# July 2003 Plans

**Draft as of** **3-Mar-03**

** indicates major development effort

| | Task | Approval Status | Priority/Dependency | Confidence/Status of Requirements |
|---|---|---|---|---|
| 4 | **Individual Business Areas** | | | |
| 5 | **1. \*\*CGAP** | Apprvd by eRA Proj.Team  12/10/03 & PMO. | High: eGrants one of JJ's top '03 priorities to EPMC 11/10/03. Commitments made to SBIR contractors. eGrants front-runner. Highly visible to grantee community. | High/ |
| 6 | a. New Development & Major Enhancements | | | |
| 7 | i. XML stream recpt & edit | | | |
| 8 | ii. Business to Government flow and interchange infrastructure | | | |
| 9 | iii. Prototype Application Receipt and validation (requires common J2EE edit checker) | | | In analysis; requirements documention not yet started |
| 10 | **2. Committee Management** | | | |
| 11 | a. J2EE Fast Track phase 2 | Apprvd by eRA Proj.Team  12/10/03 & PMO | | High/requirements delivered |
| 12 | i New Development and Major Enhancements | | | |
| 13 | 1) 5 reports - Meeting Roster, Committee Roster, NIH 1715 (voucher) Report, Invitation to Travel Report & Mailing Labels Report | | Medium. | High/requirements delivered |
| 14 | 2) enhanced roster functionality such as - copy roster, verify roster, verify voucher status, view applications for a meeting and verify degrees. | | Medium. | High/requirements delivered |
| 15 | 3) Incorporate J2EE Person Module (requires common J2EE person module) | Apprvd by eRA Proj.Team  12/10/03 & PMO | High: Need to migrate Person module to J2EE and see how it works before migrating other client/server modules that depend on Person module. | Medium/ requirements in progress |
| 16 | **3. Trainee Activities** | | | |
| 17 | a. \*\*X-Train J2EE | | | |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 18 | i. New Development & Major Enhancements | | | |
| 19 | 1) J2EE Xtrain module for external users to J2EE Xtrain module for external users to appoint and reappoint trainees. This will replace functionality from X-Train v.1.5. TA module stays up for internal and payback. Shut down X-train 1.5. PI (PD) or delegate maintains TA PPFs. Existing PPF data is used. No trainee registration. | Apprvd by eRA Proj.Team 12/10/03 & PMO (orig.for May). | High: X-Train one of JJ's top 10 priorities for '03 to EPMC 11/10/03. Need to get X-Train 1.5 off of Commons 1 database so we can retire it. | High: Requirements nearly complete. 1st version of requirements delivered. |
| 20 | b. TA Payback | | | |
| 21 | i. New Development & Major Enhancements | | | |
| 22 | 1) Build interface with OFM so that TA shows status of records sent to OFM for financial payback - to be used by Payback center. | Apprvd by eRA Proj.Team 12/10/03 & PMO. New module apprvd for Oct. Scaled back to show status. Original reqs.out of scope. NBS/OFM will cover accounts recev. | Medium. This has been deferred for 2-3 deployment rounds. Payback Center director | Low/Reqs.not yet defined. Involves interface or cooperation of OFM. |
| 23 | ii. Maintenance | | | |
| 24 | 1) Modify so payback calculation gets called upon entering payback snapshot rpt and balance due worksheet | | | |
| 25 | 2) Modify payback calculation to correctly calculate obligs of individs.w/less than 12 mos postdoc support before Revit.Act 6/10/93 | | | |
| 26 | 3) Allow APACs to be printed from user's desktop | | | |
| 27 | **4. Grants Management** | | | |
| 28 | **a. Client/Server GM** | | | |
| 29 | i. New Development & Major Enhancements | | | |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 30 | 1) Approval and processing of e-requests for No-Cost Extensions (requires request for no cost extension submitted via Commons) | e-Request for no cost extension Apprvd by eRA Proj.Team 12/10/03 & PMO. | Dependent function: If we do no-cost extensions requests through Commons, then this approval piece in GM is required. | Low/Requirements & Architecture for eRequest system not yet defined. No resourced for evaluating COTS workflow product. |
| 31 | 2) Possibly approval and processing of fellowship activation requests (requires request for fellowship activation submitted via Commons) | e-Request for no cost extension Apprvd by eRA Proj.Team 12/10/03 & PMO. | Low: If we do fellowship activation requests through Commons, then this approval piece in GM is required. | Low/ |
| 32 | 3) **Build a foreign clearance system and integrate to GM | Deferred several time from GM list. Fogarty went to outside source to get system developed. This system belongs in eRA. | Medium: This is a significant amount of work. Suggest this be deployed for a midterm release after July, or deferred to October. A pilot in a test environment could be done in the July timeframe. | Low/Initial meetings w/focus grp.held.Complex requirements involves generating subprojects. Detailed requirements not yet documented. |
| 33 | 4) Integrate J2EE customizable checklist | Apprvd by eRA Proj.Team 12/10/03 & PMO for integration in PGM and GM for March. Deferred several times. | Dependent function: Implementing the checklist in Program is dependent on this. Arhcitecture has already produced a workable pilot. | High/Architectural prototype successful. Requirements documented. |
| 34 | 5) Build link to Subproject module | Della Hann about to issue policy that ICs must enter subprojects. Needed in GM since in many ICs, GM knows which subprojects are incl.in award. Deferred several times. | Medium: The workaround is for GM to access the subproject module from ICO. | High/ |
| 35 | **b. Closeout Module** | | | |
| 36 | i. New Development & Major Enhancements | | | |
| 37 | 1) Generate & store a PDF doc of email letters when sent and checklist | | | High/deferred - not a requirement for July |
| 38 | 2) Sort by any column on several hit lists | | | High/Reqs delivered 2/21/03 |
| 39 | 3) Sorting by any column on FRC report | | | High/Reqs delivered 2/21/03 |
| 40 | 4) Cc IC central email addr & specialist for all emails | | | High/Reqs delivered 2/21/03 |

