



# Introduction to ECARES for Customers (Extramural Customer Assistance Request System)

presented by  
Division of Extramural Activities Support

The screen shots and specifications contained in this presentation depict the current version of the system, which is still under development. Some specifications may change prior to October 4, 2004.

# Project Overview and History

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- MEO IT Committee formed in Dec. 2003 to study what IT issues required resolution prior to DEAS startup.
- February 2004: MEO IT Committee begins to study various options for a work request system.
- Options Considered:
  - Various COTS products.
  - Development of custom application (in house).

# Project Overview and History

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- *Sitescape Enterprise Forum* COTS product selected by DEAS Director in consultation with MEO IT Committee in April 2004.
- Contract Awarded in May 2004.
- Requirements finalized and system development by contractor begins early June 2004.

# What will ECARES do for you?

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- Single location for entering & tracking requests.
- High system availability and reliability.
- Clarity about what tasks can be selected via the Menu of Services (Task Dictionary).
- Assurance that requests are promptly and properly routed & assigned.

# What will ECARES do for you?

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- Email notifications to customer from system when work requests reach important milestones.
- Completion of work requests according to the standards in the Performance Work Statement (PWS).
- More efficient use of support staff via workload balancing.

# Project Timeline

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- June/July:

- Development of phase 1 custom features.
- Establish application and database server infrastructure.

- August 1-16:

- Alpha testing and initial debugging of custom code.

- August 17 - 25:

- Beta test period with 6 ICs:  
NCI, NIDDK, CSR, NIGMS, NIMH, NIEHS

# Deployment Schedule

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- Early September:
  - Post beta evaluation and bug fixes.
  - Additional development and testing.
- September 22:
  - Begin “phased deployment” in “pre-production” mode for entry of actual work requests in anticipation of October 4 DEAS startup.
- October 4:
  - Standup date for DEAS
  - System in full production.

# Phase 1: Completed Components

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- User authentication via NIH Login.
- Security parameters for various user roles.
- Customer request and tracking interface.
- Task Leader/Supervisor interface.
- Custom database enhancements:
  - Extramural users lookup tables.
  - Request routing tables.
  - Task dictionary and PWS standards tables.
- Internal workflow processes and associated business rules.
- Email notification messages and logic.



# Regarding Examples Used in This Presentation

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- The screenshots in this presentation may not be identical to the screen designs in the upcoming production version.
- The data shown on the sample screenshots is test data only. It is not meant to be representative of actual customer data and does not indicate the nature and type of supporting information that customers will need to provide.

# ECARES Users by Role

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- NIH Extramural Community (Customers)
  - Requestor – person entering request (usually, the customer)
  - Customer – person receiving completed work product
- DEAS Staff (assigned to the ICs)
  - People who are assigned to do your work
- DEAS Task Leaders
  - Front line staff leaders, make and monitor assignments
- DEAS Supervisors – 3 per hub, supervise task leaders
- DEAS Hub Managers – one for each of 3 hubs.
- DEAS Quality Control
  - Provide assistance with work request or system problems

# The Task Dictionary Defined

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The Task Dictionary is the comprehensive list of tasks that may be selected when requesting work via ECARES.

The Task Dictionary is the DEAS  
“Menu of Services”.

# Menu of Services: Features

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- Listing of all tasks that can be performed by DEAS staff from the Performance Work Statement (PWS).
- Administrative support tasks for each business area are listed with that business area for convenience.
- The PWS timeliness standards associated with each task are used for computing all dates associated with request completion.
- There is no “other” category for selecting unlisted tasks. Only tasks from the PWS can be requested.

# The Menu of Services (one of three)

Address Go Links »

**Create a New Work Request** OK Cancel

**Filter task list by Business Area:**  
[Review](#) [Grants](#) [Program](#) [All](#)

Select a Task from the Task Dictionary

**Grants: General and Administrative Support**

- ☐ 10200- [Duplication and Scanning of Documents](#)
- ☐ 10220- [Scheduling Internal and Staff Meetings](#)
- ☐ 10280- [Typing and Preparing Documents](#)
- ☐ 10300- [Presentation Preparation](#)
- ☐ 10060- [Travel Arrangements](#)
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**Grants: Official Grant File Management**

