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Requirements Management and Documentation

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Requirements Management and Documentation

- **Goals and Benefits (Of interest to the Project Management Office)**
- **Tasks (Of interest to Developers)**
- **What's missing in the middle (These all go in the Requirements Document and support both the Stakeholders and Developers view of the effort) ?**
 - Stakeholder Requests
 - Technical Requirements
 - Test Cases
- **Details**
- **Questions and Answers**

Goals and Benefits

■ *Goals and Benefits Anticipated with a Coeus Solution*






- Goal 1: Streamline the approval process within UMDNJ by moving to an electronic submission and approval of grant applications.

Benefits:

- Everyone involved in the signoff of the proposal can see exactly where in the process it is and what needs to happen next
- Time savings of not having to manually distribute paperwork related to applications
- Ensures accountability that what is being approved in one department is the same as is being approved in another
- System can notify the respective compliance offices of proposed activity
- System will allow Principal Investigators, research administrators, lab managers, research office and grants and contracts to collaboratively develop proposals

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Tasks

		SREQ	TREQ	Task Name	Resource Names
64		SREQ0008	TREQ0157	Test Routing, Is 00001 Approval Required	IST
65		SREQ0008	TREQ0157	Department of Creation is Different than Department of Primary Investigator	Research
66		SREQ0008	TREQ0157	SOP For Routing	Research
67		SREQ0008	TREQ0157	OSP Enters Routes, Department Enters Routes?	Research
68		SREQ0008	TREQ0157	Entered Medicine-RWJ Routing. RWJ Testing use of route	Research
69		SREQ0008	TREQ0157	Support for SOP for Routing	IST
70		SREQ0008	TREQ0157	Solicit Departments for Approval Routing	Research
71		SREQ0008	TREQ0157	Create Departmental Rules of Approval Routing	Research
72		SREQ0008	TREQ0157	Solicit Office of Research for Approval Routing	Research
73		SREQ0008	TREQ0157	Create School Approval Routing	Research
74		SREQ0008	TREQ0157	UBHC President Signs Off	Research
75		SREQ0008	TREQ0157	Handling Research in a Peds Grant in CABM	Research
76		SREQ0008	TREQ0157	<input type="checkbox"/> You are an approver at multiple stops how to handle... probably say no.	Research
77		SREQ0008	TREQ0157	Say No! as if you approve the last approver, it'll fail to submit to g.g	Research
78		SREQ0008	TREQ0157	If a PI creates a grant in a Department, is that the routing used or is it Lead Unit?	Research
79		SREQ0008	TREQ0157	Does the routing include the routing of the Other PI's	Research
80		SREQ0008	TREQ0157	<input type="checkbox"/> Technical Issues	IST
81		SREQ0008	TREQ0157	Handle Map Changes, what to do about previously submitted proposals with old maps	IST
82		SREQ0008	TREQ0157	Handle notifying dept admin after each approval	IST,Research
83		SREQ0008	TREQ0157	How to get rid of 000001 Routing once it's defined the first time.	IST
84		SREQ0008	TREQ0157	Last Approval on Coeus-Lite should disallow approval with message to use Coeus Pr	DEV
85		SREQ0008	TREQ0157	<input type="checkbox"/> Test Routes for each department	Research,IST
86		SREQ0008	TREQ0157	Create Proposal	Research
87		SREQ0008	TREQ0157	verify routing notifications	Research
88		SREQ0008	TREQ0157	Chair Approval of Routing Mechanism	Research
89		SREQ0008	TREQ0157	How to change routing document for Chair	Research
90		SREQ0008	TREQ0157	Testing Support	IST
91		SREQ0008	TREQ0157	<input type="checkbox"/> Routing for Contracts/Subcontracts	Research
92		SREQ0008	TREQ0157	All Contracts need to go for an extra signature at Grants & Contracts	Research
93		SREQ0008	TREQ0157	All Contracts need to go for a special signature at Legal	Research

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Stakeholder Requests

This stake	SREQ0003	Approvals will be done electronically
This stake	SREQ0009	Shared Online Access to Proposals Under Development
This stake	SREQ0017	Proposal Budgets will be able to be CoDeveloped
This stake	SREQ0043	Pilot in Place July 1, 2007
This stake	SREQ0051	Approval should be able to be performed within Coeus Premium
This stake	SREQ0053	Proposal Approval and Budgets/Science
This stake	SREQ0054	Proposal Approval and Science
This stake	SREQ0056	Late Arrival of Conflict of Interest Disclosures
This stake	SREQ0072	Depending on who will be actually submitting the proposal to the Sponsor Pending vs submitted
This stake	SREQ0076	Make the detailed budgets mandatory for the purpose of the approval processing
This stake	SREQ0077	Need to review if Budget Validations are required for submitted proposals
This stake	SREQ0071	If a PI submits a proposal for approval, everyone in the approval chain should be notified
This stake	SREQ0079	Any Contracts need to be signed by Frank Culfort, VP Finance/Newark
This stake	SREQ0084	Conflict of Interest and Review
This stake	SREQ0096	Original Signatures vs Electronic Approval
This stake	SREQ0111	For changes to application in science, notify any previous approvers of changes
This stake	SREQ0101	Completed Application 10 days before Due Date
This stake	SREQ0103	for non-grants.gov submission need to backup actual proposal sent
This stake	SREQ0047	Training Approver

