

eZ-Audit
Use-Case Specification 34: School Group Administration

Version 1.0

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Revision History

Date	Version	Description	Author
January 13, 2004	1.0	Initial version created to incorporate requirements for Release 2.0	Kevin Rowland

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Use-Case Specification 34: School Group Administration

1. School Group Administration

1.1 Brief Description

The purpose of this Use-Case is to outline the process by which an ED Administrator will manage School Groups. They will have the ability to add new School Groups, view and edit existing records, and remove School Groups. The Basic Flow outlines the process for adding a new School Group.

2. Flow of Events

2.1 Basic Flow

1) ED Admin logs into the system

The System verifies the User's role of "ED Admin" through the Login Process. See Extension Point - Use Case 3 "Login to System" for details of the Login Process.

2) System presents a Search User page to the user

The system presents a page to the user that allows for search capabilities. A top navigation button will be included on this page that allows the user to link to the Group Management Page.

3) ED Admin selects the Group Management Page link

The ED Admin selects the Group Management Page link from the top navigation on the Search User Page.

4) Group Management Page is displayed

The system displays the School Group Management page. A drop down list of all the School Groups that already exist is provided. The user will be given functionalities (add, edit, display, and delete) that are accessible to perform. This will be accomplished by buttons on the bottom of the page for each function.

5) User chooses to create a School Group

The ED Admin selects the "add" button from the bottom of the Group Management Page.

6) The "Add" mode is displayed

The system displays the School Group Page in "Add" mode. The system will provide the user a means to enter the following School Group information via the listed medium:

- Name – text box
- Audit Type (consolidated or unconsolidated) – radio buttons
- 2 year option – checkbox
- Address – text boxes
- Phone number – text box

Also displayed on the page will be an area that will capture the OPEID of institutions that the user wishes to add to the created School Group. Along with this area will be a unpopulated table which will hold information pertaining to the members of the School Group.

Notes: All text boxes will be defaulted to be empty; all radio buttons and checkboxes will be defaulted to be unselected

7) The user adds an institution to the School Group with its associated information

The system will provide a text box to add the desired institution OPEID and a button that adds the institution to the group. This "add entry" button when selected submits the entered School Group

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information along with the added institution which is identified by the entered OPEID.

8) School Group is displayed with added institutions

The “Add” mode will display the School Group information as entered before in an editable form. Below this information, the system will provide a table that will allow the users to view all the added institutions in the selected School Group. The table shown on the screen should include the following columns:

- OPEID
- Institution Name
- Locator
- Begin Date
- End Date
- Fiscal Year End

The Locator can be indicated by a radio button corresponding to each institution. Also for each institution, the begin date will be presented via a text box. Next to each institution entry a delete option will be provided via a button. At the bottom of the page the user will be given the option to “save” the entered information or to “cancel” from the current mode of the School Group Administration via buttons.

Note: The table displaying all institutions in the school group will be defaulted to empty.

9) ED Admin enters the date of entry that corresponds to the new institution

With each new institution that is generated in the School Group table displayed on the page, a column will be provided that is labeled “Begin Date.” For each new institution row a text box will be provided so the ED Admin will have the ability to enter the date of the new addition.

Note: The “Begin Date” text box will be defaulted as empty.

10) User selects to save the new School Group

The system will provide a save function on the page through a button. The entered School Group information is temporarily stored by the system but needs confirmation before the School Group information is finalized.

11) User is given confirmation option

The system displays a confirmation page to the user. This page will contain the information that was entered and saved in the “Add” mode and will be displayed in a read-only format. The user will be given the option to “accept” or “edit” the presented information by means of buttons.

12) ED Admin accepts the changes made to the School Group

The ED Admin will be giving the option to accept the information displayed describing the School Group. By selecting an “accept” button, the School Group information as shown will be stored into the eZ-Audit system.

