

Agenda

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|------|---|--------------------|
| 3:00 | Review of last meeting <ul style="list-style-type: none">• Create form use case• Aid in conflict management use case | Brandon Mitchell |
| 3:10 | Etrieve Flow | Ryan Hessler |
| 3:20 | Updated diagrams <ul style="list-style-type: none">• Split the context diagram into two: COI Etrieve Forms and COI System• Status of COI form (state transition diagram) | Nathan Blankenship |
| 3:30 | Admin/auditor sign use case | Tucker Kane |
| 3:35 | Sample dashboard UI <ul style="list-style-type: none">• # forms of in each COI form status<ul style="list-style-type: none">◦ Sort by tenured/non-tenure◦ Faculty/student/staff• Change in conflict declarations• Select department and see completion and conflicts | Matthew Gallagher |
| 3:50 | Next Meeting: functional and non-functional requirements <ul style="list-style-type: none">• April 15 (Friday) | Brandon Mitchell |

Create Form Use Case

Created By:	Nathan Blankenship	Last Updated By:	Class
Date Created:	03/21/2021	Date Last Updated:	3/23/2021
Actors:	Person of Interest		
Description:	User fills out, submits, and signs a COI form		
Preconditions:	1. The User needs to complete a COI form		
Postconditions:	1. User's form is complete 2. User has signed their completed form		
Normal Flow:	1.0 Create Form <ol style="list-style-type: none"> 1. User visits the system from the annual email 2. User is directed to MTech Single Sign-On, where they log in 3. Upon successful login, user is informed of their rights and responsibilities in disclosing COIs through the terms of Service. 4. After agreeing to the terms of service, user has access to the COI form. 5. User fills out the form honestly. 6. User signs the form as confirmation. 		

Create Form Use Case

Alternative Flows:	<p>1.1 Create from Single Sign-On</p> <p>1. User visits the system from MTech Single Sign-On</p> <p>1.2 User decides to save the partially completed form, and complete it later</p> <p>1. User fills out the form partially, then indicates they would like to stop editing</p> <p>2. System prompts confirmation, saves the form and exits.</p> <p>3. User returns to the system, either through another email prompt or via Single Sign-On</p> <p>4. System stores the unfinished form</p>
Exceptions:	<p>E.1 Terms and Conditions are not agreed to.</p> <p>If for any reason a POI chooses not to accept the systems Terms of Service, the system will deny the user access to sign the form</p>
Includes/Extends:	None
Priority:	Imperative
Frequency of Use:	High
Business Rules:	BR-1, BR-2, BR-4
Special Requirements:	Auditors/Admins are not able to sign their own COI forms. In addition, certain individuals such as the Vice Chancellor of Research, the Chancellor, and the Provost require a signature from The University of Montana to be accepted.
Assumptions:	None.
Notes and Issues:	None.

Create Form Use Case

Changes/Additions:

Aid in Conflict Management

Created By:	Brandon Mitchell	Last Updated By:	Class
Date Created:	March 6, 2022	Date Last Updated:	March 30, 2022
Actors:	Admins, People of Interest		
Description:	When a Person of Interest has indicated a possible conflict of interest exists, the system will generate a management plan tailored to them and their situation.		
Preconditions:	<ol style="list-style-type: none"> 1. The Person of Interest is currently logged in. 2. The Person of Interest is currently filling out the form. 3. The Person of Interest must have indicated a possible conflict does exist. 		
Postconditions:	<ol style="list-style-type: none"> 1. A tailored management plan exists for the Person of Interest. 		
Normal Flow:	<ol style="list-style-type: none"> 1.0 Description phrase 1. The Person of Interest selects possible conflicts from a list. 2. The system prompts for an explanation. 3. The Person of Interest provides an explanation or supporting documentation. 4. The system receives their input and asks, "Is there anything else we need to know?" as a catch all. 5. The Person of Interest provides additional details. 6. The system receives their input. 7. The Person of Interest signs and submits the form. 8. The system receives their form and informs them. 9. The system generates a management plan based on their input and sends it to the Admins for review. 10. The Admins sign the plan. 11. The system informs the person of interest their plan is ready. 12. The Person of Interest signs their management plan. 13. The system records their signature. 		

