Task	Priority	Approval Status
October 2004 Plans	**Draft as of**	**04-Jun-03**
Task	**Priority**	**Approval Status**
Individual Business Areas		
1. **CGAP		
a. New Dev.& Major Enhancements		
i. List to be provided by Maurer shortly		
b. Maintenance		
2. Committee Management		
a. New Dev.& Major Enhancements		
i.The role/profile items that Krishna is working on for CM Web. Can this go for October? I believe the requirements are close to being done.		
ii. Federal Register Notice. One consideration is the OP DIVS since they do FRN's differently from us but they still have to have a mechanism to publish their FRN's.		
iii. Other enhancements		
b. Maintenance		
3. Trainee Activities		
a. X-Train		
i. New Dev.& Major Enhancements		
A. Xtrain (or an iteration of Xtrain)	High priority	
b. Trainee Activities		
i. Create a report that shows training grant data including the number of post doc and pre doc appointments reserved, and also the number used. This report should be for all T32 grants, and the report should contain all training grants for the IC. We currently have this data in the TA module, but it's only available on a grant by grant basis, not for ALL grants. (If we cant get this approved, advocate is pushing to have QVR provide this.) Perhaps this can be done as part of Web QT	High Priority	
ii. Modify COM1100 to display a payback status code for individuals that DO NOT have a payback obligation. Currently, the system does not consistently show a payback status code when there is not an obligation.	High Priority Item.	

iii. Allow OFM access to payback module for purposes of updating financial payback status. (the details of this are being scoped out.)	Medium-high priority item.	
iv. Modify TA8070 to show the parent grant in the hit list, even if an amendment exists. Problem is that if there's an amendment, it's showing up instead of the parent. Require an explicit entry of the amendment for it to show up.	Needs to be resolved, but not high priority.	
4. Grants Management		
a. New Dev.& Major Enhancements		
i. NGA changes		
A. Make NGAs table driven	High priority. Needed to support the OPDIVs downstream	
B. Convert NGAs to pdf	Medium priority. Needed to support the OPDIVs downstream	
ii. In order to move checklists from pilot to full production in October we need to remove checklist items from GM Admin screen.	High priority.	
b. Maintenance		
b. Closeout Module		
i. New Dev.& Major Enhancements		
A.generate pdf doc of closeout letters and checksheet so they can be displayed in the grant folder	High priority. Listed also under grant folder.	
B. integrate j2ee grant folder	Medium prority.	
C. instead of querying for grants based on users primary ic allow user to choose ic from dropdown - this would help with opdiv integration	Medium prority.	
D. include closeout status information in Commons Status application (this may be included in Dan's Commons list)	See under Status. Low priority.	
ii. Maintenance		
c. Foreign Clearance System		
i. New Dev.& Major Enhancements		
A. If at all possible we need to at least have foreign clearance in pilot in October to capture a full FY of foreign data.	High Priority.	

5. RAE		
a. **Web QT		
i. New Dev.& Major Enhancements		
A. Define Council Books	Priority 2	
B. Maintain Queries	Priority 1	
Save Query		
Edit Query		
Delete Query		
Set/Reset Default Query		
C. Run Saved Query	Priority 2	
D. Print to NIH Central Print	Priority 2	
E. Maintain Hitlist Layout	Priority 3	
Copy Hitlist Layout		
Enter/Edit Hitlist Layout		
Add Hitlist Fields		
Arrange Hitlist Fields		
Remove Hitlist Fields		
Delete Hitlist Layout		
Refresh Hitlist		
F. Manually Add/Remove Hitlist Rows	Priority 4	
G. Manually Arrange Sort Order	Priority 4	
ii. Maintenance		
b. CRISP Plus		
i. New Dev.& Major Enhancements		
A. Change CP interface so that IC-approved flag is one of the query parameters (and have this query parameter set to "Y" by default). This will be in support of the policy which will go in effect in October, where DRD will no longer create subprojects (except in dire need), and in practice will only index those IC-entered subprojects which have been marked "approved".	Priority 1	

