



Credits: Jack Snoeyink (author); Grace Yuan (ENG host, testing, & design); Wendy Nilsen (template language); Jim Donlon (workflow); & many testers

RoboRA,

an Excel spreadsheet in the [PD-3PO](#) family of tools, attempts to automate many of the tedious parts of writing **Review Analysis (RA)** documents: It populates [RA templates](#) (such as the Awd template on back) with reportserver data to make Word **RA drafts**, which you complete on Mac or PC, then click one button to [CleanCopy](#) to eJacket. It can also gather [review documents](#) into a bookmarked pdf, list amounts from the [latest revised budget](#), and [flag miscodes](#).

Installing RoboRA: From a **PC on the NSF network** or the Virtual Desktop/Citrix **Win 7 or Win 10 Desktop**, click [RoboRA_v0.8.xlsm](#) and when Excel Online complains, click Open in Excel: Enable content, and on the Prefs tab, set the first three. (Defaults are good for the rest.)

1. Test the reportserver connection using your division's userid and password
2. Choose your RA templates by selecting from the table.
3. Save your copy of RoboRA on your R: drive or a local drive. (Word mail merge cannot use a data source from SharePoint or OneDrive.)

Using RoboRA

In the [basic interface](#), you list proposal ids to award, decline, or standard decline. Use the menu to restrict proposal status, and buttons to **Query** reportserver and gather **Review Docs**. Check the coding, then make **RA Drafts**.

14	Std are auto-loaded to eJ. Complete drafts in Word (PC or Mac) & CleanCopy to eJacket.		
15	Awd template	Decline template	Standard Declines: auto-loaded to eJacket
16	Awd RAT.docx	Decline RAT.docx	Std Decline RAT.docx
17	prop_id	prop_id	doc:Std Triage NDP RAT.docx
18	1749609	1749563	prop_id
19	1750780	1749855	Std Decline RAT.docx

In the [advanced interface](#), you specify a set of proposals like in [PD-3PO](#) (say, all pending by program, solicitation, PD, date) and select on the RAData tab which template to use (Awd, Decline, Std Decline, etc.)

The reverse shows a template. In preference 2, if you chose a template folder on your machine, RoboRA will copy the standard templates for you to [customize](#) as desired. Keep in mind that individual customization increases the workload of those doing DD concur.

Rec	ty	re	re	RAtemplate	RAdraft_file
1.01	HC				RA 1749609
2.03	C				RA 1749563
2.04	C				RA 1749855
2.07	C				RA 1750780
2.07	C				1763937
2.10	C			Awd RAT.docx	1751135
2.12	C			Std NC-LC RAT.docx	1751102
3.04	LC			Std Triage NDP RAT.docx	1755702
3.13	LC			Decline RAT.docx	1755702
				Std Decline RAT.docx	1749385

Example of an Awd template, showing all options. (Extra non-leads, panels, etc, are suppressed if not present.)
 RoboRA will fill in the template with reportserver data to make RA drafts, which you can complete on Mac or PC.
 Double click the gray bar to strip comments and open eJacket to the RA page to paste.
 Documentation: <https://collaboration.inside.nsf.gov/eng/meritreview/ENG%20Tools%20Websites%20and%20Best%20Practices/RoboRA.aspx>

[[<prop_id0> Awd RAT.docx **General Award template of 12/5/2017** Info,
 Data pull: «update» CtxSt: «contx_stmt_id» #Revs:«Nrev»«Nunrlsb» («Nnumkcb» need Instruction,
 (un)release) RAdate: «RAupdate» and the
 CleanCopy
 Enable content/macros & double click here: "[CleanCopy text; ready e/ RA for paste]" button
 Comments in double brackets are stripped by CleanCopy, so write **outside** the brackets.
 *** is a short abbreviation of the division, program, or panel name. To see field codes, select all, then press Alt+F9]

]]NATIONAL SCIENCE FOUNDATION
 Alexandria, Virginia 22314
 «Dir_name» («Dir»
 «Div_name» («org_code»
 «pgm_ele_name» («pgm_ele_code»
 «pgm_ann_id» «solicitation»