Aid in Conflict Management

Alternative Flows:	<p>1.1 Remove Conflicts (branch after step 1)</p> <ol style="list-style-type: none"> 1. The Person of Interest decides to remove all possible conflicts. 2. The system updates the form to match their input. 3. The Person of Interest signs and submits the form. 4. The system receives their form and informs them. <p>1.3 Complicated Conflicts (branch after step 8)</p> <ol style="list-style-type: none"> 1. The Person of Interest has complicated conflicts and a form cannot be generated. 2. The system forwards their form to the Admins to manually create management plan. 3. The Admins adds the Person of Interest's form to the system and signs it. 4. The system informs the Person of Interest their management plan is ready. 5. Return to step 10.
Exceptions:	None.
Includes/Extends:	Extends Create Form use case. Includes Auditor Signs use case.
Priority:	Critical
Frequency of Use:	Used whenever a Person of Interest indicates a possible conflict exists.
Business Rules:	None.
Special Requirements:	None.
Assumptions:	1. Assumes the "Lego blocks" idea is possible and can be implemented.
Notes and Issues:	A management plan requires the signature of the Person of Interest and the signature of an Admin/Auditor to be considered complete.

Aid in Conflict Management

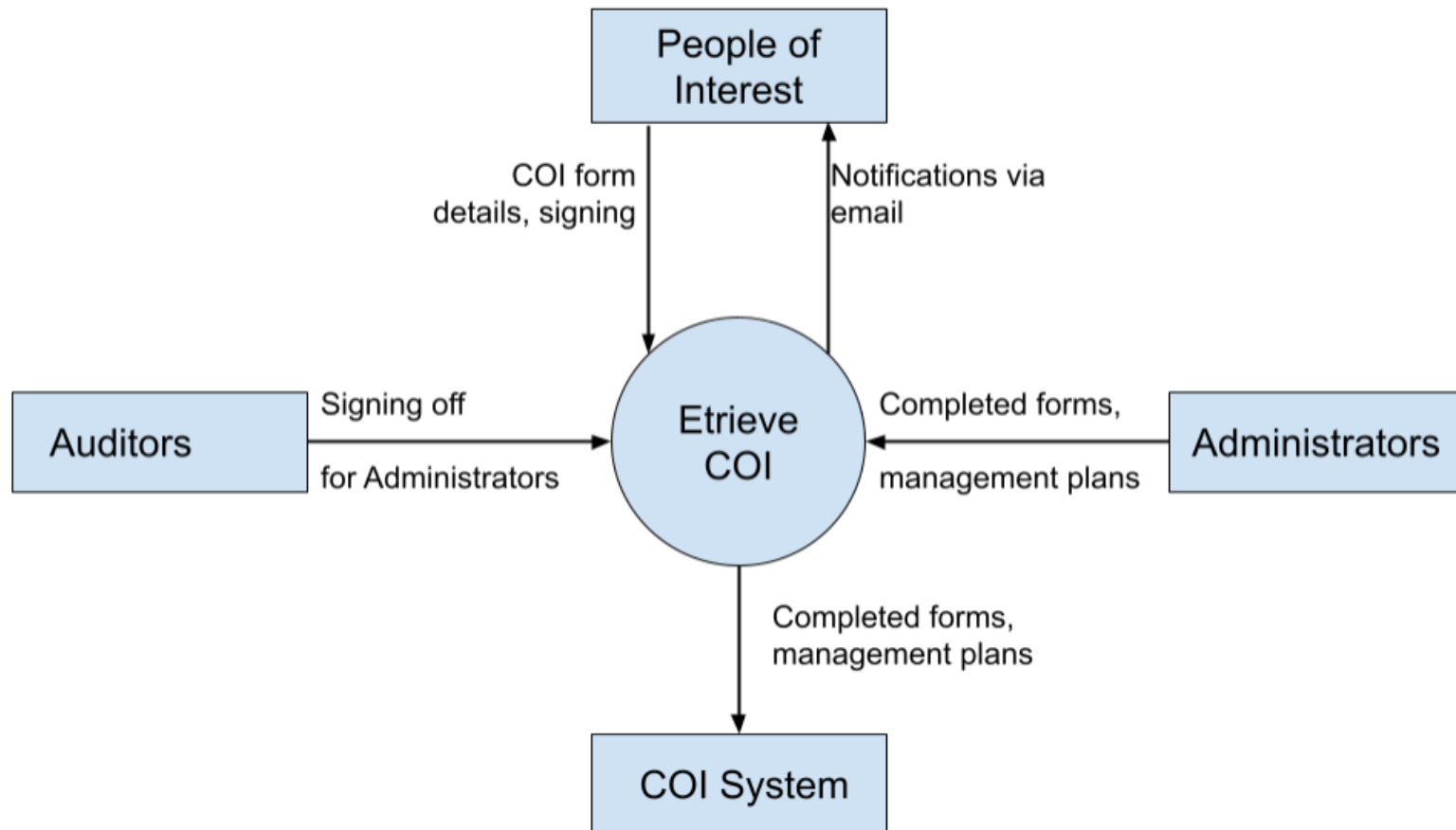
Changes/Additions:

