Program management: Use cases

Document control

Abstract:	Use case documentation for program management feature		
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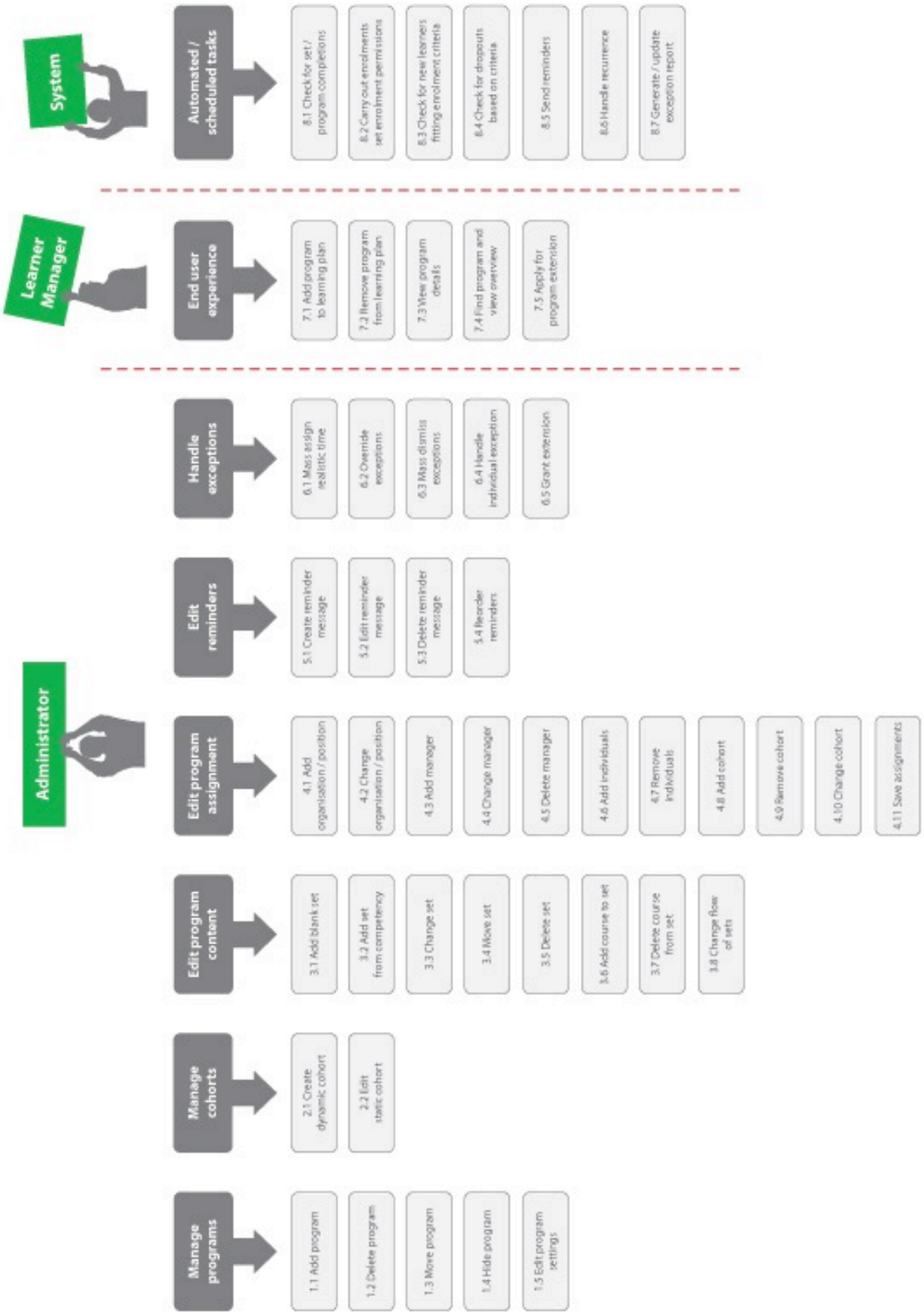
Summary of Changes:	**Version**	**Date**	**Description**

Use cases diagram



Use cases

Use case element	Description
Use case number	1.1
Application	Program management: Manage Programs
Use case name	Add program
Descriptor	Creation of a new program
Primary actor	Administrator
Precondition	None
Flow	1. Starts in add/edit courses pages (editing on) 2. Select 'add program button' 3. Program settings page PM02 appears 4. User fills out fields directly on this page 5. User edits program content (*see detailed use cases 3.X*) 6. User edits program enrolment/assignment (*see detailed use cases 4.X*) 7. User edits messages and reminders (*see detailed use cases 5.X*) 8. User handles exceptions (*see detailed use cases 6.X*) 9. User selects 'return to categories' button

