content includes:

- Proposal:** adf
- Element:** Program Specific Data
- The following errors and warnings were found in this element:
- Errors:**
 - ✘ There are required questions that must be answered.
- Warnings:**
 - ⚠ Please note that you left some optional questions unanswered.

A callout box on the right states: 'Check Elements issues **Errors** for unanswered required questions and **Warnings** for unanswered optional questions'. A red dotted arrow points from this box to the error message. A 'Note' box on the right contains the following text:

- Errors will prevent submission of proposals.
- Warnings as guidance for proposal preparation.

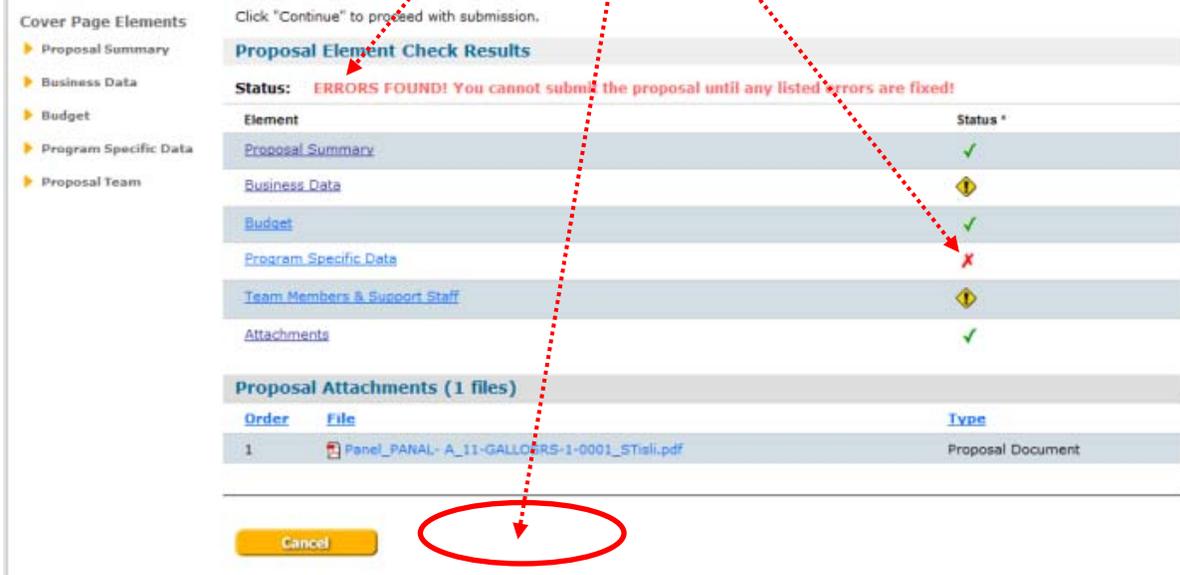
PSD Error Blocking Submittal

The Check Elements program is automatically run at proposal submittal and, if any error is issued, submittal is blocked. For this release, because the user can now save a PSD questionnaire with errors, Check Elements has been enhanced to detect PSD errors and stop submittal if any required questions are unanswered.

Example: Check Elements blocking proposal submittal because of PSD error.

The User has clicked on the Submit Proposal button but because there are unanswered required questions, Check Elements does the following:

- Issue a general error message that submittal cannot be completed until errors are fixed.
- Mark the sections that have errors with a red 'X'
- Remove the 'Submit Proposal' button



Click "Continue" to proceed with submission.

Proposal Element Check Results

Status: **ERRORS FOUND! You cannot submit the proposal until any listed errors are fixed!**

Element	Status *
Proposal Summary	✓
Business Data	⚠
Budget	✓
Program Specific Data	✗
Team Members & Support Staff	⚠
Attachments	✓

Proposal Attachments (1 files)

Order	File	Type
1	Panel_PANAL- A_11-GALLOORS-1-0001_STali.pdf	Proposal Document

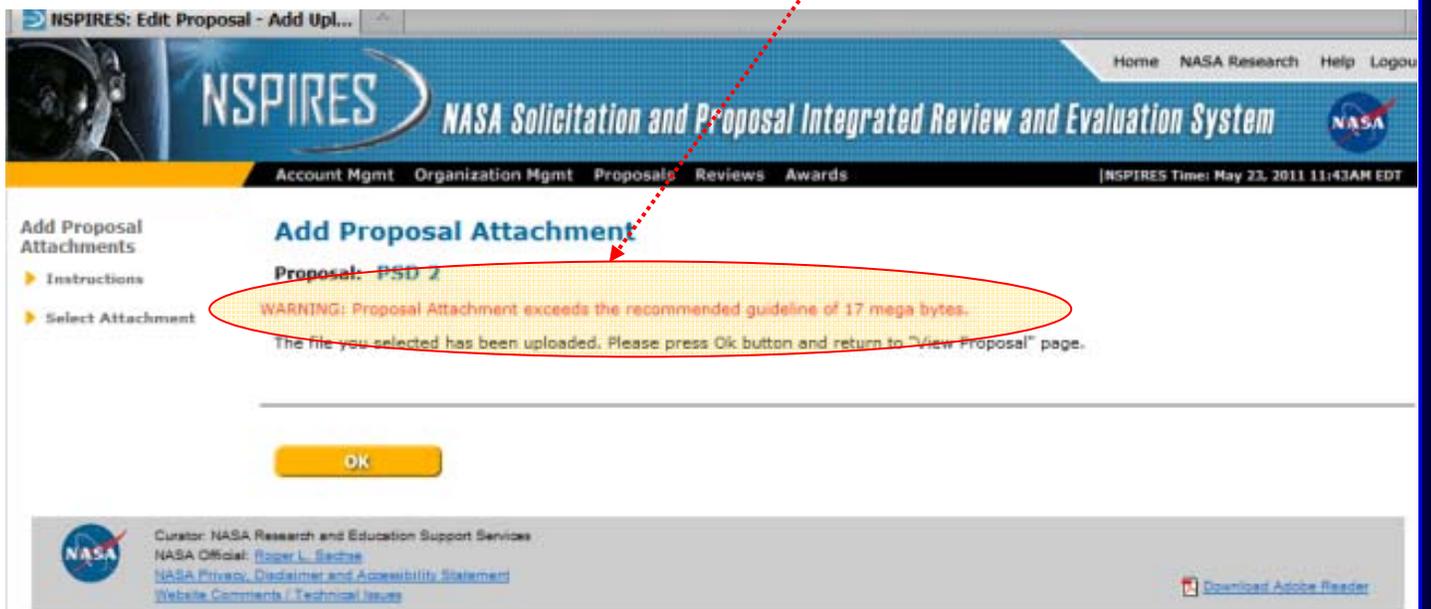
[Cancel](#)

