eRA Project Team Meeting Minutes

Date:	Tuesday, May 27, 2003
Time:	9:00–11:00 a.m.
Location:	6700 B Rockledge, Room 1205
Chair:	Jim Cain

Next Meeting: Tuesday, June 10, 9:00 a.m., 6700 B Rockledge, Room 1205

Action Items

1. (Scarlett Gibb) Post training outline used as a basis for Commons training sessions.

2. (Tim Twomey) Report back to the Project Team any decisions made regarding support flow and the potential re-routing of internal support calls through CIT.

3. (Donna Frahm) Distribute updated requirements document for the summer release.

Attachments

❑ IRDB Redesign (Pete Morton): http://era.nih.gov/Docs/IRDB%20_Redesign_Update.pdf

❑ Virtual School (Patty Austin): http://era.nih.gov/Docs/virtual_school.pdf

❑ User Support (Tim Twomey): http://era.nih.gov/Docs/User_Support.pdf

❑ Type 5 eNotification (Tim Twomey): http://era.nih.gov/Docs/ENotification.pdf

Referenced URLs

❑ Commons Demo Website: http://commonsdemo.era.nih.gov/commons-demo/

❑ Virtual School Website: http://era.nih.gov/virtualschool/

IRDB Redesign: *Making eRA Data Available*

Pete Morton

The original eRA database architecture, which is still in use today, includes two distinct data repositories. The On-Line Transaction Processing (OLTP) database contains the most up-to-date information and is focused on data input and business process support. The IMPAC II Reporting Database (IRDB) is updated nightly from the OLTP database and is a simplified database designed for speedy querying, reporting and other business decision support activities. Separating the *transaction* and *reporting* data provides a means for security delineation for data access and allows each database to be tuned for its specific purpose.

Although the original architectural approach to eRA data is still valid, ICs and others have found major problems with the current IRDB, including out of date, missing or unavailable data. Due to these issues, many ICs have created local systems that rely on information downloaded from OLTP. This practice, which defies the architectural design, has created a significant impact on OLTP performance.

A team was formed to address the IRDB issues. The team has created a five phase IRDB redesign plan.

- ❑ Phase 1: "Replicate" identified OLTP tables
- ❑ Phase 2: Design and build new IRDB structure and acquire Extract/Transform/Load (ETL) product to populate it
- ❑ Phase 3: Migrate IRDB users to new IRDB structure
- ❑ Phase 4: Migrate users off replicated OLTP tables to new IRDB structure
- ❑ Phase 5: Retire replicated OLTP tables

The team has worked very closely with the user community and will continue to do so through each phase of the project. This interactive approach will increase user buy-in and keep user impact manageable.

The team is about a month away from providing cost estimates. The project schedule will follow closely behind that milestone.

The Project Team was encouraged by the team's efforts to date and asked Pete to include in the recommendation the rules and policies for archiving database data.

Demo Facility

Dan Hall

The Commons demo facility was created in response to a large demand for Commons hands-on training and a growing need for NIH internals to have access to Commons. Within the demo facility a user can create an SO and PI account. The system populates the accounts with dummy data including a test institution and 10 sample grants. The user can then access all the functions (except IAR and registration) that a production Commons user can access.

The demo facility has already proven to be a great outreach and training tool. Over 500 training accounts have been created and used for external training classes. The demo facility allows a trainer to walk a class through a series of tasks and each student can follow along and see the same screens and data. It also provides a mechanism for institutions to hold their own training sessions at will.

Dan provided a quick demonstration of the Commons Demo Facility (http://commonsdemo.era.nih.gov/commons-demo/).

Action: **(Scarlett Gibb) Post training outline used as a basis for Commons training sessions.**

Virtual School

Patty Austin

Seminars, hands-on labs, lectures, and one-on-one tutorials are among the many methods we have traditionally used to provide training for users of the eRA system. The Virtual School is yet another method to add to the mix. The idea behind the Virtual School is to create a library of computer-based mini-lessons that internal and external users can access on demand over an Internet connection.

The first draft of the Virtual School website can be found at http://era.nih.gov/virtualschool/ or via a link on the http://era.nih.gov/ website. A mini-lesson on Financial Status Report (FSR) is currently available and a second lesson on Committee Management (CM) is currently under review. Both lessons were created with the RoboDemo product. Other products, such as Webex and SMIL are being considered for future use.

The following table outlines the Virtual School goals for 2003:

External Users	Internal Users
❑ FSR (Completed)	❑ Committee Management (In Review)
❑ iEdison (In progress; May/June Target)	❑ Grants Management
❑ Internet Assisted Review (In progress; June Target)	❑ Program & Review (stretch goal)
❑ PI Status (In progress; July Target)	
❑ eSNAP (stretch goal)	

Patty provided a short demonstration of the FSR mini-lesson currently available in the Virtual School.

User Support

Tim Twomey

As eRA usage increases so does the workload of the User Support Team. In fact, from February to April this year the number of support calls per month increased by over 50%. With nearly 6,000 IMPAC II users and 3,000 Commons users, the User Support Team fielded 992 support calls in April.

The goal of the User Support Team is to answer as many calls as possible on the first call or first email response. Despite the number of applications and the wide range of support issues, the team is reaching this goal on 25% of the calls. For the remainder of the calls, support staff must consult with 2nd tier support, operations, development, analysts, or policy makers. It is unrealistic to expect every call talker to be able to handle every call without escalation.

