



eRA Project Team Meeting Minutes

Date: Tuesday, September 28, 2004
Time: 9:00–10:25 a.m.
Location: Rockledge 1, 5th floor conference room
Chair: Izja Lederhendler

Next Meeting: Tuesday, October 12, 9:00 a.m., Rockledge 1, 5th floor conference room

Action Items

1. (Advocates/Analysts) Identify volunteer users to assist in application conversion to J2EE.

Presentations

- Introduction to ECARES for Customers (DEAS):
http://era.nih.gov/docs/ECARES_Customer_Orientation_Master_eRA9-28.pdf
- J2EE Migration Update (Tracy Soto):
http://era.nih.gov/docs/J2EE_Migration_Update_09-28-2004.pdf

Extramural Customer Assistance Request System (ECARES)

Amy Peterson

The Extramural Customer Assistance Request System (ECARES) is the tool developed for the Division of Extramural Activities Support (DEAS) organization to handle entry, assignment, and tracking of their daily workloads. ECARES is based on the Sitescape Enterprise Forum COTS product and customized to reflect requirements in the DEAS Standard Operating Procedures (SOPs) and standards in the DEAS Performance Work Statement (PWS). DEAS begins work Oct. 4 and 400 requests have already come in to ECARES. Amy walked the team through the attached presentation.

Discussion Points:

- Workload balancing is a Phase 2 feature that is targeted to be in place by the end of year.
- DEAS services three main business areas: grants management, review, and program. There are some activities that are common to the three business areas. Although they are listed as separate tasks, the logic behind them is same.
- Access to ECARES is restricted to NIH users associated with valid IC extramural organizational codes in the NIH Enterprise Directory (NED). It is important that users keep their NED records updated. ECARES pulls the NED record to build the initial system profile at first login. Requesters that are entering an ECARES request on behalf of a customer must make sure that customer has performed their initial login so that the customer's profile is available in the system. Mary Fran Deutsch noted that there is not a good way to reach all potential extramural customers (i.e. distribution lists are fragmented by divisions). The team suggested asking EPMC members to distribute information within their ICs.

- ❑ Customers receive email notifications any time a task leader or a supervisor changes the workflow state of a request. An option to disable the email notifications will be implemented later, however DEAS felt it was important for customers to see activity on their requests during the transition in support procedures.
- ❑ Task leaders back each other up and can easily adjust the filters of their workload views to see the work assigned to other leaders.
- ❑ Since at least a subset of ECARES users (e.g., task leaders and supervisors) have visibility to both Program and Review information, the team questioned what security measures are put in place to ensure that information regarding one business area is not inappropriately given to a member of the other business area. Mary Fran Deutsch reported that customers and first line DEAS staff can only see their own information. The broader view of system information is only available to members of her team in a leader or supervisory role and that the issue is well understood and being addressed through training and management controls outside of the system.
- ❑ A feature to be able to link to the DEAS SOPs from within ECARES is expected soon.
- ❑ Izja questioned how files end up in the electronic grant folder and raised a concern that grants management may be losing their effectiveness as the formal keepers of the official file. He does not want to see the official file cluttered with non-official documents. He stated that policies must be in place to keep the core of the electronic grant file pure. Marcia Hahn reported that policy lists exist to define what files should be part of the official file. Mary Fran Deutsch noted that DEAS must currently work with each individual IC to determine which files are part of their *official* file and how they should be handled.

J2EE Conversion Update

Izja Lederhendler and Tracy Soto

Izja reminded the team that J2EE was voted a top priority at the eRA retreat last fall. He stressed that converting current client/server applications to J2EE is a necessary step in moving forward with new end-to-end processing initiatives. Important planned functionality like workflow and single sign-on, for example, are dependent on the completion of the conversion. The J2EE platform provides the added benefits of increased reuse of application software, improved accessibility to applications and reduced maintenance costs because client-server applications will have been retired.

Tracy reported that eRA has chosen to use a vendor that specializes in converting client/server applications to J2EE through the use of automated tools. eRA has negotiated with the vendor to add a constraint that the applications must be converted to use current eRA J2EE framework and to implement eRA User Interface (UI) standards. This constraint adds complexity to the conversion, but produces a product that is more easily integrated into the eRA System. This conversion approach was determined to be more cost-effective and timely than manual coding. Two eRA applications, Grants Management (GM) and User Admin have just completed this process as a proof of concept. Both applications are currently in test and are being evaluated for maintainability. Several test grants have successfully passed through the converted GM module and early indications are positive that the conversion approach is solid.

