

Project Requirements
For
Software Asset Management System
(SAMS)

Version 1.2

Prepared by: Ramona Gallegos, 09342, on 04/28/2008

SAM Requirements Revision History

Revision Date	Revised By	Comment
4/21/2006	Julie Lujan	Initial draft.
5/2/2006	Julie Lujan	Updated per modified User Process Model
5/12/2006	Julie Lujan	Updated per feedback from Peer Review (5/9/2006)
5/22/2006	Jodi Eckstine	Updated per team review.
4/28/2008	Ramona Gallegos	Revised based on project status

Requirement Types Legend

Legend Key	Legend Title	Description
BR	Business Requirement	Rules the business must follow.
SR	System Requirement	Needs the system must satisfy for the corporate architecture.
UR	User Requirement	Needs the system must satisfy for the application user.

Project Requirements for SAM

Status	Id#	Business Requirements	Origin/Source	Comments
Valid?	BR-001	System will be the corporate central repository for software licenses.	Initial JAD session	
Complete	BR-002	System must allow multiple search parameters when searching for a software product or a software license.	UC02, UC08	
Valid?	BR-003	The Software PoC is responsible for the maintenance of the Software Product they are assigned to.	UC03	
Complete except store prices	BR-004	A software product must have a: <ul style="list-style-type: none"> - description - recovery activity - software type - license type - category - new price - used price - refund price - Software PoC - Administrator - availability (purchasable) flag - maintenance required flag - install instructions - uninstall instructions 	UC03	some field are software, some are software license
Complete	BR-005	A software product must have one to many software types defined.	UC03	Categories can be added by SAMS Administrators
Complete	BR-006	A software product license type must be a machine, user, or network.	UC03	Licensed by person or machine, client and server licenses
Complete	BR-007	A software product license of type user can be installed on more than one machine that is owned by the user.	UC03	Secondary use rights are indicated on all licenses
Complete	BR-008	A software product license type of machine must only be installed on one machine.	UC03	No, can have secondary use for machine based licenses

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Status	Id#	Business Requirements	Origin/Source	Comments
Complete	BR-009	A software product category must be a volume license, site license, or individual license.	UC03	Licenses can be owned by the enterprise, a project, an organization, or an individual
Complete	BR-010	A software product must list available options such as maintenance period, documentation on hand, or hardcopy on hand.	UC03	
Complete	BR-011	Contract number is required for software products managed by a contract.	UC03	Procurement information is optional
Complete	BR-012	A software product can have one to many software licenses.	UC03	
Complete	BR-013	A software product must identify whether it is controlled by a Software PoC.	UC03	All software has a POC and all licenses have an admin/POC
Complete	BR-014	A software product must not be deleted if it is referenced by a license.	UC06	
Valid? FCR/ADP	BR-015	An email must be sent to the Administrator to request the purchase of a software product that is not in the system.	UC07	
Store/Rental	BR-016	A software license must have a: - library flag	UC11	This is a preliminary field list.
Store/Rental	BR-017	A software license flagged as a library must have a: - check out date - check in date	UC11	This is a preliminary field list.
Store/Rental	BR-018	If a software product is included in a library it must have: - rental fee - rental period	UC11	
Complete	BR-019	A software license must only be associated to one software product.	UC11	
Complete	BR-020	If a license is assigned it must have an owner and a user.	UC11	Must have an owner, does not have to have a person or machine associated

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Status	Id#	Business Requirements	Origin/Source	Comments
Store/Rental	BR-022	A library license must only be associated to one software product.	UC11	
Store/Rental	BR-024	Instructions for install/uninstall must be provided for delivery types: TechDev Installer, Network Location, and Office Delivery (CSU).	UC11	This is a preliminary field list.
Valid? Returns allowed?	BR-025	System must credit the refund price to valid P/T for return of a software license.	UC15	
Store/Rental	BR-026	Software licenses flagged as a library license must use the Tech Dev install/uninstall.	UC18, UC19	
Store/Rental	BR-027	The total rental cost for a software license flagged as a library license shall be calculated by multiplying the rental fee times the number of rental periods of use.	UC19	Make sure data fields are defined for this calculation.
Profiles	BR-028	An organizational COE must be associated to an entity.	UC20	- department - center - project
Profiles	BR-029	An organizational COE must have a: - entity type - entity - title	UC22	This is a preliminary field list.
Profiles	BR-030	An email must be sent to the Administrator to request creation of an organizational COE.	UC22	
Profiles	BR-031	The COE PoC is responsible for the maintenance of the Organizational COE they are assigned to.	UC23, UC24	
Complete so far	BR-032	System must provide a variety of reports defined by project stakeholders.	Initial JAD session UC25	Current reporting on licenses in production; other reporting will be added as identified

