CC-PLUS Requirements: 2020

Category	Requirement	MVP	Priority
data management	All data retrieved from master reports must be stored in database tables	y	0
institution management	Institutions have a name, type (aligned with Carnegie Classification), FTE, visibility status, and can have multiple admin/manager-determined groups. Institutions are associated with users and providers	y	0
institution management	Harvested data should have configurable visibility levels: managers can determine on an institutional basis how data is viewed (by all or by own institution)	y	0
institution management	Institutions additionally have any or all of the following for associated providers: request IDs, names, email, customer reference ID, and reference names	y	0
institution management	Dates of creation and modification are stored for Institutional details	y	0
provider management	Managers can see a list of all providers available within the system	y	0
provider management	Administrators can add new providers to the system	y	0
provider management	Providers have names, SUSHI urls, authentication types, status, and a monthly scheduled date of harvest	y	0
provider management	Administrators can edit or update information for providers	y	0
provider management	Platfoms offered by providers are determined based on retrieved report data	y	0
provider management	Administrators can remove providers, or change their status to "inactive"	y	0
user administration	Four types of user roles should be available: Administrator, Manager, Viewer, Universal Viewer	y	0
user administration	Users can have more than one role	y	0
user administration	Administrators can create and edit Viewers, Universal Viewers, Managers, and other Admins	y	0
user administration	Administrators can add new, or edit information for, institutions and providers	y	0
user administration	Managers can create and edit Viewers and other Managers	y	0
user administration	Managers can update their own institutions name, type, FTE, group, visibility, viewers, and SUSHI details for associated providers	y	0
user administration	Administrators can additionally give managers the ability to add other existing providers to their institution	y	0
user administration	Viewers cannot create or edit fellow Viewers	y	0
user administration	Viewers can see harvested data and error reports for their own institution and other institutions that have made their data visible	y	0
user administration	Universal Viewers can see harvested data and error reports for all institution in the consortia regardless of institution visibility settings	y	0
user administration	Users have a name, title, institutional affiliation, email and one or more roles	y	0

non-functional/system	The system will be usable on a Unix, Windows, and Mac (OSX) operating systems using LAMP/XAMPP architectures	y	0
navigation and interaction	Counter 5 standard "views" of data should be available to all roles	y	1
navigation and interaction	Reports can be accessed by type of report, provider, institution or consortia, and date	y	1
navigation and interaction	Reports can be filtered by administrator/manager-determined group, type of institution (aligned with Carnegie Classification), provider platform (if applicable), and COUNTER 5 determined "views"	y	1
navigation and interaction	Reports are available for multiple institutions together (i.e. full consortium, all institutions of a particular type, or an admin/manager determined group) or individual instutions	y	1
navigation and interaction	Users can hide columns from report tables	y	1
navigation and interaction	Users can create quick links to a custom set of facets/filters for a report	y	1
navigation and interaction	Users custom report links are available on the home page	y	1
navigation and interaction	Reports can be launched from the home page	y	1
report harvesting	Reports should be harvested monthly on a date specified by the Administrator	y	1
report harvesting	Counter 5 Master Reports should be harvested and all data persisted in database	y	1
report harvesting	Reports are harvested via the SUSHI protocols according to settings stored at the provider and institution level	y	1
non-functional/system	The system will be built using open source frameworks for both front- and back-end to facilitate sharing and extensibility	y	1
non-functional/system	The code will be released with an open source license to encourage shared development and open use	y	1
non-functional/system	The end product will include a web-based interface to the application for both public and administrative users	y	1
non-functional/system	The final application follows an MVC (model, view, controller) architecture to ensure extensibility	y	1
non-functional/system	The system will manage and maintain queues for sending harvests for multiple providers and institutions.	y	3
non-functional/system	Installation of the application will depend on some level of expertise in system administration skill, but should not require large levels of staff support	y	1
data management	Titles of resources in harvested reports should be compared to existing titles and matched if possible by DOI, ISSN, ISBN and Prop ID as default	y	2
data management	Harvested data will be validated to ensure it conforms to COUNTER release 5 code of practice	y	2
data management	If a report contains resources with no ISSN, DOI, or ISBN an entry with a local system ID will be automatically generated	y	2
navigation and interaction	Viewers can see a dashboard of all scheduled, failed, and completed harvests they have permission to see	y	2
navigation and interaction	The dashboard shows an activity report with the 10 most recent completed/failed harvests	y	2

navigation and interaction	Full logs of harvests are available for institutions and vendors	y	2
navigation and interaction	An activity log is available showing all recently completed, failed	y	2
navigation and interaction	The activity log contains the harvest id, provider, institution, report type, report period, start time, and status for each harvest	y	2
report harvesting	Each harvest is assigned an identifer and is logged	y	2
navigation and interaction	Reports have context-sensitive facets determined by the type of report being viewed	y	4
navigation and interaction	The activity log can be reached from the home page	y	3
navigation and interaction	Reports that have failed will reflect vendor error message in the activity log	y	3
report harvesting	Harvests can be restarted or modified if there are errors; report harvests can be manually started	y	3
data management	Administrative users can upload a spreadsheet containing details of users, providers, and institutions to create new entities in a batch process.	y	4
navigation and interaction	From the universal header users can get to reports, settings for users/institutions/providers, and logs of activity with one click	y	4
navigation and interaction	Users have access to their account from the universal header	y	4
navigation and interaction	Users can see the date of the last update to a institution's details	y	4
navigation and interaction	Users can see the date of the last harvest of data for an institution	y	4
navigation and interaction	Users can see the date of the last harvest of data for a provider	y	4
navigation and interaction	The activity log can be sorted by recent, failed harvests	y	4
report harvesting	Automatic reharvesting of data when a harvest error occurs	y	4
non-functional/system	The application will be performant with large data sets	y	5
non-functional/system	Documentation will be developed for system installations, configuration, and management	y	5
non-functional/system	System operation will not require system administration skill	y	5
data management	Data should be available in the system for a minimum of three years previous when available	n	
data management	Tables containing titles of resources can be manually updated	n	
data management	Reports can be exported as csv, json, or xml?	n	
data management	Raw Counter reports should be stored and available for download	n	
installation & configuration	Elements required for a title match should be configurable by an Administrator	n	
navigation and interaction	Documentation is accessible from all screens through a "Help" feature	n	
navigation and interaction	Reports are sortable by alphabetical order or size for any column	n	
navigation and interaction	the activity log contains a list of scheduled harvests for the next 30 days	n	
navigation and interaction	The activity log can be faceted by...	n	
navigation and interaction	Details for a particular harvest can be accessed from the activity log	n	

navigation and interaction	A harvest can be restarted from the screen showing it's details. Information about SUSHI protocol elements can either be fixed in the screen, or the setting page to make the change should be linked	y		4
report harvesting	Configuration of the automatic reharvesting is available at installation	n		
non-functional/system	The application will have an API available for interacting with data	n		
navigation and interaction	Simple visualizations of data will be offered in addition to tabular views of data	n		
	encrypted data storage	y		
	ability to clear data storage through UI	y		