Project Scope and Requirements

Project #: 15-0190
Project Name: Research and Engagement Website Redesign

Desired Deadline: Fall 2015

Project Description

University Communications will build a new Drupal 7 website for the Office of Research & Engagement (R&E) that will replace the website currently located at http://www.umass.edu/research.

The new website will represent R&E and will support the R&E effort to increase research funding and engagement activities and present the UMass Amherst research enterprise. It will showcase the research resources on campus; reflect the scope of R&E functions; and have a Research Administration (RA) area that is well organized and easy for staff to update. The website will have a visually appealing design that is properly branded with simple and clear navigation. It will serve as the entry point for web visitors and house extensive research documentation.

The current Research website was one of the first Drupal sites hosted by OIT. It was built by outside consultants using Drupal 6 and launched at the end of 2010. The website as it exists today is disorganized, static, hard to navigate, and has no clear hierarchy of information. It is difficult to maintain and as a result includes outdated information.

Project Contacts and Roles

Research and Engagement

Sharon Tracey – Primary contact and project coordinator, stracey@umass.edu
Jen Donais – Secondary contact for Compliance, jadonais@research.umass.edu
Margaret Burggren - Secondary contact for Compliance, burggren@ora.umass.edu
Medinda LeLacheur - Secondary contact for Compliance, melindal@research.umass.edu
Carol Sprague – Secondary contact for Grants and Contract Admin, sprague@research.umass.edu
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Mary Fechner- Secondary contact for Office of Research Development, mfechner@research.umass.edu
Ian Raphael – Secondary contact for Research Business Managers Network, iraphael@research.umass.edu
University Communications

Anne Bourbeau – Project manager, abourbea@umass.edu
Dave Ruderman – Technical implementation, david.ruderman@umass.edu
Hal Marshall – Design implementation, hal@umass.edu

Project Objectives

Once completed, the website will be measured against the following objectives:

- The R&E home page clearly presents the role and function of the Office of Research and Engagement and its units and provide links to available research resources.
- The Research Administration pages present resources for faculty and staff that are clear and easy to navigate for each major step of the research funding process – from proposal development, to proposal submission and tracking, to awards management and compliance.
- Policies, forms and guidance documents are well organized and easily accessible.
- The Research Administration home page features the latest updates and upcoming events.
- Faculty and staff are able to use the website to easily find funding, submit proposals, manage awards and meet compliance requirements.
- Research Administration staff are able to easily add and update content for the website.
- The website is responsive on a range of devices. Users are able to easily navigate the website on tablets and smart phones.

Project Requirements

Based on the customer survey responses and subsequent meetings with key stakeholders, the following high-level requirements for the website have been identified.

Overall

- The website will be built in Drupal 7 and have a responsive design for optimum display on tablets and mobile devices.
- The website will have a visually appealing professional design that meets UMass Amherst brand guidelines with a clear and simple navigation structure for both R&E and Research Administration sections.
- The website will include access control functionality by business unit to allow designated staff the ability to add, edit and/or approve content for their business unit only.
- The website will include workflow functionality for content areas that require approval by designated staff before publishing.
- The website will utilize a predetermined list of topics (taxonomy terms) to organize and display content as appropriate for a better user experience.
- The website will include a site search by keyword or topic.
• The website will include the ability to set up protected areas and content that is only accessible by designated groups using their NetID.
• The website will include the UMass Amherst Google Analytics code to facilitate web analytics reporting.

Research and Engagement

Although much of the website is dedicated to the Research Administration and Compliance systems, it is also required that there be a main landing page for the Office of Research and Engagement and a number of supporting pages. A detailed R&E sitemap is included at the end of this document.