Project Requirements for SAM

Status	Id#	System Requirements	Origin/Source	Comments
Complete	SR-001	System must leverage corporate resources for support. (i.e. CCHD, ARS, ECS, server maintenance, etc.)	Initial JAD session	Integrated with NWIS, bills to Oracle
Complete so far Store	SR-002	System must interface with Oracle for project/task verification.	Initial JAD session	current process verifies via NWIS; store may need separate capability, web service?
Complete	SR-003	System notifications must provide a link (URL) to the system.	Initial JAD session	
Valid?	SR-004	System must interface with Oracle to obtain contract information for all contract managed software products.	Requirements Meeting	
Complete	SR-005	System must identify machines by the surrogate key (SK) from NWIS.	Requirements Meeting	Integrated with NWIS
Complete so far Store	SR-006	System login will be restricted by Kerberos authentication.	UC01	Store will need
Complete	SR-007	System must verify deletion requests before deleting a record.	UC06	
Complete	SR-008	System must interface with NWIS for tracking of project/task charges and credits.	UC09, UC10, UC15, UC19, UC21	
Store	SR-009	System must pass P/T, total cost, and recovery activity to NWIS after P/T validation.	UC09, UC10, UC15, UC19, UC21	
Store	SR-010	System must generate an ARS ticket for the CSU if delivery type is Office Delivery.	UC09, UC16	
Complete	SR-011	If purchase made with Pcard or PO the system must track Pcard transaction number or PO number for purchase of a software license or an organizational COE.	UC09, UC21	User input, not required

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Status	Id#	System Requirements	Origin/Source	Comments
Valid?	SR-012	System must allow a License User to transfer a software license to another machine owned by the user. There are 2 kinds of transfers: - person transferring on their own equipment - person transferring to another person	UC16	Current system allows license admin/POC to transfer machines and/or users
Valid?	SR-013	System must allow License User to transfer his/her license to another User.	UC16	Current system allows license admin/POC to transfer licenses
Valid?	SR-014	System must obtain acceptance from a license recipient when a software license is transferred.	UC16	
Store/Rental	SR-015	Software licenses flagged as a library license must only be checked out to the machine it will be installed on.	UC18	
Store/Rental	SR-016	Software licenses flagged as a library license must only be checked in from the machine it was installed on.	UC19	
Store/Rental	SR-017	System must calculate rental cost when software licenses flagged as a library license are checked in.	UC19	
Store/Rental	SR-018	System must obtain a valid P/T when software licenses flagged as a library license are checked in.	UC19	

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Status	Id#	User Requirements	Origin/Source	Comments
Store	UR-001	System will contain a software product catalog.	Initial JAD session	Currently classify/search by category
Complete	UR-002	A group of users with specialized permissions called Administrators will be managed through RDA Delegation Assignment tool.	Initial JAD session	SAMS Administrators are managed via NWIS User Group, number is unlimited
Valid?	UR-003	A group of users with specialized permissions called Software PoC will be managed through software product records.	Initial JAD session	SAMS Administrators?
Valid? Profiles?	UR-004	A group of users with specialized permissions called COE PoC will be managed through organizational COE records.	Requirements Meeting	
Complete	UR-005	System must send notification to License User when any of their assigned machines becomes inactive.	Requirements Meeting	Notification is sent to License Admin/POC when inactive person or machine associated w/license
Complete	UR-006	A user of the SAM system must be able to search software.	UC02	
Store	UR-007	System must display to the user software products available for purchase from a software catalog.	UC02, UC08	
Valid?	UR-008	Software product descriptions must be searchable by key words.	UC02, UC08	Search by category?
Complete	UR-009	System must only allow Administrators to create a software product.	UC03	
Complete	UR-010	An Administrator must be able to create a software product.	UC03	
Valid?	UR-011	An Administrator must be able to clone a software product.	UC04	enter software only once, create versions and licenses
Valid?	UR-012	A Software PoC must be able to clone a software product.	UC04	enter software only once, create versions and licenses
Complete	UR-013	An Administrator must be able to update a software product.	UC05	

