



***Software Engineering
Extreme Programming
Release Planning Document***

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Revisions

Version	Primary Author(s)	Description of Version	Date Completed
1.0	Daniel Burgess Amanda Duncan Edvin Komic Kris Kelley Bernardo Medrano	Initial planning document, lays out an overview of all the iterations before development actually begins.	2/4/10

Review & Approval

User Stories Document Approval History

Approving Party	Version Approved	Signature	Date
Dr. T. L. Lewis	1.0		

User Stories Document Review History

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Daniel Burgess	1.0		2/4/10
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Team Information

Team Name

Nine 4-Three Consulting

Project Title

Online Grants Management System

Team Mission/Project Vision

Provide a service to the educational community by creating a system which enables the Radford University community to easily propose, review, and approve grants from any computer with access to the internet.

Project Objectives

Our team's objective is to create a paperless Online Grants Management System that securely and effectively transfers grant proposal documentation to reviewers. Users shall be able to download, complete and upload forms for grants that are required in the review process. Saving the progress of the proposal process shall allow users to complete individual documents at a later date. Once the proposal is reviewed and accepted the grant will be processed.

Project Scope

The Online Grants management System will be an online database driven document upload site that will allow members of Radford University to submit grant proposal documentation to be reviewed by a chain of reviewers assigned to that particular grant. The chain of review depends on what department the proposer is associated with, how much funding the grant is requesting, and who is requesting the grant. Our team will develop this system using PHP and a MySQL database. Only Radford University students, faculty, and staff of the Sponsored Programs and Grant Management will have access to this system. Individual proposals can only be accessed by the associated reviewers. The user will be able to login and start the proposal process with different features such as saving, updating and deleting external documents associated with the user's grant such as Bio-Chemical or Hazardous Material Grant Proposal Protocol, Proposal Summary, and Grant Proposal. The actual proposal process will be web driven and submitted internally for review.

Iteration 1

Starting Grant Proposal Process Summary:

This iteration is devoted to developing the form views and functionality necessary for the user to begin the proposal. The system database will be designed and developed in this iteration. It will also include a draft version of the main page with limited functionality, the project summary, principal investigator details, grant abstract, regulatory and institutional issues, safety forms, facilities and administration cost details, and preliminary budget information.

Iteration Velocity: 585 minutes

DELIVERY DATE: 2/11/2010

<i>Display Grant Home Page</i>	30 minutes
The users will be able to read basic information about the form.	

<i>Display Grant Home Page – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Provide basic textual information about the process on the page.	23 minutes
Provide a link to login to the system.	5 minutes

<i>Input Investigator Data</i>	50 minutes
User will be able to fill out the information of the PIs involved (name, title, dept, phone # and email).	

<i>Input Investigator Data – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	23 minutes
Process the form data when submitted.	10 minutes
Insert the new data into the database.	15 minutes

<i>Input Project Information</i>	50 minutes
User will provided appropriate information about the project with the question that are provided (see proposal and summary approval form from OSPGM).	

<i>Input Project Information – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	23 minutes
Process the form data when submitted.	10 minutes
Insert the new data into the database.	15 minutes

<i>Input Project Abstract</i>	25 minutes
The user will type an abstract of the project in a text box that is provided.	

<i>Input Project Abstract – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a textarea for the abstract.	13 minutes
Process the form data when submitted.	5 minutes
Insert the new data into the database.	5 minutes

<i>Fill Out Regulatory Issues</i>	90 minutes
User will answer a series of yes or no questions about the project (see proposal and summary approval form from OSPGM).	

<i>Fill Out Regulatory Issues – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	43 minutes
Process the form data when submitted.	20 minutes
Insert the new data into the database.	25 minutes

<i>Fill Out Institutional Issues</i>	90 minutes
User will answer a series of yes or no questions about the project (see proposal and summary approval form from OSPGM).	

<i>Fill Out Institutional Issues – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	43 minutes
Process the form data when submitted.	20 minutes
Insert the new data into the database.	25 minutes

<i>Fill Out Bio-Chemical Form</i>	40 minutes
If any of the questions are answered yes in the regulatory issues section, the user will have to fill out the Bio-Chemical form.	

