

Form Buster Project Plan

Project Members

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Faculty Sponsor

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Client

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Meeting(s) with the client for developing this plan

[1/11/19 4:00 PM - 5:00 PM]

Goals & Motivations

Form Buster's main goal is to make the forms submission and forms approval process digital. The issues that arise from the manual process is that students do not know the status of the form (such as who has signed the document, if it has been approved, or if it's been lost in transit), which faculty members need to sign the document, and when to find a good time to visit the faculty member. In addition to this, Form Buster will aim to render the registration advising process between the faculty advisor and the student verifiable.

Approach/Key features

A student coordinator may enter in the student's name and search for a student's record; this record will contain a list of the student's pending, approved and declined forms. A student coordinator will also be able to start a form for a student and non prefilled information may be entered in by the student coordinator.

A student may start a form, fill in any non pre-filled information, and sign and submit the form for approval(s). If a form has been started by a faculty member or a student coordinator, the student will be notified by email, and will be able to add information to the form, sign and submit the form for approval(s). The student will receive email tracking notifications when the form has been signed by a staff member, a reason for the form to be declined, or a notification of approval; the student may also view the status of a form in their account, in addition to completed forms marked as approved or declined. If a faculty member has not made a decision (approval or

disapproval with reason), the student will be given the option to pick a different faculty member to have sign the document instead, the student will also be given this option when a form gives the option for a student to get approval from any faculty member, or if the faculty member is on vacation.

A faculty member may do the same tasks as a student coordinator. In addition to these, the appropriate faculty member will receive a notification when a student has submit a form for approval. The faculty member can then decide if he'd like to sign and submit the form, or if he'd like to decline and provide a reason. If the faculty member has not made a decision within a day of any forms, the faculty member will receive a daily email notification to remind them of their pending forms, which can also be viewed in their account.

An office/person designated as the final action for an approved form (such as the Registrar), will be notified by email when a document has received its final approval. The office/person will also receive an action list, which can be viewed from their account. Like others, the office/person may look up the student by name to view a list of pending and completed forms.

