



Cos 301
Post-Doctoral Application Management
System

Vision and scope document

October 18, 2014

Version 0.0

Iteration 1

Prepared for Ms. Cathy Sandis (UP Research Office)
by SoftServe Group

Group members

Kgothatso Phatedi Alfred Ngako (12236731)

Tokoloko “Carlo” Machaba (12078027)

Mathys Ellis (12019837)

| Change log | | | |
|------------|---------|--|---------------|
| Date | Version | Description | Person |
| 10/02/2014 | v 0.0 | Document created | Mathys Ellis |
| 02/03/2014 | v 0.1 | Added to glossary | Mathys Ellis |
| 04/03/2014 | v 0.2 | Added Integration requirements, Architecture constraints, Functional requirements introduction | Alfred Ngako |
| 05/03/2014 | v 0.3 | Added Introduction, Vision, Background, Access Channel requirements | Carlo Machaba |
| 06/03/2014 | v 0.4 | Added domain objects, open issues. Modified some sections | Alfred Ngako |
| 06/03/2014 | v 0.5 | Added quality requirements, methodology, scope and limitations | Mathys Ellis |
| 08/03/2014 | v 0.6 | Added some wrapping to the change log which is now a table | Alfred Ngako |
| 11/03/2014 | v 0.7 | Added more functional requirements which relate more to the use case diagrams | Alfred Ngako |
| 16/03/2014 | v 0.8 | Added domain objects data relation diagrams | Alfred Ngako |
| 16/03/2014 | v 0.8 | Added some preconditions and did some formatting | Mathys Ellis |
| 17/03/2014 | v 0.8 | Added rest of preconditions and all the post-conditions. Also added to the glossary | Mathys Ellis |
| 20/03/2014 | v 0.9 | Updated the domain objects diagram | Mathys Ellis |
| 20/03/2014 | v 0.9 | Updated the domain objects plus diagram | Alfred Ngako |
| 20/03/2014 | v 0.9 | Updated the use case prioritizaion | Alfred Ngako |

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1 Introduction

Thank you for using the Post Doctoral Management System. The product is being developed using the process of software engineering according the IEEE standards and will be released as version 1 in the coming months.

The current version is being released to get user input from the stakeholders so that improvements can be made to the product.

2 What is a Post Doctoral Management System?

The Post Doctoral Management System makes the management of the prospective and renewal application processes of Post-Doctoral fellowships, from start to end, more effective, intractable, reliable, secure and audit-able. And also provide the necessary auxiliary services to support the application process and make use of its data. The system makes use of a centralised user friendly web interface that will be used by the all the stakeholders involved in the various processes. The system hosts various sections that handle the different stages in the work-flow of the processes. The system automates the transitions between stages by forwarding the required information to the next stakeholder in the process and notifying them via an email notification or equivalent. The system will also need to provide reporting facilities for the application and person information stored by the system. As well as progress tracking with regards to any application. The system data is centralised to ensure that any information used by system is cohesive and valid for any stakeholder who accesses it. The system also allows for the recreation of existing data with regards to applications, people and locations, which act as importing facilities.

3 Post Doctoral Management System for End Users

The system is designed in such a way that it is accessible over any device that has access to the Internet via a web browser, whether over a computer, tablet or mobile phone. Once the user has accessed the system, it is simple for non-technical users to figure out how to navigate through the web application.

The system has a number of functions which are available to the end users depending on their security roles. Here is a list of all the functionality included in the system currently:

- Application Management Services
- Notification Services
- Announcements
- User Account Management Services

- Location Services
- Meeting Management Services

and many more functions within the above mentioned functions.

4 Objectives of the User Manual

The objectives of the User Manual are to:

- Provide instructions on how to access the system
- Provide instructions on how to navigate through the system

This is not a Technical Manual in that we do not go in depth on the processes followed by each stakeholder and the various roles they perform through the process. It is expected that each stakeholder knows their role beforehand.

5 Getting Started

The Post Doctoral Management System has been developed in a simple and understandable way. New users should not have any trouble using the system as it follows the standards that have been set in industry.

6 System Requirements

The system will run on the following web browsers and their mobile counterparts

1. Mozilla Firefox 20+
2. Google Chrome 30+
3. Microsoft Internet Explorer 9+
4. Apple Safari
5. Opera

7 Creating a User Account(Prospective Fellows)

This process is as simple as filling the form, once that is done an email will be sent to verify your details and to authenticate you are the user

The screenshot shows a web form titled "Prospective fellow user account creation" with a red header bar. Below the title, a grey bar contains the instruction "Please complete the fields below". The form is divided into two sections: "Person information" and "Residential address". The "Person information" section contains the following fields: "Title:" (a dropdown menu with "Mr." selected), "Full name:", "Surname:", "Email:", "Password:", "Re-Type Password:", "Telephone number:", "Work phone number:", "Fax number:", "Cellphone number:", and "Are you an UP employee:" (a checkbox). The "Residential address" section is partially visible at the bottom.