Use case element	Description
Use case number	1.2
Application	Program management: Manage Programs
Use case name	Delete program
Descriptor	Deletion of an existing program
Primary actor	Administrator
Precondition	Program exists within category
Flow	1. Starts in add/edit courses pages (editing on) 2. Select 'delete program' icon next to program (displayed inline with actions for regular courses) 3. Popup dialogue appears stating how many learners this will affect and asks for confirmation 4. User selects confirm 5. A second confirmation (e.g. browser confirm dialogue) appears asking for confirmation 6. User selects confirm 7. The program is removed from the system. This means is no longer appears in the required learning plan, other individual learning plans or the catalogue

Use case element	Description
Use case number	1.3
Application	Program management: Manage Programs
Use case name	Move program

Descriptor	A program is moved from one category to another
Primary actor	Administrator
Precondition	Program exists
Flow	1. Starts in add/edit courses pages (editing on) 2. User selects check box next to program (in line with regular course actions) 3. User selects 'Move selected courses to' drop down 4. User selects the desired target category 5. The program is moved to the target category and displays accordingly in the catalogue

Use case element	Description
Use case number	1.4
Application	Program management: Manage Programs
Use case name	Hide program
Descriptor	A program is hidden from view for regular users
Primary actor	Administrator
Precondition	Program exists
Flow	1. Starts in add/edit courses pages (editing on) 2. User selects hide icon (eye) next to program (in line with regular course actions) 3. The program is hidden and the eye icon is shown as closed; regular users are no longer able to see the program in the course catalogue or search results

Use case element	Description
Use case number	1.5
Application	Program management: Manage Programs
Use case name	Edit program settings
Descriptor	An existing program is edited
Primary actor	Administrator
Precondition	Program exists
Flow	1. Starts in add/edit courses pages (editing on) 2. User selects 'edit' icon next to program (in line with regular course actions) 3. Populated edit program settings page PM02 appears 4. Any changes to particular settings trigger a two-stage dialogue (*see example in use case 1.2*), which explains how many users are affected by the changes and asks for confirmation twice. Changes are applied directly upon confirmation, so there are no save and cancel buttons available. The particular items triggering the dialogue are: a. Name(s) and description b. Recurrence settings

	c. End note d. Program content e. Program enrolment f. Exception page actions 5. User selects 'return to categories' button once desired changes have been made

Use case element	Description
Use case number	2.1
Application	Cohorts: Manage Cohorts
Use case name	Create dynamic cohort
Descriptor	A new cohort (side wide group is created). This particular cohort type is dynamic, meaning that it's based on criteria in the user profile (including hierarchies), so the cohort membership changes as and when the user profile field values change.
Primary actor	Administrator
Precondition	None
Flow	1. Starts in Available cohorts screen PM06-01 2. User selects 'Create new cohort' button 3. Create new cohort screen PM06-02 appears 4. User enters name, id and description and chooses 'dynamic' type 5. User selects 'Assign members to cohort' button 6. Dynamic cohort criteria screen PM06-03 appears. 'Create dynamic cohort' button is disabled. 7. User selects relevant criteria they wish to apply to the dynamic cohort. There are three options available, which can be used in conjunction with each other and thus offer a relatively wide range of permutations. As soon as one of the criteria below is populated, the 'Create dynamic cohort' button is enabled. 8. Profile field (optional): a. User selects desired profile field from drop down (includes all custom profile fields) and types allowed values separated by commas into the values text area 9. Position (optional): a. User selects Choose position button b. Choose position lightbox appears c. User navigates to and selects the desired position d. User selects 'OK' button and lightbox disappears e. If inclusion of entire tree hierarchy under the selected position is required, user selects 'include full hierarchy' tick box 10. Organisation (optional): a. User selects Choose organisation button b. Choose position lightbox appears c. User navigates to and selects the desired position d. User selects 'OK' button and lightbox disappears

	e. If inclusion of entire tree hierarchy under the selected organisation is required, user selects 'include full hierarchy' tick box 11. User selects 'create dynamic cohort button 12. Confirmation dialogue PM06-04 appears stating the number of cohort members at this time and informs the user that dynamic cohort criteria cannot be edited once the cohort has been created 13. User selects 'continue' button 14. Dynamic cohort is created and user is returned to the Available cohorts screen PM06-01

Use case element	Description
Use case number	2.2
Application	Cohorts: Manage Cohorts
Use case name	Edit static cohort
Descriptor	The membership of a static cohort is edited
Primary actor	Administrator
Precondition	Static cohort exists
Flow	1. Starts in Available cohorts screen PM06-01 2. User selects 'edit' icon in actions column next to the static cohort they wish to edit 3. Edit cohort set screen PM06-05 appears 4. User selects the system users in the source set and moves them into the target set 5. User selects 'save changes' button 6. Confirmation dialogue PM06-06 appears stating that this will trigger X number of assignments/enrolments and Y number of exceptions. The dialogue also informs the user to go to the program edit screen to handle the exceptions in case there are any. It offers 'continue' and 'cancel' buttons. Cancelling reverts all changes made. 7. If continue button is chosen, user is returned to the Available cohorts screen