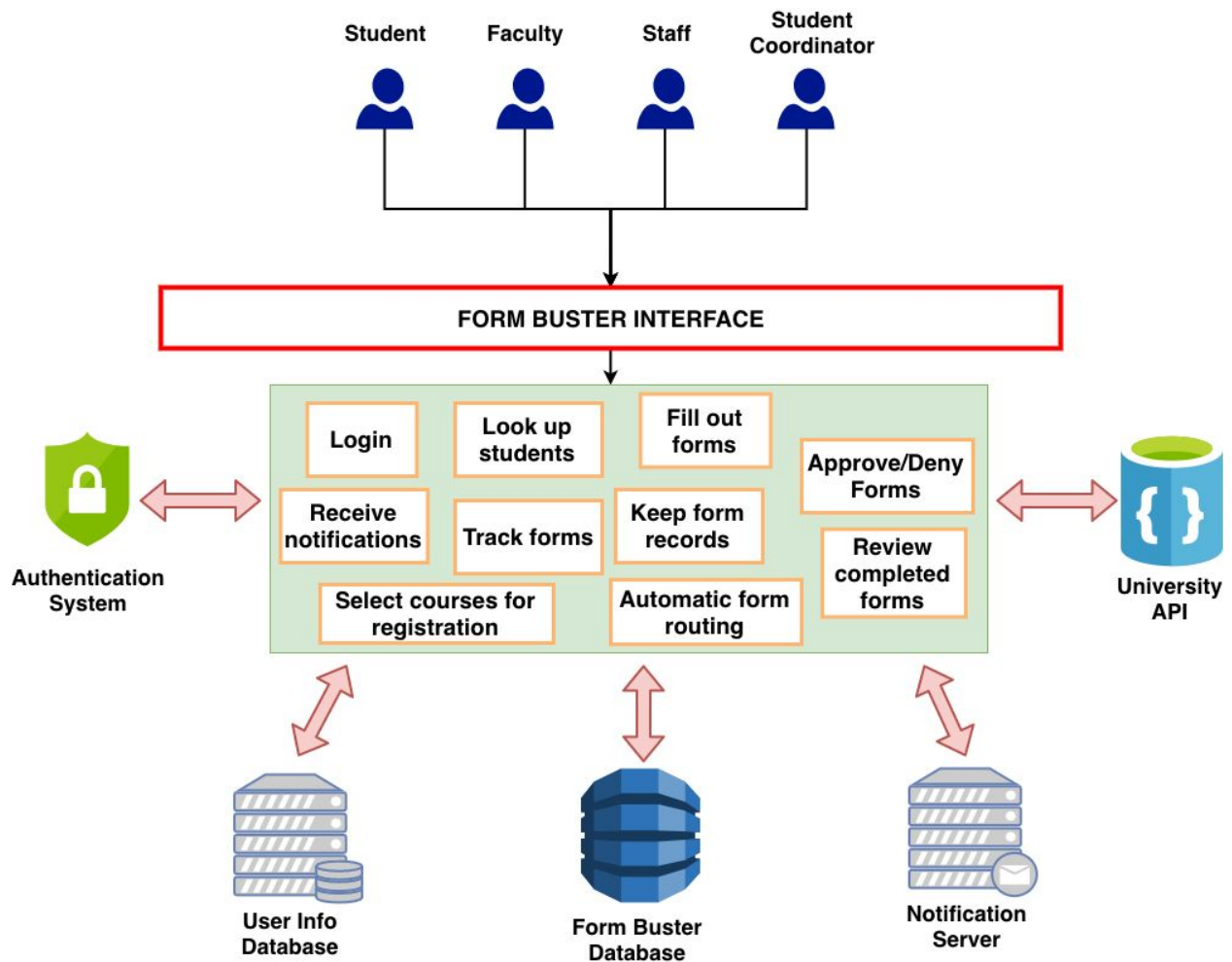
Novel Functionalities

Form Buster aims to completely digitalize the current form submission and management process. The system will bring a tracking feature that will allow users to check the status of their forms as they travel to the different persons/offices who need to sign them. Said forms will be partially kept in the database, so that any problems that may occur with someone's graduation (i.e. taking the wrong class) will be trackable; the forms themselves won't be in the database, only the information filled in by the users. The system will also facilitate students in getting ready to register for upcoming semesters ("flipping the flag" or verification of advising). Student coordinators and faculty members alike will be able to start forms on behalf of students. Lastly, the system will use a digital signature, which means logging in the system itself will represent the authentication for a particular user.

Technical Challenges

At this moment, we couldn't identify any technical challenges.

Design



Progress Summary

Module/Feature	Completion %	To do
pseudo-PAWS	100%	None.
Student records look-up	100%	None.
pseudo-TRACKS	90%	Redirection based on user role
Overall user interface	90%	Distinctive colors for each user role, different look for tracking status, relocation of menus.
Form Buster database	100%	None.

Student coordinator perspective	90%	Start a form for student, switch over to an action-centric dashboard.
Student perspective	80%	Search for courses instead of entering CRNs, Saving drafts for later.
Notifications	50%	Email notifications.
Faculty perspective	25%	Dashboard and completed forms, make decision on forms, switch over to an action-centric dashboard, generate PIN feature.
Staff perspective	30%	Dashboard and completed forms, mark forms as processed/not processed, create and retire forms, switch over to an action-centric dashboard.

Milestone 4 (Feb 11):

- Improve dashboards to be action-centric
- Retrieve and offer courses for registration from the API
- Implement Faculty and Staff dashboards
- Implement Faculty approval
- Implement “Start a Form” from a student coordinator perspective

Milestone 5 (Mar 18):

- Complete authorization system’s (roles and redirection) front-end and backend
- Implement the tracking feature visual component (progress bar)
- Implement Staff’s review of forms (mark forms as processed/not processed)
- Implement “My History” lists for Faculty and Staff
- Make poster for showcase

Milestone 6 (Apr 15):

- Implement and test security of the databases
- Implement Create/Retire forms for Staff
- Test/demo of the entire system

- Create user manual
- Create demo video

Task Matrix for Milestone 4

Task	Raphael	Grace	McNels
1. Improve dashboards to be action-centric	33%	33%	33%
2. Retrieve and offer courses for registration from the API	33%	33%	33%
3. Implement Faculty dashboard	33%	33%	33%
4. Implement Faculty approval	33%	33%	33%
5. Implement “Start a Form” from a student coordinator perspective	33%	33%	33%

Description of each planned task for the Milestone 4:

- ❖ **Task 1:** Currently when a student coordinator, staff or faculty wants to perform an action, they must search for the student first, then selection what action they would like to perform for the student. To switch to an action centric method, we will have the actions that each role may perform on their respective dashboard, then they will be allowed to search for the student they would like to perform that action for (i.e starting a form, or viewing a student’s form history).
- ❖ **Task 2:** This is to improve the student registration experience when it comes to register for classes. Instead of looking the classes up beforehand and taking note of CRNs and meeting times, students can search for a course using intuitive keywords (such as the course’s CRN, title, or department) while undergoing the form submission process. We will be using the courses API provided by FIT.
- ❖ **Task 3:** This is to help Faculty members visualize the forms filled out by students. Their dashboard will display a list of all student submitted forms that are pending a decision from that particular faculty member.
- ❖ **Task 4:** This enables Faculty members to either approve or decline forms and provide a reason if they declined. Upon approval, the form will move to its next destination, which may be another faculty member, or a staff member, and upon the staff’s decisions, the form will be moved to history.

- ❖ **Task 5:** This enables Student coordinators to start a form on behalf of the students and send it to a student to complete, if needed, or to submit.

Approval from Faculty Sponsor

"I have discussed with the team and approve this project plan. I will evaluate the progress and assign a grade for each of the three milestones."

Signature: _____ Date: _____