B. CRISP Rollover, change so that subprojects can be rolled out earlier than allowed for in the July deployment approach. Currently subprojects, indexes, and abstracts cannot be rolled out to the current fiscal year, until the DRD "FY" parameter has also rolled out to that year. This is to prevent premature rollover (and missing or incomplete data in the current year because of it). The problem is that, while this helps *some* records awarded late in the year, it punishes those which were awarded earlier in the prior year, are fully indexed, and ready to go. We must explore ways to accelerate the rollover for those grants which are deemed ready, and to throttle rollover *only* for those grants which have not yet been fully populated in the prior year.	Priority 6	
C. CRISP Plus screen changes, to more meticulously track progress on a grant-by-grant basis. It is anticipated that the rollover changes (see above) will depend upon some sort of C+ screen changes (to track DRD workflow on a grant-by-grant basis) and a change to the rollover API itself. C+ will most likely need to trigger rollover to the next FY explicitly, an algorithm which will become complicated in synchronization scenarios, since there will always be uncertain situations where users have started editing the next year's set of subprojects.	Priority 6	
d. IQR		
i. New Dev.& Major Enhancements		
ii. Maintenance		
15. eSNAP		
a. New Dev.& Major Enhancements		
i.Type 5 notification: We should be able to get the requirements done for this and I think it will be a relatively easy development effort.		
ii.Allow the option to change form if No Target in ESNAP Inclusion	High priority	
iii.eSNAP rollforward… Copy Performance Sites/Key Personnel to Next Grant Year on eSNAPS	Very high priority. Must be in place by January.	
iv.Expose Org Hierarchy Especially in eSNAP	Medium; can defer til Februrary	

v. eSNAP connect NLM publication DB to eSNAP/Commons citations	Medium for October; High for February.	
vi.include closeout status information in Commons Status application (this may be included in Dan's Commons list)	Low Priority.See under Closeout	
vii. Remove data validation from SAVE functionality in eSNAP. This will allow user to save incomplete data on a page until the data is submitted to NIH	Febuary. Look into using common edit checker.	
viii. Add another file upload option to eSNAP to detail Other Support. Note: See if same method can't be used with Just in time other support upload for competing applications.	High priority	
ix. Send eMail to PO and GMS on all submitted eSNAPs.	Low Priority.	
16. **FSR		
i. New Dev.& Major Enhancements		
a. Special FSR submission rules for Foreign grants. Allow annual submission of SNAP grants to foreign institutions.	High.	
b. Electronic submission indicator on FSR search hit list. Indicate which FSRs have been submitted electronically or mailed in.	Low.	
c. New OMB FSR form	February.	
d. handling of new awd_doc_num format. Changes to several algorithms to handle new awd_doc_num formats.	Bug. Maintenance	
e. Use common hitlist for FSR hitlist	Medium	
ii. Maintenance		
17. **Program		
a. New Dev.& Major Enhancements		
i. Add own bookmarks in pre-submission page		
ii. Delegation of work to another user		
iii.Hierarchical portfolios		
iv. Integration with Web Query Engine		
A.Integration with Web QT features, such as download docs, printing… either, 1) move PGM hitlist to Web QT, or 2) pull-in Web QT features in to PGM (ideal)		
B.Custom (user-defined) portfolios		
C.Integrate Web QT features in		
v. J2EE PO approval screen (common approval screen)		