<i>Fill Out Bio-Chemical Form – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Digitize the Bio-Chemical Form.	38 minutes

<i>Fill Out Hazardous Materials Form</i>	40 minutes
If any of the questions are answered yes in the regulatory issues section, the user will have to fill out the Hazardous Materials form.	

<i>Fill Out Hazardous Materials Form – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Digitize the Hazardous Materials Form.	38 minutes

<i>F&A Questionnaire</i>	50 minutes
User will be asked questions dealing with the F&A rate (see budget form).	

<i>F&A Questionnaire – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	23 minutes
Process the form data when submitted.	10 minutes
Insert the new data into the database.	15 minutes

<i>Fill Out Budget Information Page</i>	120 minutes
User will provide appropriate budget information.	

<i>Fill Out Budget Information Page – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	43 minutes
Create scripts to automatically total budget elements.	30 minutes
Process the form data when submitted.	20 minutes
Insert the new data into the database.	25 minutes

Iteration 2

Completing, Submitting, and Beginning Review Process Summary:

In this iteration we will develop all of the upload fields, functionality behind the cost sharing table, determining conflict of interest (policy verifications), adding comments to the proposal, adding subcontractors, submitting the proposal, displaying proposal to reviewers, and preliminary approval and denial of proposal.

Iteration Velocity: 600 minutes

DELIVERY DATE: 3/4/2010

List Subcontractors	50 minutes
User can list any subcontractors with the lines provided.	

List Subcontractors – Programming Tasks Involved	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	13 minutes
Process the form data when submitted.	15 minutes
Insert the new data into the database.	20 minutes

Cost Sharing Question	25 minutes
User will be asked if there is cost sharing.	

Cost Sharing Question – Programming Tasks Involved	
Create a page using the web template.	2 minutes
Create the appropriate form elements.	13 minutes
Process form and direct user to appropriate page.	10 minutes

<i>Fill Out Cost Sharing Details</i>	70 minutes
If there is cost sharing, the user will be able to fill out the appropriate information dealing the cost sharing in a table provided.	

<i>Fill Out Cost Sharing Details – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add form fields for each respective element.	23 minutes
Process the form data when submitted.	20 minutes
Insert the new data into the database.	25 minutes

<i>Upload Grant Proposal Document</i>	40 minutes
The user will be able to upload the word or PDF document containing their grant proposal.	

<i>Upload Grant Proposal Document – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a file upload form element.	5 minutes
Process the upload data when submitted.	10 minutes
Move and rename the file to the appropriate location on the server.	10 minutes
Insert the location of the file into the database.	13 minutes

<i>Add Comments to Proposal</i>	50 minutes
The user will be able to provide any comments that they wish to add in a text box provided.	

<i>Add Comments to Proposal – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a form field for comments.	13 minutes
Process the form data when submitted.	15 minutes
Insert the new data into the database.	20 minutes

<i>Policy and Certification Approvals</i>	50 minutes
User will read the Principal Investigator and the Conflict of Interest policies, and click on checkboxes indicating they agree with the policies and certifications listed.	

<i>Policy and Certification Approvals – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add text for each policy and certification.	10 minutes
Add checkboxes for each policy and certification.	10 minutes
Process the form data when submitted.	15 minutes
Insert the new data into the database.	13 minutes

<i>Proposal Submitted</i>	30 minutes
Submitted proposals should be sent to the initial reviewer.	

<i>Proposal Submitted – Programming Tasks Involved</i>	
Query the database for the current review chain.	15 minutes
Find the beginning of the chain.	5 minutes
Send an email to the first reviewer in the review chain.	10 minutes

<i>Complete Financial Interest Disclosure Form</i>	5 minutes
The user will be asked to confirm that they do not have a financial interest in the grant.	
The User will check a box saying they have no financial interest in the grant.	

<i>Complete Financial Interest Disclosure Form – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Provide check box. (yes or no)	3 minutes

<i>Display Saved Proposals List</i>	50 minutes
Users can view a list of saved proposals for grants.	