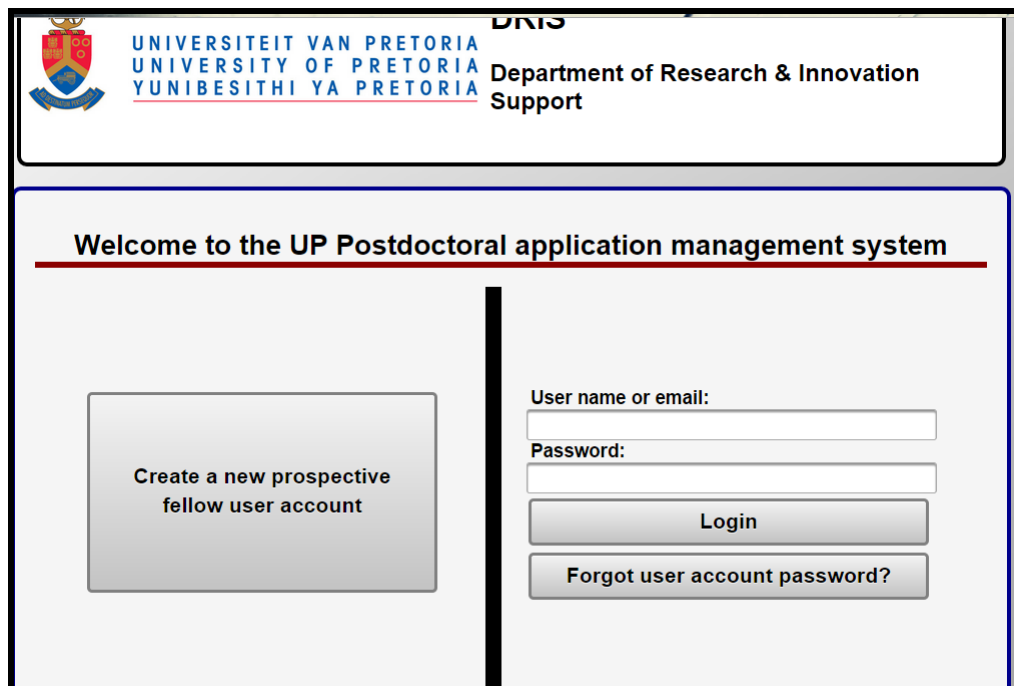
| Person information | |
|-------------------------|--------------------------|
| Title: | Mr. |
| Full name: | |
| Surname: | |
| Email: | |
| Password: | |
| Re-Type Password: | |
| Telephone number: | |
| Work phone number: | |
| Fax number: | |
| Cellphone number: | |
| Are you an UP employee: | <input type="checkbox"/> |

| Residential address | |
|---------------------|--|
|---------------------|--|

Figure 1: Creating a User Account

8 Logging on to the System

Enter your user name and password



The screenshot shows the login interface for the UP Postdoctoral application management system. At the top, there is a header bar containing the University of Pretoria logo and name in three languages (Afrikaans, English, and Zulu), along with the acronym 'DRIS' and the text 'Department of Research & Innovation Support'. Below the header, a red horizontal line separates the title 'Welcome to the UP Postdoctoral application management system'. The main content area is divided into two sections by a vertical black line. On the left, there is a button labeled 'Create a new prospective fellow user account'. On the right, there is a login form with two input fields: 'User name or email:' and 'Password:'. Below these fields are two buttons: 'Login' and 'Forgot user account password?'.

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

DRIS
Department of Research & Innovation Support

Welcome to the UP Postdoctoral application management system

Create a new prospective fellow user account

User name or email:
Password:

Login

Forgot user account password?

Figure 2: Login

9 Main Menu

This is the main menu, depending on your security role you will see different items, double click to enter the service you want to use

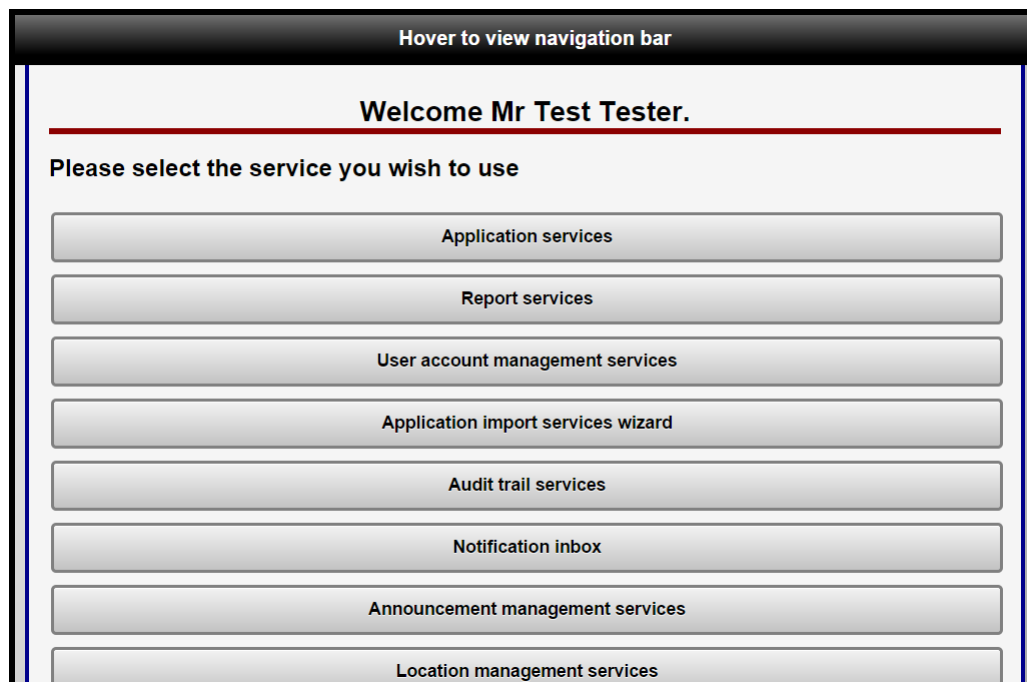
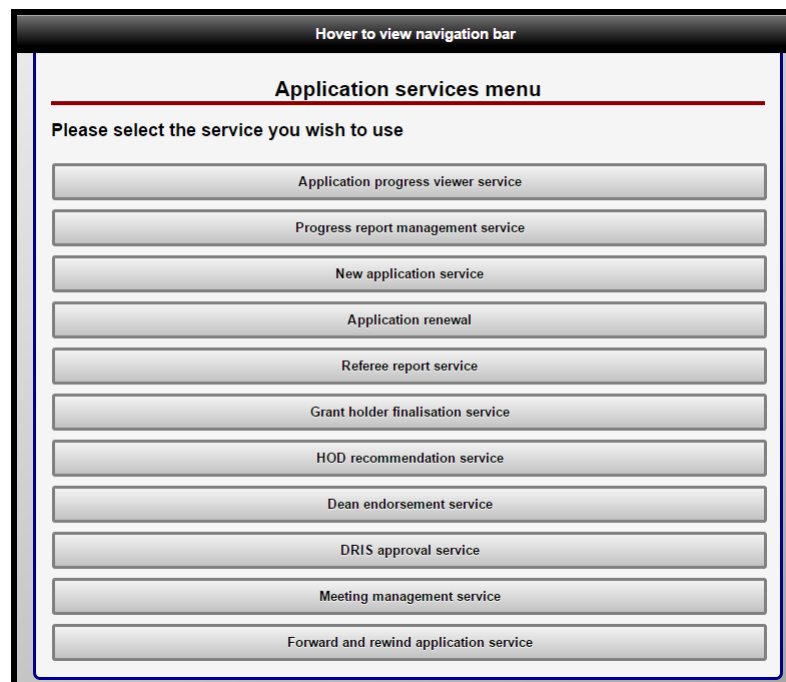


