Lab Engagement Request Form

1. Contact Information

2. Project Details

3. Technology Requirements

4. Final questions & Review

Informatics R&D Laboratory
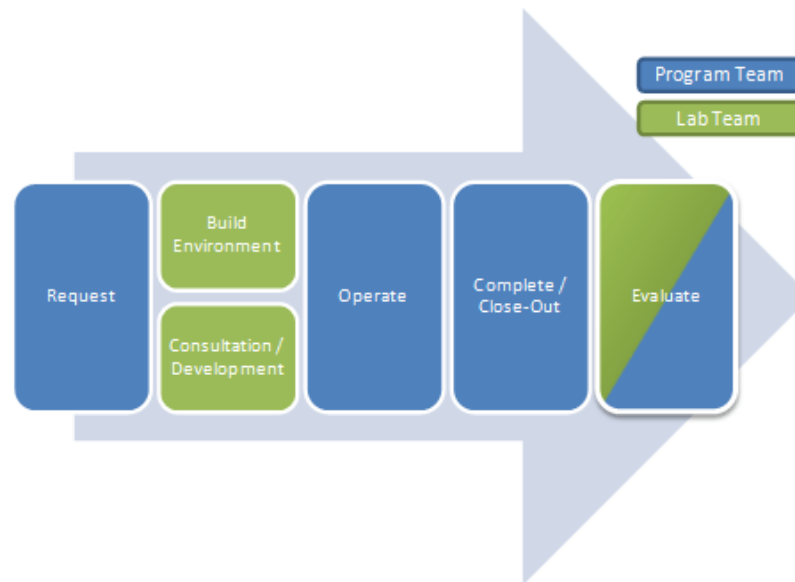A resource for CDC and its public health partners

This request form contains the following four (4) sections as indicated below:

- Primary Contact Information
- Engagement Request Overview
- Project Summary
- Technology Requirements

Please complete all applicable sections to the best of your ability to facilitate your R&D project success. Send the completed form to InformaticsLab@cdc.gov. Most forms are reviewed and processed within 2-5 days.

The activities of the program team requesting an RD project and the Lab Team are briefly displayed in Figure 1. This is not a rigid structure, but serves as a guide for how a typical RD project should progress.

Figure 1 Lab Engagement Process

Program Team

Lab Team

Request | Build Environment | Consultation / Development | Operate | Complete / Close-Out | Evaluate

Please note that at no time are projects in the R&D Laboratory to use data that contains information about health status, provision of health care, or payment for health care that can be linked to a specific individual.

In addition, projects are not to create production systems, nor connect to production systems (with the exception of, for example, low impact informational web services, to be determined on a case by case basis). Please refer to the R & D Lab Security Policy for further detail on security procedures and rules of behavior.

The lab does not provide a specific service level agreement (SLA) for support of lab engagements. However, our team is responsive and will work to resolve incidents within core CDC hours.

The lab maintains an Outlook calendar for InformaticsLab@cdc.gov that will contain information on scheduled maintenance and down times. Notices of unexpected maintenance will be sent to the primary point of contact's email address. Should your engagement have an important activity that you would like the lab to be aware of, please send a calendar invite to InformaticsLab@cdc.gov with the name of the event, date, time, engagement name and your point of contact information.

Lab engagements are designed to answer specific informatics questions and to perform experiments within a short duration. Typical engagements last from 3-6 months and can be extended further if necessary. If an engagement needs to continue longer past the extension, please complete a new engagement form noting the results of the previous engagement. Resources (virtual machines, web sites, etc.) can be transferred to the new engagement without any interruption in service.

Near the end of the engagement, IRDA will schedule a brief interview with you to record the outcomes of your engagement and collect feedback for how to improve the research and development lab.

