



e-Services Re-Engineering

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e-Services Re-Engineering Project Background

- Project Goal
 - Resolve system integration, capacity, and maintenance issues by re-architecting Infrastructure and PeopleSoft based e-Services applications
- Project Drivers
 - PeopleSoft Product will be unsupported after November 2011
 - Increased Risks in Ability to Integrate with Environment Changes
 - Potential Impact to MeF and CADE due to Shared Environment Resources
 - Inability to Maintain System Stability
 - System Performance & Capacity has degraded and exceeded original Performance & Engineering Models
- Project Constraints
 - No New Functional Requirements
 - Leverage ICCE Environment
 - Ensure Transition is Transparent to the e-Services End-user

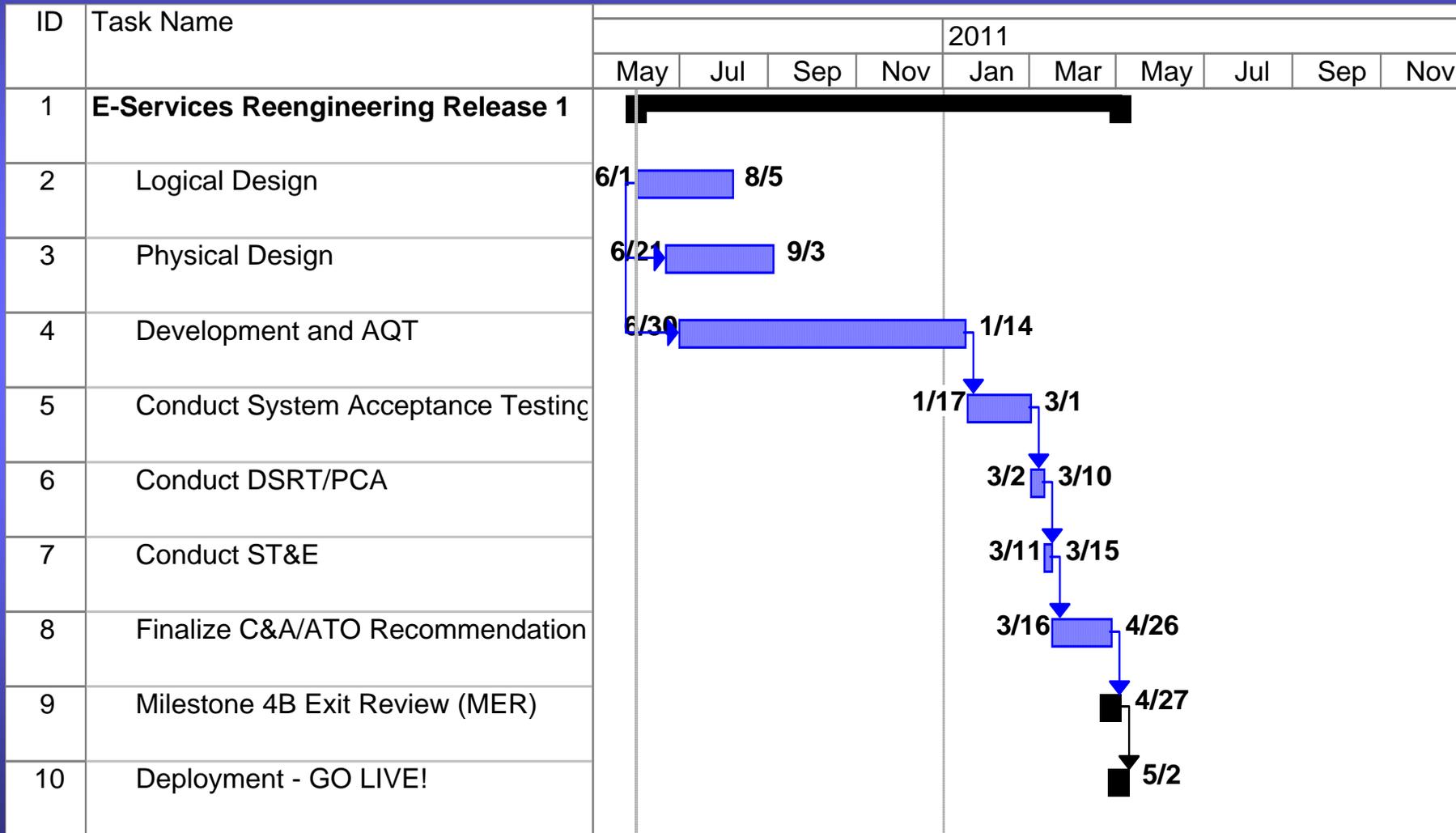


e-Services Re-Engineering Release 1 Scope

- Release 1 will migrate the e-Services Transcript Delivery System functionality from the PeopleSoft environment to a Java environment.
 - JAVA & WebSphere Business and Presentation Layer Logic
 - TDS Transaction History Mainframe DB2 database will be migrated to a Tier 2 Oracle Database by augmenting the ICCE (Integrated Customer Communications Environment) infrastructure
 - Fully Capable Disaster Recovery Environment will be established
- This effort is a “Rust Replacement” project and will leverage success from other small scale ELC projects, such as FSA, to provide functional equivalents to key ELC documents.



Critical Path Timeline





Project Leadership Team

- AD Customer Service Domain:
 - Darrell White, Acting Director Customer Service Domain
 - Mike McAdams, CSD Software Engineer
- Tax Professional e-Services Branch
 - Bill Farrell, Chief Tax Professional e-Services Branch
 - Sandra Roberts, Project Manager
 - Dawn Malan, Senior Technical Advisor
 - Lisa Johnson, Customer Liaison
- Lockheed Martin, Inc (Software Developer)
 - Jay MacMillan – Sr. Program Manager IRS
 - Le Tran – Sr. Operations Manager
 - Dave Hansell – Technical Project Management (Re-Engineering)



W&I Business Partners

- **Customer Acct Services** – Peter Stipek
 - **Electronic Products & Services Support (EPSS)**
 - Patricia LaPosta (Acting Director)
 - Gethrel Williams (Analyst)
 - Tammy Bird (Analyst)
 - Keith Wallace (SM) Operations Support
 - John Diener (Analyst)
 - Janet Stadtmiller (Analyst)
- **Accounts Management** – Jane Looney
 - **Pre & Post Filing**
 - Araia Bereket (FL)
 - Brian Sitzman (TDS SME)
 - Rita Prendergast (DA SME)
 - Sallye VanDyne TIN Matching (SME)
 - Robert Shearer (IVES SME)
- **Electronic Tax Administration** - David Williams
 - **ETA & Refundable Credits** -Michael Silvia
 - **Policy & Standards Branch** – Kevin Hatton (SM)



ELC Approach

- The project is categorized as Small Other and will use a tailored Waterfall Development Path.
- Due to existing requirements and reuse of design patterns, the project will begin in MS 4b.
- The artifacts and customer technical review from MS4a will be added to the requirements for MS 4b to be compliant with the ELC process.
- The project will perform a customer technical review (CTR) for the Business System Requirement Report (BSRR), Design Specification Report (DSR-1) and DSR-2.
- A Milestone Exit Review will be conducted at the end of MS4b.