A. Approvals should permit more then 3 signatures. Sequence is important		
B. Approvals should allow routing (to supervisor, delegates). Sequence is important		
b. Maintenance		
i. Add PCC as a search parameter. Need to be able to search on part of a program code. (NIGMS request)		
ii.Limit search criteria by limiting 1) removing wildcard searches, and 2) limiting to users IC (by defaulting IC)		
iii.On the generic search hit list, it would be nice if the IRG meeting date popped up (in addition to the SRA name) as it does when one searches "my portfolio". (Sometimes one wants/needs to attend the review of an application not in your personal portfolio). Julie Gulya, Chief, Clinical Trials, Epidemiology & Biostatistics Section.		
iv.Need PCC sort on all pages. (NIGMS request). It would also be helpful to have Program Class Code as one of the choices in the nested support option. Many of our investigators also have projects in DMID and sorting by IC does not help delineate the two divisions. (O'Neill, Blanche (NIAID)).		
v.Sort by budget and/or start dates. Want to be able to say give me T5s that have a June start date, September start date, etc. (Can do this in QVR!) . (NIGMS request)		
vi.Provide the navigation path in the header portion of the page. E.g. PGM → Program Approval → PO Checklists		
vii.Provide user (usage) static's in PGM		
viii.Show nested sorts by default		
ix.Make links to other eRA modules available in all pages.		
x.Show e-SNAP's that have arrived/days work in front of you		
xi.Program Analysis Tools: Select, save journals for searching; research PI's		
xii. Error when Maximum number of rows reached reads, "A Commons System error has occurred. Please contact the NIH administrator. (ID: 30011)"		
xiii.Correct IC Store link. Right now, this link carries users to IMPAC II documentation.		
xiv.Make links to other eRA modules available in all pages.		
xv.Consider implementing some sort of indicator that PO Notes have been successfully saved. Right now, no such indicator exists, making it difficult to know when Notes have or have not been saved successfully.		

xvi.Add the links "Next," "Back," "1,2,3,4,5," etc., that appear at the top of the hitlist to the bottom of the hitlist as well.		
xvii.It would be useful to have the grant end date be a sortable option in the post award tab (this would be useful for program officials because they would be able to see with one click, who will be likely to resubmit competing continuations soon). This would be useful because we would be able to easily get a list of those grantees we might want to contact to discuss resubmission issues in a timely way. Chiiko Asanuma -NIMH		
xviii. In the type 5s tab, I wasn't able to toggle back and forth between the ICO module and the PGM (on my computer, the PGM window becomes blank when the ICO module comes up). Chiiko Asanuma - NIMH		
xix.Why go to a search screen first? Users want go right to the portfolio screen.		
xx. Add Pop-Tracking data in Post Award pg		
xxi. Add an "About" page, a new requirement to indicate version number, release date, features, known bugs, future enhancements/features, and other relevant information.		
xxii. Login page: add info about required PO or Program Assistant role		
xxiii. Failed login page: add info about required PO or Program Assistant role		
ii. Maintenance		
20. Population Tracking		
a. New Dev.& Major Enhancements		
b. Maintenance		
14. Grants Payment Management		
a. New Dev.& Major Enhancements		
b. Maintenance		

15. Receipt & Referral		
a. New Dev.& Major Enhancements		
i.Receipt and Referral will need modifications in order to process CGAP applications. At this point, it looks like there will need to be two or three new screens, along with a modification to two or three of the existing screens. There will also need to be some new workflow incorporated.	High priority.	
b. Maintenance		
16. IM		
a. New Dev.& Major Enhancements		
i. Revisions to allow institution and departmental coding at subproject level. Related to subproject item above. This will be needed if we elect to collect only the department names from users on the subproject screen, and leave the responsibility of assigning the division, major component, and department code with SQAIB.	Priority: 4	
17. iEdison		
a. New Dev.& Major Enhancements		
i.List to be provided by Grandy shortly		
b. Maintenance		
18. Peer Review		
a. New Dev.& Major Enhancements		
i.Replace current summary statement upload service with j2ee secure method	High priority	
ii. See also under Output report in Excel		
19. Internet Assisted Review (IAR)		
a. New Dev.& Major Enhancements		
i. See under J2EE Framework for IAR demo facility	High	
ii. Create/Integrate Reviewer Folder version of Grant Folder (Mike Cox's concept, needs more analysis)	Medium priority	