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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| **41** | 5) On search by serial# HL, add mark as pending and mark as unfunded. | | | High/Reqs delivered 2/21/03 |
| **42** | 6) Ability to remove a pending grant from history screen | | | High/Reqs delivered 2/21/03 |
| **43** | 7) Add council date to the pending HL | | | High/Reqs delivered 2/21/03 |
| **44** | 8) FSR and invention stmnt radio buttons should not default to selected. | | | High/Reqs delivered 2/21/03 |
| **45** | 9) Add Closeout to email subject | | | High/Reqs delivered 2/21/03 |
| **46** | 10) Add destroyed date & PO recv? to Edit Screen | | | High/Reqs delivered 2/21/03 |
| **47** | 11) Refine the Termination Report query to only return awarded grants | | | High/Reqs delivered 2/21/03 |
| **48** | 12) Add "PO Received?" and "Acceptable?" and values for each to the Checksheet near final progress report. | | | High/Reqs delivered 2/21/03 |
| **49** | ii. Maintenance | | | |
| **50** | 1) 8 bug fixes and minor enhancements | | | Reqs delivered 2/21/03 |
| **51** | | | | |
| **52** | **5. RAE** | | | |
| **53** | **a. \*\*J2EE Query Tool phase 1** | Apprvd by eRA Proj.Team 12/10/03 & PMO. To be featured at eRA Symposium April '03. | High | High:/Requirements in draft. UI prototype well developed. |
| **54** | i. New Development & Major Enhancements | | | |
| **55** | 1) Version 1 production pilot | | | |
| **56** | **b. QuickView** | | | |
| **57** | i. Maintenance | | | |
| **58** | 1) Allow LRP applications to appear (see also under Common - LRPs) | Requested continually by users to HelpDesk. QVR already shows LRPs. | High: small change for large positive impact on users. | High/Requirements nearly comlete |
| **59** | **c. CRISP+** | | | |
| **60** | i. New Development & Major Enhancements | | | |
| **61** | 1)Implement ability to extract Title, Abstract & Specific Aims from IMPACII in req.format for DRD's Automated Indexing System (DRDAIS). | | | |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 62 | 2) View image while working on transaction screen so indexers can view image while indexing. Note: This should be done to be generic because this issue applies to all users using a grant image to do work. (see also under common functions. | | | |
| 63 | ii. Maintenance | | | |
| 64 | 1) Allow LRP applications to appear (see also under Common - LRPs) | Requested by users to HelpDesk. QVR already shows LRPs. | High: small change for large positive impact on users. | High/Requirements nearly comlete |
| 65 | **a. CRISP on the Web** | | | |
| 66 | i. New Development & Major Enhancements | | | |
| 67 | 1) Automate replication process to run early in AM. After IRDB bridge completes. | | | |
| 68 | 2) Incorporate CRISP Thesaurus functionality into retrieval engine | | | |
| 69 | 3) Implement query that spans a range of Fys | | | |
| 70 | 4) Add the ability to search using multiple Boolean operators for singular or compound terms | | | |
| 71 | 5) Add exclude functionality to exclude terminology from queries | | | |
| 72 | ii. Maintenance | | | |
| 73 | 1) Combine incremental replication and replication backfill programs | | | |
| 74 | 2) Fix bug in Expansion Logic buttons when the Stem, Fuzzy or Soundex button is selected | | | |
| 75 | 3) Fix order of state names in the state pull down list. | | | |
| 76 | 4) Fix highlighting of terms in abstact | | | |
| 77 | 5) Create a user friendly error page | | | |
| 78 | **b. IQR** | | | |
| 79 | i. Maintenance | | | |
| 80 | 1) Update IQR Help SQL statements | | | |

