Prepared for:

The National Association of Independent Schools

Use Case (G) - Parent Data Report.

09.11.2009 – First Draft delivered to Client.

09.18.2009 – Second Draft delivered to Client.

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1. Objectives.

Parent Data Report.

The Parent Data Report should make available all of the information compiled on the parents who have submitted applications, researchable and sortable by location, income level or any other variable.

2. Description.

Revision Date	Description
09/11/09	Initial Use Case provided to Client for review.
09/18/09	Second Use Case provided to Client for review.

The Parent Data Report should include important information such as contact information, location, income level, and other pertinent variables. As the user develops this population as a potential customer base, the Parent Data Report will increase the user's ability to target market and mass market in the most efficient ways, opening up an untapped revenue resource.

3. Actors.

Stakeholder	Role / Title	Value Proposition
Tammy Pearson	Business Analyst/Project Manager	This report will allow the Business Analyst/Project Manager to view parent information. This insight will help the Business Analyst/Project Manager to research parent/school financial data.
Melvin Rhoden	SSS Products and Services	This report will allow the Director of SSS Products and Services to view parent information. This insight will help the Director of SSS Products and Services to engage the schools in an intelligent and informed manner.
Amy Pica	Marketing Manager	This report will allow the Marketing Manager to view parent information. This insight will help the Marketing Manager to target market segments and schools in an informed manner.
TBA	National Account Director	This report will allow the National Account Director to view parent information. This insight will help the National Account Director to understand member schools' parent clients.

3.1. User Acceptance Testing.

Additional details of UAT for this report are TBD following beta system implementation. The following table lists baseline testing procedures common to all reports:

Step	Action	Result
1	Access the Management Reporting System via the Dashboard interface.	Pass
2	Authenticate to the system using credentials provided (or auto-login using Active Directory credentials).	Pass
3	Navigate to *My Managed Reports* area of the system.	Pass
4	Select [report name] from the dropdown list of options.	Pass
5	Supply report input parameters described in Section 7.	Pass
6	Generate the report, noting time-to-completion and system responsiveness.	Pass
7	Based on input Report Format and Frequency, verify receipt of the report (e.g. via email, XLS, PDF, etc.)	Pass

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8	Verify report data field outputs described in Section 7.	Pass
9	Verify report layout and design elements per Wireframe Deliverable in Section 6.1.	Pass
10	Add testing date, your name, and additional notes to the testing log in Section 3.2.	Pass

3.2. Testing Log.

Testing Date	Tester	Notes
TBD.	TBD. Add Actor's name.	Add notes on testing failure here for review by project team.
TBD.	TBD. Add Actor's name.	Add notes on testing failure here for review by project team.
TBD.	TBD. Add Actor's name.	Add notes on testing failure here for review by project team.

4. Preconditions.

Note: A "preconditions" section defines all the conditions that must be true (i.e. describes the state of the system) for the trigger (see below) to meaningfully cause the initiation of the use case.

4.1. Data Sources.

For the purposes of this report, the following data providers will be responsible for pushing data to the Management Reporting System:

Data Source	Data Provided
FolderWave	SSS user and application data
Databank	Parent financial data
iMIS	Member school data

5. Triggers.

Note: A "triggers" section describes the event that causes the use case to be initiated. This event can be external, temporal or internal. If the trigger is not a simple true "event" (i.e. the customer presses a button), but instead "when a set of conditions are met", there will need to be a triggering process that continually (or periodically) runs to test whether the "trigger conditions" are met: the "triggering event" is a signal from the trigger process that the conditions are now met.

To trigger this action, the actor will need to log into their Management Reporting Dashboard, navigate to the *My Managed Reports* section, and select the Parents Data Report from a drop down menu of reports to which the user wants regular access. After selecting the chosen report, users are able to specify needed variables to be included in the report.

6. Postconditions.

Note: A "postconditions" section describes what the change in state of the system will be after the use case completes. Post-conditions are guaranteed to be true when the use case ends.

The postconditions of this use case are that the user has access to the desired report (and specified data included). The user then can view this report on-screen, print, and email to other interested parties in the format designated by the user.

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6.1. Success Scenario.

