

FSA Integration Program
United States Department of Education
Federal Student Aid



R 2.0 School Group Administration Design

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Revision History

Date	Version	Description	Author
12/08/2003	1.0	School Group Administration design based on requirements selected in scope for R2.0.	Brian Cannavan
12/31/2003	1.1	Updated for Deliverable 116.6.1	Steven Jarboe

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As-Is School Group Administration Process

- Per current system design, School Group Administration through the eZ-Audit application is not supported.
- School Group Administration is handled through a nightly feed from PEPS.
 - The School Group Locator becomes the first school in the PEPS School Group list.

To-Be School Group Administration Process

Search User Page

- When the ED Admin logs into eZ-Audit, the system will display the Search User Page.
- This page will continue to look the same as the current Search User page, with the exception of a new addition of a top navigation button that links to the Group Management Page.

School Group Management Page

- When the ED Admin selects the Group Management button on the top navigation, the system will display the School Group Management Page.
- This system will provide a way for the user to select a School Group to administer. This could be accomplished through a drop down list of all school groups in the system.
- The system will provide a way for the user to add a new group, edit an existing group, display an existing group, or delete an existing group. This could be accomplished through buttons on the page for each function: add, edit, display, and delete.

School Group Page (Editable)

Add mode

- When the ED Admin selects the “Add” button on the School Group Management Page, the system will display the Editable School Group Page in “Add” mode.
- The system will provide a way for the user to enter a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number. This could be accomplished through the following: name – text box, audit type – radio button, 2 year – checkbox, address – text boxes, and phone number – text box.
- The system will provide a way for the user to add an institution to the group. This could be accomplished through a text box to add the institution OPEID and a button that adds the institution to the group.
- The system will provide a way to view the institutions in the school group, as well as update the historical information of the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Previous Locator, Begin Date (text box), End Date (text box), and Fiscal Year End.
- The system will provide a way for the user to delete an institution from the group before the group is saved. This could be accomplished through a button next to the institution row in the institution table that deletes the institution from the table. This button is only available to institutions that have been added since the group was last saved (new institutions).
- The system will provide a way to return to the School Group Administration Page without saving any information. This could be accomplished through a button on the page for the function “cancel”.
- The system will provide a way to save the School Group Administration Page. This could be accomplished through a button on the page for the function “save”.
- All text boxes will be defaulted to be empty and all radio buttons and checkboxes will be defaulted to be unselected.
- The table displaying all institutions in the school group will be defaulted to empty.

Edit mode

- When the ED Admin selects the “Edit” button on the School Group Management Page, the system will display the Editable School Group Page in “Edit” mode for the School Group selected in the School Group drop down on the School Group Management Page.
- The system will provide a way for the user to enter a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number. This could be accomplished through the following: name – text box, audit type – radio button, 2 year – checkbox, address – text boxes, and phone number – text box.
- The system will provide a way to view previous Group Locators and Historical Group Names.
- The system will provide a way for the user to add an institution to the group. This could be accomplished through a text box to add the institution OPEID and a button that adds the institution to the group.
- The system will provide a way to view the institutions in the school group, as well as update the historical information of the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Begin Date (text box), End Date (text box), and Fiscal Year End.
- The system will provide a way for the user to delete an institution from the group before the group is saved. This could be accomplished through a button next to the institution row in the institution table that deletes the institution from the table. This button is only available to institutions that have been added since the group was last saved (new institutions).
- The system will provide a way for the user to remove an existing institution from the group. This could be accomplished through a button next to the institution row in the institution table that removes the institution from the group. This button is only available to institutions that have been in the group since the before the group was last saved (current institutions).
- The system will require an end date for an institution when removing the institution.
- The system will provide a way to return to the School Group Administration Page without saving any information. This could be accomplished through a button on the page for the function “cancel”.
- The system will provide a way to save the School Group Administration Page. This could be accomplished through a button on the page for the function “save”.
- The system will provide a way to reset the School Group back to the way it was after the group was last saved. This could be accomplished through a button on the page for the function “reset”.
- All data entry fields will be defaulted to the information for the school group selected in the dropdown box on the School Group Management Page.
- The table displaying all institutions in the school group will be defaulted to the institutions in the school group selected in the dropdown box on the School Group Management Page.