<i>Display Saved Proposals List – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Query the database for the saved proposals.	25 minutes
Display a list of the current saved proposals.	15 minutes
Create links to each proposal's detail view.	8 minutes

<i>List Reviewable Proposals</i>	50 minutes
Provide a list of proposals that have been submitted for review that the system is waiting for the current user to review.	

<i>List Reviewable Proposals – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Query the database for the appropriate proposals.	25 minutes
Display a list of the current reviewable proposals.	15 minutes
Create links to each proposal's detail view.	8 minutes

<i>New Proposal for Review Notification</i>	35 minutes
Reviewers will be notified when they have a new proposal available for review.	

<i>New Proposal for Review Notification – Programming Tasks Involved</i>	
Query the database for the current review chain.	15 minutes
Find the current link within the chain.	10 minutes
Send an email to the next reviewer in the review chain.	10 minutes

<i>Approve Document Submission</i>	30 minutes
User will be able to click on a button to approve the submission of the document, signifying their digital signature on the form itself.	

<i>Approve Document Submission – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a submission agreement button.	5 minutes
Process the form data when submitted.	10 minutes
Insert the new data into the database.	13 minutes

<i>Add Comments to Proposal Being Reviewed</i>	50 minutes
Reviewers need to be able to add comments regarding the proposal for the applicant and future reviewers to see.	

<i>Add Comments to Proposal Being Reviewed – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a form field for comments.	13 minutes
Process the form data when submitted.	15 minutes
Insert the new data into the database.	20 minutes

<i>Approve or Deny Proposal Being Reviewed</i>	65 minutes
A reviewer will be able to approve or deny the proposal they are reviewing.	

<i>Approve or Deny Proposal Being Reviewed – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add an approve and reject button.	13 minutes
Process the form data when submitted.	15 minutes
Insert the new data into the database.	20 minutes
Begin the next process of the review chain.	15 minutes

Iteration 3

Completing Review, User Management, and Administration Summary:

For this iteration, we will put the finishing touches on the reviewing process finishing up user stories that did not fit into the previous iteration. We will also be developing the user management system, as well as a full suite of administration tools. Including, editing user roles, adding new users, creating review chains, managing departments, etc.

Iteration Velocity: 575 minutes

DELIVERY DATE: 4/8/2010

<i>Send Proposal for Revision</i>	20 minutes
If the proposal is rejected, the user is then notified that it needs to be revised.	

<i>Send Proposal for Revision – Programming Tasks Involved</i>	
Query the database for the PI of the proposal.	10 minutes
Send an email to the PI notifying them of the proposal status.	10 minutes

<i>Forward Proposal to Next in Chain</i>	40 minutes
Once accepted, it will then be sent to the next reviewer in the chain, unless it has reached the final reviewer.	

<i>Forward Proposal to Next in Chain – Programming Tasks Involved</i>	
Query the database to find the current step in the review chain.	20 minutes
If at the final step, trigger an Proposal Approval Notification.	10 minutes
Otherwise, trigger a New Proposal for Review Notification.	10 minutes

<i>Proposal Approval Notification</i>	20 minutes
The applicant will receive notification when their proposal has passed final review.	

<i>Proposal Approval Notification – Programming Tasks Involved</i>	
Query the database for the proposal's PI.	10 minutes
Email the PI that their proposal has been approved.	10 minutes

<i>Display Login</i>	15 minutes
Display a login page where a user can enter their username and password.	

<i>Display Login – Programming Tasks Involved</i>	
Add input boxes for username, password.	5 minutes
Add a button to submit the form.	5 minutes.
Direct form data to the correct page.	5 minutes

<i>Display Logout</i>	10 minutes
Displays the login page once the user clicks and logout button.	

<i>Display Logout – Programming Tasks Involved</i>	
Add goodbye text.	5 minutes
Add link back to main page.	5 minutes

<i>View Admin Main Page</i>	15 minutes
Admin users can view a main page with additional features, such as set user roles.	

<i>View Admin Main Page – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Display appropriate links for the administrator.	13 minutes

<i>Add New Department (Admin)</i>	25 minutes
An administrator can create a new department in the system.	

