Workgroup on Extramural Training Systems (WETS)

Date: January 9, 2003
Time: 1:30–3:30 p.m.
Location: Rockledge 2, Room 9116
Advocate: Dr. Walter Schaffer

Next Meeting: February 9, 2003, 10 a.m.–Noon, Rockledge 1, Rm. 3502

Action Items

1. (Steve Fitzgerald) Meet with OFM tech staff to validate current requirements for FPB system.

2. (Ralph Helmsen, Wally Schaffer) Meet to discuss the future direction of SITS and the formation of a SITS Working Group.

3. (Steve Fitzgerald) Compile an extended list of institutions that have used X-Train in the last year.

4. (Steve Fitzgerald) Post list of external X-Train users on the WETS website.

5. (Steve Fitzgerald) Draft an email letter to external X-Train users soliciting participation in the X-Train system design and formulation of requirements. The purpose of the letter is to get feedback on some trainee registration alternatives. Distribute letter to WETS, Tim Twomey, and George Stone for review.

6. (Steve Fitzgerald) Remedy problem of expiring mainframe passwords.

7. (All) Identify enhancements, bugs, and defects in current X-Train system; report suggestions to Steve Fitzgerald via email.

8. (Steve Fitzgerald) Post enhancement wish list on WETS website.

X-Train/TA/FPB Deployment

Steve Fitzgerald presented a preliminary deployment schedule for X-Train, Training Activities (TA), and the Financial Payback module (FPB):

Release Date	Description
July 2003	X-Train v.2 Phase 1
October 2003	X-Train v.2 Phase 2
January 2004	X-Train v.2 Phase 3
July 2004	Financial Payback Module
October 2004	Financial Payback Module (cont.)

Steve explained that the overall plan for the redesign of X-Train is to—

- Migrate the system into the new J2EE technology

- Give the TA interface the same functionality as the X-Train redesign

- Combine user interfaces into a few interfaces that are accessible to both internal and external users

- Add registration and training for research assistants

The redesign of the X-Train system will parallel the construction of the Financial Payback Module.

Steve said that for each phase of the X-Train deployment, there will be multiple iterations. That is, rather than recreating all the functionality of the X-Train version up front, Steve plans to focus on one portion of the X-Train system throughout the entire development cycle. He will then implement additional features at a later time. He explained that this method has a proven success rate for developing new software.

By July 2003, Steve said that the current version of X-Train will be completed. By the October 2003 release, TA users will have the same functionality as the redesigned X-Train system and TA users (internal to NIH) will be able to process appointments. Also, all interfaces will be combined into two interfaces: the Termination Module and the Appointment Module. These interfaces will be accessible to both external and internal users. Finally, by January 2004, trainee and research assistant registration will be implemented.

Wally Schaffer asked Steve if he is required to have clearance to collect information about research assistants for professional profiles. Steve said that clearance is needed and that obtaining permission will require significant time and effort in the redesign of the system. Wally emphasized that Dr. Zerhouni greatly values research assistant positions and will be incredibly interested in the data featured in the professional portfolios.

Update: A request for OMB clearance to use the PHS 2271 has been submitted with the most recent 398-clearance package. Once clearance has been granted, the NIH can begin collecting information on graduate and postdoctoral research assistants and associates using this form and, by extension, the X-Train system.

Official Financial Payback System

Steve distributed a diagram of the Financial Payback system. He explained that the new system will—

- Comply with the Office of Inspector General (IOG) Audit

- Coordinate NIH Payback Center records with the Office of Financial Management (OFM) so that OFM can successfully track these records

- Allow OFM to generate Central Accounting System (CAS) records

The first version of the Financial Payback system will print out a CAS report and allow users to manually enter the data into the system. Eventually, the Financial Payback system will generate these reports automatically. Steve said that he has heard, unofficially, that CAS records may be eliminated. He intends to investigate this matter.

The next steps for building the Financial Payback system are to—

- Meet with OFM tech staff to validate current requirements for FPB system.
- Verify OFM-CAS usage
- Estimate/Verify development costs
- Complete requirements documentation
- Create deployment plan
- Design and build system

Steve said he has not determined specific timelines for these tasks; however, he intends to accomplish the items listed for the July release.

Action: (Steve Fitzgerald) Meet with OFM tech staff to validate current requirements for FPB system.

SITS

Wally asked Steve if there has been any discussion of the future direction of the Special Initiatives Tracking System (SITS). Steve said there has not been significant discussion about SITS. Wally asked if Ralph Helmsen would be willing to meet with him to discuss the future direction of SITS, and to take the lead in forming a SITS Working Group. Ralph expressed interest and said he would meet with Wally to discuss the matter further.

Action: (Ralph Helmsen, Wally Schaffer) Meet to discuss the future direction of SITS and the formation of a SITS Working Group.

External X-Train Advisory Committee

Steve said that he intends to create a working group of external X-Train users. He has already compiled a list of users who are currently using the X-Train system but intends to expand this list to include institutions that have used X-Train in the last year. Steve said that he also is working closely with Tim Twomey to identify members of the Commons Working Group who might be interested in participating in an External X-Train Advisory Committee. Wally asked Steve to post this list of external users on the WETS website.

Wally suggested sending external users an email that solicits feedback and announces the formation of an External X-Train Advisory Committee. Steve volunteered to draft this letter. Wally asked if he would distribute the draft to WETS, Tim Twomey, and George Stone for review. Wally suggested using the WETS listserv to submit the letter to the group.

Steve said that X-Train usage is relatively low. Wally said that understanding the reasons for this low usage should be a high priority for WETS.

Action: (Steve Fitzgerald) Compile an extended list of institutions that have used X-Train in the last year.

Action: (Steve Fitzgerald) Post list of external X-Train users on the WETS website.

Action: (Steve Fitzgerald) Draft an email letter to external X-Train users soliciting participation in the X-Train system design and formulation of requirements. The

purpose of the letter is to get feedback on some trainee registration alternatives. Distribute letter to WETS, Tim Twomey, and George Stone for review.

APAC Password

The group has not received Annual Payback Activities Certifications (APACs) for a week. It seems that the password has been changed. Although the system notifies users when the password needs to be changed, it only informs users once. The group said that the system should notify users at least 20 days in advance. Steve said that he would investigate the problem. He said that he spoke with Michael Cox about this issue. Michael feels that there may be a way to avoid the expiration of the password.

Action: **(Steve Fitzgerald) Remedy problem of expiring mainframe passwords.**

System Enhancements

Steve said that as the redesign of the system moves forward, it is essential to identify bugs, defects, and opportunities for improvement. He would like to start tracking a wish list of enhancements. Wally asked users to email Steve with requests and observations. Steve suggested posting the wish list on the WETS website and discussing the list at each WETS meeting.

Action: **(All) Identify enhancements, bugs, and defects in current X-Train system; report suggestions to Steve Fitzgerald via email.**

Action: **(Steve Fitzgerald) Post enhancement wish list on WETS website.**

Attendees

Armistead, Allyson (OCO)	Helmsen, Ralph (NEI)	Stone, Sara (NIDCD)
Chen, Lisa (NGIT)	Linde, Emily (NHGRI)	Venable, Beverly (OD)
Fitzgerald, Steve (RN Solutions)	Schaffer, Wally (OER)	Willet, Marie (OER/OD)
Freese, Michelle (OD)	Shreffler, Carol (NIEHS)	
	Sprick, Carin (DEIS)	