iii. Incorporate some eNotification features into IAR (when assignments or conflicts change notify reviewers, send reminder if critiques haven't been posted 2 days before due date)	Low priority	
iii. Fix IAR to search and display on IAR entered fields (e.g., IAR email). Add Profile Name to Create Account screen.	High Priority.See also under Commons acnt.Mgmt.	
iv. Enforce special requirements for Create Account - no spaces. See also under Commons account mgmt.	High priority.	
v. Enforce special requirements for Create Account - User ID and PW can't match. See also under Commons account mgmt.	Medium priority	
Common Modules, Applications, and functionality		
1. Edit Checker		
a. **J2EE Edit checker (use first for CGAP)		
a. New Dev.& Major Enhancements		
b. Maintenance		
b. Client/Server edit checkers		
a. New Dev.& Major Enhancements		
b. Maintenance		
2. Person Module & Data.		
a. New Dev.& Major Enhancements		
i. See under Comm.Mgmt role/profile changes		
ii. I'm assuming that atomic fields for addresses will need to wait for January, right?		
iii. Validation of city, state, zip combinations in domestic addresses, using USPS city/state/zip data. (Note, something very similar is planned for Commons. Should be coordinated.)	Priority: 5	
a. New Dev.& Major Enhancements		
b. Maintenance		
3. **Workflow		
a. New Dev.& Major Enhancements		

b. Maintenance		
4. **e-Request system (with customizable approval chains for different requests)		
a. New Dev.& Major Enhancements		
b. Maintenance		
5. **email Notification System & Common Mailer System		
a. Common Mailers & ROT		
i. New Dev.& Major Enhancements		
A.Type 5 notification: We should be able to get the requirements done for this and I think it will be a relatively easy development effort.		
B. Incorporate some eNotification features into IAR (when assignments or conflicts change notify reviewers, send reminder if critiques haven't been posted 2 days before due date)	Also listed under IAR. Low priority	
ii. Maintenance	This is repeated under eSNAP	
b. eNotification System		
6. **J2EE Grant Folder		
a. New Dev.& Major Enhancements		
i. See under IAR for Review Folder		
ii. generate pdf doc of closeout letters and checksheet so they can be displayed in the grant folder	High priority. Listed also under IAR.	
iii.Add new documents as requested by user community	Medium priority	
iv. Integrate J2EE grant folder in a few Client/Server applications (GM - especially if closeout doc are available, Review)	Medium priority	
b. Maintenance		
7. Output Complex reports to Excel Spreadsheets (needed for Peer Review, Pop Trking, & GPM)		
a. New Dev.& Major Enhancements		

i. Add 4 reports in Ex c el output format (Roster, Admin, Mailing S.S; Program Officials Report; Unique Institition, Proj Personnel; SS Status and Dates)		
b. Maintenance		
8. ICE (APIs)		
a. New Dev.& Major Enhancements		
b. Maintenance		
9. Subproject Module		
a. New Dev.& Major Enhancements		
i. Provide delete capability in the subproject API. This will support our high-end API users, such as NCRR, who must presently coordinate with SQAIB to delete subprojects en masse, before they can even run the API. When an IC such as NCRR must do a drop-and-replace, it would be better if they could (a) drop what subprojects they have, (b) re-insert, and (c) either commit the new subprojects or rollback and retain the original set, based on the results of that transaction.	Priority: 2	
ii. Provide abstract upload capability in the subproject API. Or, this may take the form of providing an ability to upload the entire progress report, and have some sort of process extract the abstract from it. Not against this, but if no such extraction-utility comes on the scene for eSNAP, then a relatively low-cost API to allow insert or update of an abstract (which a progress-report-extractor utility could also call, whenever it's built) would be paramount for reducing workload that is shared between NCRR and DRD presently.	Priority: 3	
iii. Revisions to subproject screen, to allow entry of departmental affiliation. This depends on how we wish to proceed with Dr. Michel's recent proposal to Dr. McGowan.	Priority 4	
iv. Subproject screen changes, to drive rollover based on screen actions. Related to CRISP items 2 and 3.	Priority: 6	
a. New Dev.& Major Enhancements		
b. Maintenance		

