

# Agenda for CWG Meeting November 14-15, 2001



## Applications Subgroup Meeting – November 14, 1:30 p.m.–5:30 p.m.

1. Implementation of SNAP BPR Recommendations
  - Short-term implementation
  - Proposed plans for e-SNAP
2. Discussion of Competitive Application
  - Definition of Application Components
  - Opportunities for BPR
  - Solicitation of CWG input

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 NIH Electronic Research Administration



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eRA integrates NIH's Commons and IMPAC II electronic research administration projects.

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Bookmarks Location: <http://era.nih.gov/projectmgmt/index.htm> What's Related

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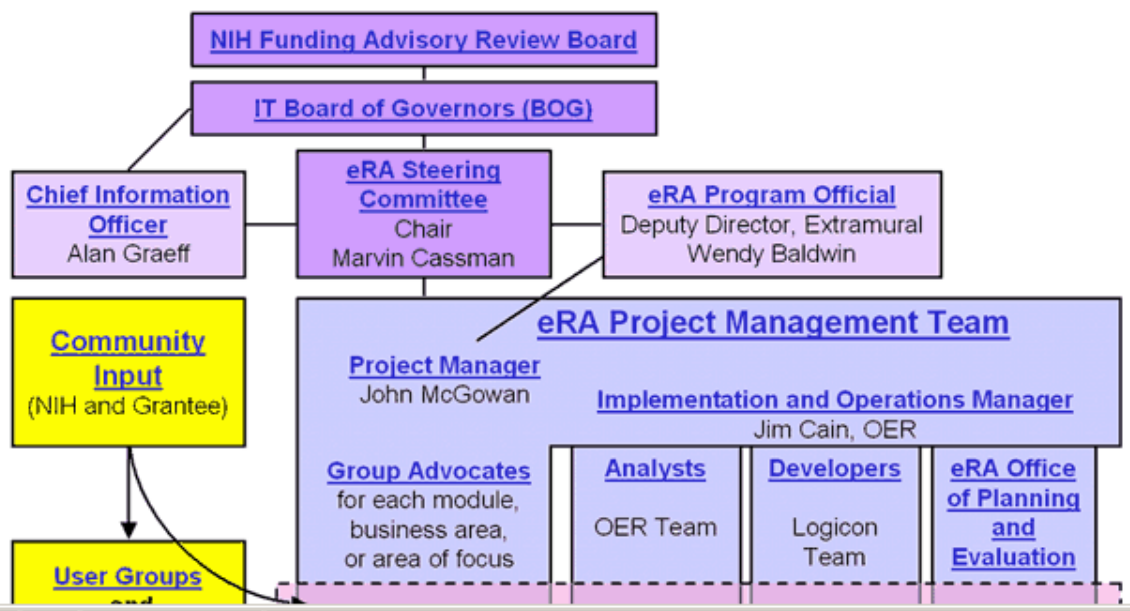
## Project Management

### Key Project Management Information

- [Working Groups](#)
- [Advocates](#)
- [Project Planning](#)
- [Meeting Minutes](#)
- [Participation matrix](#)

### eRA Project Management Diagram

For more detail click the links in the diagram below, or follow the [text-only links](#).



**eRA: Meeting Minutes - Netscape**

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## eRA Meeting Minutes

Back to the [Project Management home page](#).

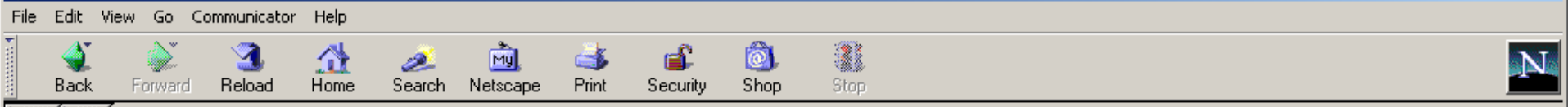
### Minutes by group

- [Project Management Team](#)
- [Steering Committee](#)
- [Committee Management User Group](#)
- [Commons Working Group \(CWG\)](#)
- [Data Quality User Group](#)
- [Grants Management User Group](#)
- [Program User Group \(ePUG\) Meeting Minutes](#)
- [Review User Group](#)
- [Scanning User Group](#)
- [Training \(WETS\) User Group](#)

Minutes from other groups will be posted as they become available.

### All minutes sorted by date

<a href="#">August 28, 2001</a>	Project Management Team
<a href="#">August 16, 2001</a>	Steering Committee
<a href="#">August 16, 2001</a>	Commons Working Group
<a href="#">August 14, 2001</a>	Committee Management
<a href="#">August 14, 2001</a>	Project Management Team
<a href="#">August 3, 2001</a>	Program User Group
<a href="#">July 24, 2001</a>	Project Management Team
<a href="#">July 11, 2001</a>	Grants Management
<a href="#">July 10, 2001</a>	Project Management Team
<a href="#">June 29, 2001</a>	Grants Management
<a href="#">June 28, 2001</a>	Steering Committee
<a href="#">June 26, 2001</a>	Project Management Team
<a href="#">June 20, 2001</a>	Committee Management
<a href="#">June 13, 2001</a>	Grants Management



## Commons Working Group (CWG) Meeting Minutes May 16, 2001

**Back to the main [meeting minutes page](#).**

NIH Commons Working Group Meeting  
May 16, 2001  
State Plaza Hotel, 2117 E Street, N.W. Washington DC

The full minutes are attached, below.

### Attachments

#### NOTE:

The attachments listed below were current as of the meeting date. Information in these documents may no longer be valid. Final versions of project documentation will be posted separately on the website.

Many of the attachments are **large** Microsoft Office files. Check the file format and file size to decide if you want to download.

Visit the [external Microsoft accessibility website](#) for more information on accessibility and Office documents.

If you still have trouble viewing these files, please contact Dr. George Stone at [george.stone@nih.gov](mailto:george.stone@nih.gov) or 301-435-0679.