• The R&E landing page will contain main navigation links to the following:
  o About page
  o Research Administration and Compliance
  o Research Development and Engagement
  o Centers and Institutes
  o Specialized Research Support
The R&E landing page will also be used to highlight the Technology Transfer Office, UMII and UMass Press, for Research at a Glance information and a link to the Research Next website.
• The R&E landing page will contain an image area that is easy to update.
• The About R&E page will include general information about R&E, its leadership, an organization chart and list of key contacts.
• The Research Development and Engagement page will include descriptions and links to the main research units. There will also be a dedicated page for Research Development.
• The Centers and Institutes page will be a landing page for information about research centers and institutes and include a link to an A-Z listing that lives in the R&E section.
• The Specialized Research Support page will include information about Research Facilities and Life Science Laboratories, Animal Care Services, Core Facilities and MA Green High Performance Computing. Separate pages will be added as needed.
• The footer area on the R&E pages will contain general contact information and links as needed. There will be some uniformity across the footers.

Research Administration (RA)

The requirements for the RA portion of the website are presented by area/main navigation item and by common features that span more than one area. A detailed RA sitemap is included at the end of this document.

Home Page

In addition to the website header and main navigation, the RA home page will require the following components:

• A slideshow with rotating images and captions
• Areas for upcoming events and deadlines;
• A list of quick links that can be updated as needed and displayed on other pages as needed.
• There may be an area for news/announcements. While there is no archive page planned at this time, an archive page can be setup and added to the navigation at a future date.
• A footer area at the bottom of all RA pages that includes RA general contact information and dedicated area for R&E links

About Section

The About section will require a description of the RA mission and functions, as well as, the following information:

• A staff directory page that will display staff by business unit. If staff contacts are included in different sections of the website, they will be pulled from the staff directory if possible.
• A page called Roles and Responsibilities that will display a table/grid with appropriate information about the various roles and responsibilities related to each area identified. This page will be referenced from other pages on the website as applicable.
• A subsection called Reports and Metrics that will include links to sponsored research reports for grants and contracts similar to www.umass.edu/research/reports-0 on the current Research website. This content can be linked to from other areas of the website as appropriate using sidebar blocks to make the information more accessible.

Events, Deadlines and Calendar

The website will require the ability for staff to add events, some that include a registration form, and for users to register for events online. There is also need for funding deadlines and information to be accessible on designated pages.

• Event types will include: trainings, meetings, workshops and information sessions. There will be specific categories for animal use, faculty and administrator trainings, IRB and IACUC meetings, and OGCA information sessions.
• Event locations will be selectable from a list with the options to add a room number or additional location not appearing in the list.
• The preferred display of events and deadlines will be a list format and not on a calendar month view. Listings will include a link to a page with detailed information about the event or deadline.
• A predetermined number of events or deadlines can be shown in sidebar block on designated pages of the website for easy access by users.

Proposals Section

The Proposals section will require the following information and functionality:

• A subsection called Find Funding will list funding opportunities for internal (on-campus) grant programs, limited submissions and links to external agency databases.
The content will be entered in a way that is efficient for staff to maintain and displayed in table format for easier readability by users.

Submission deadlines for funding opportunities can be displayed in a sidebar block on key pages or as a complete list on a dedicated page.

Sponsor-specific resources may also be included in the Find Funding subsection or with the OGCA sponsor-specific resources within the Develop Proposal subsection.

- A subsection called Develop Proposal will include relevant proposal development information. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages. Specific requirements and assumptions are noted below:
  - Roles and responsibilities referred to in this subsection will link to the appropriate part of the Roles and Responsibilities table included in the About section.
  - The term “toolkit” is no longer being used. It has been replaced by the phrase “sponsor-specific resources”.

- A subsection called Review and Submission will include relevant information about proposal review and submission. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages. Specific requirements and assumptions are noted below:
  - The current deadline queue will remain password protected on the JGAMS website.
  - The Proposal Preparation Guide will be presented in an accordion-like format so that detailed information is revealed ‘on-click’ by the user. This format will be used for other content as appropriate.

- A subsection called Post-Submission will include information identified in the RA sitemap as Just in Time and Revised Budgets. It is the understanding that the content in this subsection will be presented as basic pages.

Awards Section

The Awards section will require the following information and functionality:

- A subsection called Set up will include relevant information about award set up. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages. Specific requirements and assumptions are noted below:
  - Roles and responsibilities referred to in this subsection will link to the appropriate part of the Roles and Responsibilities table included in the About section.
  - Award Status/JOL will be a page with links to the JOL external database.