- ☐ 10340- [Creating Official Grant Files](#)
- ☐ 10360- [Filing Documents in Official Files](#)
- ☐ 10380- [Pulling and Distributing Official Files](#)
- ☐ 10400- [Requesting/Managing Missing or Late Material](#)
- ☐ 10420- [Sending Non-Electronic NGA](#)
- ☐ 10440- [Processing Research Training Grant Forms](#)

# Time and Date Standards

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- Depending on the type of task being requested, you may be prompted to enter a date value that is specific to the task.
- Some *examples* of date types you may be asked to enter with your request (all are task name dependent):
  - q AWARD ISSUE DATE
  - q GRANT TERMINATION DATE
  - q MAIL OUT DATE
  - q MEETING START DATE
  - q REVIEW MEETING END DATE
  - q TRAVEL ONSET DATE
  - q TRAVEL RETURN DATE

# Time and Date Standards - continued

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- ECARES computes estimated task completion dates at the time of request entry based on the PWS timeliness standards:
  - It estimates when work is expected to be completed based on the Minimum time to completion standard in the PWS.
  - Task Leaders are ultimately responsible for assigning a completion date to your request.
  - Assigned completion dates will always fall within a range defined by the minimum and maximum time standard from the PWS.

# Time and Date Standards - continued

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- Earlier completion dates can be requested with justification.
- Requests for future, long term completion are accepted:
  - ☞ Will go into “assigned - on hold” state until start date
  - ☞ When the “system calculated start date” arrives, the workflow state will change to “assigned – work in progress”.
  - ☞ This start date assists staff in knowing when work should actually begin so that the request is completed by the assigned date.



# Creating A Work Request

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## *Some general guidelines:*

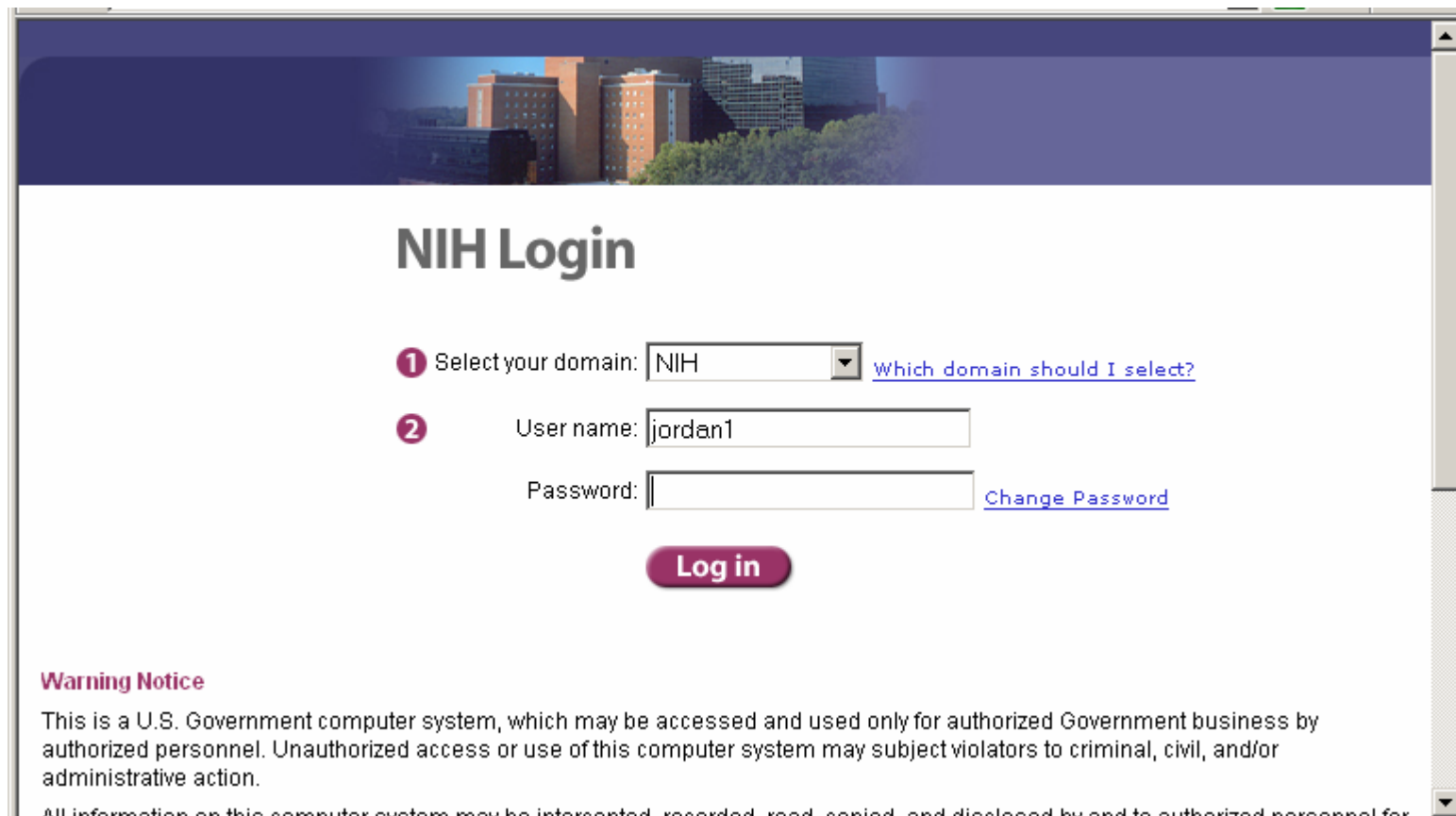
- Only one task can be entered per work request.
- “Standing order tasks” from the PWS *will not be visible* in the Task Dictionary (i.e.- answering phones, opening mail, etc).
- However, “standing order tasks” may be assigned to specific employees in your area.
- *Performance of DEAS on standing order tasks will be measured via employee logging and customer surveys.*