Button is removed: no opportunity to submit without fixing problems.

Guidelines on Size of Attachment Uploads

The system will now issue a warning for uploading proposal attachments greater than 17 megabytes. This file size is consistent with size limitations defined in recent solicitations. If you receive the warning, please check the solicitation to which you are responding for more precise definitions on file size limitations. NOTE: The system limit of 17mb is highest limit for NASA solicitations in general, but individual solicitations may have specific limits that are less.

Example: Warning for over 17mb per attachment upload attempt



The screenshot shows the NSPIRES web interface. The main heading is "Add Proposal Attachment" for "Proposal: PSD 2". A red oval highlights a warning message: "WARNING: Proposal Attachment exceeds the recommended guideline of 17 mega bytes." Below the warning, it states "The file you selected has been uploaded. Please press Ok button and return to 'view Proposal' page." and includes an "OK" button. A red dotted arrow points from the text above to the warning message. The page footer includes the NASA logo, curator information (NASA Research and Education Support Services, NASA Official: Roger L. Sestras), and links for privacy, accessibility, and technical issues. A "Download Adobe Reader" link is also present.

Peer Review Enhancements

Enhanced Evaluation Form Error Checking

Work-in-progress (i.e., leaving some required questions unanswered) can be captured on Individual and Panel Evaluations so they no longer have to be completed in one session. Saving as Draft will be permitted without answering all required questions.

Note: For evaluations that require an overall grade (see box below), saving will not be permitted unless the overall grade is entered regardless of the status of unanswered questions. The Overall Grade in the upper right hand section of a form is not to be confused with questions on the form asking for grades or overall grades. Grade validation is separate from question validation.

Example: User attempts to save with errors and then overrides validation

The screenshot displays a 'Proposal Evaluation Form' with the following sections and content:

- Header:** 'Proposal Evaluation Form' with metadata: Individual Evaluations Due: 11/19/2011, Review Support Personnel.
- Section: Proposal Evaluation**
 - Checkbox: **Temporarily Enable Saving of Form with Unanswered Required Questions**
 - Message: **Validation Error. You must correct the following error(s) before proceeding:**
 - Errors:
 - What are the relative strengths of this proposal? *** ERROR Please enter the 'Relative Strengths' of this proposal. ERROR ***
 - What are the relative weaknesses of this proposal? *** ERROR Please enter 'Relative Weaknesses' for this proposal. ERROR ***
- Section: Proposal Information**
 - Proposal #: 11-SGPS053A -0001
 - Title: Iteration 5.3 Test Data 1
 - PI: Gallos, Stephen
 - Organization: Z54S
 - Solicitation: AAAGALLOSNOV11
- Section: Review Information**
 - Overall Grade: 1-5 (Integer - no decimal places)
 - Status: (none)
 - Review: Iteration 5.3 Test Review [SGEVALFORM]
 - Reviewer: Corey, Wendel (Review Chair)

Annotations in the image include:

- A box at the top right explains that an Overall Grade section is required for saving and that the note should be ignored if it is not present.
- Red dotted arrows point from the error messages to the 'Temporarily Enable Saving...' checkbox in a lower section of the form.
- A second box at the bottom right explains that the user can attempt to save with these errors and override the validation, but will not be able to 'Submit as Final' until errors are corrected.

Evaluation Form Finalization

The system will prevent Individual and Panel Evaluations from being 'Saved as Final' if *required* evaluation criteria are not addressed.

Example: User attempts to 'Save as Final' with the errors that are temporarily overridden (see page 6), but the system prevents this from happening.

The screenshot shows a web application interface with a navigation bar at the top containing 'Account Mgmt', 'Organization Mgmt', 'Proposals', 'Reviews', and 'Awards'. On the right side of the navigation bar, it displays 'NSPTRES Time: May 04, 2011 01:25PM EDT'. Below the navigation bar, the page title is 'Proposal Evaluation Form'. A red error message reads: 'ERROR: You cannot submit this evaluation as final. There are required Evaluation Criteria that need to be completed.' Below the error message, the following information is displayed: 'Proposal: 11-SGPSD53A -0001: Iteration 5.3 Test Data I', 'PI: Gallos, Stephen', 'Organization: Z\$\$\$' and 'Review: Iteration 5.3 Test Review [SGEVALFORM]'. There is a yellow 'Cancel' button on the left. A red oval highlights a rectangular area where the 'Submit as Final' button would normally be, and a red dotted arrow points from this oval to a text box below.

The user cannot submit the evaluation because the 'Submit as Final' button has been removed.