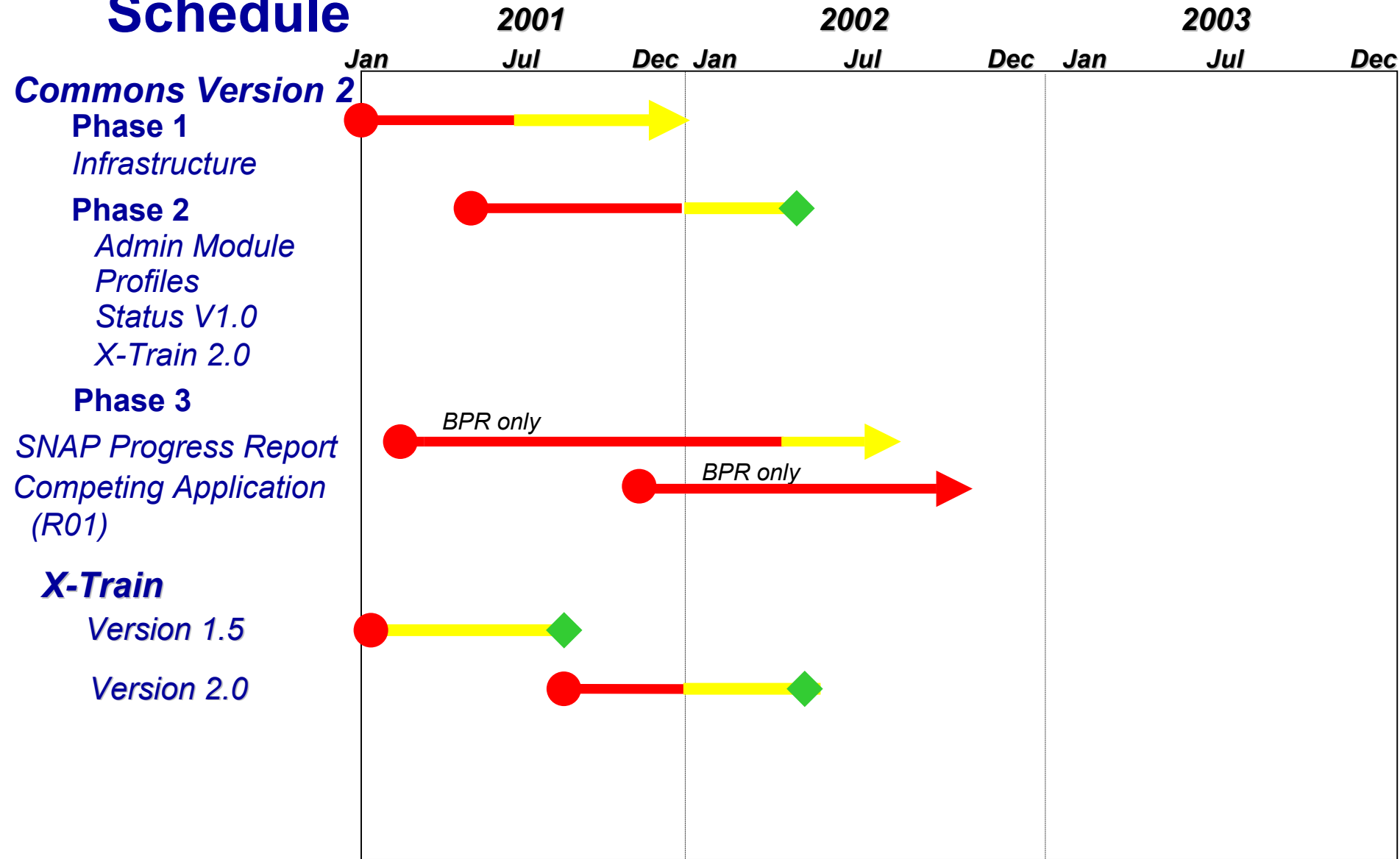
Attachment	File format	File size
<a href="#">Meeting minutes</a>	MS Word	262 k
<a href="#">Morning presentation</a>	MS PowerPoint	194 k
<a href="#">Afternoon presentation</a>	MS PowerPoint	72 k

# Status of SNAP Reengineering



- Recommendations finalized and approved by NIH
- Changes acknowledged to HHS
  - No change to paper submission
  - Changes to occur in e-SNAP
- Changes to be announced to grantee community through NIH Guide
  - Announcement timed relative to deployment of e-SNAP
    - Pilot late 2002

