# eRA Project Team Meeting Minutes

**Date:**  Tuesday, April 27, 2004
**Time:**  9:00–10:10 a.m.
**Location:**  Rockledge 1, 5th floor conference room
**Chair:**  Israel Lederhendler

**Next Meeting:** Tuesday, May 25, 9:00 a.m., Rockledge 1, 5th floor conference room

## Action Items

1. (Scarlett Gibb) Notify Project Team when maintenance item status web page is available.

2. (Advocates) Send suggestions for modifications to release note formatting to Felicia Shingler.

## Attachments

❑ FY2005 Budget Request (Israel Lederhendler):
http://era.nih.gov/Docs/Budget%20presentation%20-%2003-31-2004%20-%20ITWG_Final2.pdf

❑ Data Quality (Jim Tucker):
http://era.nih.gov/Docs/Software_Maintenance_Process_04272004.pdf

## Review of FY2005 Budget Presentation

*Israel (Izja) Lederhendler*

Izja officially started his detail as Interim Project Manager on March 1, 2004. On March 2, he was informed he had less than a month to prepare the FY2005 budget request and on March 31 he was in front of the Information Technology Working Group (ITWG) making the presentation. Izja thanked the eRA staff for all there efforts in pulling together the presentation and content.

Izja reviewed the attached budget slides with the team.

Discussion topics:

❑ Primary goal of FY2005 is the full implementation of electronic receipt of grant applications (i.e., capacity to receive RO1s via XML data stream through Grants.gov and partnerships with SBIRs and institutes). Initial rollout is for RO1s with plans to expand as funding allows.

❑ New tools, techniques and efficiencies should allow us to move towards a cycle reduction for getting grants out the door.

❑ eRA has put an integrated transactional portfolio management system on the desktop of every NIH program official. The system is quite functional; however improvements in the usability of the system can be obtained by listening better and responding faster to the program community.

- Looking at future opportunities to use a Collexis-type tool for assisting in program analysis. There is still a long road ahead to achieve wider acceptance of Collexis technology and Knowledge Management (KM), but this application of the technology would be an important bridge between policy, program and budget.

- eRA must commit to an on-going redesign of the grants management system that allows for integration with program, budget and council operations.

- To oppose the view that eRA is a large, cumbersome, slow-moving system Izja noted the following examples where eRA responded quickly and effectively to important requests:
  - Population Tracking
  - Human Stem Cell Tracking
  - NIH Director's Pioneer Award
  - Prototype Disease Coding System

- Danielle Bielenstein noted that at the last large budget officer meeting Altum gave a presentation on software they are developing for disease coding. Her comment led into a larger discussion on the topic. Key points included:
  - Altum serves a number of institutes at NIH
  - The Director of NIH and his Steering Committee has asked eRA to prototype Collexis technology for the purpose of disease coding. Seven institutes are involved in the development of the prototype. In September they will report to the Steering Committee and, if successful, they will go forward with a pilot that includes the institutes. As such, any new coding system will not be implemented for at least 18 months.
  - The team is concerned that a clear message has not been sent or pushed down to all levels. Izja reported that the topic has been discussed at EPMC, in Dr. Zerhouni's briefings to Congress, and Project Team, as well as, in public minutes of Dr. Zerhouni's Steering Committee.
  - Chanath Ratnanather noted that the Collexis prototype will focus on the 230 disease categories that are tracked by Building 1, not the scientific codes that each IC tracks. The prototype activity does not specifically address scientific coding issues or how Collexis and other systems may complement each other.

- The new governance structure imposes an additional layer on eRA priority setting. People from ICs and different business areas will weigh in and look at eRA closely to make priority recommendations. The new process has a larger number of stakeholders and the strategic approach for responding to them is different.

- The strategy for developing the budget presentation was to take the priorities that the Project Team came up with and group them into themes that eRA expects to continue going forward. The first theme, *System Maintenance, Performance and Data Quality*, comprises the operational tasks necessary to keep the system running and represents the core activities. The remaining themes, *Electronic Receipt of Applications, End-to-end*

*Process, and Future Innovations*, are high priority areas but they are fundamentally discretionary and therefore progress will depend on available funds.

❑ Izja noted that eRA must deliver the functionality to allow electronic submission of annual reports and animal assurances to the Office of Laboratory Animal Welfare. This item has been put off for several years due to budget constraints. While the budget constraints have actually increased, the importance of this item has been elevated.

❑ Izja highlighted the eRA FY05 Goals & Associated Costs slide (#15)

## Maintenance Deployment Process

*Jim Tucker*

Jim explained the maintenance release process and reviewed the attached slides.