Use case element	Description
Use case number	3.1
Application	Program management: Edit program content
Use case name	Add blank set
Descriptor	An empty set of courses is added to the contents of a program within the program content editing screen
Primary actor	Administrator
Precondition	Program exists and is being edited
Flow	1. Starts on 'Program content' screen PM03-01 2. User selects 'set of courses' from the 'add a new' drop down

	3. User selects 'add' button next to the 'add a new' drop down 4. An empty set is created and added to the program. If a previous set exists, the default set divider is set to 'Then' and appears in the drop down box between sets accordingly 5. User selects completion criteria (operator) from the drop down a. If 'one course' is chosen, the operator within the set is 'OR'. This means only one of the courses has to be completed to satisfy the set completion criteria. If 'all courses' is chosen the set operator is 'AND' meaning all courses must be completed for the set to complete. b. The relevant operator displays in each row from row two in the left most column of the courses table. 6. (*See use case 3.6*) 7. User enters the time allowance by selecting 'hours/days/weeks/months' from the drop down and typing the relevant number into the input box. Note, these fields indicate the allowed elapsed time rather than the time the learning will take. These fields are used mainly for due dates, reminders and the exception report. 8. If enrolments/assignments for the program already exist, 'apply changes' and 'cancel' buttons will need to be made available 9. When changes are applied, a confirmation dialogue stating the number of affected learners will be presented

Use case element	Description
Use case number	3.2
Application	Program management: Edit program content
Use case name	Add set from competency
Descriptor	A set of courses defined by a competency is added to the contents of a program within the program content editing screen
Primary actor	Administrator
Precondition	Program exists and is being edited
Flow	1. Starts on 'Program content' screen PM03-01 2. User selects 'competency' from the 'add a new' drop down 3. User selects 'add' button next to the 'add a new' drop down 4. The 'Select competency' lightbox appears PM03-04 5. User browses to and selects the relevant competency. Only one competency can be selected at any one time. The selected competency appears on the right hand side of the Select competency lightbox. The competency can be deselected by clicking on the delete (X) icon, which appears next to the competency on rollover. 6. User selects ok and the lightbox disappears. Returns to 'Program content' PM03-05 7. The courses entailed by the competency are added to the courses table and the competency aggregation method becomes the set

	operator. The competency title is displayed at the top of the set. Unlike with a set of courses, neither operator, nor courses are editable. PM03-05 8. User enters the time allowance by selecting 'hours/days/weeks/months' from the drop down and typing the relevant number into the input box. Note, these fields indicate the allowed elapsed time rather than the time the learning will take. These fields are used mainly for due dates, reminders and the exception report. 9. If enrolments/assignments for the program already exist, 'apply changes' and 'cancel' buttons will need to be made available 10. When changes are applied, a confirmation dialogue stating the number of affected learners will be presented

Use case element	Description
Use case number	3.3
Application	Program management: Edit program content
Use case name	Change set
Descriptor	Changes are applied to an existing set of courses within the contents of a program as part of the program content editing screen. The general case is that as soon as there are enrolments into the program (i.e. the program has been assigned to users) confirmation dialogues appear for most actions. These generally state the number of people affected by the change and ask for confirmation twice.
Primary actor	Administrator
Precondition	Program and set exist
Flow	1. Starts on 'Program content' screen PM03-01 2. User changes any parameter / data item 3. Confirmation dialogue appears stating number of affected users and offers continue and cancel buttons (similar to PM03-03) 4. User selects continue 5. A second dialogue (e.g. browser confirm dialogue) asking 'Are you sure?' appears 6. The changes are applied 7. Should the user select 'cancel' at any stage, the changes are reverted

Use case element	Description
Use case number	3.4
Application	Program management: Edit program content
Use case name	Move set
Descriptor	A set of courses is moved within the program content
Primary actor	Administrator
Precondition	More than one set of courses exist within the program

Flow	1. Starts on 'Program content' screen PM03-01 2. User selects 'move up' or 'move down' button on the set they wish to move 3. A dialogue appears stating this move may have significant consequences for the flow of the program and change the program's logic and order. A warning is issued to the user to check the set dividers to make sure the program works as they intend to. The dialogue also states how many users are affected (similar to PM03-03) 4. User selects continue 5. The set is exchanged with the following or previous set, depending on the operation chosen. Both sets move around the set divider (operator), which stays as is.

Use case element	Description
Use case number	3.5
Application	Program management: Edit program content
Use case name	Delete set
Descriptor	A set of courses is deleted within the program content
Primary actor	Administrator
Precondition	More than one set of courses exist within the program
Flow	1. Starts on 'Program content' screen PM03-01 2. User selects 'delete set' button to the right of the set 6. A dialogue appears stating this move may have significant consequences for the flow of the program. The dialogue also states how many users are affected and requires conformation from the user. PM03-03 3. Once confirmation has been given, the set is deleted from the program. 4. A set divider is also need to be deleted. The following cases apply: a. If the previous set divider is an 'OR' operator, the previous divider will be deleted b. If the previous set divider is a 'THEN' operator, the next divider will be deleted 5. Seeing as the program logic has changed, most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	3.6
Application	Program management: Edit program content
Use case name	Add course to set
Descriptor	A course is added to a set within the program content
Primary actor	Administrator
Precondition	Program and set exist