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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| **81** | | | | |
| **82** | **15. eSNAP** | | High: eGrants one of JJ's top '03 priorities to EPMC 11/10/03. | |
| **83** | a. New Development & Major Enhancements | | | |
| **84** | i. e-Notification for type 5 (push) (requires common e-notification system) | Priorities for CWG and NIH. | Medium: | Medium: Analysis not started |
| **85** | ii. Input research accomplishments | Priorities for CWG and NIH. | Medium: | Medium: Analysis not started |
| **86** | iii. Establish a mechanism for the user to indicate whether or not a specific screen has been completed, and display the status to the user throughout the eSNAP preparation cycle | Priorities for CWG and NIH. | Medium: | High: Requirements not yet started |
| **87** | iv. Population Tracking data entered through eSNAP | Apprvd by eRA Proj.Team 12/10/03 & PMO; orig.planned for May | High: Once in place, eSNAP will be fully functional for all types of applications. | We've had 2 user reviews, done the HTML and should be able to complete by 3/14. I'll have the Pop Tracking modifications for the client server side (should be small) piece of it done by then. |
| **88** | a. Maintenance | | | |
| **89** | i. Purge and clean-up routines | | | Low/Analyis not started |
| **90** | ii. Minor bug fixes and improvements | | | |
| **91** | | | | |
| **92** | **16. **FSR** | | | |
| **93** | a. New Development & Major Enhancements | Part of IMPAC 1 sunset requirement. | | |
| **94** | i. Incl. terminated & other prev. awd. grants in 'awarded' definition | | | |
| **95** | ii. Handle all CAS transaction scenarios (deferred from Mar) | | | |
| **96** | iii. Email notification of rejected FSRs (deferred from Mar) | | | |
| **97** | iv. Create administrative close OFM action | | | |
| **98** | v. Add new business rule to validate the FSR data. | | | |
| **99** | vi. require user to enter certain query parameters in order to run searches. | | | |

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| | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 100 | vii. FSR became very bloated (JAVA-wise). Developers will need to re-design and re-write parts of the application. | | | |
| 101 | viii. FSR summary reports (2-3) to give OFM management reports to how many FSR have been processed by whom and what is the outstanding workload by week (broken down by IC / External org) | | | |
| 102 | b. Maintenance | | | |
| 103 | i. Fix approx 5 minor bugs | | | |
| 104 | | | | |
| 105 | **17. **Program** | Apprvd by eRA Proj.Team 12/10/03 & PMO. | Program interface one of JJ's top '03 priorities to EPMC 11/10/03 | |
| 106 | a. New Development & Major Enhancements | | | |
| 107 | i. Integrate customizable checklists | Apprvd by eRA Proj.Team 12/10/03 & PMO for integration in PGM and GM for March. Deferred several times (orig.to go in ICO) | High: Program Approval processing is a top priority for Program for July. | High:/Architectural prototype successful |
| 108 | ii. Pgm approval functionality, incl.completing customiz.checklist | | High: Program Approval processing is a top priority for Program for July. | Medium:/Requiremetns in progress |
| 109 | iii. **Provide a customizable and savable default sort for each user | | | |
| 110 | iv. Incude/exclude subprojects | | | |
| 111 | v. Filter by FY & council dates in list.; select multiple FY & council rounds.  Default to current FY & next council | | | |
| 112 | vi. Combine agenda & review order rpt & provide link | | | |
| 113 | vii. Capability to select Snapshot report sections for printing | | | |
| 114 | viii. Add a Pre-Award page; Add an Other/Withdrawn Grants page? | | | |
| 115 | ix. Attention flag to indicate problem areas | | | |