2.2 Alternative Flows

2.2.1 Delete new institutions

*Steps 1-8 are the same as the Basic Flow

9) ED Admin deletes an institution before saving

The system will provide a way to delete each new institution, a member that has been added to the School Group since the last time the group was saved. A “delete” button next to each new institution row in the generated School Group table will be provided. By selecting this button, the user will have the ability to

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remove the new member from the table and consequently from the School Group.

10) The user selects the delete option

The user selects the provided “delete” button to remove an institution that has been added since the last time the School Group has been saved.

11) “Add” mode page is updated and displayed

The “Add” mode page is updated and redisplayed as describe in item 8 without the information pertaining to the deleted institution.

12) User selects to save the new School Group

The system will provide a save function on the page through a button. The entered School Group information is temporarily stored by the system but needs confirmation before the School Group information is finalized.

13) User is given confirmation option

The system displays a confirmation page to the user. This page will contain the information that was entered and saved in the “Add” mode and will be displayed in a read-only format. The user will be given the option to “accept” or “edit” the presented information by means of buttons.

14) ED Admin accepts the changes made to the School Group

The ED Admin will be giving the option to accept the information displayed describing the School Group. By selecting an “accept” button, the School Group information as shown will be stored into the eZ-Audit system.

2.2.2 *Selected School Group is edited*

*Steps 1 - 4 are the same as the Basic Flow

5) Ed Admin chooses to edit an existing School Group

The ED Admin selects a School Group from the provided drop down list. The ED Admin then selects the “edit” button.

6) The “Edit” mode is displayed

The system will display the Editable School Group Page in “Edit” mode. The system will populate existing school information in an editable form via the listed medium:

- Name – text box
- Audit Type (consolidated or unconsolidated) – radio buttons
- 2 year option – checkbox
- Address – text boxes
- Phone number – text box

The system will also provide a table that will allow the users to view the institutions in the selected School Group. The table shown on the screen should include the following columns:

- OPEID
- Institution Name
- Locator
- Begin Date
- End Date
- Fiscal Year End

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The Locator can be indicated by a radio button corresponding to each institution. Next to each institution displayed in the table, the user will be given the option to “remove” that member from the School Group by way of a button. Also, the system will provide buttons at the bottom of the page that will allow the user the following options: “save”; “cancel”; or “reset”.

7) ED Admin adds an institution to the existing School Group

The system will provide the user with a text box to add a desired institution OPEID and a button that adds the institution to the group. This “add entry” button when selected will populate a table with the existing School Group information.

8) The system is updated and the “Edit” mode page is redisplayed

The system displays the “Edit” mode page as describe before with the new institution included in the display table. The user will now have an updated view of the School Group with the institution name, fiscal year end, begin/end date, and OPEID of the new institution included. The added institution, along with any other members added to the School Group since the last time it was saved, will have a “delete” option next to its institution row in the display table. This function gives the user an option to remove the new member. Also for each institution, the begin date will be presented via a text box.

9) ED Admin enters the date of entry that corresponds to the new institution

With each new institution that is generated in the School Group table displayed on the page, a column will be provided that is labeled “Begin Date.” For each new institution row a text box will be provided so the ED Admin will have the ability to enter the date of the new addition.

Note: The “Begin Date” text box will be defaulted as empty.

10) The user selects the delete option

The user selects the provided “delete” button to remove an institution that has been added since the last time the School Group has been saved.

11) The system is updated and the “Edit” mode page is redisplayed

The “Edit” mode page is updated and redisplayed as describe in item 6 without the information pertaining to the deleted institution.

12) ED Admin enters end date for an institution in preparation for removal

Before removal, the user will have to enter the removal date of the institution from the School Group. This will be done via a text box found in a column of the display table labeled “End Date.” With the end date entered the user can proceed with the removal process.

Note: The “End Date” text box will be defaulted as empty.