Flow	1. Starts on 'Program content' screen PM03-01 2. User selects the 'Add course' button within the set 3. The 'Select courses' lightbox appears PM03-02 4. User browses to and selects the relevant course(s). Multiple courses can be selected at the same time. Selected courses appear on the right hand side of the Select courses lightbox. Courses can be deselected by clicking on the delete (X) icon, which appears next to the courses on rollover. 5. User selects ok and the lightbox disappears 6. The selected courses are added to the courses table 7. If enrolments/assignments exist a. The relevant confirmation dialogues appear and require the user to confirm. Numbers of users affected are pointed out. 8. Upon confirmation from the user, the course is added to the set 9. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	3.7
Application	Program management: Edit program content
Use case name	Delete course from set
Descriptor	A course is removed from a set within the program content
Primary actor	Administrator
Precondition	Course set exits and contains at least one course
Flow	1. Starts on 'Program content' screen PM03-01 2. User selects the 'X' button at to the right of the course ellipsis. 3. If enrolments/assignments exist a. The relevant confirmation dialogues appear and require the user to confirm. Numbers of users affected are pointed out (similar to PM03-03) 4. Upon confirmation from the user, the course is removed from the set 5. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	3.8
Application	Program management: Edit program content
Use case name	Change flow of sets
Descriptor	The flow of the program is changed through changing the options of the set dividers. This allows sequences to be enforced or alternative completion criteria to be created.
Primary actor	Administrator
Precondition	Program with multiple sets exists
Flow	1. Starts on 'Program content' screen PM03-01 2. User selects set divider drop down between sets and changes the

	option. The following cases apply a. THEN to OR: this means that users must complete either the set before to the operator or the set following the operator b. OR to THEN: this means that users must complete the set before the operator before they can move on to the set following the operator 3. If enrolments/assignments exist a. The relevant confirmation dialogues appear and require the user to confirm. Numbers of users affected are pointed out (similar to PM03-03) 4. Upon confirmation from the user, the set divider is changed 5. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.1
Application	Program management: Edit program assignment
Use case name	Add organisation or position
Descriptor	An organisation or position (tree) is added to the groups enrolled to the program
Primary actor	Administrator
Precondition	Program exists and has content assigned
Flow	1. Starts on 'Program assignment' screen PM04-01 2. User selects 'Add <*object*> to program' button within relevant hierarchy section 3. The relevant browse / selection lightbox appears PM04-02, PM04-03, PM04-04, PM04-05 4. User selects relevant object 5. User selects 'ok' button 6. Confirm changes dialogue appears, stating what has been changed and how many learners this will affect. Offers continue and cancel buttons PM04-02-01, PM04-03-01, PM04-04-01, PM04-05-01 7. Upon confirmation from the user, the object is added to the relevant table but the change is not saved to the program until use case 4.11 8. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6) 9. (*Optional continuation: see use case 4.2*)

Use case element	Description
Use case number	4.2
Application	Program management: Edit program assignment
Use case name	Change organisation or position
Descriptor	An organisation or position (tree) is modified in the groups enrolled to the program

Primary actor	Administrator
Precondition	Program exists, has content assigned and has already been assigned to the relevant organisation or position
Flow	1. Starts on 'Program assignment' screen PM04-01 2. Case 1: Select/deselect all below a. User selects / deselects all below tick box 3. Case 2: Set required completion timing a. User selects 'set completion' link (or relevant link showing completion timing criteria) b. Completion criteria dialogue appears PM04-07 c. User enters date using input box or date selector d. Alternatively to 'c' user fills in the event based criteria input box and drop downs e. User selects save 4. Case 3: Remove object a. User selects 'X' icon on the relevant object b. 'Confirm remove assignments' dialogue appears showing numbers of learners affected c. User selects 'continue' 5. For either of the above cases, the Confirm changes dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied but is not saved to the program until use case 4.11 7. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.3
Application	Program management: Edit program assignment
Use case name	Add manager
Descriptor	A part of the line management hierarchy is added to the list groups to which the program is assigned
Primary actor	Administrator
Precondition	Program exists and contains content
Flow	1. Starts on 'Program assignment' screen PM04-01 2. User selects 'Add manager to program' button within Management hierarchy section 3. Select manager lightbox appears PM04-05 4. User selects relevant manager(s) followed by 'ok' button 5. Confirm changes dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied but change is not saved to the program until use case 4.11 7. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1,