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| 116 | x. Default (hierarchical) portfolios at IC, Division, Branch, and Program Area level, in addition to the PO level | | Low: Will involve a lot of work and require capturing data never captured in IMPAC II, Division and Branch. Architecture and Analysis suggests deferring. Work around is to use PCC as basis. Looking into this option. | |
| 117 | xi. Custom (user-defined) portfolios | | | |
| 118 | xiii. Add/Remove individual applications from PO's (private) portfolio | | | |
| 119 | xiv. Move query functionality to RAE | | | |
| 120 | b. Maintenance | | | |
| 121 | i. Fix bugs and minor enhancements from March release | | | |
| 122 | | | | |
| 123 | **18. ICO/IC Admin.** | | | |
| 124 | **a. ICO Client/Server application** | | | |
| 125 | i. New Development & Major Enhancements | | | |
| 126 | 1) Add feature to allow IC using Review Details screen to move an Applic.already reviewed back from The October Fy X to the May/Aug FY X-1 council round to pay it in Current fy. Need before EOY. | IMPAC 1 sunset requirement. | High: Must be available before end of FY. There is no function in IMPAC II to accomplish this. Had to use IMPAC 1 last year. | Medium/Requriements not yet documented |
| 127 | 2) Implement council data normalization for AHRQ and CDC ICs | Requested by AHRQ user to search for duals in ICO. | Medium - High:  If we are to offer services to Dept., should provide same features for non-NIH applications same as for NIH. AHRQ told this is planned for July. | High/Requirements delivered |
| 128 | ii. Maintenance | | | |
| 129 | 1)  Allow LRP applications to appear (see also under Common - LRPs) | Requested by users to HelpDesk. QVR already shows LRPs. | High: small change for large positive impact on users. | High/requirements nearly complete |
| 130 | **b. **Spin off a J2EE IC Administration module so that J2EE ICO functionality doesn't have to be integrated to c/s application** | IC Staff Roles and Management Interface one of JJ's top priorities to EPMC 11/10/03. | | Low/Requirements in progress |