Review Analysis Recommendation: **Award**
 Total request: «rqst_tot»; Total recommended: «budg_tot»
 «prop_titl_txt»

L: «prop_id0» «last0», «first0» «inst0» «rqst0»
N: «prop_id1» «last1», «first1» «inst1» «rqst1»
N: «prop_id2» «last2», «first2» «inst2» «rqst2»
N: «prop_id3» «last3», «first3» «inst3» «rqst3»
N: «prop_id4» «last4», «first4» «inst4» «rqst4»
N: «prop_id5» «last5», «first5» «inst5» «rqst5»
N: «prop_id6» «last6», «first6» «inst6» «rqst6»

«panel_id0» «rec0» «panel_name0» («panel0» panelists; «conf0» decl conf),
 on «panel_end0», recommended as «RCOM_TXT0» («revs0»)
 Std competition rank «rank0» of «panelString0»

«panel_id1» «rec1» «panel_name1» («panel1» panelists; «conf1» decl conf),
 on «panel_end1», recommended as «RCOM_TXT1» («revs1»)
 Std competition rank «rank1» of «panelString1»

«panel_id2» «rec2» «panel_name2» («panel2» panelists; «conf2» decl conf),
 on «panel_end2», recommended as «RCOM_TXT2» («revs2»)
 Std competition rank «rank2» of «panelString2»

Ad hoc reviews («AhNrev»): «AhNrev», with last on «AhLast»
 «RApre_note»

PROJECT OVERVIEW[[Brief description of the project]]

Narrative begins here.
 CleanCopy removes [[instructions]],
 so write your text outside brackets.

INTELLECTUAL MERIT[[Brief description of the Intellectual Merit strengths and weaknesses in the words of the PDs]]

BROADER IMPACTS[[Brief description of the Broader Impacts strengths and weaknesses in the words of the PDs]]

REVIEW SUMMARY[[«allReviews» Brief description of the panel characteristics, tone, attitudes and/or issues -- anything not in the context statement. Include PDs opinion of the continues, proposal, use and timing of Ad Hoc, explanation of wider range of reviews, and any extenuating circumstances or panel surprises. Keep in mind that this will be in the permanent record, and may be seen by a FOIA request.]]

AWARD CONSIDERATIONS[[Only for awards, includes budget changes, issues addressed by the PI, cofunding, etc]]

RECOMMENDATION[[Requested action, rationale for action (program/cluster process, available funding, program priorities and balance, etc), funding decision-making process]]
 As Program Director, I evaluated this proposal for funding in light of its intellectual merit and broader impacts relative to the goals of the program, taking into account the reviews and recommendations. I also considered this proposal in relation to other proposals reviewed in this program, the need to maintain appropriate balance among subfields, the total amount of funds available to the program for new proposals, and general Foundation policies. I concur with the reviewers' assessment and recommend that this project be funded as described below.

«RASigner»
 «RASigner2»
 Thursday, January 4, 2018

[[Notes for DGA, including IRB and PI meetings, etc]] «RAps_note»
IMannual budget required if split/or CONTINUING]]STANDARD GRANT,
 Requested duration: «rqst_mnth_cnt» months, starting «rqst_eff_date»

L: «prop_id0» «last0», «first0» «inst0» PRC: «PRC0»
 «fisc_yr» «b0tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id1» «last1», «first1» «inst1» PRC: «PRC1»
 «fisc_yr» «b1tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id2» «last2», «first2» «inst2» PRC: «PRC2»
 «fisc_yr» «b2tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id3» «last3», «first3» «inst3» PRC: «PRC3»
 «fisc_yr» «b3tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id4» «last4», «first4» «inst4» PRC: «PRC4»
 «fisc_yr» «b4tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id5» «last5», «first5» «inst5» PRC: «PRC5»
 «fisc_yr» «b5tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»
N: «prop_id6» «last6», «first6» «inst6» PRC: «PRC6»
 «fisc_yr» «b6tot» Org: «org_code» PEC: «pgm_ele_code» Obj: «obj_class_code»

CISE narrative
 Customize for your division or program.

Standard Grant from latest revised budgets.
 For co-funding or continuing grant, see Budget tab

Signature Block