# Commons Version 2.0 Implementation Schedule

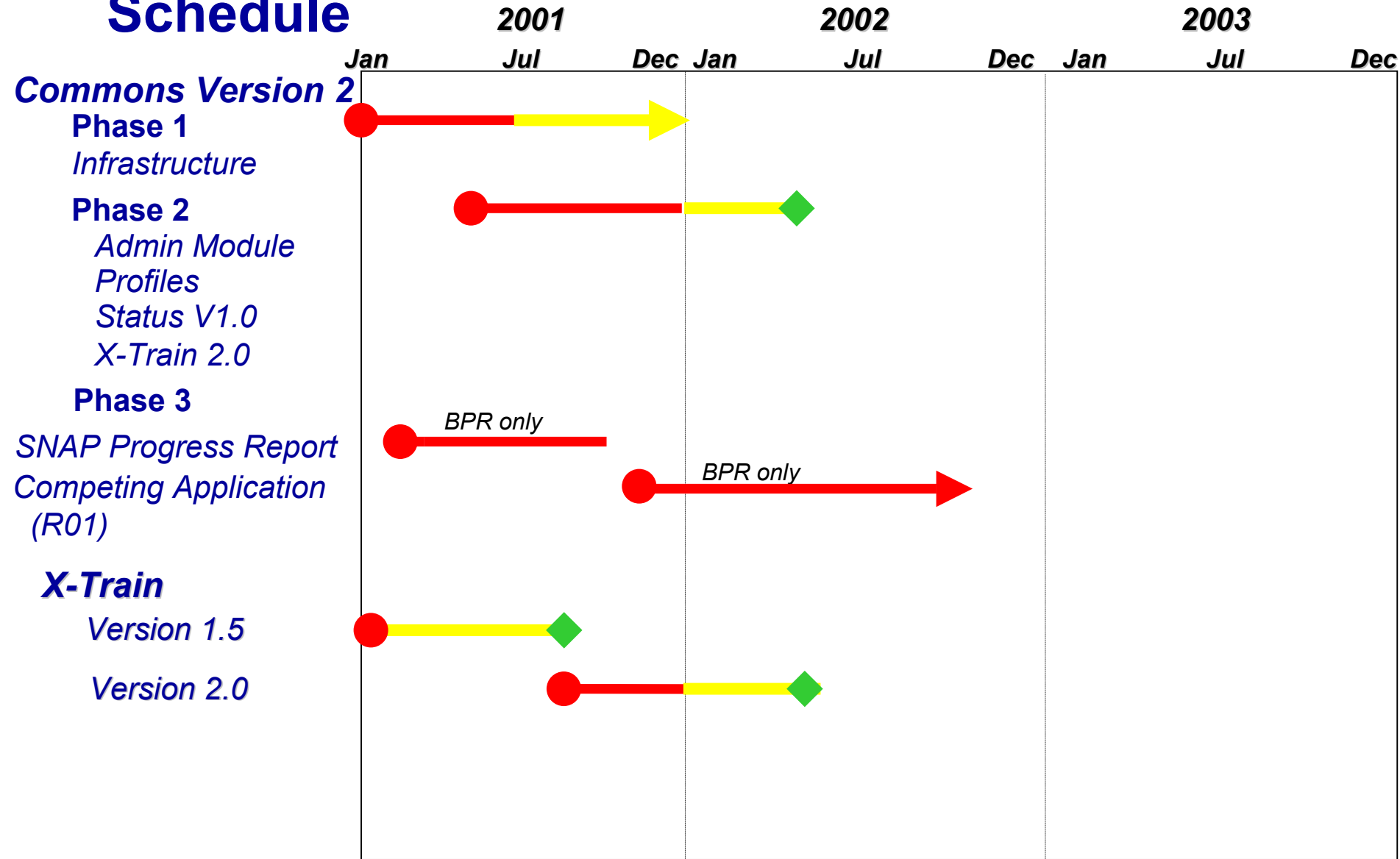


Legend: Analysis\* — Development — Deployment —

Start ● Continuing ▶

\* Includes business process reengineering and design

# Commons Version 2.0 Implementation Schedule



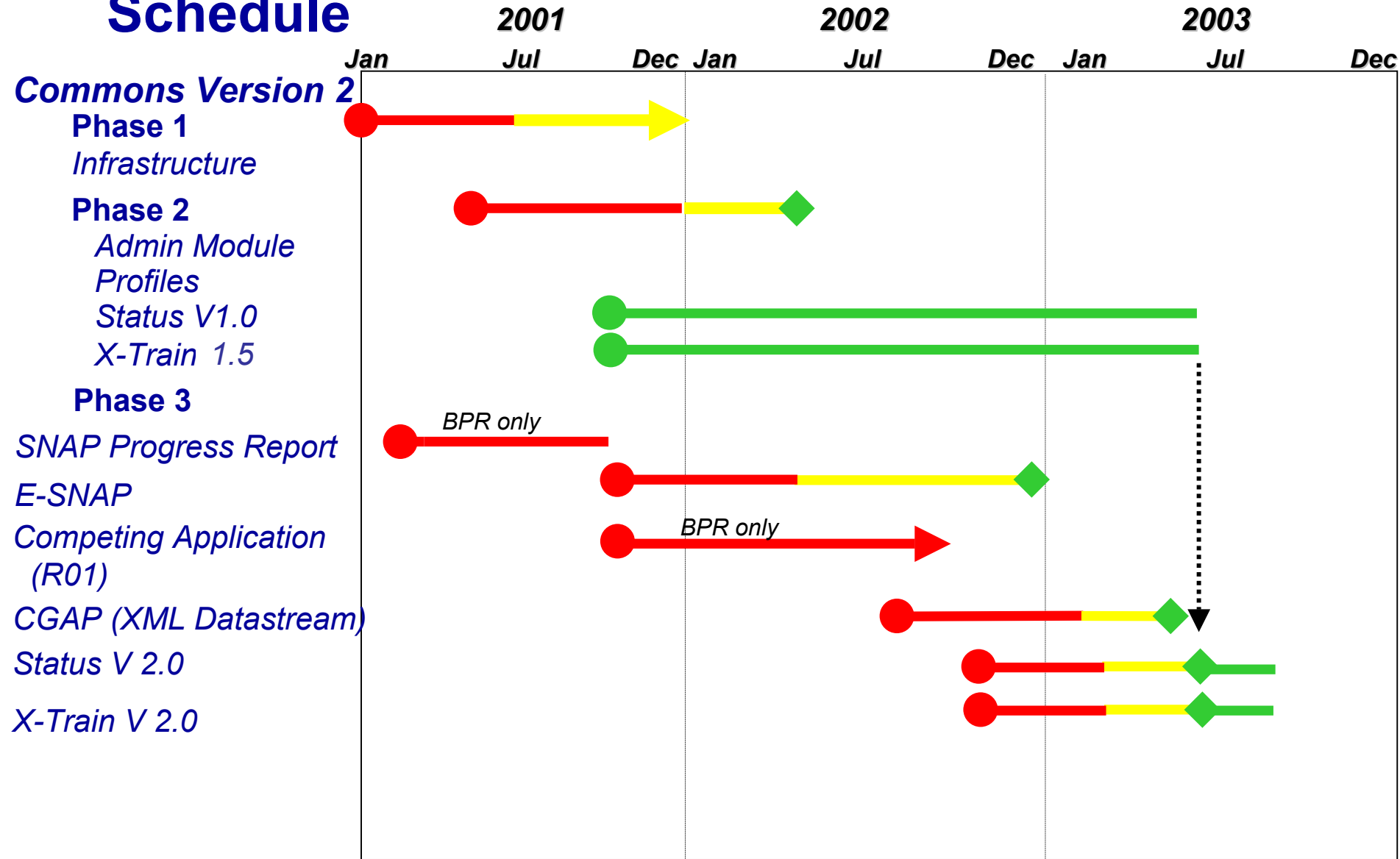
Legend: Analysis\* — Development — Deployment —