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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| **131** | i. New Development & Major Enhancements | | | |
| **132** | 1) **Customizable checklist administration | Required for customized checklist. Either integrate J2EE module to client/server ICO, or start up new J2EE IC Admin.module | Dependent function: this is the UI for an IC to set up their customized checklist. For first version, suggest only User Support have access to this function; Later, IC data administrators. | High/Architectural prototype successful. Requirements nearly complete |
| **133** | 2) **Foreign Clearance module | Deferred several time from GM list. Fogarty went to outside source to get system developed. This system belongs in eRA. | Medium: This is a significant amount of work. Suggest this be deployed for a midterm release after July, or deferred to October. A pilot in a test environment could be done in the July timeframe. | Low/Initial meetings w/focus grp.held.Complex requirements involves generating subprojects. Detailed requirements not yet documented. |
| **134** | 3) **Email Notification system UI | Either integree J2EE module to client/server ICO, or start up new J2EE IC Admin.module | Low: Suggest email messages needed for July release be set up by developer using the Common mailer system interface. Treat same as ROT. | Low/Pending determination to use Oracle 9i workflow, COTS workflow product, or custom build. |
| **135** | | | | |
| **136** | **19. Peer Review** | | | |
| **137** | **a. Client/Server Application** | | | |
| **138** | i. New Development & Major Enhancements | | | |
| **139** | 1) Output selected reports to Excel (see under common functionality) | Enhancing reports and query tools one of JJ's top priorities to EPMC 11/10/03. | High: This requirement is different than exporting a hitlist to Excel; this is to save a complex Oracle report to Excel while retaining most of the formatting. This was a driver to look at Discoverer. Needed by multiple business areas, incl. Review, PGM, and Pop Tracking. Review has been promised this feature for some time. | High/Requirements documented - nearly complete |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 140 | 2)Address security concern - replace FTP process for SSs with secure method | FTP Identified as security risk. | High: | High/Requirements documented |
| 141 | 3) Enhance CD Order System by users to place and confirm attachments on the CDs at time of order submission, replacing current cumbersome method of web & email messages after the CD is ordered | Requested by Peer Review CD users. | Medium: | High/Requirements in progress |
| 142 | ii. Maintenance | | | |
| 143 | 1) Minor fixes | | | Requirements in progress |
| 144 | **b. IAR** | | | |
| 145 | i. New Development & Major Enhancements | IAR enhancements were deferred from earlier releases due to down scoping for budgetary purposed. Needed to make system fully functional. | | |
| 146 | 1) Fix logic for phone reviewers to meet policy (major) | | | Requirements Nearly Complete |
| 147 | 2) Add more sort options on screens | | | High/Requirements documented |
| 148 | 3) Several medium to large enhancements | | | High/Requirements documented |
| 149 | ii. Maintenance | | | High/Requirements documented |
| 150 | 1) Minor fixes to be identified | | | High/Requirements documented |
| 151 | | | | Requirements Nearly Complete |
| 152 | **20. Population Tracking** | | | |
| 153 | a. New Development & Major Enhancements | | | |
| 154 | i. Make changes to support eSNAP submission of pop tracking data | Apprvd by eRA Proj.Team 12/10/03 & PMO; orig.planned for May | High: Once in place, eSNAP will be fully functional for all types of applications. | High: Requirements in process; JADs met. |
| 155 | ii. Change subproject rollover to roll over subs when type 5 shell parent created. Need to attach pop trk data to subs prior to parent award | | High: Required for timely & complete enrollment data collection | High/Requirements documented |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 156 | iii. Output selected reports (aggregates) to Excel (see under common functionality) | Enhancing reports and query tools one of JJ's top priorities to EPMC 11/10/03 | Low: For Pop Tracking, there is a workaround. Program analyst is using EXCEl to query the database | Low |
| 157 | c. Maintenance | | | |
| 158 | i. Minor fixes | | | |
| 159 | | | | |
| 160 | **14. Grants Payment Management** | | | |
| 161 | a. New Development & Major Enhancements | | | |
| 162 | i. Output selected reports to Excel (see under common functionality) | Enhancing reports and query tools one of JJ's top priorities to EPMC 11/10/03 | Medium: | High/Requirements documented |
| 163 | | | | |
| 164 | **15. Receipt & Referral** | | | |
| 165 | a. New Development & Major Enhancements | | | |
| 166 | i. Possibly some integration with CGAP | Apprvd by eRA Proj.Team  12/10/03 & PMO. | High: eGrants one of JJ's top '03 priorities to EPMC 11/10/03. For there to be end-to-end processing, CGAP receipts must flow to R&R. May occur after July time frame in non-production environment to support CGAP pilot. | High:/Requirements currently being documented |
| 167 | ii. Possibly use new person matching algorithm recommended by QRC | | data quality one of JJ's top '03 priorities to EPMC 11/10/03. QRC was tasked to do this; now we need to implement it. | Medium: requirements in progress |
| 168 | iii. Possibly electronic ARAs using new eRequest system | | Low: This should be deferred to October. No cost extensions and less complex requests should be implemented in July. | Low/analysis not yet started |
| 169 | iv. Change configuration of long running reports to avoid new limit of sessions (e.g., submit chron job similar to SSs and ICO Council Sweep) | | Dependent Function: Needed if Ops implements a timeout for long running reports. | Medium: In analysis, requirements not yet started |
| 170 | b. Maintenance | | | |

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| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 171 | i. Several and minor enhancements, each one under $10k.  Most of the minor enhancements were cut out of the original March list. | | | High/Requirements nearly complete |
| 172 | | c | c | |
| 173 | **16. IM** | | | |
| 174 | a. J2EE IM Module | c | c | |
| 175 | i. Maintenance | | | |
| 176 | a. Contracts | Need clear go/no go for this from Program office. | Prefer to defer | |
| 177 | i. New Development & Major Enhancements | | | |
| 178 | 1) Build bridge to bring contract data from DCIS to IMPAC II | | | |
| 179 | b. ATRS | | | |
| 180 | i. New Development & Major Enhancements | | | |
| 181 | 1) Move the reconciliation of OFM data and IMPACII from mainframe application to Unix  PL/SQL | Architecture objected to use of mainframe. It was decided to se MF temporarily to shut down IMPAC 1 by Oct. | Medium | |
| 182 | i. Maintenance | | | |
| 183 | | | | |
| 184 | **17. iEdison** | Approved by Program office on March list. | High: Program office is tracking this very carefully since its deployment is one of the metrics for evaluating this project at the Dept. | |
| 185 | a. New Development & Major Enhancements | | | |
| 186 | i. Post-initial release enhancements requested by internal/external users once deployed | | High: After initial deployment, it is critical to quickly make usability and basic functionality enhancements requested by users. | |
| 187 | ii. Display state of each invention & patent record to the graphical display of the relational hierarchy | | | |