Figure 3: Main Menu

10 Application Services

This is the application service menu, depending on your security role you will see different items, double click to enter the service you want



The screenshot shows a web application interface for selecting services. At the top, a black bar contains the text "Hover to view navigation bar". Below this, a red horizontal line separates the header "Application services menu" from the main content area. The main content area has a light gray background and contains the instruction "Please select the service you wish to use". Below this instruction is a vertical list of twelve buttons, each with a light gray background and a thin black border. The buttons are labeled as follows: "Application progress viewer service", "Progress report management service", "New application service", "Application renewal", "Referee report service", "Grant holder finalisation service", "HOD recommendation service", "Dean endorsement service", "DRIS approval service", "Meeting management service", and "Forward and rewind application service".

Hover to view navigation bar

Application services menu

Please select the service you wish to use

- Application progress viewer service
- Progress report management service
- New application service
- Application renewal
- Referee report service
- Grant holder finalisation service
- HOD recommendation service
- Dean endorsement service
- DRIS approval service
- Meeting management service
- Forward and rewind application service

Figure 4: Application Services Menu

11 Navigation Bar

If you hover at the top of the page you will navigate through the system. It is available at the top of the page. If the user is not comfortable using this, the back button on the web browser works as well

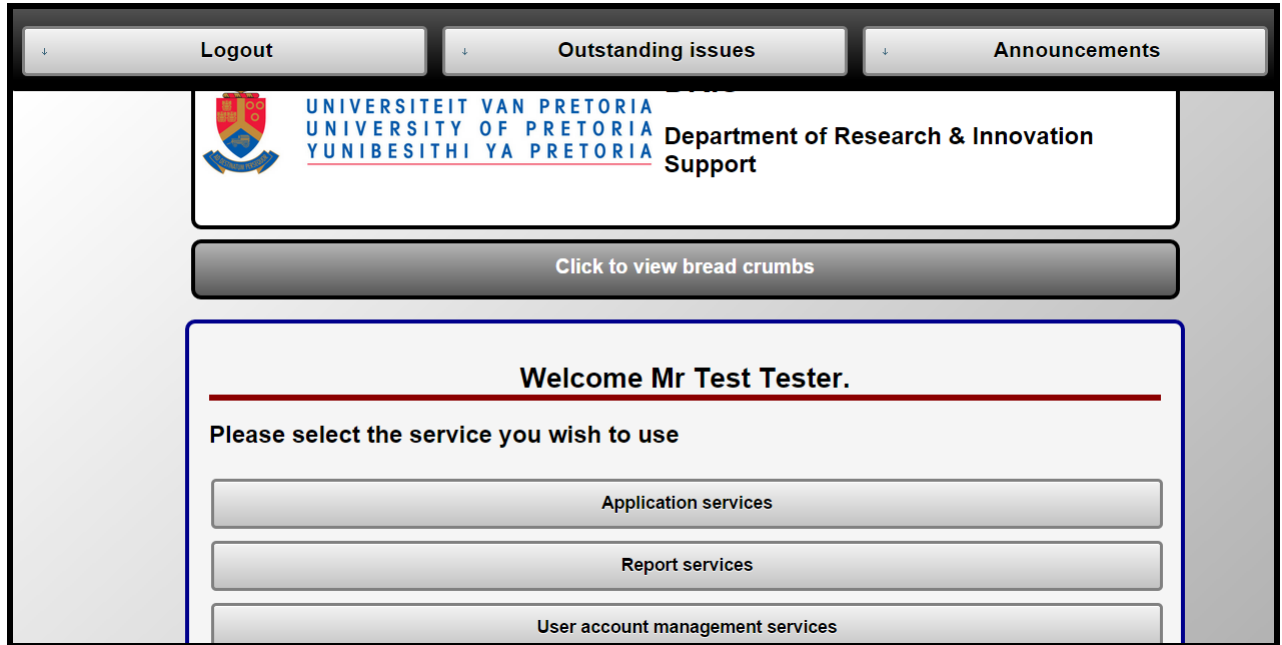


Figure 5: Navigation Bar

12 Bread Crumbs

This shows the path followed to get to the state you are currently in, simply click on the button