Start ● Continuing ▶

\* Includes business process reengineering and design



# Commons Version 2.0 Implementation Schedule

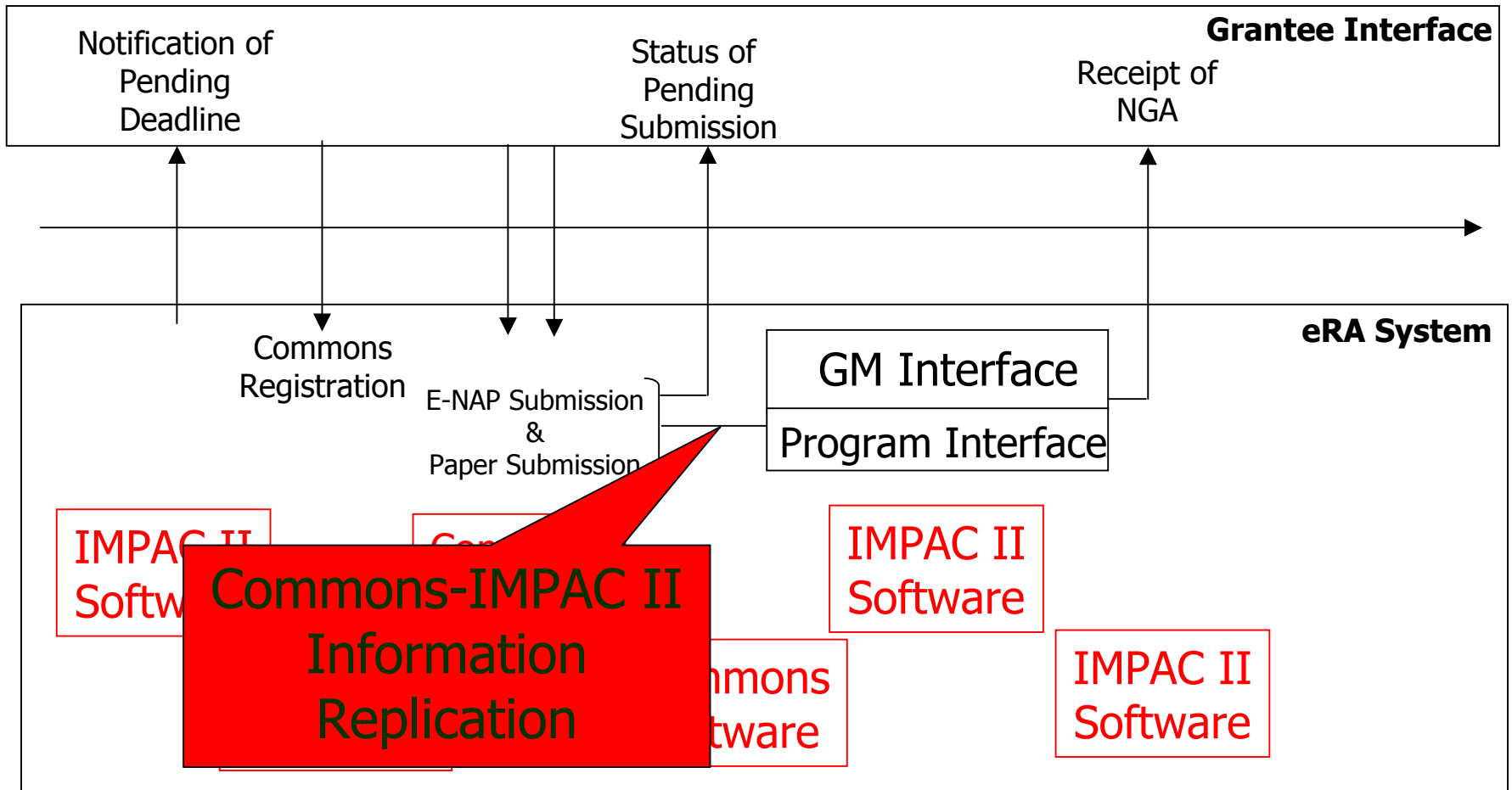


Legend: Analysis\* — Development — Deployment —

Start ● Continuing ►

\* Includes business process reengineering and design

# E-SNAP End-to-End



	A	B	C	D	E	F	G	H
1	NO.	Task	Requirement	Resource Lead				
2	<b>System/software tasks</b>							
3	1	Grantee notification of pending submission deadline etc.	IMPAC II e-mail to grantee	IMPAC II Analyst				
4	2	Deployment of Commons e-SNAP interface	Commons interface to grantee	Commons Analyst				
5	3	Replication of Commons data to IMPAC II	Transfer of Commons data to IMPAC II	IMPAC II Analyst				
6	4	Submission of hard copy SNAP in parallel with e-SNAP submission	Defined procedure for receipt and scanning of hard copy	IMPAC II Analyst				
7	5	Creation of role-based electronic and image record in IMPAC II	Creation of official record	IMPAC II Analyst				
8	6	IC GM and Program notification of e-SNAP receipt	IMPAC II e-mail to cognizant IC staff	IMPAC II Analyst				
9	7	IC GM and Program printing of e-SNAP image record	IMPAC II grant folder print utility	IMPAC II Analyst				
10	8	IC Program processing of e-SNAP submission	IMPAC II ICO SNAP processing functionality	IMPAC II Analyst				
11	9	IC GM processing of e-SNAP submission	IMPAC II GM interface SNAP processing functionality	IMPAC II Analyst				
12	10	IC GM ability to issue award	IMPAC II GM interface award creation functionality	IMPAC II Analyst				
13	11	Generation of NGA	IMPAC II system functionality to generate NGA via e-mail or datastream	IMPAC II Analyst for e-mail, Commons analyst for datastream				
15	<b>Human Factor Tasks</b>							
16	1	Preparation of extramural community for e-SNAP	Outreach/training of IC GM and Program staff communities	Commons analysts, Commons Group Advocate				
17	2	Preparation of IC staff for electronic SNAP processing	Outreach/training of extramural community	IMPAC II analysts, GM group advocate, Program group advocate				