# Logging in to the system

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- Access ECARES by pointing your browser at:  
<http://ecares.od.nih.gov>
- ECARES uses NIH Login.
- Access is restricted to NIH users associated with valid IC extramural organizational codes in the NIH Enterprise Directory (NED).
- In the near future, ECARES will be integrated with the NIH Portal.

# Logging in to the system



The screenshot shows a web browser window displaying the NIH Login page. At the top is a dark blue header with a cityscape image. Below the header, the title "NIH Login" is centered. The login form consists of two numbered steps: 1. "Select your domain:" with a dropdown menu showing "NIH" and a link "Which domain should I select?". 2. "User name:" with a text box containing "jordan1", and "Password:" with a text box and a link "Change Password". A red "Log in" button is centered below the form. At the bottom left, a "Warning Notice" states: "This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action." Below this, a line of small text reads: "All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for..."

**NIH Login**

1 Select your domain: NIH [Which domain should I select?](#)

2 User name: jordan1

Password: [Change Password](#)




**Log in**


**Warning Notice**

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

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# The “Customer Landing Page”

Address  <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/customerLandingPage>  Go  Links >>

 **DEAS**  
Division of Extramural Activities Support  
DEAS  
[Hathan SALMIEH - OD](#)

**Extramural Customer Assistance Request System  
(ECARES)**

**IMPORTANT: Requests Entered For Work DUE Prior to October 4, 2004 Will Be DELETED.**  
**Actual requests may be entered, but ONLY for work due after the DEAS Opening Date of October 4, 2004.**  
**Please do not enter "test" or "practice" requests into this system. Thanks.**

**For user support contact the NIH Help Desk at 301-496-4357 or at <http://support.cit.nih.gov> for assistance.**

[Enter a New Work Request](#)

Task ID	Title	Status	Assignee
10200	<a href="#">this is only a test</a>	Assigned - On Hold	
11380	<a href="#">Need 10 boxes of copier paper</a>	Assigned - On Hold	
11220	<a href="#">Mail out material to transition committee</a>	Assigned - Work in Progress	Justin DONATON
10380	<a href="#">Pull file for Grant 1234</a>	Complete - Pending Customer Acceptance	Justin DONATON
11660	<a href="#">Prepare slides for meeting</a>	Assigned - Work in Progress	Justin DONATON
11260	<a href="#">Date test</a>	Assigned - On Hold	
10220	<a href="#">Schedule staff meeting for Oct 5</a>	Assigned - On Hold	

# The “Customer Landing Page”

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- This is your first stop after login.
- Initiate a new work request from this page.
- Page presents a summary view of all your current requests.
  - ☞ Request ID number and title.
  - ☞ Current workflow status.
  - ☞ Employee assigned to do your work.
  - ☞ Request Title links to request details (more on this later...)