	8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.4 & 4.5
Application	Program management: Edit program assignment
Use case name	Change manager
Descriptor	A line management assignment entry is modified in the groups enrolled to the program
Primary actor	Administrator
Precondition	Program exists, has content assigned and has already been assigned to the relevant line manager
Flow	1. Starts on 'Program assignment' screen PM04-01 2. Case 1: User changes drop-down in 'For' column a. User selects 'all below' (increase in assignments) b. User selects 'direct team' (decrease in assignments) 3. Case 2: Set required completion timing a. User selects 'set completion' link (or relevant link showing completion timing criteria) b. Completion criteria dialogue appears PM04-07 c. User enters date using input box or date selector d. Alternatively to 'c' user fills in the event based criteria input box and drop downs e. User selects save 4. Case 3: Remove manager a. User selects 'X' icon on the relevant manger name b. 'Confirm remove assignments' dialogue appears showing numbers of learners affected PM04-06 c. User selects 'continue' 5. For either of the above cases, the Confirm dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied but change is not saved to the program until use case 4.11 7. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.6 & 4.7
Application	Program management: Edit program assignment
Use case name	Add individual(s) and remove individual(s)
Descriptor	The program is assigned to individual(s) via the program assignment screen.
Primary actor	Administrator

Precondition	Program exists and has content assigned
Flow	1. Starts on 'Program assignment' screen PM04-01 2. Case 1: Handling a single learners a. User selects 'add individual to program' launches PM04-08 b. User finds and selects the relevant learner in the source box c. User selects the arrow to move them into the destination box 3. Case 2: Handling multiple users a. User finds and selects multiple learners in the source box b. User selects the arrow to move them into the destination box 4. User selects 'continue' 5. Upon confirmation by the user, the changes are applied but change is not saved to the program until use case 4.11 6. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.8
Application	Program management: Edit program assignment
Use case name	Add cohort
Descriptor	The program is assigned to an existing cohort
Primary actor	Administrator
Precondition	Program and cohort exist
Flow	1. Starts on 'Program assignment' screen PM04-01 2. User selects 'Add cohort to program' button in cohort section 3. Select cohort lightbox appears PM04-04 4. User browses to and select relevant cohort 5. User selects 'OK' button 6. Confirm changes dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 7. Upon confirmation from the user, the changes are applied PM04-04-01 but change is not saved to the program until use case 4.11 8. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.9
Application	Program management: Edit program assignment
Use case name	Remove cohort
Descriptor	A cohort to which the program is currently assigned is removed from the list
Primary actor	Administrator
Precondition	Program exists and is assigned to a cohort
Flow	1. Starts on 'Program assignment' screen PM04-01

	2. User selects 'X' icon on the relevant cohort name 3. 'Confirm remove assignments' dialogue appears showing numbers of learners affected PM04-06 4. User selects 'continue' 5. Confirm change dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied but change is not saved to the program until use case 4.11 (i.e. the program is removed from the users' required learning plans) 7. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.10
Application	Program management: Edit program assignment
Use case name	Change cohort
Descriptor	The completion timing criteria are changed for a cohort in the assigned to list for the program
Primary actor	Administrator
Precondition	Program exists and is assigned to a cohort
Flow	1. Starts on 'Program assignment' screen PM04-01 2. User selects 'set completion' link (or relevant link showing completion timing criteria) for the cohort in question 3. Completion criteria dialogue appears PM04-07 4. User enters date using input box or date selector 5. Alternatively, user fills in the event based criteria input box and drop downs 6. User selects save 7. Confirm changes dialogue appears, stating how many learners this will affect and offers continue and cancel buttons 8. Upon confirmation from the user, the changes are applied but change is not saved to the program until use case 4.11 9. 4.11 replaces this step. Most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6)

Use case element	Description
Use case number	4.11
Application	Program management: Confirm and save assignment changes
Use case name	Save assignments
Descriptor	Assignments within the program have been changed through use cases 4.1, 4.2, 4.3, 4.4, 4.5, 4.6, 4.7, 4.8, 4.9, 4.10
Primary actor	Administrator
Precondition	Assignments have been modified
Flow	1. Starts on 'Program assignment' screen PM04-01 2. User selects 'Review and save all changes to assignments' button

	3. Confirm and save changes dialogue appears PM04-09, stating all assignment changes a. User selects 'Cancel assignments' button and returns to PM02 and no changes are made. b. User selects 'Edit assignments' button and returns to PM04-01 to continue editing assignments. c. User selects 'Save all changes' button and all assignment changes are saved. 4. If 'Save all changes' most system use cases are triggered (esp. 8.1, 8.2, 8.3, 8.4 and 8.6). 5. If assignment conflicts exist user is taken to the exception report PM07-01 to resolve

Use case element	Description
Use case number	5.1
Application	Program management: Edit reminders
Use case name	Create reminder message
Descriptor	Create reminder message
Primary actor	Administrator
Precondition	Program exists
Flow	1. Starts on 'Program messages / reminders' screen PM05-01 2. User selects type of message from drop down 3. User selects 'Add' button next to type of message drop down 4. New message box appears PM05-02 5. Depending on type of message, user configures trigger settings 6. User types in subject and message body, using variables to pull in specific data where required 7. User selects whether a message should be sent to the manager using the 'send notice to manager' checkbox 8. User types in message body using variables where desired