# Reengineering the Competitive Application



- Streamlining data requirements (handout)
  - Advantages offered by implementation of profiles
  - Advantages offered by recategorizing of information
  - Opportunities to question need for information
- Streamlining business process
  - Receipt, referral, review
  - Just-in-time submissions
  - Application schedule and content
- Solicitation of CWG to formalize recommendations and seek consensus
  - Yep...one of those wonderful Excel workbooks
  - Discussion to follow at next CWG meeting


# Agenda for CWG Meeting November 14-15, 2001



## Interface Specifications Subgroup Meeting – November 15, 8:30 a.m.–12:30 p.m.

1. Status of Commons V 2.0 platform
2. Status of Commons applications
  - Commons V 1.0 interfaces
  - X-Train V 1.5 deployment
  - RUP artifacts for V 2.0 interfaces
  - GUI standards for V 2.0
  - Work on past CWG issues
3. Introduction to Close Out module

# Commons V 2.0 Platform

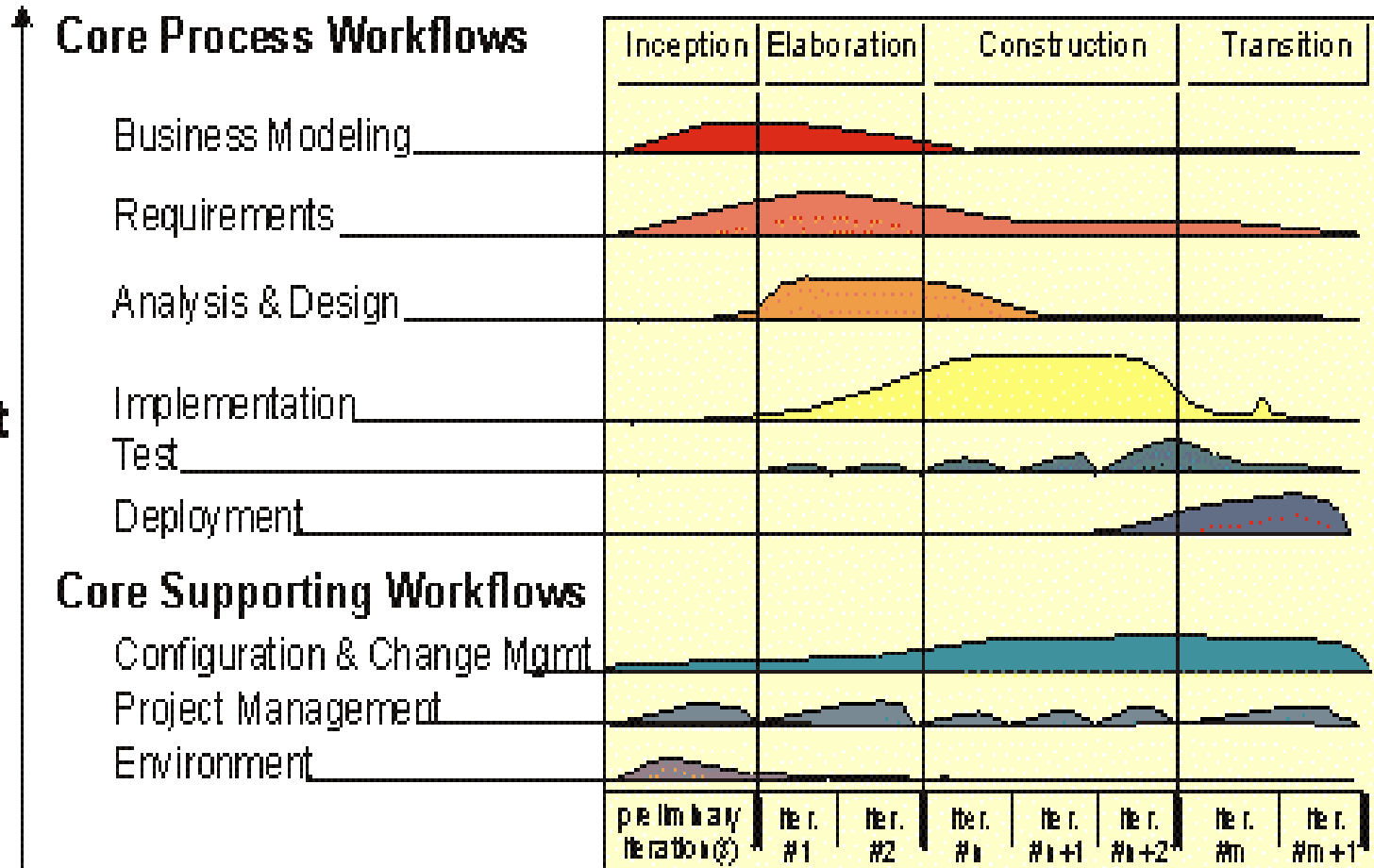
- 
- Commons V 2.0 Project Site
    - <http://commons2.oer.od.nih.gov>
    - Internet Explorer<sup>®</sup>-specific
    - RUP Artifacts
      - Scope Document
      - Promotion Plan
      - Analysis and Design Documents
      - Environment Documents: Development Case
  - Phase 1 internal release scheduled for January 20, 2002
    - Construction Phase nearing completion
    - Testing underway

# Rational Unified Process® for Software Engineering

Organization along time



Phases



Organization along content

Iterations

preliminary iteration, iter. #1, iter. #2, iter. #i, iter. #i+1, iter. #i+2, iter. #m, iter. #m+1