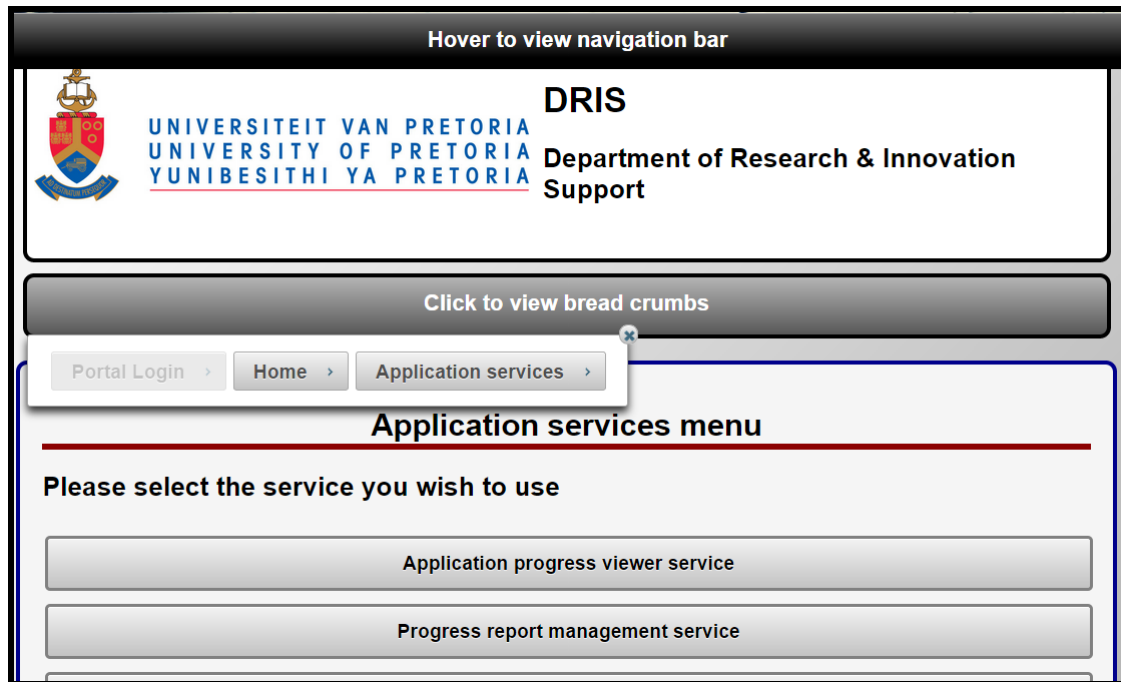


Figure 6: Bread Crumbs

13 Announcement Management

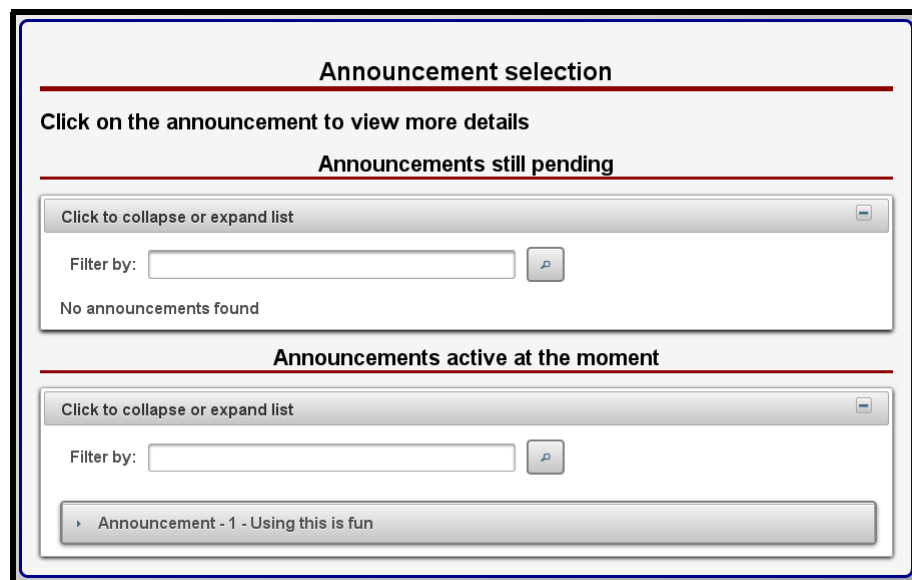
The following provides the options available for users with regards to Announcement Management.

For announcement creation the user enters the details into the form and click on publish it once you are done.



The screenshot shows a web form titled "Announcement creation". Below the title is a red horizontal line, followed by the instruction "Complete the field details below to create an announcement". The form contains the following fields: "Image file:" with a red asterisk and a "+ Image file" button; "Headline:" with a red asterisk and a text input field; "Message:" with a red asterisk and a text input field; "Start date:" with a red asterisk and a date input field; and "End date:" with a red asterisk and a date input field. At the bottom of the form is a large button labeled "Publish announcement".

Figure 7: Creating an Announcement



The screenshot shows a web interface titled "Announcement selection". Below the title is a red horizontal line, followed by the instruction "Click on the announcement to view more details". There are two sections: "Announcements still pending" and "Announcements active at the moment". Each section has a "Click to collapse or expand list" button with a minus sign. Below each section is a "Filter by:" text input field and a search button. The "Announcements still pending" section shows "No announcements found". The "Announcements active at the moment" section shows a list item: "Announcement - 1 - Using this is fun".