| | Task | Approval Status | Priority/Dependency | Confidence/Status of Requirements |
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| 188 | iii. Add Dormant Lockout Functionality | | | |
| 189 | iv. Pre-population of manufacturing & inventor waivers,& 3rd party assignment request forms | | | |
| 190 | v. Add functionality to allow NIH Admin to change sys.parameters | | | |
| 191 | vi. Add reports - agency & organization contact data | | | |
| 192 | vii. Auto create org. profile based on org. code provided by NIH admin during process of registrations | | | |
| 193 | viii. View Audit records | | | |
| 194 | b. Maintenance | | | |
| 195 | i. Post-initial release maintenance | | | |
| 196 | | | | |
| 197 | **Common Modules, Applications, and functionality** | | | |
| 198 | **1. Edit Checker** | | | |
| 199 | **a. \*\*J2EE Edit checker (use first for CGAP)** | | | |
| 200 | i. New Development & Major Enhancements | | | |
| 201 | 1) Build v.1 of common J2EE edit checker to support CGAP or evaluate COTS tool | Apprvd by eRA Proj.Team 12/10/03 & PMO. Deferred from March | High: If we don't develop a common edit checker for the J2EE applications early, each business area will develop their own. | Medium: |
| 202 | **b. Client/Server edit checkers** | | | |
| 203 | i. Maintenance | | | |
| 204 | | | | |
| 205 | **2. Person Module & Data.** | | | |

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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| **206** | **a. \*\*J2EE Person module (version to support CM Fast Track)** | Apprvd by eRA Proj.Team  12/10/03 & PMO | <u>Medium for CM</u>: workaround is to continue to use the c/s web enabled version configured especially to interface with J2EE. <u>High for Data Quality</u>: Data quality enhancements are planned for the J2EE version. Also, J2EE migration plan calls for this at this time. Also, High for Migration planning. Since most C/S applications use the Person module, need to migrate it if the c/s integration isn't adequate from user's point of view. | Medium/ requirements in progress. |
| **207** | i. New Development & Major Enhancements | | | |
| **208** | 1) Build v.1 on J2EE Person Module that supports CM | | | Medium/requirements in progress. Wont implement for July by recommendation of Architecture. Plan is for users to eval.c/s web-enabled version integrated w/J2EE CMFT. Based on user response, we'll determine if J2EE Person module needed to migrate C/S appls, or if c/s integration suffices for time being. If a J2EE Person module is required, alll enhancements to one version of person module must be made in other version. We will keep 2 versions in sync until c/s version retired. |

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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| **209** | **b. Client/Server Person Module** | | | |
| **210** | i. New Development & Major Enhancements | | | |
| **211** | 1) Retire Address Line 5 | Apprvd by eRA Proj.Team 12/10/03 & PMO; deferred from March. | Apprvd by eRA Proj.Team 12/10/03 & PMO; deferred from March. data quality one of JJ's top '03 priorities to EPMC 11/10/03 | Medium/ reqs in progress. Need to assess impact on bus.areas |
| **212** | 2) Change c/s person module (incl.ver.in CMFT) to enforce profile/role integrity | Apprvd by eRA Proj.Team 7/23/02 when Maurer/Silver presented rules for profile/role integrity | Medilum | Delivery of requirements to devel. will be approx.2 weeks late |
| **213** | 3) Address degree data quality | Apprvd by eRA Proj.Team 12/10/03 & PMO; B274 | Apprvd by eRA Proj.Team 12/10/03 & PMO; deferred from March. data quality one of JJ's top '03 priorities to EPMC 11/10/03 | Medium/ requirements in progress |
| **214** | ii) Maintenance | | | Requirements in progress |
| **215** | | | | |
| **216** | **3. **Workflow** | | | |
| **217** | a. New Develoment & Major Enhancements | | | |
| **218** | i. Proof of concept of workflow tool Bizflow | | Medium: | Wont/Architecture wants to defer because of workload issues |
| **219** | | | | |
| **220** | **4. **e-Request system (with customizable approval chains for different requests)** | Apprvd by eRA Proj.Team 12/10/03 & PMO | | |
| **221** | a. New Development & Major Enhancements | | | |
| **222** | i. No Cost Extensions requests received via Commons (needed by GM) | Apprvd by eRA Proj.Team 12/10/03 & PMO | Medium: | |
| **223** | ii. Possible Fellowship activation requests received via Commons (needed by GM) | | Low: | Low: Requirements not yet started |
| **224** | iii. Possibly pilot a worklow COTS product | | Low: | Wont/Architecture wants to defer because of workload issues |
| **225** | iv. Possibly electronic ARAs to be processed internally by R&R | Apprvd by eRA Proj.Team for October 12/10/03 & PMO | Medium: | Low: Requirements not yet started |
| **226** | | | | |
| **227** | **5. **email Notification System** | | | |