# ERA J2EE

- Home
- Artifacts
  - Deployment
    - Promotion Plan
  - Projectmanagement
  - Requirements
    - Scope
    - Software Requirements
    - Supplementary Specification
    - GUI Standards
    - Screen Specs
  - Use Cases
    - Use Case Model
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- Training
  - Code Conventions
  - OOAD overview
- Guidelines
- Glossary
- Artifact Templates
- Project Library
- Tools



## ERA J2EE COMMONS Scope Document

**Version 1.3**

July 31, 2001

**Contract No:**

**Task Order No:**

**Document ID:**

**Prepared For:**

Office of Policy for Extramural Research Administration  
Office of Extramural Research  
National Institutes of Health  
Bethesda, MD

**Prepared By:**

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J2EE Architecture

Task Name	lag	Days	Act. Start	Act. End	%Done	After	Resource Name	Wk Start	2Wk End	BL Start	BL End	Est. S
<b>0 Commons Version 2</b>		243.06 d	2/16/01	2/5/02	67%			6/1/99	1/13/00	2/16/01	5/16/02	
<b>1 Release 1</b>		243.06 d	2/16/01	2/5/02	68%			2/16/01	1/21/02	2/16/01	1/21/02	2/16
2 Inception Phase		109 d	2/16/01	7/23/01	0%			NA	NA	NA	NA	
<b>8 Elaboration Phase</b>		109.5 d	6/12/01	11/16/01	90%			6/12/01	9/26/01	6/12/01	9/26/01	6/12
<b>52 Construction Phase</b>		124 d	7/24/01	1/22/02	60%			7/24/01	1/2/02	7/24/01	1/2/02	7/24
<b>53 Iteration 1</b>		71 d	7/24/01	11/2/01	100%			7/24/01	11/2/01	7/24/01	11/2/01	7/24
<b>54 Implementation Workflow</b>		52 d	7/24/01	10/5/01	100%			7/24/01	10/3/01	7/24/01	10/3/01	7/24
<b>59 Test Workflow</b>		27 d	9/25/01	11/2/01	100%		SISQA	9/25/01	11/2/01	9/25/01	11/2/01	9/25
<b>63 Iteration 2</b>		59 d	10/5/01	1/3/02	36%			10/3/01	11/2/01	10/3/01	11/2/01	10/3
<b>64 Implementation Workflow</b>		59 d	10/5/01	1/3/02	62%			NA	NA	NA	NA	
65 Code & UT	1+	15 d	10/5/01	10/29/01	100%	54	J2EE Team	10/3/01	10/19/01	10/3/01	10/19/01	10/3
66 Unit Integration Test	1+	6 d	10/29/01	11/6/01	100%	65	J2EE Team	10/19/01	11/2/01	10/19/01	11/2/01	10/19
67 Final Bug Fix Release	1+	6 d	12/6/01	12/14/01	0%	70	J2EE Team	12/5/01	12/13/01	12/5/01	12/13/01	12/5
68 Support Final Bug Fix & Regression Test	1+	7 d	12/21/01	1/3/02	0%	71	J2EE Team	12/20/01	1/2/02	12/20/01	1/2/02	12/20
<b>69 Test Workflow</b>		31 d	11/6/01	12/21/01	0%			8/22/01	12/20/01	8/22/01	12/20/01	8/22
70 Iteration 2 ST	1+	20 d	11/6/01	12/6/01	0%	66	SISQA	11/5/01	12/5/01	11/5/01	12/5/01	11/5
71 Regression	1+	5 d	12/14/01	12/21/01	0%	67	SISQA	12/13/01	12/20/01	12/13/01	12/20/01	12/13
<b>72 Iteration 3</b>		80 d	9/25/01	1/22/02	22%			NA	NA	NA	NA	
<b>73 Requirements Workflow</b>		40 d	9/25/01	11/23/01	44%			NA	NA	NA	NA	
74 Finalize detailed requirements for Iteration 3		40 d	9/25/01	11/23/01	44%		Reifsnider,Stucl	NA	NA	NA	NA	
75 Analysis and Design Workflow - TBD		15 d	11/23/01	12/14/01	0%	73		NA	NA	NA	NA	
76 Implementation Workflow - TBD		15 d	12/14/01	1/8/02	0%	75		NA	NA	NA	NA	
77 Test Workflow - TBD		10 d	1/8/02	1/22/02	0%	76		NA	NA	NA	NA	
<b>79 Transition Phase</b>		23 d	1/3/02	2/5/02	0%	63		1/2/02	1/21/02	1/2/02	1/21/02	1/2
<b>80 Iteration 1 (deployment of construction i2)</b>		3 d	1/3/02	1/8/02	0%			1/2/02	1/17/02	1/2/02	1/17/02	1/2
<b>81 Deployment Workflow</b>		1 d	1/3/02	1/4/02	0%			1/2/02	1/17/02	1/2/02	1/17/02	1/2
82 Delivery To Internal User	1-	0 d	1/3/02	1/3/02	0%			1/16/02	1/16/02	1/16/02	1/16/02	1/16
83 User Training	1-	1 d	1/3/02	1/4/02	0%	82		1/16/02	1/17/02	1/16/02	1/17/02	1/16
84 Product Release Milestone Activities	1-	3 d	1/3/02	1/8/02	0%			1/16/02	1/21/02	1/16/02	1/21/02	1/16
<b>85 Iteration 2 (deployment of construction i3) - TBD</b>		10 d	1/22/02	2/5/02	0%	72		NA	NA	NA	NA	
86 IVV Testing		10 d	1/22/02	2/5/02	0%			NA	NA	NA	NA	
87 Delivery to Internal User		0 d	2/5/02	2/5/02	0%	86		NA	NA	NA	NA	

# Commons V 1.0 Interface



- Status
  - Summary Statements
    - ASCII Text Version – deferred
    - Move to pdf – delayed from Nov. to Jan.
  - NIH Staff Contact information – Jan.