- A subsection called Administration will include relevant information about award administration. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages.
• A subsection called *Subawards* will include information identified in the RA sitemap as Definitions, Issuing Subawards/Processes and Subaward Monitoring/Guidance Doc. It is the understanding that the content in this subsection will be presented as basic pages.

**Compliance Section**

The Compliance section will require the following information and functionality:

• A subsection called *Animal Subjects/IACUC* will include relevant information about working with animal research subjects. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages. Specific requirements and assumptions are noted below:
  o Ability to display only Animal Subject/IACUC documents
  o Detailed information about e-protocol submission for animal subjects will ‘live in the E-Systems section.
  o Frequently asked questions will be presented using an accordion format that allows users to click on a question to reveal the answer.

• A subsection called *Human Subjects/IRB* will include relevant information about working with human research subjects. Refer to the RA sitemap at the end of this document for a detailed outline of this subsection. It is the understanding that the content in this subsection will be presented as basic pages. Specific requirements and assumptions are noted below:
  o Ability to display only Human Subject/IRB documents
  o Detailed information about e-protocol submission for human subjects will ‘live in the E-Systems section. References made in this subsection will link to the appropriate subsection in E-Systems.
  o Frequently asked questions will be presented using an accordion format that allows users to click on a question to reveal the answer.

• A subsection called *Research Ethics* will include information identified in the sitemap as Conflict of Interest, Responsible Conduct of Research and Misconduct. It is the understanding that the content in this subsection will be presented as basic pages with links to associated documents as required.

• A subsection called *Research Safety and Security* will include information identified in the RA sitemap as Biosafety/IBC, Export Controls, Data Access and Facilities Access. It is the understanding that the content in this subsection will be presented as basic pages with links to associated documents as required.

**Policies, Forms and Guidance - Document Repository**

In an effort to better organize the many documents used by RA staff and the audiences they support, the website will require a section that will act as a central repository where all documents will be accessible.
• Documents will consist of web pages, uploaded PDF files, and links to externally hosted documents.
• Documents will include a brief description of the document and related documents as applicable.
• Documents can be identified as policies, guidance or forms and be listed by type or by topic or all at once.
• Documents can be displayed within other sections of the website to show context using the appropriate topic designation.
• A custom print CSS will be developed to allow web documents to be printable without navigation so that users will not need to download a document to print it.

University Communications has been asked to use the University of Maryland Office of Research Administration’s forms page (http://www.ora.umd.edu/?q=forms/umd) as a model for presenting documents in a grid format by topic that include a brief description.

Training, Resources and Services Section

The Training, Resources and Services section will require the following information and functionality:

• An area on the landing page that shows a designated number of upcoming events, workshops and trainings
• A dedicated page that lists all upcoming events
• A subsection called Resources for Staff will include Research Business Managers Network (RBMNet) services identified as Proposal Support, PowerPoint training presentations, checklists and tools. It is the understanding that the content in this subsection will be presented as basic pages with the ability to upload PPT and other supporting files.
• A subsection called Resources for Faculty will include Office of Research Development (ORD) resources identified as PowerPoint training presentations, the Deckard newsletters and other resources. It is the understanding that the content in this subsection will be presented as basic pages with the ability to upload PPT and other supporting files.

Specific requirements and assumptions are noted below:
  o The Deckard newsletters will not be searchable due to proprietary content.
• A page/section called New to Campus that includes important and relevant information for faculty that are new to UMass Amherst. A link to this page will be included on the RA home page under Quick Links to provide easy access to this information.
• There may also be a requirement for archiving workshops with links to associated reference materials in PDF, Word or PowerPoint format. Some workshop materials will need to be in a protected area. The stated goal is for resources to be ‘open source’ and accessible.
• An online for that allows users to make support requests.

e-Systems Section

The E-Systems section will require pages or subsections for the following E-Systems.
• SmartGrant
• Jordan Online
• e-Protocol
  o This section will include e-Protocol information for: Human, Animal, FCOI, and IBC.
• Export Control (eShip Global)
• Graduate Student Salary and Fringe Calculator
• Sponsor-Specific Systems
  o This section will include short descriptions and links for: Grants.gov, Research.gov, eCommons, FastLane and nSpires.
• ECRT
• Summit

Detailed ‘how-to’ information and external links for logging into these systems will be presented as basic pages. E-Systems that are referenced from other areas of the website will link to this section for the detailed information.