# Enter A New Request

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11260	<a href="#">Date test</a>	Assigned - On Hold	
10220	<a href="#">Schedule staff meeting for Oct 5</a>	Assigned - On Hold	
10620	<a href="#">Travel Voucher Processing</a>	Pending Assignment	
10080	<a href="#">Please process my travel voucher</a>	Pending Assignment	

# The Menu of Services

Address  <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861/6099372/Grants>  Go  Links >>

**Create a New Work Request**  

**Filter task list by Business Area:**  
[Review](#) [Grants](#) [Program](#) [All](#)

Select a Task from the Task Dictionary

**Grants: General and Administrative Support**

- ☐ 10200- [Duplication and Scanning of Documents](#)
- ☐ 10220- [Scheduling Internal and Staff Meetings](#)
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# 1. Select a task business area:

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861/6099372/Grants>

Create a New Work Request OK Cancel

**Filter task list by Business Area:**  
[Review](#) [Grants](#) [Program](#) [All](#)

Select a Task from the Task Dictionary

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View task menu by functional business area or view entire list via these links.



# 1. Select a task business area:

---

- Task menu may be viewed by business area: Review, Grants, Program
- Or user may choose to view the entire task menu at one time: select All
- User may select a default business area as part of their user profile.
- Task menu was built from the PWS.

## 2. Viewing the task definition

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861/Grants>

Create a New Work Request OK Cancel

Filter task list by Business Area:  
[Review](#) [Grants](#) [Program](#) [All](#)

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- ☐ 10460- [Closing Out Grants](#)
- ☐ 10480- [Transferring Files to Storage](#)
- ☐ 10500- [Disposing of Documents](#)

**Grants: IMPAC II and Other Database Actions**

- ☐ 10520- [Processing Actions in Databases](#)
- ☐ 10540- [Querying Databases](#)

**Microsoft Internet Explorer**

 Task Definition: Includes domestic/foreign and local travel. Includes reviewing travel requests/orders and vouchers, coordinating arrangements with the Traveler, entering travel requests/orders into the NBRSS system, coordinating arrangements with the travel management contractor (Omega Travel), processing Foreign Travel clearance forms if applicable, preparing an Actual Expense Allowance (AEA) memo if there is a situation where Traveler is unable to secure lodging at Government per diem rate, checking for meeting registration requests and preparing travel orders, and entering travel vouchers into the NBRSS system.

OK

Click the task title for a definition of what the task type includes.