Use case element	Description
Use case number	5.2
Application	Program management: Edit reminders
Use case name	Edit reminder message
Descriptor	An existing reminder is edited
Primary actor	Administrator
Precondition	Message exists
Flow	1. Starts on 'Program messages / reminders' screen PM05-01 2. User modifies trigger, subject, descriptions etc. 3. Changes will be saved / applied when saving at the bottom of the screen 4. Relevant system use cases are triggered

Use case element	Description
Use case number	5.3
Application	Program management: Edit reminders
Use case name	Delete reminder message
Descriptor	An existing reminder message is deleted
Primary actor	Administrator
Precondition	Reminder exists
Flow	1. Starts on 'Program messages / reminders' screen PM05-01 2. User selects delete icon on relevant set 3. Confirmation dialogue is displayed 4. Upon confirmation by the user, the reminder message is deleted

Use case element	Description
Use case number	5.4
Application	Program management: Edit reminders
Use case name	Reorder reminders
Descriptor	The position of a reminder is changed in the list. The ordering of the reminders has no consequence in terms of system behaviour other than the display order. This is to allow users to allow creating suitable orders of reminders for large programs with many reminders.
Primary actor	Administrator
Precondition	Multiple reminders exist
Flow	1. Starts on 'Program messages / reminders' screen PM05-01 2. Users selects up or down arrow on the relevant set 3. The set is moved one position up or down in the list

Use case element	Description
Use case number	6.1
Application	Program management: Handle exceptions
Use case name	Mass assign realistic time
Descriptor	Within the exception report, a mass assignment can be undertaken for those exceptions, which have been thrown on the basis of the remaining time until the deadline being shorter than the allowed time allocated for the program via the allocations of allowable elapsed time in the sets. This case adjusts deadlines according to the time allowed.
Primary actor	Administrator
Precondition	Time based exceptions have been thrown
Flow	1. Starts on 'Program exception report' screen PM07-01 2. User selects 'All time allowance issues' from Select options PM07-02 3. System displays the number of users, which have been selected. It also highlights all of the relevant rows in the on-screen view below by

	checking the checkboxes. PM07-03 4. User selects 'Set realistic time allowance automatically' option from Action options PM07-04 5. Confirmation of mass resolution dialogue appears PM07-05. This shows the affected number of learners and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied to each of the selected records. Each user is assigned a due date of NOW + ALLOWED TIME FOR PROGRAM 7. Relevant system use cases are triggered

Use case element	Description
Use case number	6.2
Application	Program management: Handle exceptions
Use case name	Mass override exceptions
Descriptor	Within the exception report, a mass assignment can be undertaken for those exceptions, which have been thrown on the basis of the remaining time until the deadline being shorter than the allowed time allocated for the program via the allocations of allowable elapsed time in the sets. This case does not adjust deadlines according to individuals – it simply applies the settings set in the program.
Primary actor	Administrator
Precondition	Time based exceptions have been thrown
Flow	1. Starts on 'Program exception report' screen PM07-01 2. User selects 'All time allowance issues' from Select options PM07-02 3. System displays the number of users, which have been selected. It also highlights all of the relevant rows in the on-screen view below by checking the checkboxes. PM07-03 4. User selects 'Override and add program anyway' option from Action options PM07-05 5. Confirmation of mass resolution dialogue appears. This shows the affected number of learners and offers continue and cancel buttons 6. Upon confirmation from the user, the changes are applied to each of the selected records. Each user is assigned the due date set in the program 7. Relevant system use cases are triggered

Use case element	Description
Use case number	6.3
Application	Program management: Handle exceptions
Use case name	Mass dismiss exceptions
Descriptor	A large number of exceptions are dismissed from the exception report. No assignments are made.

Primary actor	Administrator
Precondition	Time based exceptions have been thrown
Flow	1. Starts on 'Program exception report' screen PM07-01 2. User selects the relevant set from Select options PM07-02 3. System displays the number of users, which have been selected. It also highlights all of the relevant rows in the on-screen view below by checking the checkboxes. PM07-03 4. User selects 'Dismiss and take no action' option from Action options PM07-04 5. Confirmation of mass resolution dialogue appears. This shows the affected number of learners and offers continue and cancel buttons PM07-05 6. Upon confirmation from the user, the records are dropped from the exception report and the choice of action is logged. No assignments are made.

Use case element	Description
Use case number	6.4
Application	Program management: Handle exceptions
Use case name	Handle individual exception
Descriptor	An individual exception from the exception report is handled
Primary actor	Administrator
Precondition	An exception exists in the exception report
Flow	7. Starts on 'Program exception report' screen PM07-01 8. User searches for individual by name (optional) 9. User selects check boxes in table row in front of individual learners names 10. User selects desired option from Action options PM07-04 11. Case 1: Set realistic time a. If more than one learner is selected, the confirmation of mass resolution dialogue appears. This shows the affected number of learners and offers continue and cancel buttons PM07-05 b. Upon confirmation from the user, the changes are applied to each of the selected records. Each user is assigned a due date of NOW + ALLOWED TIME FOR PROGRAM 12. Case 2: Override a. User selects 'Override and add program anyway' option from Action options PM07-04 b. Confirmation of mass resolution dialogue appears. This shows the affected number of learners and offers continue and cancel buttons PM07-05 c. Upon confirmation from the user, the changes are applied to each of the selected records. Each user is assigned the due date set in the program 13. Case 3: Dismiss

	a. User selects 'Dismiss and take no action' from the Action options PM07-04 b. Confirmation of mass resolution dialogue appears. This shows the affected number of learners and offers continue and cancel buttons PM07-05 c. Upon confirmation from the user, the records are dropped from the exception report and the choice of action is logged. No assignments are made. 14. Relevant system use cases are triggered

