Background

Trillium Health is a non-profit organization that provides a variety of health care services. Most funding is based on grants received from federal, state and local authorities.

Objectives:

- Allow users to manage active and potential grants
- Alert users when a certain task is due
- Store documents and revision history throughout the grant process
- Gather all the documentation for auditing and compliance purposes

Design

We use the Spring framework in the application layer to integrate together the REST Services, DAOs, and the Model which includes Hibernate and JPA annotations to persist objects to the database. The client layer uses Angular JS to interact with the services.

System Features

- **Grant**
  - Keep track of grant status (Active, Potential), award information, and contacts
- **Documents**
  - All grant related documents can be stored within the grant document library or specific tasks
- **Tasks**
  - Create your own tasks for each grant and workflow with due dates and custom reminders
- **Workflow**
  - Create and repeat grant workflows for different stages (Apply, CPA, Audit, etc)
- **LDAP**
  - Connect with Trillium’s currently in place Active Directory system for users and account info
- **Reminders**
  - Send emails and update on Microsoft Outlook Calendar when tasks are due

Delivered Product

- **Modify Existing Grant**
  - Name: Tonight: Franz Ferdinand
  - Primary Funder: Ulysses S. Grant
  - Award: $1775
  - Description: I've been a little busy these days. I've been a bit different, baby
  - Grant Status: POTENTIAL
  - Links: [https://www.youtube.com/watch?v=01aZ9k3_zSw](https://www.youtube.com/watch?v=01aZ9k3_zSw)

Rational Unified Process

**Risk Mitigation; Iterative Development; Upfront Scoping in the Inception Phase**

Retrospective

- Code Reviews helped with team synergy
- Not revisiting original risk estimates was costly
- Using Trello to assign tasks has gone well
- Great customer involvement and feedback

Future Work

- Further integration with Outlook
- Document tagging for categorization
- Recycling bin features for deleted documents/tasks/grants
- The ability to proxy as another user
- Viewing documents within the system