<i>Add New Department (Admin) – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Add a form where they can enter the department details.	8 minutes
Process the form once it is submitted, validating data.	10 minutes
Insert the new information into the database.	5 minutes

<i>View Existing Departments (Admin)</i>	25 minutes
An administrator can view a list of the existing departments within the system, with links to editing and deleting each department.	

<i>View Existing Departments (Admin) – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Query the database for the current list of departments.	5 minutes
Output the list of departments.	13 minutes
Create links to editing and deleting the departments.	5 minutes

<i>Edit Existing Department (Admin)</i>	35 minutes
An administrator can edit the details of each existing department.	

<i>Edit Existing Department (Admin) – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Query the database for the selected department details.	5 minutes
Create form to edit the details, outputting details from DB into form.	10 minutes
Process the form once it is submitted, validating the data.	10 minutes
Update the database with the new information.	8 minutes

<i>Delete Existing Department (Admin)</i>	10 minutes
An administrator can delete an existing department.	

<i>Delete Existing Department (Admin) – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Update the database, removing the deleted information.	8 minutes

<i>View Department Review Chain (Admin)</i>	35 minutes
An administrator can view the current review chain for a given department.	

<i>View Department Review Chain (Admin) – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Query the database for the current review chain of a given dept.	13 minutes
Display the current review chain on the page in a concise format.	20 minutes

Add User to Front of Dept Review Chain (Admin)	55 minutes
An administrator can add a user as a reviewer to the front of the review chain for a given department.	

Add User to Front of Dept Review Chain (Admin) – Programming Tasks Involved	
Add the appropriate form fields to the review chain page.	20 minutes
Create handlers to process the form.	15 minutes
Restructure the review chain with the added user.	10 minutes
Update the database with the new review chain.	10 minutes

Add User to End of Dept Review Chain (Admin)	55 minutes
An administrator can add a user as a reviewer to the end of the review chain for a given department.	

Add User to End of Dept Review Chain (Admin) – Programming Tasks Involved	
Add the appropriate form fields to the review chain page.	20 minutes
Create handlers to process the form.	15 minutes
Restructure the review chain with the added user.	10 minutes
Update the database with the new review chain.	10 minutes

Delete a User From The Dept Review Chain (Admin)	45 minutes
An administrator can delete a user from the review chain of a given department.	

Delete a User From The Dept Review Chain (Admin) – Programming Tasks Involved	
Add the appropriate buttons to the review chain page.	10 minutes
Create handlers to process the button clicks.	15 minutes
Restructure the review chain with the user removed.	10 minutes
Update the database with the new review chain.	10 minutes

Add Budget Condition to Dept Review Chain (Admin)	35 minutes
An administrator can add a constraint to a specific link in the review chain of a given department, so that the user only is passed the grant to review if the budget is above the specified amount.	

Add Budget Condition to Dept Review Chain (Admin) – Programming Tasks Involved	
Add the appropriate form elements to the review chain page.	10 minutes
Create handlers to process the new form elements.	15 minutes
Update the database with the new review constraints.	10 minutes

Edit User Roles (Admin)	55 minutes
An administrator can change the user roles of all registered users.	

Edit User Roles (Admin) – Programming Tasks Involved	
Create a page using the web template.	2 minutes
Query the database for all of the current users.	20 minutes
Display all current users and form elements for roles on the page.	20 minutes
Update the database with the new user roles.	13 minutes

Add / Approve New Users (Admin)	45 minutes
An administrator can add new users to the system by entering their username, email address, and department.	

Add / Approve New Users (Admin) – Programming Tasks Involved	
Create a page using the web template.	2 minutes
Create the appropriate form fields.	15 minutes
Create handlers to process the form elements.	15 minutes
Insert the new user into the database.	13 minutes

<i>Set User Roles</i>	35 minutes
When adding a new user, the admin can set the role of that user.	

<i>Set User Roles – Programming Tasks Involved</i>	
Create a page using the web template.	2 minutes
Create form elements for the user roles.	10 minutes
Process the form data when submitted.	10 minutes
Update the user role in the database.	13 minutes