School Group Page (Read Only)

Display Mode

- When the ED Admin selects the “Display” button on the School Group Management Page, the system will display the Editable School Group Page in “Display” mode for the School Group selected in the School Group drop down on the School Group Management Page.

- The system will provide a way for the user to view a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number.
- The system will provide a way to view the institutions in the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Begin Date, End Date, and Fiscal Year End.
- The system will provide a way to view previous Group Locators and Historical Group Names.
- The system will provide a way to return to the School Group Administration Page. This could be accomplished through a button on the page for the function “return”.
- The system will provide a way to edit the School Group Administration Page. This could be accomplished through a button on the page for the function “edit”.
- All data entry fields will be defaulted to the information for the school group selected in the dropdown box on the School Group Management Page.
- The table displaying all institutions in the school group will be defaulted to the institutions in the school group selected in the dropdown box on the School Group Management Page.

Delete Mode

- When the ED Admin selects the “Delete” button on the School Group Management Page, the system will display the Editable School Group Page in “Delete” mode for the School Group selected in the School Group drop down on the School Group Management Page.
- The system will provide a way for the user to view a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number.
- The system will provide a way to view previous Group Locators and Historical Group Names.
- The system will provide a way to view the institutions in the school group, as well as update the historical information (end date) of the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Begin Date, End Date (text box), and Fiscal Year End.
- The system will provide a way to return to the School Group Administration Page. This could be accomplished through a button on the page for the function “cancel”.
- The system will provide a way to delete the School Group Administration Page. This could be accomplished through a button on the page for the function “delete”.
- The system will require End Dates for all institutions in a School Group when deleting the School Group.
- All data entry fields will be defaulted to the information for the school group selected in the dropdown box on the School Group Management Page.
- The table displaying all institutions in the school group will be defaulted to the institutions in the school group selected in the dropdown box on the School Group Management Page.
- The system will provide an ED Admin User the ability to view School Groups that have been deleted.

Add Mode

- When the ED Admin selects the “Save” button on the Editable School Group Page in “Add Mode”, the system will display the Editable School Group Page in “Add” mode for the School Group the user is adding.

- The system will provide a way for the user to view a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number.
- The system will provide a way to view previous Group Locators and Historical Group Names.
- The system will provide a way to view the institutions in the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Begin Date, End Date, and Fiscal Year End.
- The system will provide a way to accept the School Group and return to the School Group Administration Page. This could be accomplished through a button on the page for the function "accept".
- The system will provide a way to edit the School Group Administration Page. This could be accomplished through a button on the page for the function "edit".
- All data entry fields will be defaulted to the information for the School Group the user is adding.
- The table displaying all institutions in the school group will be defaulted to the institutions in the School Group the user is adding.

Edit Mode

- When the ED Admin selects the "Save" button on the Editable School Group Page in "Edit Mode", the system will display the Editable School Group Page in "Edit" mode for the School Group the user is editing.
- The system will provide a way for the user to view a name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number.
- The system will provide a way to view previous Group Locators and Historical Group Names.
- The system will provide a way to view the institutions in the school group. This could be accomplished through a table drawn on the screen which includes the following columns: OPEID, Institution Name, Locator indicator, Begin Date, End Date, and Fiscal Year End.
- The system will provide a way to accept the School Group and return to the School Group Administration Page. This could be accomplished through a button on the page for the function "accept".
- The system will provide a way to edit the School Group Administration Page. This could be accomplished through a button on the page for the function "edit".
- All data entry fields will be defaulted to the information for the School Group the user is editing.
- The table displaying all institutions in the school group will be defaulted to the institutions in the School Group the user is editing.

Special Requirements

- The system will require that at least 2 institutions be in a group in order for the group to be saved.
- The system will require that a School Group Name must be unique.
- The system will require a School Group Name, Type, Address, and Phone Number when editing or adding a School Group.
- The system will require a Begin Date when adding an Institution to a School Group.
- The system will not allow an OPEID to be in more than one group.
- The system will require a Locator Institution to be selected before a School Group can be saved.