The Wireframe presented in Section 8.0 provides NAIS a visual representation of a successful delivery of this report.
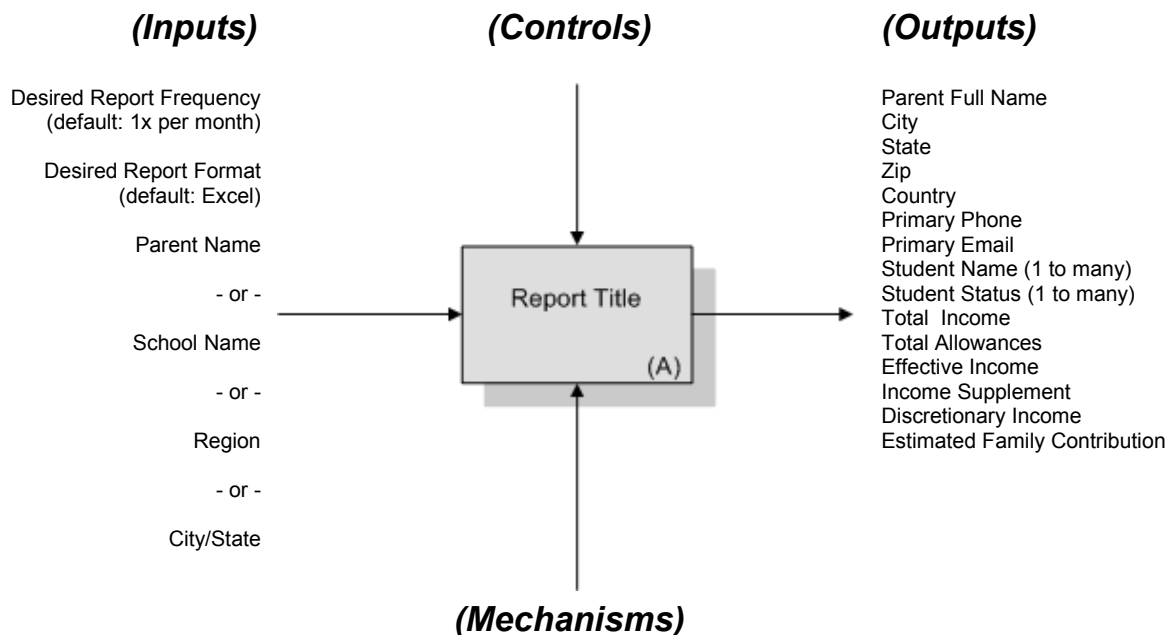
6.2. Failure Scenario.

The scenario has failed if the end user is not receiving the desired report after fulfilling required triggers stated above (Section 5).

7. IDEF0 Diagram.

Diagram legend:

- *Inputs* – Inputs are transformed or consumed by the report to produce outputs.
- *Controls* – Controls specify the conditions required for the report to produce the correct outputs.
- *Outputs* – Outputs are the data produced by the report.
- *Mechanisms* – Mechanisms are the means used to execute a report.

Summarize Preconditions described above.

(Inputs) **(Controls)** **(Outputs)**

(Inputs)	(Controls)	(Outputs)
Desired Report Frequency (default: 1x per month)		Parent Full Name City State Zip
Desired Report Format (default: Excel)		Country Primary Phone Primary Email
Parent Name	Report Title	Student Name (1 to many) Student Status (1 to many)
- or -	(A)	Total Income
School Name		Total Allowances Effective Income
- or -		Income Supplement Discretionary Income
Region		Estimated Family Contribution
- or -		
City/State		

(Mechanisms)

TBD during beta system development. Specific technologies used to accomplish Report Format, Frequency, and Outputs are unknown at present.

8. Report Wireframe.

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22 September 2009. 15:25pm

Parent Data Report

NAIII
NATIONAL ASSOCIATION OF
INDEPENDENT SCHOOLS

[Parent Name] or [School Name] or
[Region] or [City/State]

Parent Details (([TOTAL NUMBER]))

Mr Michael Smith	Washington, DC, 20045, USA				
202 222 1234	msmith@yahoo.com				

		Total Income	$[data]	Income Supplement	$[data]
		Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

Jonathan Smith [Student Status]
Susan Smith [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

[Full Name]	[City],[State],[ZIP], [Country]	Total Income	$[data]	Income Supplement	$[data]
[phone]	[email]	Total Allowances	$[data]	Discretionary Income	$[data]
		Effective Income	$[data]	Est. Family Contribution	$[data]

[Student name] [Student Status]
[Student name] [Student Status]

{ etc }

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