

## ANTICIPATED SYSTEM REQUIREMENTS

Research Bureau Needs	Requirement	Bureau Manager	Administrator	Finance Manager	Research Project Manager	Administrative Secretary	Librarian	Customer	Principal Investigator	FHWA	IT Staff	ROC
Must be able to create and manage user accounts	<i>acknowledgement</i>	X	X									
Must be able to submit Research Need	<i>acknowledgement</i>	X	X	X	X	X	X	X	X	X	X	X
Must develop research need ranking prioritization		X	X									X
Must automate ROC scoring sheet	<i>includes selection of ROC members and notifying of Research Need</i>	X	X									X
Must be able to assign Research Need	<i>assign to RPM</i>	X	X									
Must able to review Research Need		X	X		X							
Must calculate Research solicitation date and generate RFP with automated RFP number	<i>Dates based on Camille's calculator</i>	X	X		X							
Must automate request to post RFP on website		X	X		X							
Must automate notification to NJ Universities and Transportation Centers of RFP posting on website		X	X									
Must have capabilities to submit Proposals with Pre-Risk Assessment Form A and Dave Kuhn's budget spreadsheet	<i>system should not accept any submission past 5:00pm deadline</i>								X			
Automate acknowledgement of receipt of submitted proposal	<i>Software</i>											
Must have capability to shade names and separate research plan from proposal		X	X									
Send Proposal and Evaluation form to Raters/Customer Team	<i>notify Raters(customer's team) of Proposal Evaluation, once in receipt of scores, tally of score and calculate winner</i>				X							
Send ratings to the RPM								X				
Ability to send Proposals' Budgets for RPM's review		X	X									
Must have ability to advance RFP to project		X	X		X							
Must automate award and non-award letters						X						
Must be able to reassign projects		X	X									
Automate Letter to Incur Costs	<i>Notify all user roles selected</i>	X	X	X	X	X						
Must include automated AD-12			X	X								

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	<i>able to be edited and pdf version emailed to University Research contact</i>			X								
Must automate Task Order		X	X		X							
RPM should review Task Order prior to circulation				X	X	X						
Track AD-12s and Task Order					X							
Must automate award package (roles and responsibilities, invoicing, quarterly submission, etc.)			X		X							
Must be able to pull project info to update RIPs		X	X									
Must provide Project Summary		X	X	X	X	X		X	X	X		
Must provide early warning prompts when due date is approaching			X		X			X	X			
Must automate Monthly/Quarterly reports	<i>view and send</i>	X	X		X			X	X			
Must automate Quarterly Assessment form	<i>view and send</i>				X			X				
Must have ability to upload Meeting Minutes									X			
Review Meeting Minutes		X	X		X			X	X			
Must submit invoice									X			
Review of invoice submission				X	X							
Must automate AC-1641, Contract Manager checklist and cover sheet				X								
Must track invoices paid				X	X	X						
Must be capable to automate Budget Modification and/or Time Extension Modification	<i>PI to RPMM first and them RPM to Finance manager once approve</i>			X	X				X			
Must track time extension requests		X	X	X	X	X						

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	<i>Ability to generate "Request for Budget Modification" by University electronically. Once created, system should generate an e-mail to next person in charge of command to approve/accept it. Once this next person approves/accepts it, the process should repeat in sequence to next person in charge of command, until all people have approved. Once finalized approval sequence, Finance Manager should be able to print final approved version of document.</i>											
Must track budget modifications		X	X	X	X	X						
Allow submission of Draft Final Report									X			
Review Final Report	<i>Customer and RPM</i>	X	X		X			X				
Must contain final report status		X	X		X							
Generate Federal Final Report number						X						
Approve final report		X	X		X			X		X		
View final report		X	X		X	X	X	X	X			
Final invoice submission									X			
Approval of final invoice and send it to finance manager				X	X							
Closeout survey					X			X				
Must produce closeout checklist and documents				X	X							
Must be able to provide project info to update TRIS		X	X									

**General Requirements**

Must be easy to read/legible												
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Must be user friendly												
Must have training program	<i>end user guide</i>											
Need to improve customer service	<i>automate email correspondence: notification of RFP postings to Universities and notifications to RPMs of project assignment</i>											
Must have sorting capabilities for funding type, university, PI, organization, RPM, status of projects, starting date and ending date, % of progress												
Must have capability to view all research projects and the assigned RPM. And if transferred, who had it previously	<i>Last status should also be available.</i>											
Must have capability to push to different statuses of the project phase	<i>If RFP or problem statement does not progress to project status, then it should be moved to archive and off the RPM's list of projects. We should have a list of statuses for the RPM as well as overall project status.</i>											
Must have capability to schedule meetings												
Must maintain database of PI's and customers, PMs												
Must have electronic signature capability												
Must identify length of time project is overdue												
Must notify users when action is required												
Must automate SPR thumbnails and FHWA 6 month report												
Must generate financial report including amount authorized, obligated expended, and balances for each program code	<i>warning system to notify to use prior year funding first then current year funding.</i>											
Must track FHWA pooled fund transfers												
Must automate Risk Assessment form												
Automate Risk Form B and C												
Must be able to receive state FMIS DOS records from mainframe												

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Must automate and calculate PI and University staff hours	<i>extracting hours from Recipient's Dave Kuhn's budget spreadsheet</i>											
Must be able to generate Survey of State Government R&D Report	<i>twice a year</i>											
Must maintain agreement balances												
Must produce workload report by RPM, number of projects and phase												
Must provide delayed projects list												
Must provide redundancy and system backups												
Must have capability to place hold on project, RFP withdrawn by customer, and cancellation												
Must have capability to have open dialogue between PI, customer and RPM	<i>All communication/dialogue should be kept with the research project for historically purposes (PI; Customer; RPM; and Finance Manager)</i>											
Must have capability to include implementation phase for projects	<i>Ability to link subsequent related projects to original RFP/Research Project so we can have an overview of how much money spent on specific topic, meaning title; example: Extension 1, Extension 2, Extension 3; each with same TO as original title; Phase 1, Phase 2, Phase 3, Implementation 1, Implementation 2, Implementation 3; each will have a different TO than original title)</i>											
Must have security features to safeguard data												

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	Must display project data (customer, PI, manager, budget vs. expended [automatically updated], invoice payment list, task order number, project title, % completed, start date, completion date, status [active, completed], description, funding source and year [contract ID, job number, state vs. federal and match], resource [university, consultant], implementable products [cost vs. benefits])											
	Must display job number charges (in house salary and contract)											
	Must display project schedule by task (start and end dates of tasks, revised start and end dates, task duration, and % completed for each task)											
	<i>charts and graphs, tables</i>											
	Must have warning system in place for ..sending automated email notification											
	<i>Check for invoice submission, if no invoice submitted for 9 months then send warning email notification regarding FIRE list. Check for invoice submission for 12 months then send email notification.</i>											
	Must have FMIS 5 files extraction system in to the software											
	<i>master, costdata,general,phaseextra,transaction</i>											
	Must have key word search ability											
	Must have the ability to review and approval remotely									X		
	Must provide current balance by biannual program									X		
	Must have authorization approval									X		
	Must have scope of work approval									X		
	Must have budget approval									X		
	Must have program modification approval									X		
	Must have budget modification approval									X		
	Must have notification once review is required									X		
	Must be compatible with current OS										X	