Step 1. Contact Information

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Contact Information

Please list names and email addresses of your team members who will require access to the requested lab resources:

Group name [ ]

First Name*	Last Name*	Organization*	Phone	Email*	Primary point of contact? (please select at least 1)	Login needed?	Notifications	Username
[ ]	[ ]	[ ]	[ ]	[ ]	☐ Primary	☐ Yes	◉ Yes ○ No	[ ]
[ ]	[ ]	[ ]	[ ]	[ ]	☐ Primary	☐ Yes	◉ Yes ○ No	[ ]
[ ]	[ ]	[ ]	[ ]	[ ]	☐ Primary	☐ Yes	◉ Yes ○ No	[ ]
[ ]	[ ]	[ ]	[ ]	[ ]	☐ Primary	☐ Yes	◉ Yes ○ No	[ ]

*=Required

Add more team members

Step 2. Project Details

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This is the second user form page.

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Project Details

Project Title/Name

Requested Start Date

Requested End Date

Left text would appear after the user picks a start and end date to let them know the timeframe they have chosen. In the admin version this would be replaced by the approved date text and field on right.

You have requested an engagement to last 3 months, 2 weeks and 4 days.

Approved Start Date

Approved End Date

Project Type
▼
Prototype
Evaluation
Hybrid

Project Use
▼
Internal
External
Collaborative

Blue = admin only, so the content below would naturally move up in a fluid front end code layout.

We can best help you meet your needs if we have a general understanding of your project. Please help us frame your project by addressing the following questions. Even if you are only requesting use of the physical laboratory space, a project summary will allow us to potentially leverage other R&D technology initiatives in working with you.

Project Summary

Project Goals

Project Success Criteria

Project Stakeholders

Who are the stakeholders (users/actors) in your proposed engagement? Please list key technology users, data suppliers, report recipients, as well as any applicable governing guidelines (e.g., HIPAA).

Stakeholder*	Role** #

Add more stakeholders

*Organization, C/I/O, user group, individual, etc..
**e.g., User, data supplier, report recipient, governing body.
#Please note that you can choose more than one role per stakeholder.

Step 3. Technology Requirements

Lab Engagement Request Form

Technology Requirements

The Lab has defined a set of core technology standards which can be quickly installed as a default (i.e., not otherwise specified). Please modify as needed for your specific project requirements. Please list specific software needed in the Notes section. Begin by adding a technology resource:

Add a technology resource

When the user clicks the "Add a technology resource" button, the page will change to "v1m3-2" page.

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Step 4. Final Questions & Review

Lab Engagement Request Form

Technology Requirements

The Lab has defined a set of core technology standards which can be quickly installed as a default (i.e., not otherwise specified). Please modify as needed for your specific project requirements. Please list specific software needed in the Notes section. Begin by adding a technology resource:

Add a technology resource

Add details about currently selected resource

Technology Resource Type ▼

Once the resource type is selected, the form data associated will show in this area. See the next mock-up for after several resources have been entered, "v1m3-3".

List of your resources

(Click item to view/change details on the left.)

Technology Resource Type

Yellow is the currently selected resource, it's details will be on the left once a type is selected from the drop-down. Also, the text should mimic this items selection text.

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Technology Requirements

The Lab has defined a set of core technology standards which can be quickly installed as a default (i.e., not otherwise specified). Please modify as needed for your specific project requirements. Please list specific software needed in the Notes section. Begin by adding a technology resource:

Add a technology resource

Add details about currently selected resource

Virtual Computer (Desktop, server, etc) ▼   VM Configuration ▼

Windows7 desktop
Windows Server 2008
SQL Server
CentOS
Other

Notes

Do you need this VM to be an externally accessible resource? (e.g., http://yourservername.phiresearchlab.org)

○ Yes ○ No   *If yes, show fields below*

Requested subdomain (e.g., yourservername)

Server Port (e.g, 8080)   External Port (e.g, 80)

VM name

Internal Notes

Proxy from   Resource start date

Proxy to   Resource end date

Below logo and all dividing lines should adjust as the page gets longer, but maintain a minimum height as designed for the first informational page.

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List of your resources

(Click item to view/change details on the left.)