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Status	Id#	User Requirements	Origin/Source	Comments
Valid?	UR-014	A Software PoC must be able to update a software product.	UC05	Same as SAMS Administrators?
Complete	UR-015	An Administrator must be able to delete a software product.	UC06	when no versions or licenses exist for product
Valid?	UR-016	A Software PoC must be able to delete a software product.	UC06	Same as SAMS Administrators?
Store	UR-017	Any user of the SAM system must be able to request software product.	UC07	
Complete	UR-018	An Administrator must be able to search for a software license.	UC08	Anyone can search SAMS, also listed from Customer and Machine screens in NWIS
Complete	UR-019	A Software PoC must be able to search for a software license.	UC08	Anyone can search SAMS, also listed from Customer and Machine screens in NWIS
Store	UR-020	System must allow CSU Technician to purchase a software license.	UC09	
Store	UR-021	A user of the SAM system must be able to purchase a software license.	UC09	
Valid?	UR-022	System must allow the selection of software options when purchasing a software license.	UC09	
Store	UR-023	System must only display new price for software license when user is purchasing a software license.	UC09	
Store	UR-024	System must notify Software PoC if user attempts to purchase a software product that is controlled by the Software PoC.	UC09	
Store	UR-025	The purchase of a software license is handled by the Software PoC if it is for a software product which is controlled by a Software PoC.	UC09	
Store	UR-026	System must charge used price and maintenance cost when buying a used license if maintenance is required.	UC09	

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Status	Id#	User Requirements	Origin/Source	Comments
Store	UR-027	System must charge used price and allow option to renew maintenance cost when buying a used license if maintenance is NOT required.	UC10	
Store	UR-028	System must pass required values to NWIS for payment processing of software license purchase, renewal of software license maintenance, check-in of a library license, return of software license, or purchase of organizational COE.	UC09, UC10, UC19, UC21	
Store	UR-029	System must provide software installation instructions when a software license is purchased or transferred.	UC09, UC16, UC21	
Store	UR-030	System must generate ARS install ticket to CSU for specified software license purchased or transferred.	UC09, UC16, UC21	
Store	UR-031	System must display actual price after purchase confirmed.	UC09, UC21	
Complete	UR-032	System must email License User a notification of license expiring prior to software license expiration.	UC10	Currently goes to License Admin/POC
Complete	UR-033	System must notify License User 30 days prior to software maintenance expiration if license type is machine or user.	UC10	90 day notice currently goes to License Admin/POC
Complete	UR-034	System must notify License Owner 30 days prior to software maintenance expiration if license type is network.	UC10	90 day notice currently goes to License Admin/POC
Complete	UR-035	System must display previously charged P/T for software license maintenance renewal if P/T is still valid.	UC10	Displays last billed P/T
Valid?	UR-036	If maintenance is required and maintenance is not renewed, the software license must be returned.	UC10	Not all software "goes away" if maintenance is not renewed