| | A | B | C | D |
|---|---|---|---|---|
| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 228 | a. New Development & Major Enhancements | | | |
| 229 | i. e-mail notification to extramural official 60 days prior to eSNAP due date | Priorities for CWG and NIH. | Medium: | |
| 230 | ii. Complete functionality and UI | | Medium: Work around is for developers to set up email notifications using existing common mailer system | Low: Pending recommendation by architecture to use Oracle workflow, a COTS product workflow, or to custom build |
| 231 | b. Maintenance | | | |
| 232 | i. General maintenance on ROT and common mailer system | | | |
| 233 | ii. Suppress ROT email for change in extension in SRG mtg identifiers | | | |
| 234 | | | | |
| 235 | **6. **J2EE Grant Folder** | | | |
| 236 | a. New Development & Major Enhancements | | | |
| 237 | i. Develop July version | | Medium: the basic J2EE grant folder could be used by Program for July | High: Requirements in progress. However, there may not be enhancements for July. |
| 238 | b. Maintenance | | | |
| 239 | i. Maintain March version 1st release | | | Low: maintenance items to be identified after initial release in March |
| 240 | | | | |
| 241 | **7. Output Complex reports to Excel Spreadsheets (needed for Peer Review, Pop Trking, & GPM)** | Enhancing reports and query tools one of JJ's top priorities to EPMC 11/10/03. | High: This requirement is different than exporting a hitlist to Excel; this is to save a complex Oracle report to Excel while retaining most of the formatting. This was a driver to look at Discoverer. Needed by multiple business areas, incl. Review, PGM, and Pop Tracking. Review has been promised this feature for some time. | High: Requirements nearly complete |
| 242 | a. New Development & Major Enhancements | | | |

| | A | B | C | D |
|---|---|---|---|---|
| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 243 | i. Output selected Peer Review reports to Excel | Approved and requested by Review User Group for over 2 years | High: Promised to Review Users for selected review reports. Has become an RPC issue. | High: Requirements nearly complete |
| 244 | ii. Pop Tracking aggregate report | | Low: For Pop Tracking, there is a workaround. Program analyst is using EXCEl to query the database | |
| 245 | iii. GPM new reports | | Medium: This could help the budget officers and executive officers, and therefore the project. | |
| 246 | | | | |
| 247 | **8. ICE (APIs)** | | | |
| 248 | a. New Development & Major Enhancements | | | |
| 249 | i. Change to PCC validation rules to better accommodate PCC format changes which are occurring within several IC's  (LIKELY) | | High: 3 ICs want their PCC validation rules changed and we currently have them hard coded in the API. | High/Requirements completed |
| 250 | | | | |
| 251 | **9. Subproject Module** | | | |
| 252 | a. New Development & Major Enhancements | | | |
| 253 | i. Modify CRISP rollover to remove its processing for type-5 awards  (DEFINITE). CRISP rollover code for type-5's will be built into the Type-5 module (DEFINITE) (create subprjts for Type 5 soon as shell is created for type 5; needed for Pop Trk) | | Dependent function for high priority pop trk task | High/Requirements completed |
| 254 | ii. Enhance to accommodate Foreign components for Foreign clearance app. | | Dependent function GM foreign clearance task | Low/anlayst not yet started |
| 255 | iii. Enforce policy NIH-wide that ICs must enter subprojects, not DRD. Note: this will involve training, coordination, documentation & analyst involvement. Not clear that changes to subproject module are required. | Approved by EPMC several years ago. eRA had to put in place structure to support this which is now complete. Della Hann is coordinating with analysts to enforce policy for July. | High: to support policy. | Low/anlaysis not yet started; however, likely that no development is needed. System can be used as is to support policy. |
| 256 | | | | |