# 3. Select a Task to Request

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861/Grants#>

**Filter task list by Business Area:**  
[Review](#) [Grants](#) [Program](#) [All](#)

Select a Task from the Task Dictionary

**Grants: General and Administrative Support**

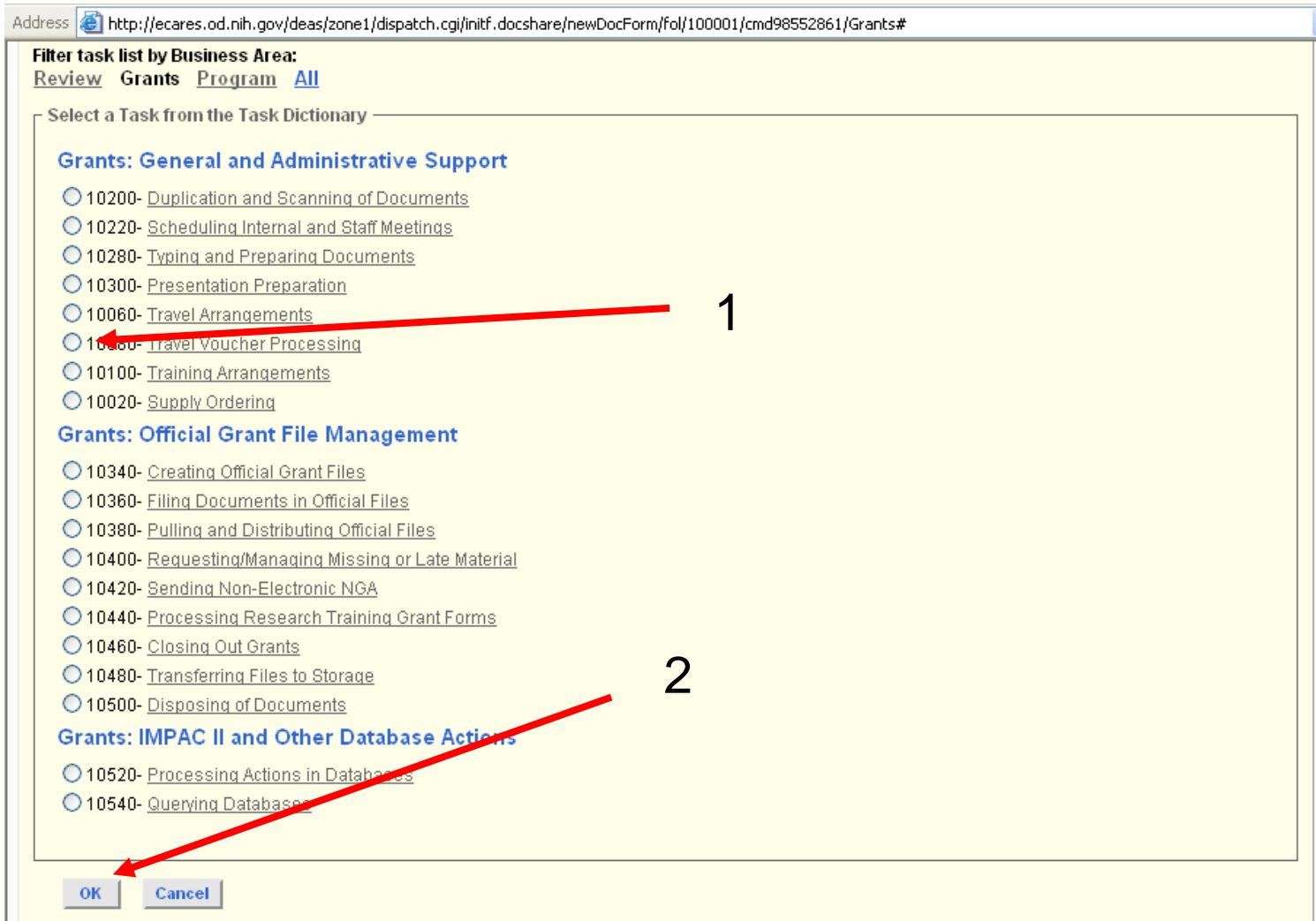
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# 4. Enter Date Type Requested

- For tasks that require date information, users will enter it here.
- All other tasks will skip this step and proceed to details page.

Enter Requested Date - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861/1775656> Go

**Enter Requested Date** OK Cancel

**Travel Voucher Processing - Reviewing and Entering travel vouchers into NBRSS**

Enter Task Date

**TRAVEL RETURN DATE**

day month year or choose date from popup calendars:

27 September 2004

OK Cancel

**September 2004**

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

# 5. Add Request Details – top half

1

## Enter Your Request Information

OK

Cancel

### Travel Voucher Processing - Reviewing and Entering travel vouchers into NBRSS

Enter a brief description of the work being requested

Task type number	10080
TRAVEL RETURN DATE	09/27/2004
Estimated Completion Date	10/04/2004

#### Desired Completion Date

day month year or choose date from popup calendars: October November

4  October  2004

**Explanation** If your Desired Completion Date is less than the Estimated Completion Date, you need to supply a justification.

Customer Login Name

List

Customer Title

Request details

2

2a

## 5. Add Request Details – top half

---

- Detail page shows a system calculated “estimated completion date” based on the PWS time standards.
- If requesting an earlier completion date, you are required to enter a brief explanation.
- Completion dates in the past cannot be entered.
- Leave the customer field blank unless you are entering the request for someone else.

# 5. Add Request Details – bottom half

3

4

5

Submit!

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/newDocForm/fol/100001/cmd98552861>

Customer Login Name  [List](#) Customer Title

Request details

Style  Font  Size

**B** *I* U

From the trip to Bethesda

☐ View HTML [Stop using the HTML editor](#) [Check spelling](#)

[Editing options...](#)

Options

Attach a file  [Browse...](#)

☐ Attach more files (a prompt will appear after you click OK)

[OK](#) [Cancel](#)

## 5. Add Request Details – bottom half

---

- Provide supporting information needed to complete your request in the Request Details text edit box.
- If you have a large amount of supporting detail, create a document off line and attach it to your request.
- All document formats supported.
- Multiple files may be attached.
- Assignee will retrieve your files from the request when they receive it.




