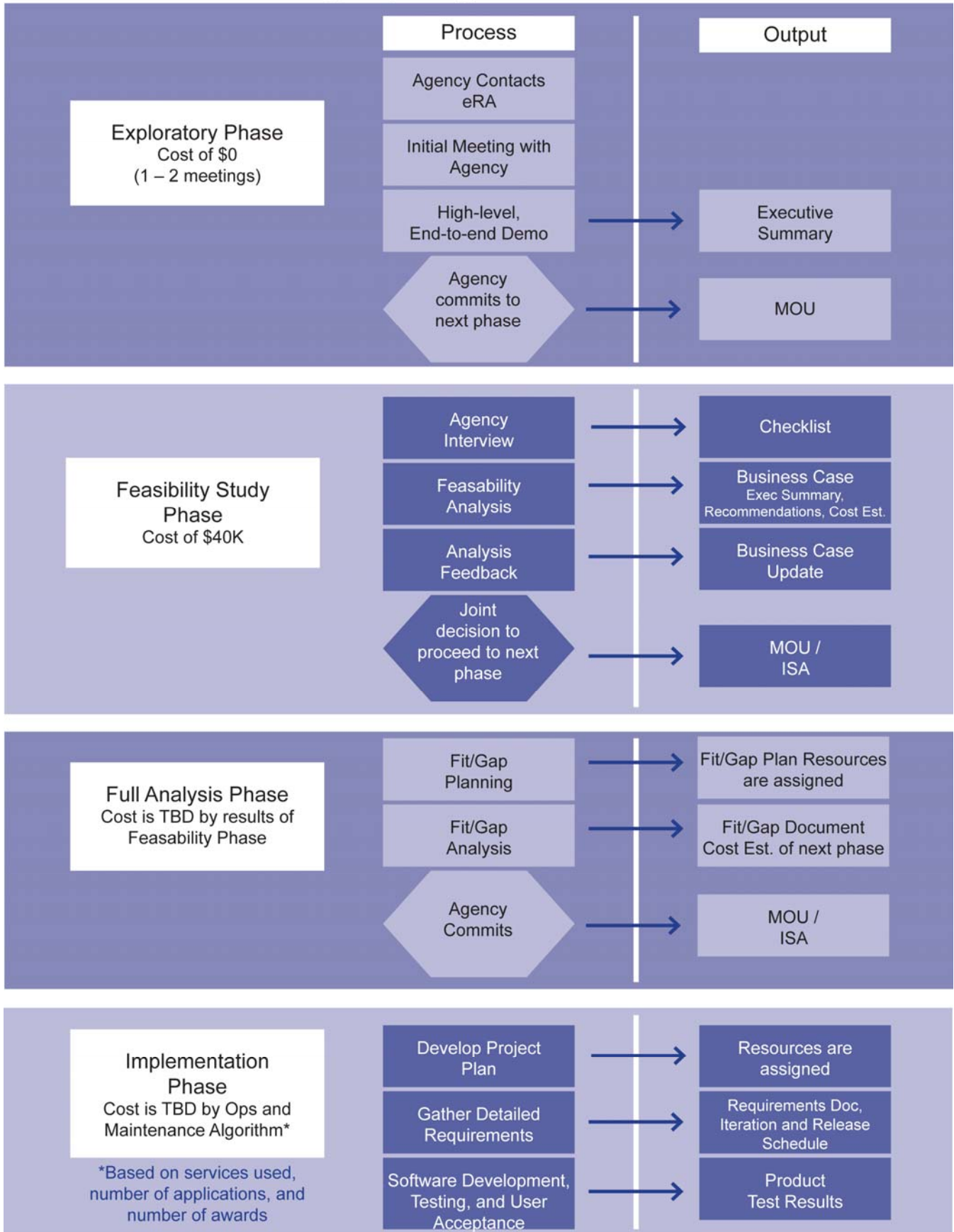


Agency Integration Phases



Exploratory Phase

Agency Contacts eRA - Agencies contact eRA management with the intention of learning more about eRA services. eRA points them to the Agency Integration website (include link) and solicits preliminary questions. eRA explains the process for evaluation and explains cost for the exploratory phase is pro-bono. The person at eRA, who is contacted first by the Agency, in turn contacts the Agency Integration Program Manager and a short summary is sent to the eRA; Director, CS Director and eRA AI Core Team .