| | A | B | C | D |
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| **3** | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 257 | **10. ICSTORe (note: since J2EE query tool is to replace ICSTORe eventually, keep enhancement to min.)** | | | |
| 258 | a. New Development & Major Enhancements | | | |
| 259 | i. Integrate J2EE Grant Folder to make avail. to Multiple client/server apps. | | Wont: workaround is to use existing grant folder. New query tool and Program module will use J2EE grant folder. | Wont |
| 260 | ii. Add FSR and eSNAP as additional document types | | Wont: GM requested this. This enhancement would cost 42K. The new j2EE query tool will offer these document types. Work to put it in ICSTORe would not be reusable. | Wont |
| 261 | b. Maintenance | | | |
| 262 | i. Allow LRP applications to appear (see also under Common - LRPs) | | High: small change for large positive impact on users. | High/Reqs.nearly complete |
| 263 | | | | |
| 264 | **11. LRPs** | | | |
| 265 | a. Maintenance | | | |
| 266 | i. Allow LRP applications to be viewed in QV, ICO, ICSTORe, and CRISP+ | | High: small change for large positive impact on users. | High/Requirements nearly comlete |
| 267 | | | | |
| 268 | **12. IRDB** | | | |
| 269 | a. Maintenance | | | |
| 270 | | | | |
| 271 | | | | |
| 272 | | | | |
| 273 | **13. View image and do transactional work at same time (needed to support CRISP indexers for July, but an eRA common requirement.** | | High: eGrants one of JJ's top '03 priorities to EPMC 11/10/03.  To completely leverage the benefits of eGrants, need to resolve problem of how to | |
| 274 | a. New Development & Major Enhancements | | | |
| 275 | | | | |
| 276 | | | | |

|  | A | B | C | D |
|---|---|---|---|---|
| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 277 | **Infrastructure and J2EE Base System** | | | |
| 278 | **1. Framework & Integrated/shared components** | | | |
| 279 | a. New Development & Major Enhancements | | | |
| 280 | i. **Common search and hit list integration | | | |
| 281 | ii. Continue demo facility development for IAR, X-Train, etc. | | | |
| 282 | iii. **Combine FSR/eSNAP/Status within Single Search/Results | Apprvd by eRA Proj.Team 12/10/03 & PMO; cont.from March | | Haven't started but expect to be done by 3/14. This one may slip, but I should be able to get it done. |
| 283 | iv. Incorporate X-Train | | | |
| 284 | v. Usage statistics - look at Web trends | Apprvd by eRA Proj.Team 12/10/03 & PMO. Deferred from March | | |
| 285 | b. Maintenance | | | |
| 286 | i. General framework maintenance | | | |
| 287 | ii. Demo facility maintenance | | | |
| 288 | iii. Improve UI for error msgs. Make bigger & bolder. | | | |
| 289 | iv. Minor updates/fixes to Roles/Rights | | | - Should be done by 3/14. |
| 290 | | | | |
| 291 | a. New Development & Major Enhancements | | | |
| 292 | i. Integrate J2EE Grant Folder into Status | | | |
| 293 | b. Maintenance | | | |
| 294 | **3. PPF** | | | |
| 295 | a. Maintenance | | | |
| 296 | **4. Account Administration** | | | |
| 297 | a. New Development & Major Enhancements | | | |
| 298 | i. **Redesign create account | | | Done 2 passes of UCs.  Will have a 3rd pass completed by Wednesday and can schedule a final UC review at any time |
| 299 | b. Maintenance | | | |

|  | A | B | C | D |
|---|---|---|---|---|
| 3 | **Task** | **Approval Status** | **Priority/Dependency** | **Confidence/Status of Requirements** |
| 300 | | | | |
| 301 | | | | |
| 302 | **Other** | | | |
| 303 | **1. \*\*Website redesign** | Apprvd by eRA Proj.Team 12/10/03 & PMO | | Wont/resource issue for Architecure |
| 304 | a. Internal website | | | |
| 305 | b. External website | | | |
| 306 | c. Content management | | | Opportunity to bring on Z-Tech content mgmt analyst to start requirements and planning |
| 307 | **2. Combined new techview (March/July)** | | | |
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