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Status	Id#	User Requirements	Origin/Source	Comments
Complete	UR-037	A License User must be able to renew their software license maintenance, transfer or return their software license.	UC10, UC15, UC16	User can renew or surrender, License Admin/POC can transfer
Valid?	UR-038	A Software PoC must be able to create a software license.	UC11	Same as SAMS Administrator?
Complete	UR-039	An Administrator must be able to create a software license.	UC11	
Store/Rental	UR-040	An Administrator must be able to designate a library license.	UC11	
Store/Rental	UR-041	A Software PoC must be able to designate a library license.	UC11	
Valid?	UR-042	A Software PoC must be able to update a software license.	UC12	Same as SAMS Administrator?
Complete	UR-043	An Administrator must be able to update a software license.	UC12	
Complete	UR-044	An Administrator must be able to delete a software license.	UC13	if no people or machines are associated with license
Valid?	UR-045	A Software PoC must be able to delete a software license.	UC13	Same as SAMS Administrator?
Complete	UR-046	System must maintain a profile for each user which includes all licenses assigned to that user.	UC14	Report from SAMS or Customer screen
Complete	UR-047	A user of the SAM system must be able to view user profile.	UC14	
Complete	UR-048	User Profile must display all machines owned by a user and the software licenses installed on each machine.	UC14	Report from SAMS and Machine screens
Complete	UR-049	User Profile must display all software licenses assigned to a user even those not installed on a machine.	UC14	
Valid, Store?	UR-050	System must allow an Administrator, CSU Technician, or the License User to return a software license.	UC15	User can surrender

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Status	Id#	User Requirements	Origin/Source	Comments
Valid? Store	UR-051	System must allow Administrator and Software PoC to set a refund amount for a software license when it is returned.	UC15	
Complete	UR-052	A software license is returned to the Software PoC for redistribution if it is from a software product which is controlled by a Software PoC.	UC15	available seats are managed by license admin/POC
Store	UR-053	System must provide software uninstall instructions when a software license is returned or transferred.	UC15, UC16	
Store	UR-054	System must generate ARS uninstall ticket to CSU for specified software license returned or transferred.	UC15, UC16	
Complete	UR-055	System must allow Administrator, CSU Technician, Software PoC or License User to transfer a software license.	UC16	Administrators can transfer licenses
Valid?	UR-056	System must only allow the Software PoC to transfer a software license if it is from a software product which is controlled by the Software PoC.	UC16	
Valid?	UR-057	A License User can only request a transfer of their software license if it is not controlled by a Software PoC.	UC16	Users can surrender, transfer by Administrators
Valid?	UR-058	System must validate that the License Recipient receiving the transfer of the software license accepts the transfer.	UC16	
Store/Rental	UR-059	System will contain a library of software product licenses.	UC17	
Store/Rental	UR-060	A user of the SAM system must be able to view the library.	UC17	
Store/Rental	UR-061	A user of the SAM system must be able to check out a software license designated as a library license.	UC18	

Project Requirements for SAM

Status	Id#	User Requirements	Origin/Source	Comments
Store/Rental	UR-062	The License User who checked-out a library license must be able to check in a software license designated as a library license.	UC19	
Profiles	UR-063	A user of the SAM system must be able to search for an organizational COE.	UC20	
Profiles and Store	UR-064	A user of the SAM system must be able to purchase an organizational COE.	UC21	
Profiles and Store	UR-065	System must allow CSU Technician to purchase an organizational COE for a customer.	UC21	
Profiles and Store	UR-066	User must be able to select from the list of software licenses within an Organizational COE they choose to purchase.	UC21	
Profiles	UR-067	An Administrator must be able to create an organizational COE.	UC22	
Profiles	UR-068	An Administrator must be able to update an organizational COE.	UC23	
Profiles	UR-069	A COE PoC must be able to update an organizational COE.	UC23	
Profiles	UR-070	An Administrator must be able to delete an organizational COE.	UC24	
Profiles	UR-071	A COE PoC must be able to update an organizational COE.	UC24	
Complete so far	UR-072	System will provide reports only accessible by the system Administrators.	UC25	Reports accessible by anyone with access to NWIS
Complete so far	UR-073	System will provide reports only accessible by Software PoCs.	UC25	Reports accessible by anyone with access to NWIS
Complete so far	UR-074	System will provide reports only accessible by COE PoCs.	UC25	Reports accessible by anyone with access to NWIS
Valid?	UR-075	An Administrator must be able to delegate their role using the Roles & Delegation of Authority tool.	UC26	Not using RDA, using NWIS User Groups