Initial Meeting with Agency – eRA CS Director & AI Core Team will determine which other eRA staff with necessary expertise need to attend the meeting. AI CRM coordinates the necessary Agency and eRA business, policy and technical staff to attend the meeting. The goal for this meeting is to understand the high-level details of what the Agency is looking for in a service, if they currently use a system at the Agency, and whether they are considering other Government and/or commercial grant management solutions. eRA explains the Agency Integration process and phases. The Agency is asked to contact the AI PM or CRM if they are interested in taking the next step of attending a high-level demo of the system(s) of interest or an end-to-end demo.

Demo High-level End-to-End – Agency contacts the AI PM or CRM to schedule the demo. The AI CRM coordinates the demo(s) for Agency staff for evaluation.

Deliverable:

- Executive Summary – eRA prepares this document and distributes to everyone who attended the initial meeting. The summary should include the overall understanding of what the Agency’s interests are in eRA systems and services, preliminary overview of what their objectives, goals and even mandates may be.
- MOU – Standard wording and stating the expectations of the next phase. Cost for the next phase is a set cost.

Decision: A joint decision is made to move forward with the next phase.

Gate: *Agency commits to next phase*

Feasibility Study Phase (*set cost*)

Interview Agency – eRA schedules a meeting with the Agency to fill out a detailed fit-gap checklist which will be used to do the analysis and help eRA determine the feasibility of using any number of the services that eRA provides. AI Core team will coordinate the eRA staff to help develop the business case and recommendation. The final step is to determine the cost of the next phase based on the analysis.

Deliverable:

- Checklist (template attached)

Feasibility Analysis – The AI Core Team assembles the experts needed for the analysis that will determine the technical/business approach, level of effort estimates and recommendation. Initial meetings are required to discuss the details of the Agency checklist with the team members. Architecture and Requirements Analysts work together to determine the approach and generate summary of the analysis. A draft business case, based on the analysis summary, is reviewed internally and a recommendation is finalized with management.

Deliverable:

- Business Case (executive summary updates, recommendation, cost estimate of next phase)

Analysis Feedback – AI Core Team schedules a meeting with the Agency to discuss the Business Case, recommendation on next steps and cost estimate for next phase.

Deliverable:

- MOU – Standard wording and stating the expectations of the next phase. Cost estimate for the next phase

Decision: A joint decision is made to move forward with the next phase.

Gate: *Agency commits to next phase*

Full Analysis Phase:

Fit/Gap Planning – AI Core Team develops the plan based on the specific services that the Agency is interested in using. Training needs and schedule, connectivity to Stage environment, data analysis needs for data migration, lists of values for agency specific data, develop fit/gap checklist.

Deliverable:

- Fit/Gap Plan
- Resources are assigned

Fit/Gap Analysis – Work with agency staff to understand their business processes. High-level demos and possibly hands-on testing to evaluate business processes within system and determine what changes the Agency might need to make to their business process or what must be changed within the system to accommodate Agency specific requirements. A list of “must haves” will be documented for further analysis and a list of things eRA cannot accommodate and why. Workarounds are also documented such as functionality that the Agency will need continue to support within their extension systems.

Deliverable:

- Fit/Gap Analysis Document – Highlights the Fits and Gaps of the system(s)
- MOU – Standard wording and stating the expectations of the next phase. Rough cost estimate for the next phase

Decision: A joint decision is made to move forward with the next phase.

Gate: *Agency commits to next phase*

Implementation Phase:

Develop Project Plan - This document outlines the plans for phases, iterations and releases and pilot planning based on the negotiated ASR list.

Deliverables:

- Project Plan

Gather Detailed Requirements – Meetings with Agency and eRA Requirements Analyst(s), Architects, Development to gather detailed requirements based on the ASR list.

Deliverables:

- Use Case Model
- Use Cases
- Supplementary Specification

Develop and Test Software

Implement New Software

Gate: *User Acceptance*

Production Phase:

Pilot – A phased approach may be used where the Agency chooses to implement changes and pilot the system before using it for full production

Implementation – Implement changes identified during the pilot phase

Full Production – operations and maintenance

Gate: *User Acceptance*