13) The user selects remove option

The system will provide a “remove” button that corresponds to each existing institution, added to the system prior to the last time the School Group was saved. When the ED Admin selects the “remove” button, the institution will be deleted from the School Group.

14) The system is updated and the “Edit” mode page is redisplayed

The display table will be repopulated with all of the current institutions as well as all of the historical institutions. The deleted schools will be listed in a read-only format with a begin date, end date and other corresponding information provided. The rest of the “Edit” mode page is displayed as described in item 6.

15) User selects to save the changes made to the School Group

The system will provide a save function on the page through a button. The entered School Group

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information is temporarily stored by the system but needs confirmation before the School Group information is finalized.

16) User is given confirmation option

The system displays a confirmation page to the user. This page will contain the information that was entered and saved in the “Add” mode and will be displayed in a read-only format. The user will be given the option to “accept” or “edit” the presented information by means of buttons.

17) ED Admin accepts the changes made to the School Group

The ED Admin will be giving the option to accept the information displayed describing the School Group. By selecting an “accept” button, the School Group information as shown will be stored into the eZ-Audit system.

2.2.3 *Selected School Group is displayed*

*Steps 1 – 4 are the same as the Basic Flow

5) Ed Admin chooses to view an existing School Group

The ED Admin selects a School Group from the provided drop down list. The ED Admin then selects the “display” button.

6) The “Display” mode is displayed

The system will provide a view of the name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number of the selected School Group. The system will also provide a table to view institutions from he selected School Group. The table shown on the screen should include the following columns:

- OPEID
- Institution Name
- Locator indicator
- Begin Date
- End Date
- Fiscal Year End

All existing information will be provided in the display table and the locator of the School Group will be marked. Also, all information provided in this mode will be of read-only format.

7) User returns back to the School Group Management Page

The ED Admin will be giving the option to return back to the School Group Management Page. By selecting a “return” button, the user will return back to the School Group Management without changing the existing information about the selected School Group.

2.2.3 *Selected School Group is deleted*

*Steps 1 – 4 are the same as the Basic Flow

5) Ed Admin chooses to delete an existing School Group

The ED Admin selects a School Group from the provided drop down list. The ED Admin then selects the “delete” button.

6) The “Delete” mode is displayed

The system will provide a view of the name, audit type (consolidated or unconsolidated), 2 year option, address, and phone number of the selected School Group. The system will also provide a table to view institutions from he selected School Group. The table shown on the screen should include the following

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columns:

- OPEID
- Institution Name
- Locator indicator
- Begin Date
- End Date
- Fiscal Year End

All existing information will be provided in the display table and the locator of the School Group will be marked. Also, all information provided in this mode will be of read-only format.

7) ED Admin enters end date for all active institution in preparation for deletion

Before deletion, the user will have to enter the removal date of the institution from the School Group. This will be done via a text box found in a column of the display table labeled "End Date." With the end date entered the user can proceed with the removal process.

Note: The "End Date" text box will be defaulted as empty.

8) User deletes the entire School Group

The system will provide a "delete" button that corresponds to the entire School Group, historical and active institutions. With all corresponding end dates entered and the "delete" button selected the School Group will be removed from the eZ-Audit system.

3. Special Requirements

3.1 Required Fields

The following fields are required when editing or adding an institution:

- School Name text box
- Audit Type radio button (consolidated or unconsolidated)
- School Street Address text box
- School City text box
- School State text box
- School Zip text box
- Locator indicator radio button

3.2 School Group Name must be Unique

Upon the user selecting "Save" in the "Add" and "Edit" mode, the system requires a School Group name to be entered. The system will also require for this name to be unique, different then any existing School Groups in the eZ-Audit system.

3.3 System Prevention of Duplicate OPEIDs

When an institution is being added via the "add entry" button in the "Add" or "Edit" mode, the system will check the uniqueness of the OPEID. This identification number must be unique to not only the selected School Group but all School Groups in the entire eZ-Audit system. This error check should prevent two entries associated with the same OPEID to exist in the system.