11. LRPs		
a. New Dev.& Major Enhancements		
i.We will need to make some modifications for LRP. If we are going to make any changes, they will have to be done in October, since January is too late for next year's receipt cycle (the deadline for LRP applications is November 30). At a minimum, we need to be able to accept type 2s. I don't believe there will be a lot of coding changes needed for that, although we will certainly need to update the status on all the existing LRP applications (some of which are not yet in our system). My question: how much latitude do we have to make more substantial changes? I would need to convene our focus group to get a read on how this year's process went, and draw up requirements for next year. But if all we're doing is maintenance for October, does that mean we won't be able to get any changes in?		
b. Maintenance		
12. IRDB		
a. New Dev.& Major Enhancements		
b. Maintenance		
13. View image and do transactional work at same time (needed to support CRISP indexers for July, but an eRA common requirement.		
a. New Dev.& Major Enhancements		
b. Maintenance		
14. Summary Statements		
a. New Dev.& Major Enhancements		
i.Replace current summary statement upload service with j2ee secure method	High	
15. IC Admin/ICO		
a. New Dev & major enhancements		
i. Implement council data normalization for rest of OPDIVs. AHRQ and CDC done in July. Needed to support other OPDIVs in IMPAC II, such as FDA, etc.	High	

ii.ICO/GUM: The only major enhancement left to do is the 800-series fields for multiple ICs. Initial estimate is for 100 hours of development and unit testing time.		
b. Maintenance		
i. The rest of the things left to do are minor, no more than 140 hours total.		
Infrastructure and J2EE Base System		
1. Framework & Integrated/shared components		
a. New Dev.& Major Enhancements		
Seems "we" have forgotten one of the most important features we were to gain with J2EE. That is the single sign on. I found out today we will have a couple of new URLs to post after July. We will now have separate URLs for Closeout, Program. CM Web, IC Admin and WEB QT. Probably another for e2272 (or whatever we will call web version of TA) in October and I don't know what else. We must get these into a single "system". We can call it eRA Systems or some such.		
ii.Content Management. Make Dynamic 20 places in existing Commons.	High priority	
c. Commons Account Management		
i.Allow an Extramural User to cancel a Pending PI Verification Request	Low priority	
ii. Fix IAR to search and display on IAR entered fields (e.g., IAR email). Add Profile Name to Create Account Screen.	High priority. Repeated under IAR.	
iv. Enforce special requirements for Create Account - no spaces. See also under IAR.	High priority.	
v. Enforce special requirements for Create Account - User ID and PW can't match. See also under IAR.	Medium priority	
i.Allow a date specification for Assurances, Use IAR Calendar. - Waiting on David to Proceed	Low priority.	
e.Commons PPF		
i. Get Rid of Lock/Unlock Feature in Maintain Accounts. Use Reset Password instead - Base Requirement	Bug. Maintenance	
ii.Support of xTRAIN in Maintain Profiles	High priority	
iii.Rework Menu Groupings/Especially Addresses (Billing/Shipping Address Analogy) - Base Requirement	Low priority.	
iv.Show a Report on Persons records in Maintain Profiles	Low priority	
v.City/State/Zip Lookup		
f. Commons Status		

i.include closeout status information in Commons Status application (this may be included in Dan's Commons list)	Low Priority.See under Closeout	
ii.Consolidate Status/eSNAP/xTRAIN - Launch into those Apps from Status. I	High priority	
iii. f you want to get really ambitious you could expand the 'Consolidate Status/eSNAP/xTRAIN' item and have the consolidated version use the shared hitlist module.	Medium priority	
iii.No Cost Extensions	High priority	
iv.Eliminate Type 5 Query Screen	Medium priority	
v.CGAP Status in Status	High priority	
vi.Close Out - Show Grants in Close-Out.	Medium priority	
vii. Don't show award amounts in Status if not yet awarded	Bug. Maintenance	
g. Commons System Management		
i.Allow Time Criteria for System Messages	Bug. Maintenance	
h.Demo Facility		
i.xTrain in Demo Facility	Medium priority	
ii.IAR in Demo Facility	Medium priority	
i. Commons CGAP support for Just in Time requests (JIT)	Medium priority	
i. IRB Certification	"	
ii.IACUC Certification	"	
iii.Checklist	"	
iv.Other Support	"	