Use case element	Description
Use case number	6.5
Application	Program management: Handle exceptions
Use case name	Grant extension
Descriptor	A request for an extension of the deadline by the user is granted or refused
Primary actor	Administrator
Precondition	Learner has triggered use case 7.5 'Apply for program extension'
Flow	1. Starts on 'Program exception report' screen PM07-01 2. User searches for individual by name (optional) 3. User selects check boxes in table row in front of individual learners names 4. Case 1: Grant extension a. User selects 'grant extension' from the Action options 5. Case 2: Refuse extension a. User selects 'refuse extension' from the Action options 6. Confirmation of dialogue appears and offers continue and cancel buttons PM07-05. 7. Upon confirmation from the user, the relevant new due dates are applied for the learner in question and an alert is generated and sent to the user.

Use case element	Description
Use case number	7.1
Application	Program management: End user experience
Use case name	Add program to learning plan
Descriptor	A learners or manager adds a program to an individual learning plan (not required learning). This works in the same way as adding regular courses to learning plans.
Primary actor	Learner, manager and administrator acting on behalf
Precondition	Program and learning plan exist
Flow	1. Starts in programs tab of learning plan screen LP03 2. User selects 'Add new program' button

	3. Program selection lightbox appears. This contains all programs in the regular categories / catalogue view (much like the courses view) but only shows programs. 4. User selects program(s) to be added 5. User selects 'ok' button 6. Program is added to programs list 7. User sets due date and selects 'Update settings' button (optional)

Use case element	Description
Use case number	7.2
Application	Program management: End user experience
Use case name	Remove program from learning plan
Descriptor	A program, which is part of a regular individual learning plan (not required learning) is removed.
Primary actor	Learner, manager and administrator acting on behalf
Precondition	Program exists within learning plan
Flow	1. Starts in programs tab of learning plan screen LP03 2. User selects delete (X) icon in the actions column of the program in question 3. Confirmation dialogue appears offering continue and cancel buttons 4. Upon confirmation from the user, the program is deleted from the learning plan. Note, that this does not affect the courses, which have come into the user's plan as part of the program. All courses stay as they are. It is also worth noting that only the current 'set' of courses from the program should have made it into the user's plan.

Use case element	Description
Use case number	7.3
Application	Program management: End user experience
Use case name	View program details
Descriptor	Learner or manager view the details page of the program
Primary actor	Learner, manager
Precondition	Learner is enrolled into program as part of an individual learning plan
Flow	1. Starts on home page 2. User selects 'My Learning' from top navigation 3. My Learning dashboard appears 4. User selects 'Learning plans' from sub navigation in header LP01 5. Case 1: Program in required learning a. User selects program title b. 'Required learning version' of program detail page appears LP02 6. Case 2: Program in individual learning plan a. User selects 'programs' quick link for learning plan, which

	contains the program in question LP03 b. User selects program title link from the programs list c. 'Regular (IDP) version' of program detail page appears LP04

Use case element	Description
Use case number	7.4
Application	Program management: End user experience
Use case name	Find program and view program overview
Descriptor	User looks for and finds program in the catalogue or via search and views the overview details
Primary actor	Learner, manager
Precondition	Program exists and is visible in catalogue
Flow	1. Starts on home page 2. User selects 'Find courses' from top navigation LP06 3. Case 1: via search courses a. User types in search criteria, e.g. course name in full or part b. User selects 'search' button c. Search results appear. These contain courses and programs alike 4. Case 2: via browse categories a. User selects 'Browse categories' from secondary navigation at the top b. Category contents appear. Courses and programs are shown in the same way. Programs are differentiated only by the icon used in front of the program title c. If visible in compete overview, user selects the show details (i) icon. This shows the description of the program in a popup window. d. User browses to the category containing the program e. Programs and courses appear alike, with icons, title and description 5. Selecting the program title link will trigger the 'do you wish to enrol dialogue'. Potential issue here – this may need to refer the use to having to add the program to the learning plans as opposed to giving access via the catalogue directly.