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Technical Requirements

This requir	TREQ0002	Submit Opportunities from NIH through Coeus
This requir	TREQ0003	Create Route and Map for Medicine-RWJ
This requir	TREQ0009	Coeus-Lite Proposal Creation works
This requir	TREQ0018	Notify Approvers of Science Changes
This requir	TREQ0019	Approval Process should be available within Coeus Premium
This requir	TREQ0020	Update Science after submit for approval
This requir	TREQ0034	Routing Rules to support everyone being notified when a proposal is submitted for approval
This requir	TREQ0036	Get Rid of Coeus Premium Link on Coeus-Lite
This requir	TREQ0105	Have the list of proposals display the deadlines for the proposals
This requir	TREQ0126	coeus should be able to print out what the grants.gov packet looks like
This requir	TREQ0157	each department will be able to create routing rules
This requir	TREQ0180	Actual submission to grants.gov is done within the Office of Research
This requir	TREQ0182	Legal Signatures vs Coeus Approval Routing
This requir	TREQ0196	Special Reviews for any Reason can be kept in Proposal
This requir	TREQ0461	Figure out how to minimize the rejection of proposals due to missing information
This requir	TREQ0464	Submitter to Sponsor will need to be defined
This requir	TREQ0466	Approval and Rejection Comments should be available to users
This requir	TREQ0468	Bypass Approval Routing Function
This requir	TREQ0473	Need to Require Detailed Budgets for any Proposals
This requir	TREQ0477	In Sync with NIH Budget Category
This requir	TREQ0478	Is there a Proposal Type of No-Cost Extension, or is this all on the Award Side.
This requir	TREQ0481	The Proposal PI is not necessarily responsible for the Certification
This requir	TREQ0482	Should Office of Research be able to add approval letters late
This requir	TREQ0486	What about the Department of Paycheck
This requir	TREQ0499	Multiple Approvals Currently uses Multiple GAFAs
This requir	TREQ0500	Approvals should be expedited as much as possible by application
This requir	TREQ0505	Contract Negotiations for Clinical Trials
This requir	TREQ0514	There will need to be a training course for Approvers
This requir	TREQ0515	Are there any reports which need to be made available for Approvers
This requir	TREQ0517	need to define a minimum set of data for a submission

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Test Cases

Test0114	Test RWJ Cert
Test0115	use uh cert to send a uh grant to test server
Test0116	submit a grant from sph to nih using test server
Test0117	submit a grant from SOM to grants.gov
Test0118	submit a SN grant to grants.gov
Test0119	submit an SHRP grant to grants.gov
Test0120	submit an NJMS grant to grants.gov
Test0121	submit a proposal from DS to grants.gov
Test0002	Submit Proposal through Coeus
Test0089	Approvals will be done electronically
Test0092	Security Cert can be used to submit proposal
Test0098	Create Proposal Using Coeus-Lite for Submission to grants.gov
Test0102	create a new unit which has a separate signing authority than existing schools
Test0106	Submit Proposal to Grants.Gov Sponsor
Test0107	Proposal to Sponsor which is not grants.gov Sponsor - Paper
Test0108	Submit to a non-grants.gov Sponsor - Other Electronic Submission
Test0109	Test a grant with a compliance need
Test0110	Test that late science is allowed
Test0111	try changing the narrative after submit for approval
Test0112	test changes to PHS Science Documents after Approval Routing
Test0113	Send a Proposal Out the Door and see about changing the Protocol Information
Test0084	PI's and Co-PIs in different departments have their chairs approve
Test0085	Need to Test Changing a route
Test0086	change routing after previously submitted

- Take Notes at meetings. They can be discussed as requirements for the project. If they're not detailed, someone will notice they're missing. Although stakeholders will be overwhelmed, they really want you to keep track of the details and help them prioritize these details.
- Have the stakeholders say if requirements are essential, high value or follow-on.
- If it's essential and it can't be done in time, ask "Is that all really essential?" If yes, you're justified in asking for more resources or an extended deadline.
- Phasing in will get all the essential requirements out of the way and if more time allow high value requirements to be addressed.

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Thanks

- **Product used for Requirements Management: DOORS Fastrak**
 - <https://focalpointus.telelogic.com/asp10/fp/servelet/Login?login=false>
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