Updated Diagrams

- Addition of Etrieve has made old diagram outdated
- Updated diagrams to better reflect and incorporate changes

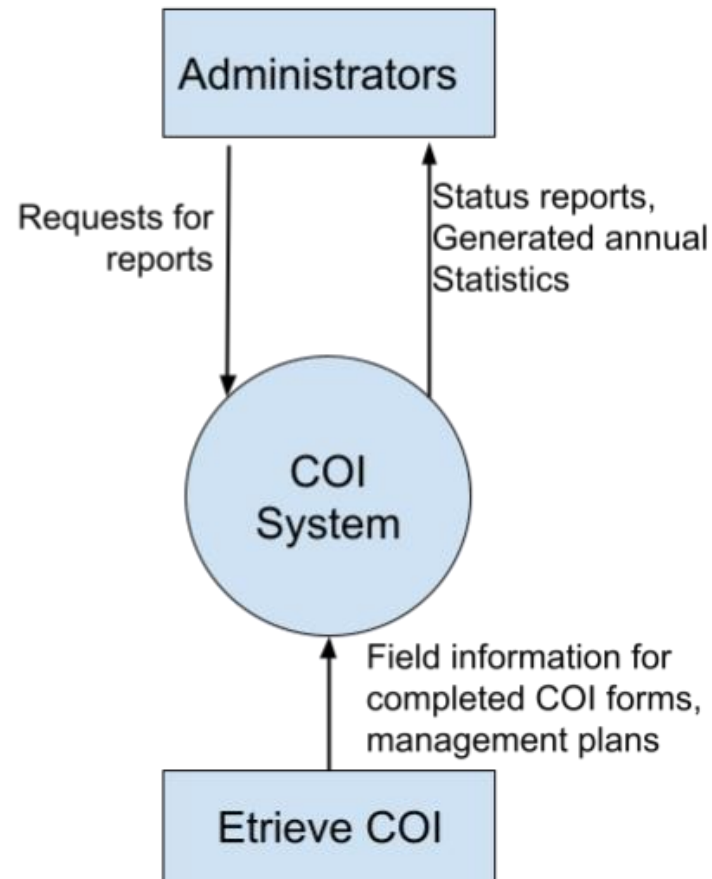
COI Etrieve Context Diagram

Etrieve COI Context Diagram



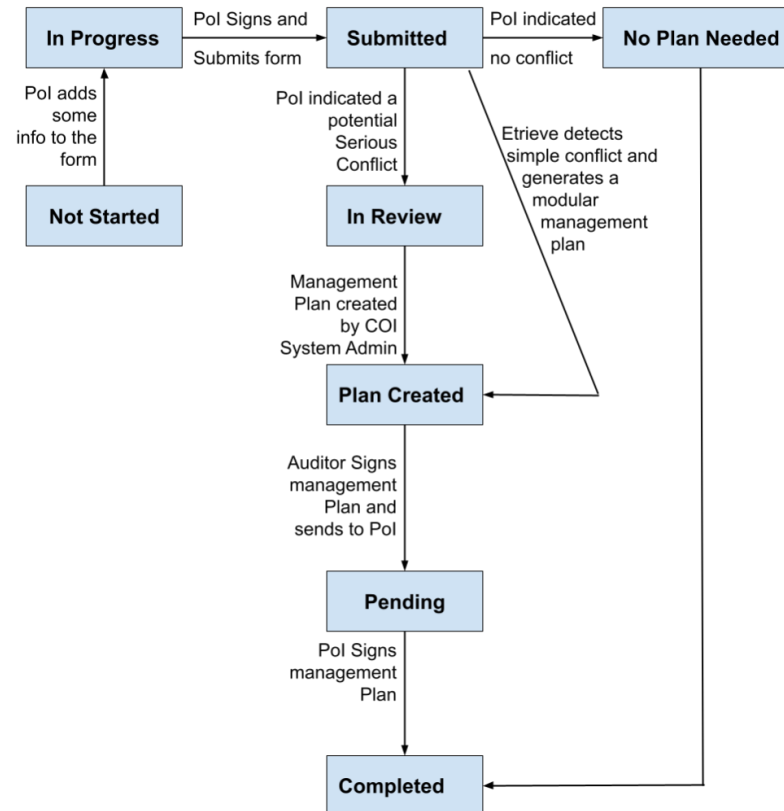
COI System Context Diagram

COI System Context Diagram



COI Form State Transition Diagram

State-Transition Diagram for COI forms and management plans



Auditor Signs Use Case

3.2.3 Admin Signature

Created By:	Tucker Kane	Last Updated By:	Class
Date Created:	03/21/2022	Date Last Updated:	3/23/2022
Actors:	Admin		
Description:	User uses <i>Etreive Forms</i> to sign off on completed COI forms.		
Preconditions:	A Person of Interest has completed their COI form and that form is ready for approval.		
Postconditions:	The COI form for the user has been approved or rejected.		
Normal Flow:	1.0 Sign COI form <ol style="list-style-type: none"> 1. The user is presented a COI form that needs approval. 2. The user looks over the form and approves the from with their signature. 3. The system informs the user that the form is signed. 		
Alternative Flows:	1.1 Form is rejected upon review (branch on step 2) <ol style="list-style-type: none"> 1. The admin indicated that there is an issue with the form. 2. System notifies POI of rejected form status and prompts them to edit and resubmit a new COI form or informs the user to contact the Research Office directly. 		
Exceptions:	None.		
Includes/Extends:	None		
Priority:	Critical		
Frequency of Use:	Used whenever a Person of Interest submits a COI form for approval.		
Business Rules:	BR-1, BR-3, BR-4, BR-5		
Special Requirements:	POI's that are also an have an Admin role do not have permission to approve their own COI forms.		
Assumptions:	None		
Notes and Issues:	Admins and Auditors have been combined into a single role of Auditor.		

Admin/Auditor Sign Use Case

Changes/Additions:

COI Dashboard

- Tenured and Non-tenured Pols
- Filter the status of COI form
- Filter by conflicts
- Search by name or department

Thanks for your time!

Next Meeting

- Functional and non-functional requirements
- April 15th, Friday