Scope Document

SM Foundation Incorporated Scholarship Tracking System Module 2

# Introduction

The client meeting held last August 13, 2015 with SM Foundation Incorporated (SMFI) introduced many changes to the required functions of the system. The nature of these changes has necessitated the building of an entirely new database, and the subsequent recreation of the web portal. The purpose of this document is to list the requirements of the system as understood by the developers based on the feedback given during the aforementioned client meeting. The requirements listed here shall be the deliverables of the new system. Given the limited amount of time remaining for the project, additional features and functions beyond those listed here will not be included in the third and final iteration.

# Users

|  |  |  |
| --- | --- | --- |
| Username | Access Point | Roles and Permissions |
| Scholar | Frontend website | * View own records * Create own subjects list * Create own grades records * Edit unapproved own subjects list * Edit unapproved own grades records * Upload files * Send messages to SM Foundation Incorporated |
| SM Foundation Accounts   * Linda Atayde * Ling Lansang * Tess Samillano * Greg Baclea-an Jr. * Cath Llarena * Jenn Ocampo | Backend website | * Administrator privileges * Full access to all backend features * Approve scholar-created records * Create, Read, Update, and Delete (CRUD) rights to all records and record types |

# Frontend Website Features

* Accessible by the Scholar
* Profile
  + Scholar may view personal details
  + Scholar may view details of own school
* Subject List
  + Scholar may create a record for his/her own Subject List
    - Scholar may enter the following information:
      * Terms
      * Subject Names
      * Subject Units
  + Subjects within the Subject List are primarily grouped by the Term in which they are to be taken
  + Subject List records must be approved by SMFI
    - Records may be edited by the Scholar only until they have been approved
* Records
  + Scholar may view own grades records
  + Scholar may create own grades records
    - Grades records are created based on previously created Subject List
    - Scholar may enter the following information:
      * Raw Grade
      * School Year Start
      * School Year End
  + Grades records must be approved by SMFI
    - Records may be edited by the Scholar only until they have been approved
  + Scholar may submit an explanation for unsatisfactory or failing grades to SMFI
  + Scholar may view own tuition records
  + Scholar may view deduction records charged against him/her
  + Scholar may view incentives credited to him/her
* Forms
  + Scholar may fill up a form to apply for optional work
  + Scholar may view previously submitted forms for optional work
  + Scholar may upload scanned documents
* Calendar
  + Scholar may mark dates on the calendar
  + Scholar may create events on the calendar
  + Scholar may view previously entered calendar events
* Contact
  + Scholar may fill up a form to send an email to SMFI

# Backend Website Features

* Accessible by any of the SMFI User Accounts
* School Records
  + SMFI may view existing school records
  + SMFI may edit existing school records
  + SMFI may delete existing school records
  + SMFI may create new school records
  + All school records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * School Name
      * School Area
      * School Address
      * School Contact Email(s)
      * School Contact Number(s)
      * School Vendor code
* Grade Equivalences
  + SMFI may view existing grade rule records
  + SMFI may edit existing grade rule records
  + SMFI may delete existing grade rule records
  + SMFI may create new grade rule records
  + All grade rule records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * School ID/Name
      * Numerical Grade Equivalent
      * Letter Grade Equivalent
      * Lower Percentile Grade Equivalent
      * Upper Percentile Grade Equivalent
      * School Rating
      * Foundation Rating
        + PASS
        + FAIL
  + Existing grade rule records will be displayed by the school they apply to
* Scholar Records
  + SMFI may view existing scholar records
  + SMFI may edit existing scholar records
  + SMFI may delete existing scholar records
  + SMFI may create new scholar records
  + All scholar records contained in the database must be created by SMFI
    - SMFI may enter the following information
      * Scholar First Name
      * Scholar Middle Name
      * Scholar Last Name
      * School ID/Name
      * Scholar Gender
      * Scholar Address
      * Scholar Course
      * Scholar Graduate Status
        + Graduated
        + Not Graduated (default)
      * Scholar Year Level
      * Scholar email(s)
      * Scholar Contact Number(s)
      * Scholar Cash Card Number
      * Scholar Sponsor
      * Scholar Type
        + With Allowance, Tuition Fee, and Incentive