Figure 8: View all the Announcements

14 Audit Trail Services

The user will be able to view the audit log, they can enter information in the filters to find the entries they would like to see

| Audit log viewer | | | | |
|---------------------|---|---------------------|------------------|------------------------|
| Audit log | | | | |
| (1 of 1) | | | | |
| Entry ID | Action | Timestamp | Person system ID | Person name |
| | | | u0123456 | |
| 114 | [Method = login] [Parameters: com.softserve.auxiliary] | 2014/10/14 23:04:52 | u01234567 | Mr. GrantHolder Tester |
| 115 | [Method = loadPendingApplication] [Parameters: com.softserve.auxiliary 0; 2147483647;] | 2014/10/14 23:05:02 | u01234567 | Mr. GrantHolder Tester |
| 116 | [Method = loadPendingApplication] [Parameters: com.softserve.auxiliary 0; 2147483647;] | 2014/10/14 23:05:24 | u01234567 | Mr. GrantHolder Tester |
| 117 | [Method = getHODsOfApplication] [Parameters: com.softserve.auxiliary com.softserve.DBEntiti applicationID=3];] | 2014/10/14 23:05:32 | u01234567 | Mr. GrantHolder Tester |
| 118 | [Method = authenticateUserAsOw] [Parameters: com.softserve.auxiliary com.softserve.DBEntiti cvID=u01234567];] | 2014/10/14 23:08:19 | u01234567 | Mr. GrantHolder Tester |
| Created CV [Method | | | | |

Figure 9: View the audit log

15 Forward and Rewind Service

The user will click on the application they wish to forward or rewind, change the application status and state the reason for the change

Application - 8 - Recommend(To be Ammended)

Application type: New
Application Status: Finalised
Application creation date: Tuesday 14 October 2014
Fellow name: Mr. Recommend3 Tester
Grant holder name: Mr Test Tester
Project title: Recommend(To be Ammended)

Reason for move: *

Select status to move to: *

Open Submitted Referred Recommended Endorsed

Move application to status

Application - 9 - Dean Approval (To be approved)
Application - 10 - Fellowship
Application - 11 - Dean Approval (To be Ammended)
Application - 13 - Eligibility(To be denied)
Application - 14 - Eligibility(To be given eligibility)
Application - 12 - Eligibility(To be approved)

Figure 10: Forward or Rewind An Application

16 Location Management Service

The user will navigate through to the required location by double clicking on the appropriate button. At the bottom of the screen the user will be able to change the name of the location or create a new location.

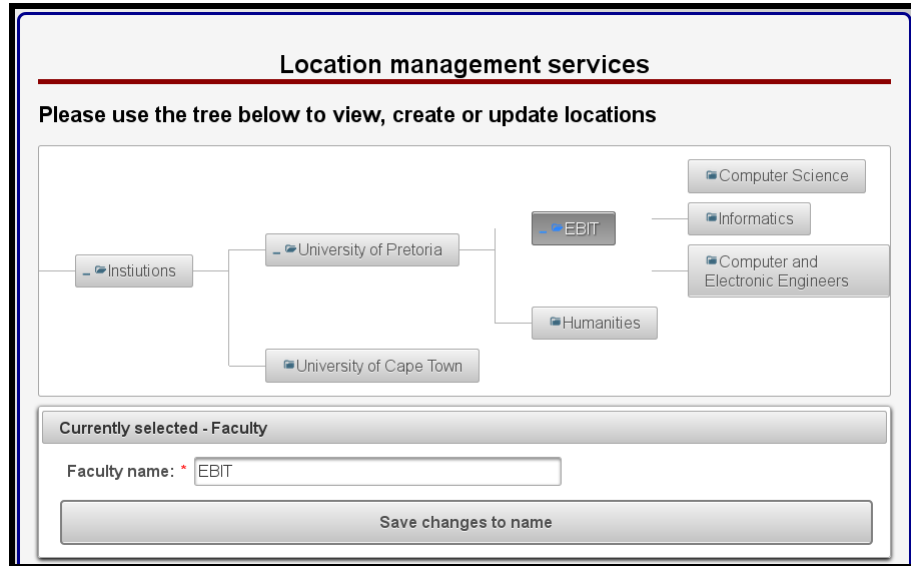


Figure 11: Forward or Rewind An Application

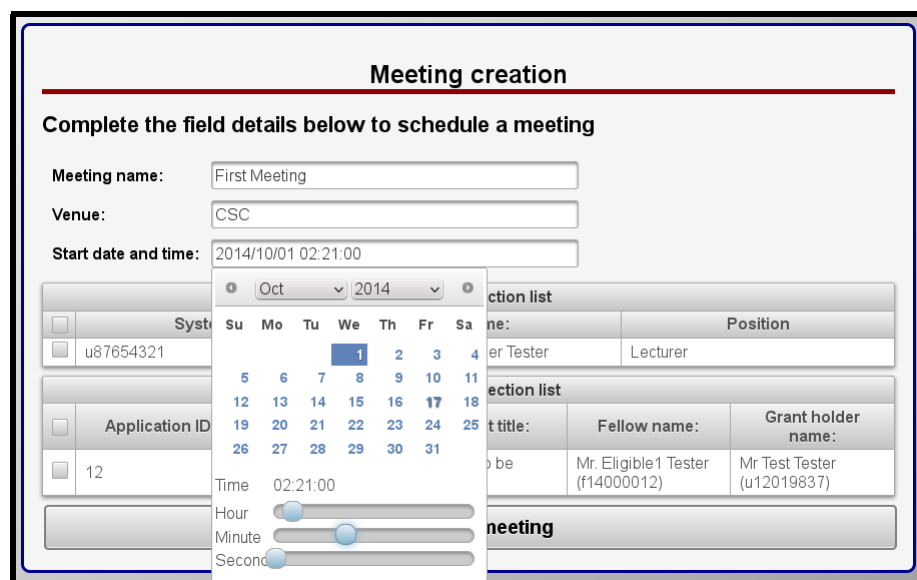
17 Meeting Management



A screenshot of a web application menu titled "Meeting management services menu". Below the title is a red horizontal line. The text "Please select the service you wish to use" is displayed. There are three large, light gray buttons with black text: "Schedule a new meeting", "View meetings", and "Comment on meeting".