3.4 Begin Date required for all new Institutions

When an institution is being added via the "add entry" button in the "Add" or "Edit" mode, the system will require a begin date. The updated School Group with new institutions will not be allowed to save until a begin date will entered for each new member.

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3.5 Minimum Institutions per School Group

At no time will a School Group be allowed to exist in the system without consisting of at least 2 institutions. When adding or editing a School Group, the group will not be allowed to save without two members.

3.6 End Date required for all deleted Institutions

An institution can be removed from the system via the “Edit” mode or via the “Delete” mode of the School Group Management. In both cases, all institutions must have a corresponding termination date, “End Date”, before being deleted/removed from the School Group or from the system.

3.7 Cancel Function

If a user selects the “Cancel” option at any time during the Basic or Alternative flow, the system will return to the School Group Administration Page without saving any information. This button is found in the “Edit”, “Delete”, and “Add” mode of School Group management system.

3.8 Edit Function

If a user selects the “Edit” option at any time during the “Add” or “Display” mode, the system will link to the “Edit” mode. This optional link will be provided to the user via an “edit” button contained in each mode at the bottom of the page. Once in the “Edit” mode, the user will have access to an editable document which is outlined in Alternative Flow 2.2.2.

3.9 Reset Function

Within the “Edit” mode, the user will have access to a reset function. This will be provided via a “reset” button. When the user selects the button, all changes made during this current session will be negated. The information associated with the selected School Group will then be of the same form as the last time the group was saved.

4. Preconditions

4.1 ED Admin user assigned System Role of “ED Admin”

The User’s profile was created/saved as the ED Admin Role in the User Management Area of eZ-Audit.

5. Post conditions

5.1 School Group information stored in eZ-Audit system

After School Group Administration has managed the information pertaining to the institutions classified as School Groups by eZ-Audit, the information is stored in the system database. The School Group Information is then available to other eZ-Audit modules, like the School Group design module.

6. Extension Points

6.1 Use Case 3 “Login to System”

Outlines eZ-Audit User’s ability to sign in to the system.

7. Requirements

7.1 Release 2.0 Requirements

R20316 The system will allow an ED Admin/School Group Manager to set up a school group as a “Two Year” group.

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- R20317** The system will maintain historical School Group information, including the following: End Dates, Previous Locators, Historical Group Name.
- R20318** The system will provide an ED Admin User the ability to manage School Group information.
- R20319** The system will allow an ED Admin User to add institutions to a School Group.
- R20320** The system will allow an ED Admin User to remove institutions to a School Group.
- R20321** The system will allow an ED Admin User to enter/update institutions to a School Group Name
- R20322** The system will allow an ED Admin User to enter/update institutions to a School Group Locator.
- R20323** The system will allow an ED Admin User to enter/update institutions to a School Group Type.
- R20324** The system will allow an ED Admin User to enter/update institutions to a School Group Address.
- R20325** The system will allow an ED Admin User to enter/update institutions to a School Group Phone Number.
- R20326** The system will require a name, type, address, and phone number for all School Groups.
- R20327** The system will maintain the Begin Date for an institution in a School Group.
- R20328** The system will display the following information for all institutions in a School Group, OPEID, Institution Name, Locator indicator, Begin Date, End Date, and Fiscal Year End.
- R20329** They system will require that at least 2 institutions be in a group in order for the group to be saved.
- R20334** The system will require an End Date when removing an institution form a School Group.
- R20330** The system will require a locator institution to be selected in a School Group before the group can be saved.
- R20331** The system will require that a School Group Name must be unique.
- R20332** The system will not allow an OPEID to be in more than one group.
- R20333** The system will require a Begin Date when adding an institution to a School Group.
- R20335** The system will require End Dates for all institutions in a School Group when deleting the School Group.
- R20336** The system will provide an ED Admin User the ability to view School Groups that have been deleted.