# Commons V 1.5 Interface



- X-Train
  - Extramural Business Process/Interface
    - Deployed October 1, 2001 in pilot
    - Currently 7 pilot schools participating
      - Broadcast e-mail sent Nov. 8 to invite broad participation
    - 32 trainee appointments received since deployment
    - Issue: need for delegation to enter data
  - NIH Staff Issues
    - Backlog of unprocessed e-2271 records
    - Termination Notice policy

# Commons V 2.0 Interfaces



- Admin/Registration, Accounts/Profiles
  - RUP Artifacts on Commons Project Site
    - Scope Document
    - Software Requirements Document
    - Supplementary Specification
    - Use Case Model
    - Technical Use Cases
      - Commons Registration
      - Security
      - Admin Account Management
      - IPF/PPF
  - Review and Comment Welcome

# ERA J2EE

- Home
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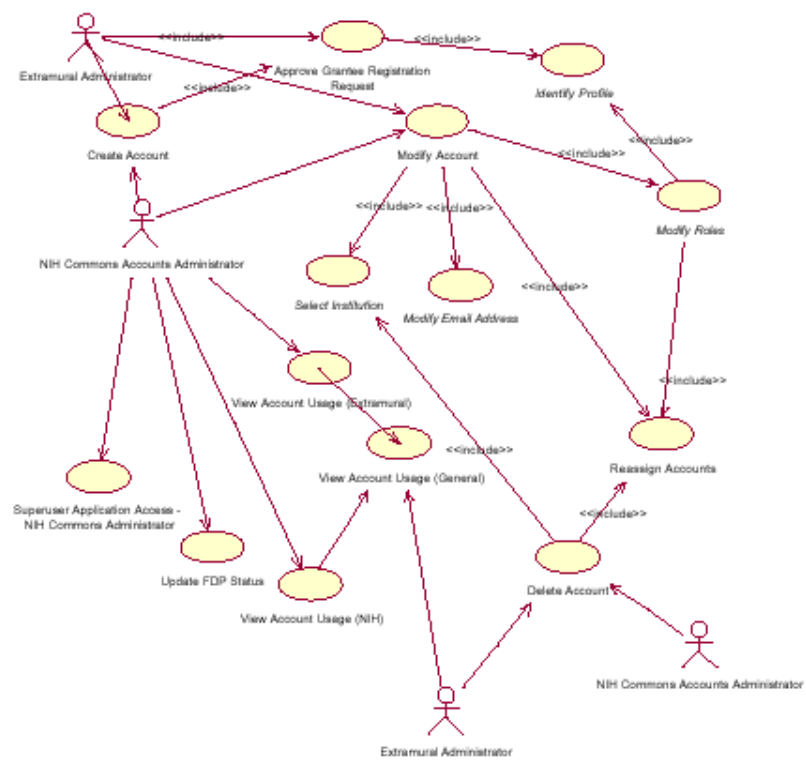


Figure: 4 Admin/Account Management Use Case Diagram

# ERA J2EE

This Page contains a list of all Use Cases

- Home
- Artifacts
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- Tools

## Registration

- [Request to Register Grantee Institution](#)
- [Verify Grantee Institution Registration Email](#)
- [Approve Account Request](#)
  - [Select Institution](#)

## Security

- [Login to COMMONS](#)
- [Logout of COMMONS](#)
- [Change Password](#)
- [Superuser Application Access - NIH Commons Administrator](#)
- [Configure Audit Policy](#)

## Admin/Account Management

- [Create Account](#)
  - [Identify Profile](#)
- [Delete Account](#)
- [Modify Account](#)
- [Modify Email Address](#)
- [Modify Roles](#)
- [Reassign Accounts](#)
- [Update FDP Status](#)
- [View Account Usage \(Extramural\)](#)
- [View Account Usage \(General\)](#)
- [View Account Usage \(NIH\)](#)

## IPF/PPF

- [Modify PPF Identifying Information](#)
- [Modify PPF Supporting Information](#)
- [Update IPF](#)
- [View IPF](#)

# Commons V 2.0 GUI Standards



- RUP Artifacts on Project Site
  - GUI Standards Document
  - Screen Specifications
- Human Factors Analyst Participation
  - HuFA now on board
  - Adaptation of GUI Standards
  - Validation of CWG Recommendations

# CWG GUI Recommendations



## ■ Screen layout


- Smaller icons and graphics: reduce wasted space
- Maintain contact with user in header: e.g display user name and role
- Better alignment of rows and column when applicable

## ■ Text and Page flow


- Consolidate sub-screens with links into single screen
  - Administration
  - IPF-related information
  - PPF-relate information



# CWG GUI Recommendations

- 
- Screen Functionality
    - Need to incorporate better search capabilities
    - Provide confirmation screens/pop-ups
    - Clarify functions associated with specific links/icons
  - Navigation
    - Provide better navigation “bar”
    - Minimize need to go back to main menu
    - Make navigation to help obvious (same location on every page)

# CWG GUI Recommendations

- 
- Help Features
    - Use pop-up help to keep user on same screen
    - Provide context-sensitive link to FAQ's as part of context-sensitive help
    - Provide examples of acceptable field content format
  - Other Functionality Needed
    - Redesign/define institutional hierarchy options
    - Provide more complete user administration reports
    - Revisit user types, roles, permissions, approvals



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# eRA Commons



Welcome Guest

- Home
- Register
- Sister Sites...

- ### Restricted Sites
- Snap
  - Status
  - Admin
  - X-Train
  - Datastream Delivery
  - Application Viewer



### Member's Log-in

Institution Code

User Name

Password

SUBMIT CLEAR

- ### About the Commons
- Scope & Purpose
  - Frequently Asked Questions
  - Grantee Organization Registration
  - ERA Contacts

## What's NEW on the Commons

[Minimum Password Length Increased](#) - The minimum password length for ERA Commons accounts has been increased to six characters to match present industry standards. Existing accounts with passwords less than six characters will continue to work. However, users who create new accounts or modify passwords of existing accounts will have to abide by the new 6 character minimum.