Physical Hardware (mobile device, etc.)

Physical Hardware (mobile device, etc.)

Virtual Computer (Desktop, server, etc)

Virtual Computer (Desktop, server, etc)

This white space is deliberate to help the form on left feel less overwhelming, but should collapse on smaller screens.

Yellow is the currently selected resource, it's details are on the left.

Step 4. Final Questions & Review

Lab Engagement Request Form

1. Contact Information

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Final questions & Review

Will any of your resources connect to any systems/databases outside the IIU laboratory network?
*Please note that... blah.....

○ Yes ○ No

Does your project involve the use / testing of data (synthetic data, publicly available, etc.,)

○ Yes ○ No

Will your project require access to any third-party websites and/or applications?

○ Yes ○ No

Please feel free to provide any additional information regarding your technology needs below.

The questions above will expand if a "yes" answer is chosen, this can be seen on the next page, "v1m4-2"

Please confirm that all the entered information is accurate. Click "Submit" when ready. Once you have submitted your information, if you need to make changes, please contact the R&D Lab at informaticslab@cdc.gov

Review of selected input

Sam Grisham with OSELS / EAPO is your primary point of contact, and you would also like to allow 5 other users.

For project "MMWR Prototype for the iPad"

Your requested Start Date is June 5, 2010   Your requested End Date is June 10, 2010

This project has 3 stakeholders.

You are interested in the following resources

1	Virtual Computer (Desktop, server, etc)
3	Physical Hardware (mobile device, etc.)
1	Online tools (wiki, project management, etc.)
0	Other

This page shows the initial state of the form for the user, which includes key data to review above.

Submit this engagement request

Lab Engagement Request Form

Final questions & Review

1. Contact Information

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Will any of your resources connect to any systems/databases outside the IIU laboratory network?
*Please note that... blah....

○ Yes ○ No

If yes, show field below

If yes, please provide details

Does your project involve the use / testing of data (synthetic data, publicly available, etc.,)

○ Yes ○ No

If yes, show field below

If yes, please describe the following:
What is/are the primary sources of data, if any, for the proposed technology? Please note that all data sets must be examined (e.g., for privacy & security) prior to loading into the lab environment. The lab can provide synthetic data if necessary.

Will your project require access to any third-party websites and/or applications?

○ Yes ○ No

If yes, show field below

If yes, please provide details

Please feel free to provide any additional information regarding your technology needs below.

Project Status ▼   Changer

Project Status Notes

Infrastructure Status ▼   Changer

Infrastructure Status Notes

Outcome / Summary / General Notes

For the admin user, the right side review area will be replaced with the above admin data fields. The status items may be used enough to change the layout to "v1m4-3"

Submit/update this engagement request

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Lab Engagement Request Form

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Project Status ▼   Changer [_____]

Project Status

[text box]

The advantage of this admin version is the status updates could be viewed/changed in this location from any page in the form.

Infrastructure Status ▼   Changer [_____]

Infrastructure Status Notes

[text box]

Informatics R&D Laboratory
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Final questions & Review

Will any of your resources connect to any systems/databases outside the IIU laboratory network?
*Please note that... blah....

○ Yes   ○ No

If yes, please provide details

[text box]

Does your project involve the use / testing of data (synthetic data, publicly available, etc.,)

○ Yes   ○ No

If yes, please describe the following:
What is/are the primary sources of data, if any, for the proposed technology? Please note that all data sets must be examined (e.g., for privacy & security) prior to loading into the lab environment. The lab can provide synthetic data if necessary.

[text box]

Will your project require access to any third-party websites and/or applications?

○ Yes   ○ No

If yes, please provide details

[text box]

Please feel free to provide any additional information regarding your technology needs below.

[text box]

Outcome / Summary / General Notes

[text box]

For this version of the admin page, the "Outcome" field is moved to the top, or the review data could be shown and the "Outcome" field could remain below.

[Submit/update this engagement request]