## 6. Post Request Submission: Result Screen

Please process my travel voucher - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/showFolder/101000/def/def/4074067> Go Links

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[DEAS](#)

[Nathan SALMINEN - OD](#)

**Workflow:** Task Request Workflow: **Pending Assignment**

[Return to your landing page](#)

[Modify this request](#)

**971. Please process my travel voucher** [Reply](#)

[Nathan SALMINEN](#) Posted on 09/27/04 03:50 PM  
Workflow state changed by [Nathan SALMINEN](#) on 09/27/04 03:50 PM  
Click here to see all state changes: [State Change History](#)

Travel Voucher Processing Reviewing and Entering travel vouchers into NBRSS

TRAVEL RETURN DATE	09/27/2004
Estimated completion date	10/04/2004
Requested completion date	10/04/2004
Request date	09/27/04 03:50 PM
Customer	<a href="#">Nathan SALMINEN</a>
Task leader	<a href="#">Lucy ROWSER</a>
Assignee	

From the trip to Bethesda

Done Internet

# What Happens to Submitted Requests?

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- Submitted requests are routed to an appropriate task leader based on:
  - Your IC.
  - Your location.
  - The business area of the task you requested. (ie-routed to task leaders who specialize in review, grants or program related functions).
- In a majority of cases, submitted requests will be assigned to support staff the day they are received.

# Submitted Requests: Assignment Rules

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- Requests submitted prior to 2 pm will be assigned to an employee on the same business day. After 2 pm, the assignment may not take place until the following business day, depending on time of submission and workload.
- If requests are not assigned within the allowed time period, the supervisor and/or task leader is alerted via a special email notification.
- All day related calculations are based on workdays or fractions of workdays (for tasks requiring completion within hours).
- *For any request where today's date = your requested completion date, task leaders receive a mandatory email alert.*

# Summary of Work Request Statuses

Status Definitions	
	<i>Request Status</i>
1	Pending Assignment
2	Pending Assignment - Overdue
3	Assigned – On Hold (for requests submitted for future completion)
4	Assigned – Work in Progress
5	Assigned – Work in Progress – Overdue (due date passed)
6	Assigned – Work in Progress – Redo
7	On Hold – Pending Clarification/Information (request already assigned – info needed from customer)
8	Complete – Pending Customer Acceptance
9	Satisfactorily Completed – accepted by customer
10	Satisfactorily Completed – accepted by default
11	Not Satisfactorily Completed


# Email Notifications

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- Customers receive email notifications anytime a task leader or supervisor *changes the workflow state of your request*.
- If the Requestor and Customer are not the same person, both receive all notifications concerning the request.
- Emails will contain information about the specific request and indicate if any action is required by the customer (ie-signing off on a completed request).
- Customers will soon have the option of disabling email notifications.

# Track your request

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/customerLandingPage> Go Links



Division of Extramural Activities Support  
DEAS  
[Nathan SALMINEH - OD](#)

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10080	<a href="#">Please process my travel voucher</a>	Pending Assignment	

Click request title link to see request details and history

current request status

# Examine request history

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/docProfile/100977> Go Links >>



## Division of Extramural Activities Support

DEAS

[Nathan SALMINEN - OD](#)

**Workflow:** Task Request Workflow: **Assigned - Work in Progress**

[Return to your landing page](#)

949. Prepare slides for meeting

[Nathan SALMINEN](#) Posted on 09/27/04 11:38 AM  
Modified by Amy PETERSON on 09/27/04 03:53 PM  
Workflow state changed by Amy PETERSON on 09/27/04 03:53 PM  
Click here to see all state changes: [State Change History](#)

Presentation Preparation Preparing or assisting in preparation of presentation

Estimated completion date	09/30/2004
Requested completion date	09/30/2004
Assigned completion date	09/30/2004
Start date	09/27/2004
Assigned date	09/27/2004
Request date	09/27/04 11:38 AM
Customer	<a href="#">Nathan SALMINEN</a>
Task leader	<a href="#">Lucy ROWSER</a>
Assignee	<a href="#">Justin DONATON</a>