[New Look and Feel enhances Usability](#) - We are currently developing a new, more robust version of the NIH Commons to accommodate the broad grantee community. Here is a first pass at some of the enhancements we're planning to deliver soon.

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## Institution Register Instructions

### Welcome to the ERA Commons Online Registration Process.

Register your institution with the ERA Commons and establish up to two accounts for your institution. Selected staff at your institution can create additional accounts at the institution level.

Before registering your institution please carefully read the registration material provided here. Print a copy of this page to use as reference while completing the form (click the "Print" button or select Print from the File menu to print a copy of this page).

The process for registering in the ERA Commons is as follows:

1. Download the Honorable Intentions Document
2. Complete the Online Institution Registration Form
3. NIH Approval Process Takes Place
4. Reply to the e-mail address verification message sent by the NIH
5. Receive Account Information from the NIH
6. Create and maintain additional accounts at the institution level

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- **Before registering your institution** please read through the registration material provided here carefully. It is recommended that you print off a copy of this page to use as a reference tool when completing the form. To print a copy select the "Print" button on your browser button bar or select "File/Print" from the menu bar.
- \* = Required

### Institution Information

*Institution Name	<input type="text" value="SUNY"/>		
*Street 1	<input type="text" value="124 Like st."/>	Street 2	<input type="text"/>
Street 3	<input type="text"/>	Street 4	<input type="text"/>
*City	<input type="text" value="Bethesda"/>	*State	<input type="text" value="MARYLAND"/>
*Zip Code	<input type="text" value="22223"/>	IPF Code	<input type="text"/>

### Principal Signing Official

### Accounts Administrator

Name Prefix	<input type="text" value="Mr."/>	Name Prefix	<input type="text" value="Ms."/>
*First Name	<input type="text" value="Robert"/>	*First Name	<input type="text" value="Roberta"/>
Middle Name	<input type="text" value="I."/>	Middle Name	<input type="text" value="I."/>



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### Institution Information

*Institution Name	<input type="text" value="SUNY"/>		
*Street 1	<input type="text" value="124 Like st."/>	Street 2	<input type="text"/>
Street 3	<input type="text"/>	Street 4	<input type="text"/>
*City	<input type="text" value="Bethesda"/>	*State	<input type="text" value="MARYLAND"/>

### Signing Officer

Here is some contextual help to explain what a Principal Signing Officer is.

[\[FAQ\]](#)

### Accounts Administrator

Name Prefix	<input type="text" value="Mr."/>	Name Prefix	<input type="text" value="Ms."/>
*First Name	<input type="text" value="Robert"/>	*First Name	<input type="text" value="Roberta"/>
Middle Name	<input type="text" value="J."/>	Middle Name	<input type="text" value="J."/>

My Computer



NATIONAL INSTITUTES OF HEALTH

# eRA Commons



[NIH Home](#)

Welcome George Stone  
Authority Signing Official

[Logoff](#)

- Home
- Admin...
- Snap
- Status
- Sister Sites...

Account Administration ==> Change Your Password

Profile Administration ==> Create a New Account

## Available Applications

- Snap
- Status
- Admin
- X-Train new
- Datastream Delivery new
- Application Viewer new

- Maintain User Accounts ==> Account Administrators
- Maintain Admin Officials
- View Account Usage
- Account Administrators
- Administrative / Staff
- Principal Investigators / Scientific Staff
- Signing Officials
- All
- Search

## Important Information

Here's an area where we could put important information that is specific to this user.



## About the Commons

- ▶ Scope & Purpose
- ▶ Frequently Asked Questions
- ▶ Grantee Organization Registration
- ▶ ERA Contacts

## What's NEW on the Commons

[New General information for logged in users](#) - This space can contain messages for our registered users who have successfully logged into Commons.

[New Look and Feel enhances Usability](#) - We are currently developing a new, more robust version of the NIH Commons to accommodate the broad grantee community. Here is a first pass at some of the enhancements we're planning to deliver soon.

- [ [Q&A About NIH](#) | [Employment Opportunities](#) | [Visitor Information](#) ]  
 [ [Recent Changes to This Site](#) | [Information for Employees](#) | [Información en español](#) | [Search](#) ]  
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National Institutes of Health (NIH)  
Bethesda, Maryland 20892



[Department of Health and Human Services](#)

✉ ▲ Top

# Other Commons V 2.0

## Functionality



- Redesign/define institutional hierarchy options
  - Working with IPF team to incorporate standard 4-level hierarchy
    - Institution – DUNS
    - Unit/School/College/Institute
    - Division
    - Department
- Single Point of Ownership for PPF and IPF
  - Working with PPF team
    - Identify sources of duplicate profiles in IMPAC II
    - Limit NIH Staff from changing Commons profiles
    - Clean up existing profiles using Commons profiles as valid
- User Roles and Rights - to follow



# Grant Close Out



- Submission of 3 mandatory reports
  - Financial Status Report
    - Form SF269 – long form: to report program income
    - Form SF269A – short form: no program income
    - Currently submitted in paper or via TSO interface to mainframe
  - Final Progress Report (Open)
    - Narrative Progress
    - Paper submission to awarding NIH IC
  - Final Invention Certification (HHS Form 568)
    - Submitted to awarding IC
    - IC provides NIH Extramural Invention Reporting Office with copy to allow reconciliation with iEdison database
    - Paper submission to awarding NIH IC
- Business process analysis underway

# Grant Close Out: Current Focus – FSR Design



- FSR data entry
  - Currently using command line entries into mainframe
  - Also paper submission to OFM
  - Future: data submission through Commons
- FSR data processing
  - Currently review/approve by OFM
  - Approval entered into IMPAC I by OFM
  - Grants Management Official at awarding IC views accepted reports using IMPAC I Snapshot
  - Future: Data from Commons into IMPAC II
    - Access to initial report and revisions
    - Notification and approval by OFM (IMPAC II interface)
- Store and view report history
  - Reports, late submissions, overdue reports, etc.