Project Assumptions

• Content for the website will be identified and maintained by R&E staff.
• Strategy and presentation of policies, forms and guidance documents will be reviewed and approved by designated R&E staff prior to adding all documents to the website.
• Online forms that are added will be simple forms with no built-in workflow.

Project Restrictions

The following items DO NOT fall within the scope of this project:

• Addressing the limitations of the report functionality (JOL)
• Changes to the protected deadline list that is currently done with JGAMS
• Updates to any external database systems
• Adding the ability to include video content on the website

Service Level Agreement

• University Communications staff will assist with build out of the website using content provided by R&E staff.
• Content for the website will be evaluated as needed by University Communications staff and recommendations for best presentation will be made.
• University Communications staff will provide Drupal training for designated R&E staff members.
• University Communications will provide post launch assistance to ensure technical functioning of the requirements listed in this document.
• Requests for additional functionality will need to be formally submitted using our online project request submission form: http://www.umass.edu/urprojects/
Project Milestones

The following table outlines the milestones for this project.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Discovery</td>
<td>Initial conversations and communications to determine project goals and requirements.</td>
</tr>
<tr>
<td>Information Architecture/Sitemap</td>
<td>Detailed sitemap is created and approved by client.</td>
</tr>
<tr>
<td>Site Provisioning</td>
<td>UMass Drupal Package (UDP) website is provision on the IT development server at the desired URL. Site structure is built to match the approved sitemap.</td>
</tr>
<tr>
<td>Determine Data Structures</td>
<td>Drupal content types and views are created to support the sitemap and requirements.</td>
</tr>
<tr>
<td>Custom Configuration</td>
<td>Custom configuration or content types are created as needed to support more complex requirements.</td>
</tr>
<tr>
<td>Content Gathering, Editing and Input</td>
<td>Client gathers required content for the website. UR trains client as appropriate for content input. Editorial review of content done by R&amp;E staff.</td>
</tr>
<tr>
<td>Page Layout</td>
<td>Layout of content is optimized to include visual elements and sidebar content as needed.</td>
</tr>
<tr>
<td>Design</td>
<td>Design is refined and elements are added as necessary.</td>
</tr>
<tr>
<td>Formal Client Review</td>
<td>Client review of completed website. <strong>Time allowed for this is generally two weeks</strong>. Client sends feedback to UR and additional revisions are made as required.</td>
</tr>
<tr>
<td>Pre-staging Review/Go-Live Checklist</td>
<td>UR performs a review of the final website for general consistency and usability. <strong>Time allowed for this is one week.</strong></td>
</tr>
<tr>
<td>Site Move to Staging/Testing</td>
<td>UR works with IT to schedule the move of the final website to the staging server where it is tested prior to launch. <strong>Time allow for testing is one week.</strong></td>
</tr>
<tr>
<td>Site Launch</td>
<td>UR works with IT to schedule the move of the website from staging to the production (live) server. Final checks are done after launch to make sure everything is working as expected.</td>
</tr>
<tr>
<td>Post Launch</td>
<td>UR will provide support to ensure the website is functioning as determined by the originally submitted requirements. Client is responsible for content updates once the website is launched. Requests for additional functionality will be considered but not guaranteed.</td>
</tr>
</tbody>
</table>
Research & Engagement – Final Sitemap 6/26/2015

A. About (mission in text on first page)
   1. What We Do
      a. Organizational Chart
   2. Leadership
   3. Key Contacts

B. Research Administration & Compliance
   (link to new Research Admin website)

C. Research Development & Engagement
   (This landing page will highlight Research Development, Technology Transfer, UMIII and UMass Press – only Research Development will have a page on this site, the other will link to their respective sites)
   1. Research Development