Figure 12: Meeting Management Menu

The user will select the option they want from the menu above.



A screenshot of a web application form titled "Meeting creation". Below the title is a red horizontal line. The text "Complete the field details below to schedule a meeting" is displayed. The form contains several input fields: "Meeting name:" with the value "First Meeting", "Venue:" with the value "CSC", and "Start date and time:" with the value "2014/10/01 02:21:00". A calendar widget is open, showing the month of October 2014, with the 1st highlighted. To the right of the calendar, there are two tables. The first table is titled "Person list" and has columns "Name" and "Position". It contains one row: "er Tester" and "Lecturer". The second table is titled "Fellow list" and has columns "Fellow name:" and "Grant holder name:". It contains one row: "Mr. Eligible1 Tester (f14000012)" and "Mr Test Tester (u12019837)". Below the tables, there are three sliders for "Hour", "Minute", and "Second", with the "Hour" slider set to 02, "Minute" to 21, and "Second" to 00. At the bottom, there is a large button labeled "Create meeting".

Figure 13: Meeting Creation

Click on the application for more details

Meetings that have not been held

Click to collapse or expand list

Filter by:

No meetings found

Meetings that are currently active

Click to collapse or expand list

Filter by:

Meeting - 1

Name:

First Meeting

Organiser:

Mr Test Tester

Venue:

CSC

Start date and time:

2014/10/01 00:21:00

End date and time:

Not yet ended

Attendance list

| System ID | Name: | ???Position??? |
|-----------|--------------------------|----------------|
| u87654321 | Mr. PostDocMember Tester | Lecturer |

Application to be reviewed

| Application ID | Application type: | Project title: | Fellow name: | Grant holder name: |
|----------------|-------------------|-----------------------------|----------------------------------|----------------------------|
| 12 | New | Eligibility(To be approved) | Mr. Eligible1 Tester (f14000012) | Mr Test Tester (u12019837) |

Comment on meeting

Figure 14: View Meetings

19

18 Notification

The user will use the filters to find the notifications they require.

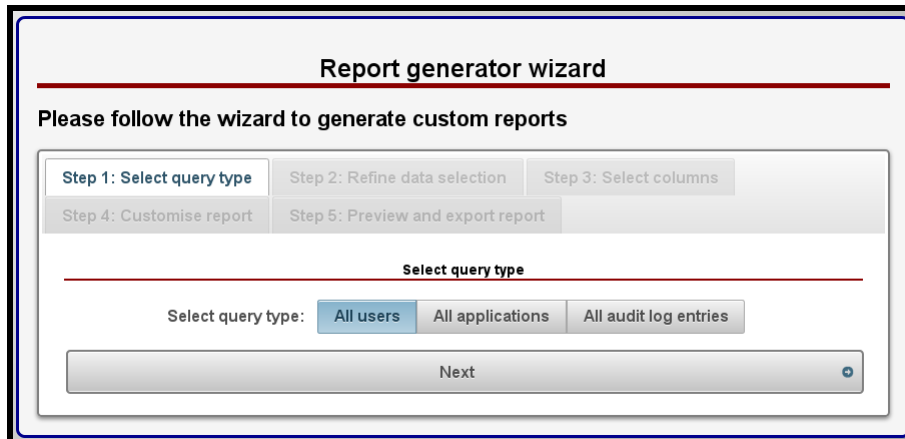
| Notification viewer | | | |
|----------------------------|-----------------------|---|-------------------------------|
| Inbox | | | |
| (1 of 1) | | | |
| From | Subject | Message: | Sent time |
| Mr Test Tester (u12019837) | Application finalised | The application Recommend(To be approved) has been finalised by Mr Test Tester. Please review the application for recommendation. | Wed Oct 15 01:36:10 SAST 2014 |
| | Application finalised | Please note that the application 'Recommend(To be approved)' has been finalised for which you are the grant holder of. | Wed Oct 15 01:36:22 SAST 2014 |
| Mr Test Tester (u12019837) | Application finalised | The application Recommend(To be denied) has been finalised by Mr Test Tester. Please review the application for recommendation. | Wed Oct 15 01:37:50 SAST 2014 |
| Mr Test Tester (u12019837) | Application finalised | The application Recommend(To be Ammended) has been finalised by Mr Test Tester. Please review the application for recommendation. | Wed Oct 15 01:38:05 SAST 2014 |
| | | Please note that the application | |

Figure 15: View Notifications

19 Reporting Service

The process of generating is this:

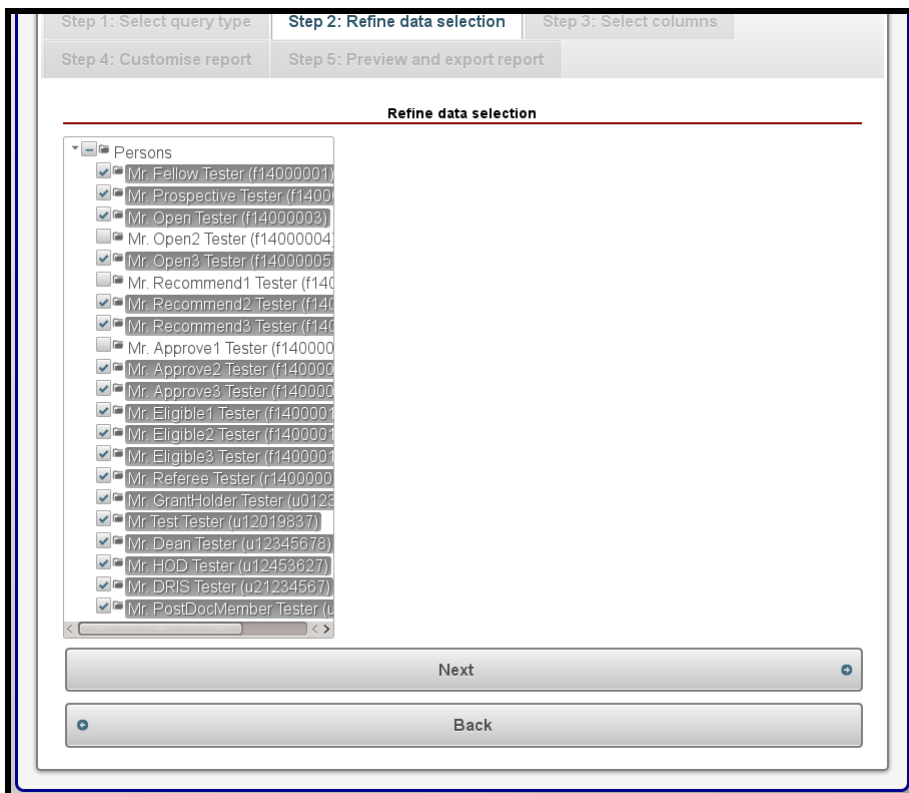
- Click on the Report wizard and select a query type



The screenshot shows the 'Report generator wizard' interface. At the top, it says 'Please follow the wizard to generate custom reports'. Below this, there are five steps: Step 1: Select query type (active), Step 2: Refine data selection, Step 3: Select columns, Step 4: Customise report, and Step 5: Preview and export report. Under the 'Select query type' section, there are three buttons: 'All users' (selected), 'All applications', and 'All audit log entries'. At the bottom, there is a 'Next' button with a right arrow icon.

Figure 16: View Notifications

- Refine the selection as they see fit



The screenshot shows the 'Refine data selection' step of the wizard. It features a tree view under the 'Persons' category, listing various user roles with checkboxes. The roles include: Mr. Fellow Tester (f14000001), Mr. Prospective Tester (f14000002), Mr. Open Tester (f14000003), Mr. Open2 Tester (f14000004), Mr. Open3 Tester (f14000005), Mr. Recommend1 Tester (f14000006), Mr. Recommend2 Tester (f14000007), Mr. Recommend3 Tester (f14000008), Mr. Approve1 Tester (f14000009), Mr. Approve2 Tester (f14000010), Mr. Approve3 Tester (f14000011), Mr. Eligible1 Tester (f14000012), Mr. Eligible2 Tester (f14000013), Mr. Eligible3 Tester (f14000014), Mr. Referee Tester (r14000000), Mr. GrantHolder Tester (u012345678), Mr. Test Tester (u12019837), Mr. Dean Tester (u12345678), Mr. HOD Tester (u12453627), Mr. DRIS Tester (u21234567), and Mr. PostDocMember Tester (u12345678). At the bottom, there are 'Next' and 'Back' buttons with arrow icons.

Figure 17: View Notifications

- Select the columns they want to be displayed in the report.

Report generator wizard

Please follow the wizard to generate custom reports

Step 1: Select query type Step 2: Refine data selection **Step 3: Select columns**

Step 4: Customise report Step 5: Preview and export report

Select columns

- Person
 - ☒ System ID
 - ☐ Password
 - ☒ Title
 - ☒ Full Name
 - ☒ Surname
 - ☐ Email
 - ☐ Telephone Number
 - ☐ Work Number
 - ☐ Fax Number
 - ☐ Cellphone Number
 - ☐ Up Employee
 - ☐ Account Status

Next

Back

Figure 18: View Notifications

- Customize the report by adding the header and name.

Report generator wizard

Please follow the wizard to generate custom reports

Step 1: Select query type Step 2: Refine data selection Step 3: Select columns

Step 4: Customise report Step 5: Preview and export report

Customise report

Report title: *

Report sub-title: *

Next

Back

Figure 19: View Notifications

- See the preview of the report and export it into the required format

Step 1: Select query type
Step 2: Refine data selection
Step 3: Select columns
Step 4: Customise report
Step 5: Preview and export report

Preview and export report

Generated on

Learning

| System ID | Title | Surname | Full Name |
|-----------|-------|---------------|-----------|
| f1400001 | Mr. | Fellow | Tester |
| f1400002 | Mr. | Prospective | Tester |
| f1400003 | Mr. | Open | Tester |
| f1400005 | Mr. | Open3 | Tester |
| f1400007 | Mr. | Recommend2 | Tester |
| f1400008 | Mr. | Recommend3 | Tester |
| f1400009 | Mr. | Approve1 | Tester |
| f1400011 | Mr. | Approve3 | Tester |
| f1400012 | Mr. | Eligible1 | Tester |
| f1400013 | Mr. | Eligible2 | Tester |
| f1400014 | Mr. | Eligible3 | Tester |
| r1400001 | Mr. | Referee | Tester |
| u01234567 | Mr. | GrantHolder | Tester |
| u12019837 | Mr. | Test | Tester |
| u12345678 | Mr. | Dean | Tester |
| u12453627 | Mr. | HOD | Tester |
| u21234567 | Mr. | DRIS | Tester |
| u87654321 | Mr. | PostDocMember | Tester |