State Changed By	State Changed On	State After Transition
Nathan SALMINEN	09/27/04 11:38 AM	Submitted
Nathan SALMINEN	09/27/04 11:39 AM	Pending Assignment
Brenda BERNARD	09/27/04 03:37 PM	Assigned - On Hold
Amy PETERSON	09/27/04 03:53 PM	Assigned - Work in Progress

[Close Window](#)

Done

# Was your request completed correctly?


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- Upon completion of your request, an email notification will be sent to you.
- Click the link in the email, login to the system, and you will be taken directly to the Details page for that request.
- You may also get to the details/sign off screen from the Request Title link on the customer landing page.



# Was your request completed correctly?

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/customerLandingPage> Go Links »



Division of Extramural Activities Support  
DEAS  
Nathan SALMINEH - OD

**Extramural Customer Assistance Request System  
(ECARES)**

**IMPORTANT: Requests Entered For Work DUE Prior to October 4, 2004 Will Be DELETED.**  
Actual requests may be entered, but ONLY for work due after the DEAS Opening Date of October 4, 2004.  
Please do not enter "test" or "practice" requests into this system. Thanks.

For user support contact the NIH Help Desk at 301-496-4357 or at <http://support.cit.nih.gov> for assistance.


[Enter a New Work Request](#)

Task ID	Title	Status	Assignee
10200	<a href="#">this is only a test</a>	Assigned - On Hold	
11380	<a href="#">Need 10 boxes of copier paper</a>	Assigned - On Hold	
11220	<a href="#">Mail out material to transition committee</a>	Assigned - Work in Progress	Justin DONATON
10200	<a href="#">Pull file for Grant 1234</a>	Complete - Pending Customer Acceptance	Justin DONATON
11660	<a href="#">Prepare slides for meeting</a>	Assigned - Work in Progress	Justin DONATON
11260	<a href="#">Date test</a>	Assigned - On Hold	
10220	<a href="#">Schedule staff meeting for Oct 5</a>	Assigned - On Hold	
10620	<a href="#">Travel Voucher Processing</a>	Pending Assignment	
10080	<a href="#">Please process my travel voucher</a>	Pending Assignment	

**Follow link to customer acceptance page**

# Decide the outcome...

Address <http://ecares.od.nih.gov/deas/zone1/dispatch.cgi/initf.docshare/docProfile/100974> Go Links »

 **DEAS**  
Division of Extramural Activities Support

[DEAS](#)  
[Nathan SALMINEN - OD](#)


**Workflow:** Task Request Workflow: **Complete - Pending Customer Acceptance**

Was your work request completed satisfactorily? [OK](#)

☐ Yes  
☐ No

Explanation text **required** for response(s) "No"

[Return to your landing page](#)

 **946. Pull file for Grant 1234**

[Nathan SALMINEN](#) Posted on 09/27/04 11:34 AM  
Modified by Amy PETERSON on 09/27/04 03:55 PM  
Workflow state changed by [Amy PETERSON](#) on 09/27/04 03:56 PM  
Click here to see all state changes: [State Change History](#)

Pulling and Distributing Official Files Pulling, tracking, and distributing grant files

Estimated completion date	09/29/2004
Requested completion date	09/29/2004
Assigned completion date	09/29/2004

[Reply](#)

**Indicate acceptance  
(Yes/no) and add  
comments, if desired**

# Request Outcomes

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- 24 hours after being notified that your request is complete, the request status will default to *Satisfactorily Completed* if you do not log in and indicate your acceptance/non-acceptance of the work.
- After 24 hours, you may still change the status to *Not Satisfactorily Completed* by contacting a supervisor.

# Request Outcomes - continued

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- Requests indicated as being *Not Satisfactorily Completed*
  - Require an explanation
  - And will be tracked as redo work until completed to the customer's satisfaction.
- Your work will be given a new status of “*Work in Progress-redo*” and possibly re-assigned, if deemed necessary.
- When the redo is complete, you will once again be asked if you are satisfied.

# Coming Improvements

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- A number of improvements and changes will be incorporated into ECARES in the very near future.
- Many of these changes are a direct result of customer comments following the August beta test.
- Improvements will be incrementally deployed as soon as they are completed by the contractor.