The following table lists the current eRA J2EE and Client/Server applications.

eRA J2EE Applications	eRA Client/Server Applications
<p>J2EE in production:</p> <ul style="list-style-type: none"> • Committee Management Web (CM-WEB) • Grants Closeout Module (GCM) • IC Administration (ICAdmin) • Password (PASS) • Program Module (PGM) • Web Query Tool (WEB-QT) <p>Recently converted and currently in test:</p> <ul style="list-style-type: none"> • Grants Management (GM) • User Administration (UA) 	<p>First Group for J2EE Conversion:</p> <p>Containment: 10/2004-02/2005 Production Pilot: By May 28, 2005</p> <ul style="list-style-type: none"> • Committee Management (CM) • GUM • IC Operations (ICO) • ICSTORE • Review (REV) • Subprojects <p>Second Group for J2EE Conversion:</p> <p>Containment: 01/2005-05/2005 Production Pilot: By September 1, 2005</p> <ul style="list-style-type: none"> • Crisp Plus (CP) • Population Tracking (POP) • Receipt & Referral (RR) • Special Initiatives Tracking System (SITS) • Training Activities (TA)

In order to meet schedule and resource goals for conversion and shutdown of client/server versions, applications will be in “containment” during conversion (approximately 5 months).

Containment: Can you do your work without the change? If yes, any change request (bug fixes, enhancement, etc.) received for client server applications during this timeframe will not be implemented in the client/server application. Changes will be made to the J2EE version at the end of the conversion.

The conversion process is specifically to convert an existing production application from client/server to J2EE. The assumption made for this conversion is that no changes at all will be made to the client server application during the conversion process. The assumption we have made is that people are accomplishing their work with these applications and the only constraint that could happen is a policy change. **We are asking that policy decisions during this timeframe reflect this decision to contain enhancement of existing client/server applications.**

Discussion Points:

- ❑ There is an effort underway to reverse engineer requirements for the client/server applications. Although requirements were documented many years ago during the initial implementation of the client/server applications, they have not been maintained over the years to keep in line with the evolution of the code and are not at a sufficient level of detail. The newly documented requirements will be used to verify the converted applications and provide the needed baseline to move forward through Business Process Modeling and new development activities.

- ❑ Teresa Kinley asked if the changes to GM that CDC requested will be affected by this process. Cathy Walker noted that GM has just finished its conversion and the CDC requests are part of the redesign effort to follow.
- ❑ Tracy noted that both the J2EE and client/server applications will run in parallel for several months, but following conversion software changes will be made to the J2EE version only.
- ❑ Following conversion the User Interface (UI) screens will have all the same elements but some screen adjustments may be made to adhere to eRA UI standards.
- ❑ eRA Business Analysts will be working with Advocates and user groups to identify between one and three volunteer users for each application to provide input on user interfaces, review test plans, consult with developers, and assist with testing. Expected commitment is approximately 12 hours/week. Volunteer users for applications in the first conversion group need to be identified by October 8, 2004.

Action: (Advocates/Analysts) Identify volunteer users to assist in application conversion to J2EE.

Attendees

Bosco, Susan (MAI)	Goodman, Mike (OD)	Sachar, Brad (Oracle)
Bukowski, Maria (OD)	Hahn, Marcia (OER)	Salata, Kalman (CSR)
Burns, Amy (LTS)	Hughes, Steve (OD)	Sanderson, Gina (LTS)
Caban, Carlos (OER)	Ikedo, Richard (NIGMS)	Saunders, Crystal (SAMHSA)
Carr, Faizah (AHRQ)	Jordan, Craig (NIH/NIDCD)	Seach, James (NCI)
Cox, Michael (OER)	Katzper, Linda (OD/DEIS)	Siegert, Mark (OER)
Crapo, Harry (PSGS)	Kinley, Teresa (CDC)	Simms, Sophonia (OD)
Cummins, Sheri (LTS)	Koshy, Maria (OER)	Sinnett, Everett (CSR)
Dean, Caroline (FDA)	Lagas, Robert (Lagas Assoc.)	Soto, Tracy (OD)
Deutsch, Mary Fran (OD)	Lederhendler, Israel (NIMH)	Subramanya, Manju (LTS)
Diggs, Lana (OD)	Loewe, Mike (NINDS)	Thomson, Alastair (Blueprint)
Dixon, Diana (OD)	Mayer, Pam (NINDS)	Tucker, Jim (OER)
Dutcher, Sylvia (Mitretek)	Milner, Tina (OD)	Twomey, Tim (OD)
Fadeley, Vickie (OER)	Morton, Larry (OER)	Van Brunt, Virginia (LTS)
Faenson, Inna (OD)	Morton, Pete (CIT)	Walker, Cathy (OER)
Flach, Jennifer (OD)	Moyer, Skip (AHRQ)	Wehrle, Janna (NIGMS)
Fox, Daniel (IBM/Z-Tech)	Patel, Kalpesh (Ekagra)	Zhen, Changqing (IBM)
Frahm, Donna (OER)	Peterson, Amy (MAI)	Zucker, Sherry (DEIS)
Gaines, Patti (OER)	Porter, Yvette (OD)	
Gibb, Scarlett (OD)	Reeb, Michael (PSGS)	