The process is as follows:

1. Business Analyst bundles maintenance fixes

2. Task sent to development team for Level of Effort

3. Task Order Manager presents maintenance bundle to Change Control Board (CCB)

4. No later than one week from CCB, testers must provide target date to release from test

5. At test readiness review (usually held just prior to release from test) final decision is made whether date will be met

   ▪ Testers must justify any slip from original target (e.g., number of bugs found drastically changed schedule)
   ▪ When appropriate, individual items that fail in test will be removed from bundle rather than holding up release

Additional discussion points:

❑ New deployment strategy implemented this year; fewer major releases, more frequent maintenance releases

❑ Major changes in the eRA team infrastructure at end of 2003

   – New contract topology

      ▪ Multiple development vendors

      ▪ Introduction of integration contract

   – New ticket tracking tools implemented (e.g., ClearQuest)

   – Ramping issues (learning curve of new contractors, office logistics, process changes) have slowed development efforts in early 2004

❑ Multiple maintenance releases ready to go to test

❑ Adjustments of federal staff have been made to augment new integration testers as they learn the systems

❑ Integration testing—verification that subsystems fit together and work properly as a whole service

Acceptance testing—user oriented testing; done by government staff and established Mitretek resources; strong knowledge base built over the years

❑ Looking for opportunities to streamline testing of maintenance releases; should not have to follow same test cycle as a major release

# Deployment Communication

*Scarlett Gibb*

Discussion points:

❑ In process of developing a web page that can be used to check the status of maintenance items

– Timeframes that will be listed will be the best guess available and will be subject to change; expect guess to be within 1-2 weeks of actual dates

– Advocates suggested that consideration be given to archiving old data for reference

**Action:** **(Scarlett Gibb) Notify Project Team when maintenance item status web page is available.**

❑ Target posting release notes by (or before) deployment date; changes being made to process to alert documentation team earlier in process

– It was noted that Ev Sinnett does an excellent job of translating provided release notes into a document that addresses the user's perspective; good best practice for other teams

– Advocates suggested that the format of release notes be revised to make them more user friendly (e.g., PDF indexing)

**Action:** **(Advocates) Send suggestions for modifications to release note formatting to Felicia Shingler.**

❑ Business Analysts will continue to be the primary contact point

❑ Sometimes maintenance items hold up user acceptance of software

– Advocates need lead time to set up training

– Business Analysts need feedback from Advocates when a particular maintenance item is holding up a roll-out; this information should be part of prioritization exercise

# Attendees

Alvey, David (IBM)

Bielenstein, Danielle (NIH/FIC)

Bradley, Eileen (CSR)

Bukowski, Maria (OD)

Burns, Amy (LTS)

Caban, Carlos (OER)

Cain, Jim (OER)

Chicchirichi, David (OER)

Cummins, Sheri (LTS)

Dixon, Diana (OD)

Dutcher, Sylvia (Mitretek)

Faenson, Inna (OD)

Flach, Jennifer (OD)

Frahm, Donna (OER)

Gains, Patti (OER)

Giba, Scarlett (OER)

Goodman, Mike (OD)

Hahn, Marcia (OER/OPERA)

Hausman, Steve (NIAMS)

Houston, Kelli (IBM)

Hughes, Stephen (OD)

Ikeda, Richard (NIGMS)

Katzper, Linda (OD/DEIS)

Kinley, Teresa (CDC)

Lagas, Robert (Lagas Assoc)

Lederhendler, Israel (NIMH)

Loewe, Michael (NINDS)

Lynch, Peggy (IBM)

Martin, Carol S. (NHGRI)

Milner, Tina (OER)

Morton, Larry (OER)

Morton, Pete (CIT)

Moyer, Skip (AHRQ)

Patel, Kalpesh (Ekagra)

Ratnanather, Chanath (Z-Tech)

Reeb, Michael (Perot)

Sachar, Brad (Oracle)

Salata, Kalman (CSR)

Seppala, Sandy (LTS/COB)

Shingler, Felicia (OER)

Simms, Sophonia (OD)

Sinnett, Everett (CSR)

Snouffer, Anna (OD/OFACP)

Soto, Tracy (OD)

Tatham, Thomas (CSR)

Taylor, Jean (SAIC)

Tipparaju, Suryarao (ACT)

Tucker, Jim (OER)

Van Brunt, Virginia (LTS)

Wehrle, Janna (NIGMS)

Zhen, Changqing

Zucker, Sherry (DEIS)