**Use Case Requirements – Template Management – Add & Edit Template**

**Preconditions**

1. User must be logged in.
2. User must have ‘Admin’ role.

**Basic Flow**

*Add*

1. The page loads a blank form.
   1. Template Message
      1. This is the message that will be displayed on the Appointments page.
      2. Maximum 2000 characters.
   2. Assigned Clinics
      1. The message will be displayed for appointments with these clinics.
      2. This grid will be blank until a user has added a clinic.
      3. The grid columns are:
         1. Remove
         2. ClinicID
         3. Name
         4. Physical Location
         5. Specialty
         6. Enabled by Default?
   3. Available Clinics
      1. This is a list of clinics that can be assigned to the template.
      2. The grid columns are:
         1. Add
         2. ClinicID
         3. Name
         4. Physical Location
         5. Specialty
2. The user enters a ‘Template Message’ in the blank textbox.
3. The user can click the ‘Save’ button to create the template or can begin adding ‘Available Clinics’.
4. The user clicks the ‘Add’ button next to an ‘Available Clinic’ the wish to add.
5. If the user previously did not click the ‘Save’ button, the system will both create the template and add the clinic to the template. These changes are immediate and don’t require the ‘Save’ button to be clicked.

*Edit*

1. The page loads the saved information for editing.
   1. Template Message
   2. Assigned Clinics
   3. Available Clinics
2. The user can edit the existing message in the textbox.
3. The user can click the ‘Save’ button to update the ‘Template Message’.
4. The user can click the ‘Remove’ link from ‘Assigned Clinics’ they wish to remove this template from. These changes are immediate and don’t require the ‘Save’ button to be clicked. This will only remove clinics from the template. It will not save the ‘Template Message’.
5. The user can click the ‘Add’ link from ‘Available Clinics’ they wish to add to this template. These changes are immediate and don’t require the ‘Save’ button to be clicked. This will only add clinics to the template. It will not save the ‘Template Message’.

**Alternate Flow(s)**

*Enabled by Default*

1. The user wishes to set an ‘Assigned Clinic’ to be enabled by default.
2. The user clicks the ‘Enabled by default?’ checkbox in the ‘Assigned Clinics’ grid.
3. The system will save the changes immediately without the need to click the ‘Save’ button. There are no confirmation popups.

*Preview*

1. The user wishes to see the letter preview for this template.
2. The user clicks the ‘Preview’ button.
3. The system will save the ‘Template Message’.
4. The system will redirect the user to the template preview page.

*Cancel*

1. The user wishes to cancel changes to the ‘Template Message’ and return to the ‘Template List’.
2. The user clicks the ‘Cancel’ button.
3. The system redirects the user back to the ‘Template List’.

*Delete*

1. The user wishes to delete the template.
2. The user clicks the ‘Delete Template’ button.
3. The system warns the user, “Are you sure you wish to delete this template?”
4. The user clicks ‘Ok’.
5. The system deletes the record and associated clinics.
6. The user is redirected back to the ‘Template List’ page.

*Filtering*

1. The user can filter the record list either by entering text in the top of the column.
2. The system filters the records and reloads the list.

*Sorting*

1. The user can click the column title to sort by any column listed.
2. The system resorts the records and reloads the list.

**Post Conditions**

1. The ‘Template’ table may be inserted/updated/deleted.
2. The ‘TempalteClinic’ table may be inserted/updated/deleted.