

## FILNET CASE STUDY

### Grantees Web Portal

Phase I: New Site Replaces Expensive, Time-consuming, Completely Paper-Based System

CLIENT	 <p>U.S. Civilian Research &amp; Development Foundation (CRDF)</p>
PROJECT	Grantees Web Portal (GWP)
WEBSITE	<a href="http://www.crdf.org/">http://www.crdf.org/</a>
TECHNOLOGY	NET, XML, Microsoft SQL Server, XML Business Form Templates, HTML, XHTML, Java, CSS
DURATION	02.2008 – 09.2008

#### Overview

The U.S. Civilian Research & Development Foundation (CRDF) is a nonprofit organization authorized by the U.S. Congress and established in 1995 by the National Science Foundation. This unique public-private partnership promotes international scientific and technical collaboration through grants, technical resources and training. In its effort to improve services to its grantees, the organization called on the award-winning web development expertise of Filnet Inc. to build a brand new online gateway, dubbed the Grantees Web Portal (GWP). This summary deals with phase one of the project.

#### Challenge

The majority of CRDF awards require the submission of periodic progress reports summarizing the technical progress of the project, significant accomplishments and problems encountered. So, CRDF needed a modern and uniform way to collect and process information from its grantees from around the world. The desired system would provide a secure mechanism for grantees to submit project status reports, financial reports, payment requests, administrative modification requests and other forms of information to CRDF. Additionally, the new application would have to integrate seamlessly with a new CRDF information system (IS) database.

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### PROJECTS SUMMARY

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 CRDF Program Rep: John Wilson | CRDF Grant Rep: Juliana Smith

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TIMELINE

BUDGET

### ANNOUNCEMENTS

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### REQUEST LOG

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DATE SUBMITTED	REQUEST TYPE	CURRENT STATUS	ASSOCIATED PROJECT
02/29/2008	<a href="#">Submitted No-Cost Extension Request</a>	Pending Review	RUP1-33002-MO-08: Effects of Sunspot Activity...
02/05/2008	<a href="#">Submitted Travel Request</a>	Pending Review	RUP1-33002-MO-08: Effects of Sunspot Activity...
01/15/2008	<a href="#">Submitted Project Status Report</a>	Pending Review	RUP1-33002-MO-08: Effects of Sunspot Activity...
01/03/2008	<a href="#">Submitted US Payment Request</a>	Pending Review	RUP1-33002-MO-08: Effects of Sunspot Activity...
12/23/2008	<a href="#">Submitted Institutional Support Reports</a>	Pending Review	RUP1-33002-MO-08: Effects of Sunspot Activity...

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## Solution

Upon finalizing the requirements and information architecture of the GWP project, Filnet developed wireframes, an HTML demo and templates. Using .NET, XML and MS SQL Server, Filnet embarked on the development of the GWP. Filnet also used XML Business Form Templates for the data exchange system. The portal's database schema was designed in coordination with a contractor and CRDF staff so that it would be compatible with CRDF IS.

Filnet created interfaces for the portal's four main categories of options, which includes Manage Profile, Administration, Financial and Reporting. By clicking on a specific option, users are directed to appropriate pages within the website.

Filnet put in place a login where users can enter name and password that gives them access to the portal upon validation. The system then sends the user to a welcome page. Individuals may have one or more projects associated with their profiles. If desired, users can update their information easily and flag any changes in real-time.

GWP also allows for individual project profiles to be created for each individual grant and then assigned to one or more user profiles. In fact, the system permits user profiles created in the IS to be easily pushed to the web portal database using an API that was developed jointly with the IS contractor.

### *Profile Management Interface*

The new GWP gives users the ability to manage their profiles and update contact information such as mailing address, phone, e-mail and password. As a security measure, Filnet ensured that all other information stored in the profile cannot be changed.

### *Administration Interface*

The Administration interface of the portal gives CRDF staff the ability to post announcements. If needed, the system can even generate automatic messages "kicked back" announcements from CRDF IS when specific requests have been processed or approved.

### *Financial Interface*

In Financial section of the site, users can complete and send in technical and reports associated with a project online. For instance, individuals can submit payments or travel requests as well as other finance related tasks.

### *Reporting Interface*

Accessing the Reporting interface, users may submit a variety of reports to CRDF including project status, travel and IS reports among others.

## **Results**

Following the internal launch and staff training, the website was released to the public in Fall 2008. The portal has been well received by CRDF grantees from around the globe. Using an API, data is pushed from and by the internal system, CRDF IS, to the GWP database with the appropriate status flags. The application allows new and updated data from the GWP to be pulled back to internal system for processing by the CRDF IS.

Using the new portal, individuals can view their lists of outstanding items waiting for approval, status updates, announcements and project listing. Most important, GWP replaces an expensive, time-consuming, completely paper-based system. The system is a giant step forward for both CRDF and the grantees, saving time and money while providing a practical audit trail and paperless data correction mechanism for the CRDF grant administrators.