Created by

Page 1 of 1

Export to PDF

Export to MS Excel

Back

Figure 20: View Notifications

- Save the report in the preferred location

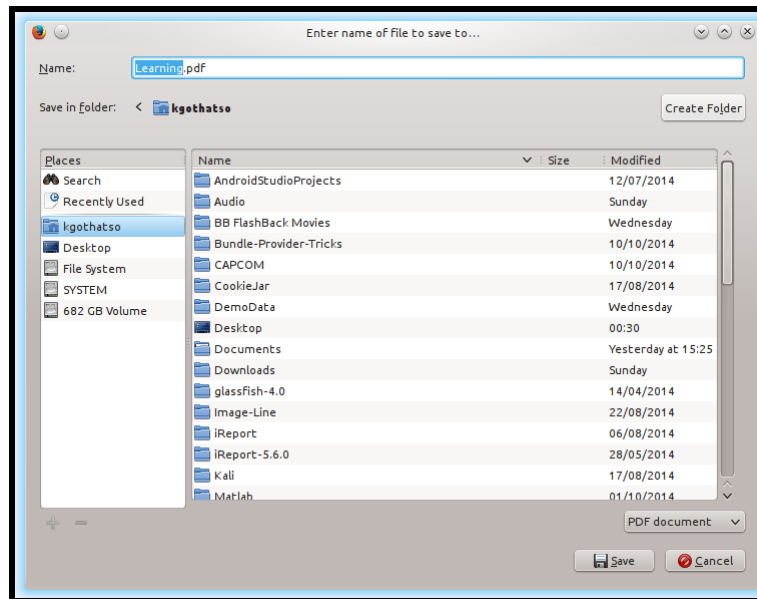


Figure 21: View Notifications

20 User Account Management

The user will be able to edit their user information.

Email:

Password:

Re-Type Password:

Telephone number:

Work phone number:

Fax number:

Cellphone number:

Are you an UP employee: ☒

Residential address

Country:

Province:

Town / City:

Suburb:

Street name:

Street number:

Room number:

Zip / Postal Code:

Save changes

Figure 22: Edit User Account

The system administrator will be able to edit user accounts, by selecting an account and doing the appropriate action.

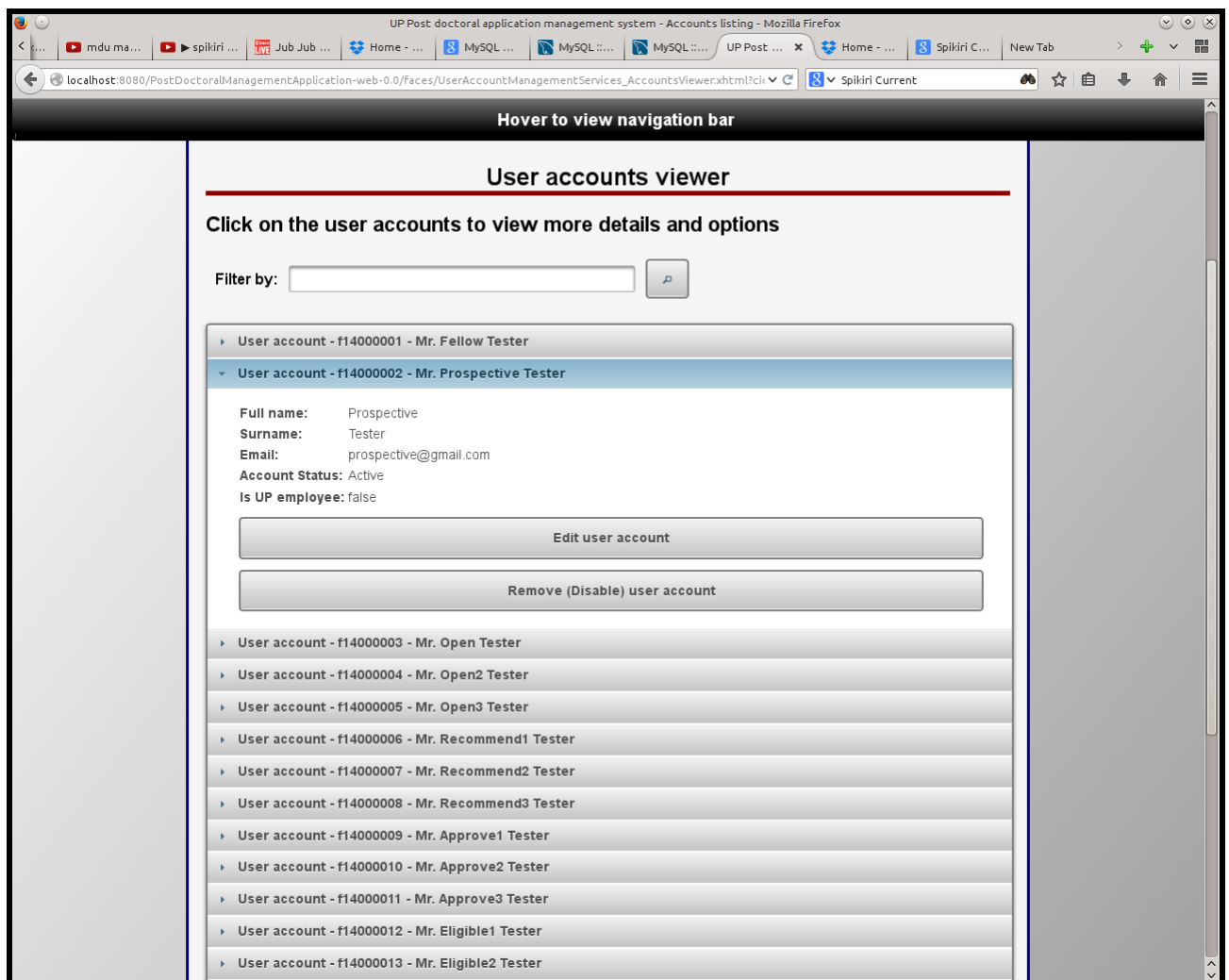


Figure 23: Edit other User Accounts