In order to achieve customer satisfaction it is important to set appropriate support expectations upfront.

User Support Can	User Support Can Not
✓ Explain how it works	✗ Unlock a record
✓ Point you in the right direction	✗ Speed up the system
✓ Collect detailed information	✗ Fix data problems
✓ Recreate the problem	✗ Explain or change policy
✓ Assign calls to appropriate analysts	✗ Make analysts work faster

✓ Follow up on outstanding tickets	✗ Work miracles
✓ Keep you informed	

Tim informed the Project Team that his team is working through many challenges from lack of office space to loss of experienced staff and the training of new hires. Tim has a full staff now, but is concerned about possible ramifications of the re-compete, which is due to hit at a critical point in the grant cycle.

Current hours of support are 07:30-18:00 ET. Tim would like to extend coverage to 20:00 ET to cover full business hours on the west coast.

Tim presented some potential changes in call flow. eRA may soon be affected by the "one User Support or Helpdesk area at NIH" policy. If put into effect, all IMPAC II calls from NIH staff will be routed through CIT. Commons calls and other OPDIV calls (AHRQ, CDC, etc) would continue to route directly to eRA staff. Specific details for the call flow changes are still in progress and eRA is seeking an exception to the policy so that all calls can follow the same support path regardless of the source.

The Project Team agreed that internal and external users should follow the same call flow and pointed out that the vocal external user community will not like to be bounced between support desks or have to repeat the details of their issue multiple times.

Action: (Tim Twomey) Report back to the Project Team any decisions made regarding support flow and the potential re-routing of internal support calls through CIT.

Type 5 eNotification

Tim Twomey & Mike Loewe

Prior to the development of the eRA system Type 5 grant kits were printed and mailed to grantees. With the Internet and eRA systems in place reminders are no longer mailed. Many PIs forget to submit their progress reports and, as a result, do not receive their awards. In response to this issue, a few ICs created their own eNotification systems for Type 5 grants. Soon a few more ICs created systems and then a few more until grantees were inundated with various eNotifications, each with a different style, language, and request.

In order to meet the immediate need for eNotifications, while enforcing some control over the content of communications to the external user community, eRA will partner with NINDS. NINDS developed an eNotification solution that has been shared with and adopted by many ICs. The eRA team will standardize form letters to be sent and adapt the system to be used by all ICs. The eRA team will work with each IC to convert their individual system to the standard model.

The eNotification function will be rolled into the current Commons Notification System as soon as possible. The function will be incorporated into the full-blown eNotification System slated for development following the re-compete.

Mike pointed out that Type 5 grants account for 60% of funded grants. Since instituting the eNotification system at NINDS in February, they have seen a 10% improvement in receiving applications on time. Utilizing the electronic system across all ICs will represent a significant time and resource savings over manual notification methods.

Summer Release Requirements Update

Donna Frahm

Donna reports there have been only minimal changes to the detailed requirements that she reviewed with the team on April 22. The CCB decision summary for May 22 has been distributed to the team. Future decision summaries will be posted on the eRA website.

Action: **(Donna Frahm) Distribute updated requirements document for the summer release.**

Load Balancing Update

Ali Ghassemzadeh

For the last two weeks the eRA Operations and Architecture teams have been working very closely with CIT and F5, the BIG IP (load balancing) vendor. The redirection problem that was discussed at the last Project Team meeting has been identified. However, the eRA team has decided to move forward with an alternate plan in which redirection within BIG IP is not used. By removing redirection from the configuration and providing a suitable workaround for the scenarios in which redirection is needed, the team has been able to move ahead with testing and other activities needed to make the May 30 target date. The redirection patch provided by F5 will be thoroughly tested and introduced following the summer application release.

Although the eRA team is on track to meet the May 30 target, CIT has requested an additional week to ready the CIT support team for production level 24x7 support. The new target to introduce load balancing for external applications is June 6. In previous contingency planning sessions, the eRA team determined that the additional week delay would not impact the current summer release schedule.

Attendees

Armistead, Allyson (LTS, COB)

Austin, Patricia (OER/COB)

Bukowski, Maria (OD)

Caban, Carlos (OER)

Cain, Jim (OER)

Cobert, Penny (OD)

Cummins, Sheri (LTS/COB)

Fadeley, Vickie (OER/OPERA)

Frahm, Donna (OER)

Ghassemzadeh, Ali (OER)

Gibb, Scarlett (COB)

Hall, Dan (Z-Tech)

Hausman, Steve (NIAMS)

Liberman, Ellen (NEI)

Loewe, Michael (NINDS)

Markovitz, Paul (OER)

Martin, Carol (NHGRI)

Morton, Pete (CIT)

Newburgh, Janet (CSR)

Panniers, Richard (CSR)

Pasquina, Joe (PSGS)

Patel, Kalpesh (Ekagra)

Ratnanather, Chanath (Z-Tech)

Seppala, Sandy (LTS/COB)

Shingler, Felicia (COB)

Silverman, Jay (NGIT)

Snouffer, Anna (OFACP)

Twomey, Tim (OD)

Vann, Cecelia (COB)

Walker, Catherine (OER)

Williamson, Mary Ann (NIDCR)

Wright, David (OPERA)

Zucker, Sherry (DEIS)