SMFI

My Scholar A

Kabayan Scholar

* + - * + With Tuition Fee and Incentive (No Allowance)

My Scholar B

ICA Grant Scholar

* + - * Scholar Vendor Code
  + Existing scholar records will be displayed by the school the scholars are enrolled in
* Grades Records
  + All grades records are sorted by Approved or Not Approved
  + SMFI may view existing grades records
  + SMFI may edit existing grades records
  + SMFI may delete existing grades records
  + SMFI may create new grades records
  + All grades records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * Scholar ID/Name
      * Subject
      * Term
      * Raw Grade
      * School Year Start
      * School Year End
  + SMFI may approve grades records
    - SMFI may set the following fields during the grades record approval process:
      * Subject Taken Status
        + Not Taken
        + Taken
        + Failed
      * Approval Status
        + Not Approved
        + Approved
* Tuition Records
  + SMFI may view existing tuition records
  + SMFI may edit existing tuition records
  + SMFI may delete existing tuition records
  + SMFI may create new tuition records
    - SMFI may create tuition records individually or in bulk based on the school
  + All tuition records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * Scholar ID/Name
      * Term
      * School Year Start
      * School Year End
      * Date of Enrollment
      * Tuition Amount
      * Tuition Paid Status
        + Paid
        + Not Paid
      * Date of Payment
  + Existing tuition records will be displayed by the school the scholars are enrolled in
* Deduction Records
  + SMFI may view existing deduction records
  + SMFI may edit existing deduction records
  + SMFI may delete existing deduction records
  + SMFI may create new deduction records
  + All deduction records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * Scholar ID/Name
      * Deduction Date
      * Deduction Amount
      * Deduction Remark
  + Existing deduction records will be displayed by the scholar they apply to
* Allowance Withholding
  + SMFI must create a new withholding record every time they wish to withhold an allowance
    - This is to ensure accurate historical record keeping
    - SMFI may enter the following information:
      * Scholar ID/Name
      * Date Withheld
      * Remark
      * Date Released (initially empty)
  + SMFI may view existing withholding records
  + SMFI may edit existing withholding records
    - SMFI must edit a previously created withholding record with a date released when releasing a scholar’s allowance
  + SMFI may delete existing withholding records
  + Existing withholding records will be displayed by the scholar they apply to
* Incentive Records
  + SMFI may view existing incentive records
  + SMFI may edit existing incentive records
  + SMFI may delete existing incentive records
  + SMFI may create new incentive records
  + All incentive records contained in the database must be created by SMFI
    - SMFI may enter the following information:
      * Scholar ID/Name
      * School ID/Name
      * Incentive Date
      * Incentive Amount
      * Incentive Remark
  + Existing incentive records will be displayed by the scholar they apply to
* View Uploads
  + SMFI may view existing uploads
  + SMFI may edit existing uploads
  + SMFI may delete existing uploads
  + SMFI may upload new files
  + Existing uploads will be displayed by the scholar they apply to
* Calendar
  + SMFI may mark dates on the calendar
  + SMFI may create events on the calendar
  + SMFI may view previously entered calendar events
* Reports
  + The following reports will be included:
    - GPA Report
      * Generates grade equivalencies and calculated GPA
      * Criteria:
        + By Scholar
        + By School Year
        + By Term
        + By Foundation Rating
    - Deduction Report
      * Generates total deductions
      * Criteria:
        + By Scholar
        + By Month
    - Graduates Report
      * Generates a list of graduated scholars
      * No criteria
    - Masterlist of Scholars
      * Generates a list of all scholars
      * Criteria:
        + By year level
    - Tuition Fees Report
      * Generates a list of tuition fee record
      * Criteria:
        + By School year
        + By Term
* Interface Files
  + Interface files to be generated based on given format
  + Types:
    - Allowance
      * Doc type - invoice
    - Deductions
      * Doc type - CM
    - Payment to schools for tuition
      * Doc type - invoice
    - Other payments to scholars: Incentive Deduction
      * Doc type - invoice
    - Other payments to scholars: Rewards
      * Doc type - invoice