D. Centers & Institutes
   1. A-Z List (This may end up linking to Scholarworks page.)

E. Specialized Research Support
   1. Research Facilities and Life Science Laboratories
   2. Animal Care Services
   3. Core Facilities
   4. MA Green High Performance Computing
Research Administration – Final Sitemap 6/26/2015

A. **About** (mission in text on first page)
   1. Staff Directory
   2. Roles and Responsibilities (this will be a table/grid)
   3. Reports and Metrics

B. **Proposals**
   1. Find Funding
      a. Internal Funding Opportunities (On-campus)
      b. Off-campus
         1. Limited Submissions
         2. Funding for New and Early-Career Faculty
         3. GrantForward
      c. Sponsor-specific Resources
   2. Develop Proposal
      a. Roles and Responsibilities- remove in favor of larger one
      b. Sponsor-specific Resources (maybe have content from OGCA and ORD)
      c. Principal Investigators and Co-Principal Investigators
      d. Internal Processing Form (IPF)
      e. Effort
      f. Indirect Costs
      g. Subcontracts
      h. Cost Sharing
      i. Budget Justification Samples
      j. Broader Impact
   3. Review and Submission
      a. Getting Started: Critical Information & Submission Process
      b. Current Deadline Queue
      c. Proposal Workflow Chart
      d. Proposal Preparation Guide
      e. Proposal Status
      f. Staff Contacts
   4. Post-Submission
      a. Just In Time
      b. Revised Budgets
C. Awards

1. Set up
   a. What are awards
   b. Pre-establishment of Account
   c. Roles and Responsibilities
   d. Acronyms
   e. Award Process
   f. Award Timeline
   g. Staff Contacts
   h. Award Status/JOL

2. Administration
   a. Award Management
   b. No Cost Extensions
   c. Rebudgeting
   d. Transfer of Grants
   e. Reporting and Award Closeout
   f. Change of Principal Investigator

3. Subawards
   a. Definitions
   b. Issuing Subawards/Processes
   c. Subaward Monitoring/Guidance Doc

D. Compliance

1. Animal Subjects /IACUC
   (The outline submitted below was taken from the current website. Anne will be reviewing it and meeting with Alison on 6/25.)
   a. Animal Use
   b. Protocol Submission
   c. Animal Welfare Assurance (OLAW)
   d. IACUC Guidelines
   e. IACUC Meeting and Animal User Training Information
   f. Occupational Health Program
   g. Useful Links
   h. Frequently Asked Questions

2. Human Subjects / IRB
   a. Institutional Review Board
   b. Training and Education
c. Submitting and Reporting
d. e-Protocol
e. IRB Guidelines
f. Policies and Regulations
g. Baystate Collaborative Program
h. Frequently Asked Questions

3. Research Ethics
   a. Conflict of Interest
   b. Responsible Conduct of Research
   c. Misconduct

4. Research Safety and Security
   a. Biosafety/IBC
   b. Export Controls
   c. Data Access and Use
   d. Facilities Access and Use

E. Policies and Forms
   (Use Maryland format but include policies and guidance)
   1. Policies
   2. Guidance
   3. Forms

F. Training, Resources, Services

   1. Upcoming Events, Workshops, Trainings
   2. Resources for Staff (RBMNet services)
      a. Proposal Support
      b. PPTs of trainings, checklists, excel tools (e.g., project management)
   3. Resources for Faculty (ORD)
      a. PPTs of trainings, Deckard newsletters
   4. New to Campus

G. E-Systems

   1. SmartGrant
   2. Jordan Online
   3. e-Protocol
      a. Human
b. Animal
c. FCOI
d. IBC
4. Export Controls – eShip Global
5. Graduate Student Salary and Fringe Calculator
6. Sponsor-Specific Systems
   a. Grants.gov
   b. Research.gov
   c. eCommons
   d. FastLane
   e. nSpires
7. ECRT
8. Summit
Signature Section

By signing below, I certify that I understand and approve of the goals and requirements stated in this document.

Approved by  Elizabeth S. Chilton, Assoc. Vice Chancellor for Research & Engagement

Signature __________________________

Date  7/2/15 __________________________