Use case element	Description
Use case number	7.5
Application	Program management: End user experience
Use case name	Apply for program extension
Descriptor	If a program is assigned to the required learning section, users may apply for an extension in case the deadline is not achievable.
Primary actor	Learner

Precondition	Program is assigned to the learner via the program management assignment feature and appears in the required learning plan at the top of the learning plans screen within the learner's My Learning area.
Flow	1. Starts on 'Learning plans' screen 2. User selects the link containing the program's title within their required learning section of the learning plans screen 3. 'Required learning version' of program detail page appears LP02 4. User selects the 'Request an extension' link beneath the program title 5. Extension request dialogue appears containing date selector, reason for extension text area and continue and cancel buttons 6. User selects date and types in reason for extension request 7. User selects continue 8. Confirmation message appears stating the extension request has been sent to the administrator 9. System generates extension request entry in the exception report

Use case element	Description
Use case number	8.1
Application	Program management: Automated / scheduled tasks
Use case name	Check for set or program completions
Descriptor	The system runs a task to check if any users have completed a set (or an entire program) – it produces a set of data with relevant information to trigger other system actions. Note, this use case is intended to describe the behaviour of the system – it does not intend to prescribe the exact program logic.
Primary actor	System
Precondition	Programs with enrolments exist and a trigger was engaged
Flow	1. System iterates through list of programs 2. For each program, system iterates through list of sets 3. For each course in the set, system checks course completion of all learners enrolled in the program 4. The numbers of completions are tallied up; if they amount to the full criteria of a set, the set is flagged as completed and the learner is added to the list of users, which require the system to take further actions. The system flags, which set is completed. 5. The completed list of learners, which require further action is returned to the program component, which triggered this use case.

Use case element	Description
Use case number	8.2
Application	Program management: Automated / scheduled tasks
Use case name	Carry out enrolments / set enrolment permissions
Descriptor	The system receives a list of users and information which sets they have

	completed. It then checks through the flow/logic of the program to determine, which set of courses the users require access permissions to and assigns these enrolment permissions to the users accordingly.
Primary actor	System
Precondition	A set of users has been produced for which enrolment action is required. *See use case 8.1*.
Flow	1. System iterates through the list of users requiring action 2. System looks up program flow/logic and finds a match for the set, which has been completed. 3. System then determines the set(s) of courses which the user requires access to next 4. System gives enrolment permissions to the set(s) of courses, which follow the set they have just completed. Access permissions are given similarly to manager approval. This means users are not actually enrolled on the courses in question but they are automatically enrolled into any course within this set the first time they try to access a course within it.

Use case element	Description
Use case number	8.3
Application	Program management: Automated / scheduled tasks
Use case name	Check for new learners fitting enrolment criteria
Descriptor	The system checks through all user profiles and determines which addition users fall into the assignment criteria of the programs in the system. This covers all of the assignment criteria, including assignment to • Organisation (or within hierarchy tree, depending on program settings) • Position (or within hierarchy tree, depending on program settings) • Line management (team or full hierarchy) • Dynamic cohort It compiles a list of users and which programs they need to be enrolled into and passes this result to the system component, which carries out the assignment.
Primary actor	System
Precondition	Program with assignment criteria exists
Flow	*1. See descriptor*

Use case element	Description
Use case number	8.4
Application	Program management: Automated / scheduled tasks
Use case name	Check for dropouts based on criteria
Descriptor	This is essentially the counterpart to 8.3, handling users who drop out of the criteria of the program assignment. In summary, the system iterates

	through the assignment criteria for programs and checks whether the users still satisfy them. If not, the system removes the program from the user's required learning. Is also removes all outstanding enrolment permissions, which haven't already been converted into enrolments. All courses, progress and other enrolments are not changed.
Primary actor	System
Precondition	Program assignments exist
Flow	*1. See descriptor*

Use case element	Description
Use case number	8.5
Application	Program management: Automated / scheduled tasks
Use case name	Send reminder messages
Descriptor	The system sends out the reminders that 'fall due'. This ties into dashboards and also captures emails. All reminders are defined in the User Interface document (Program Management UI.doc) in section PM05-01.
Primary actor	System
Precondition	
Flow	*1. See descriptor*

Use case element	Description
Use case number	8.6
Application	Program management: Automated / scheduled tasks
Use case name	Handle program recurrence
Descriptor	The system handles programs, which are set to require recurring completion. In summary, this works as follows: 1. System iterates through all programs, which are set to recur and determines the list of learners per program, which require renewed 'completions' 2. System determines the required program completion times for each user and the times at which the process needs to start on the basis of realistic time to allow for the program (as determined in the program settings) 3. For those users, which require a new attempt/completion, the system manages the existing completion data and sets up data so that the new data is kept alongside any historic completions. This may mean using attempts or history tables for previous completion data. 4. The system automatically gives people access to the first set, issues the relevant reminders and sets due dates accordingly.
Primary actor	System
Precondition	Recurring programs with assignments exist
Flow	*1. See descriptor*

Use case element	Description
Use case number	8.7
Application	Program management: Automated / scheduled tasks
Use case name	Generate / update exception report
Descriptor	The system checks through the list of new learners fitting the assignment criteria (*see user case 8.3*) to see if any of the times are deemed unrealistic – i.e. the allowed time for the program is longer than users have until the required completion date. If so, users are entered into the exception report and the administrators are notified.
Primary actor	System
Precondition	Program assignments exist
Flow	*1. See descriptor*