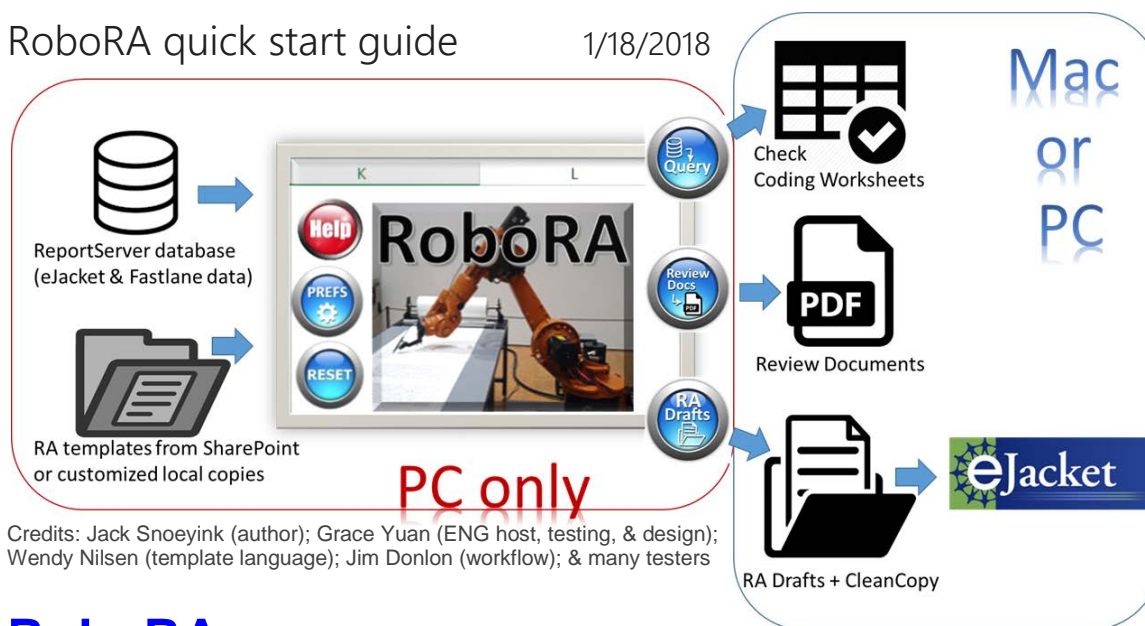


1/18/2018



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.)


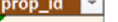
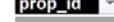
## Using RoboRA

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 **R**

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 doc: Std Triage NDP RAT.docx

17   

18 1749609 1749563 1749563

19 1750780 1749855 1749609

to **Query** reportserver and gather **Review Docs**. Check the coding, then make **RA Drafts**.

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	re	re	re	RAtemplate	RAdraft
1.01	HC				RA 1749600
2.03	C				RA 1749586
2.04	C				RA 1749855
2.07	C				RA 1750788
2.07	C				1763933
				Awd Rat.docx	1751133
				Std NC-LC Rat.docx	1751100
				Std Triage NDR Rat.docx	1755700
3.04	LC			Decline Rat.docx	1755700
3.13	LC			Std Decline Rat.docx	1749385