Financial Management Association

Caroline Rankin, Madison Gardner,
Rodolfo Castillo and Walker Stanley
Financial Management Association

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Table of Contents

Vision & Plan

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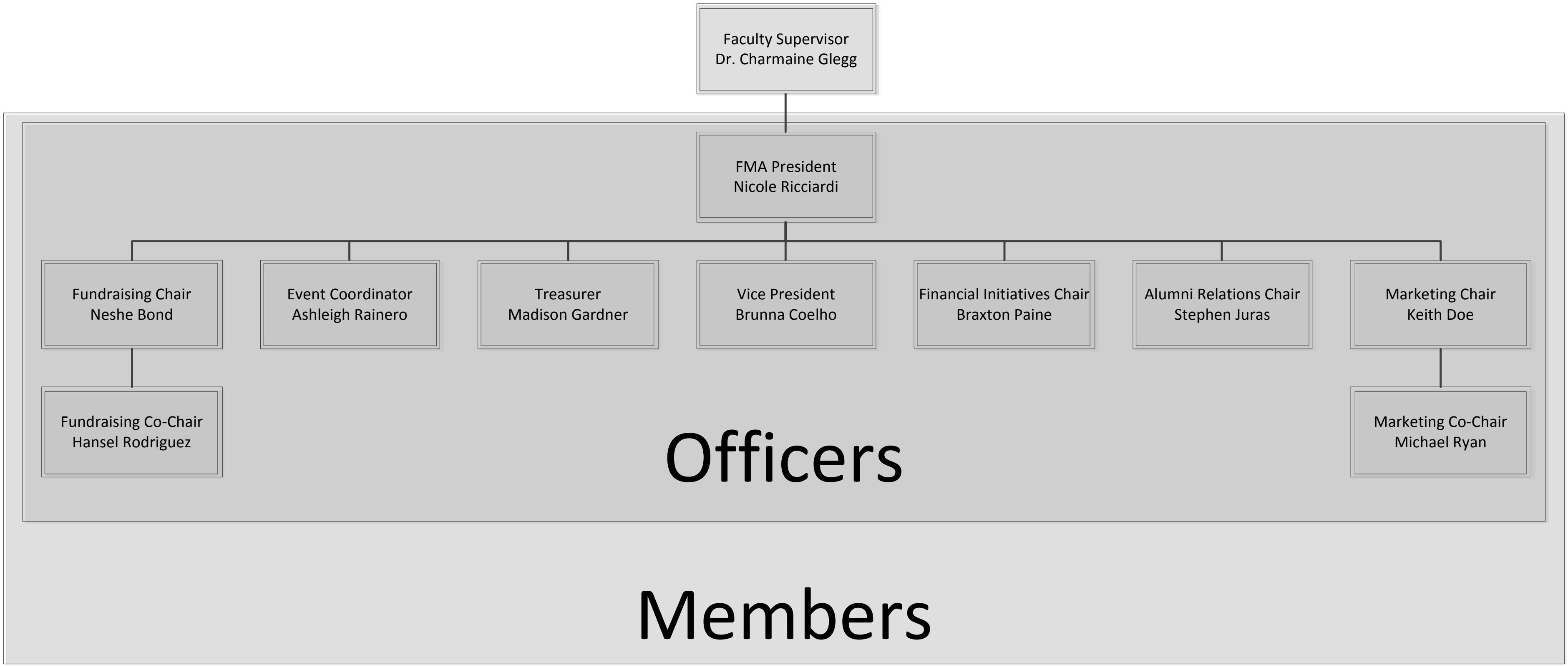
Business Background

The Financial Management Association (FMA) is one of the East Carolina University College of Business's student organizations. It is open to students of all majors, but it is also closely tied to finance concentration of the business degree. There are several similar groups in the College of Business that align themselves with other concentrations, but the FMA is one the most prolific and high-profile student organizations in both the Business School as well as on campus. The club has over 100 members register annually, and generated over $15,000 in revenues last fiscal year. A major factor for this success is in part due to the member base which is made up of an academically diverse crowd: last year alone, there were members with degrees finance, accounting, management, OMGT, MIS, marketing, economics, mathematics, and nursing. This widespread interest across campus allows for many opportunities for students interested in any area of finance.

The FMA regularly meets—usually monthly—for a presentation given by an individual currently working in the financial industry. This provides great opportunities for students; they can ask almost any questions directly to an individual working in their area of interest. Past speakers have included representatives from BB&T, Credit Suisse, State Employees Credit Union, First Command Financial Services, and Captrust, just to name a few. The group also takes two major trips every year--Washington D.C. in the fall, and New York City in the spring. On these trips, the FMA makes great connections with companies and employers that benefits students as well as the College of Business. Past trips have included visits to the NYSE, PIMCO, Blackrock, Bloomberg, the Federal Reserve, the World Bank, and Jennison Investments.

While the FMA is thriving as a successful student group in the College of Business, it is desperately in need of some organizational structure and operational reengineering. The club is essentially handed over from one group of students to another on a yearly basis, oftentimes with nothing more than a notebook of former meeting minutes and attendance sheets. Having a system in place to deal with the functional problems of the FMA would benefit current group officers, as well as students for years to come.

Organization Chart



- Although officers are administrators of the club, they are also full paying members
- Only person outside of membership of the club is the Faculty Supervisor: Dr. Glegg

Why an Information System?

Many of the Financial Management Association's problems stem from the fact that their information is inconsistent and scattered between officers. Since everything is currently written on paper and then entered into an excel sheet, mistakes are common and often unnoticed. Having an information system allow the group to employ a system that enforces procedural consistency and streamlines otherwise difficult tasks. The scope of this project includes six of those business critical areas: Attendance, Event Coordination, Alumni Database, Marketing, Accounting, and Record Keeping.

Attendance

Current Environment:
When students first enter an FMA meeting, they are bombarded with several sheets of paper requiring their signature. First, they must put their name and email on the *Sign-In Sheet*. Second, they must put their name and email on a *Trip Sign-Up Sheet* if they are interested in going on the trip for that semester. Lastly, they are handed two to three *Extra Credit Sign-In Sheets* for various professors who provide extra credit points to students who attend meetings. After the meeting begins, these sheets are passed around the room to ensure that everyone has signed all the applicable sheets.

Problems:
By the time an attendee has found their seat, they may have signed their name and email four or five times. Not only is inconsiderate to the members of the group, but it is also incredibly time consuming. When the sheets are then passed around the room, it is quite noisy and distracting to the speaker who has generously donated their time to speak to the FMA. Between a late start and noisy papers being passed around the room, the group has not made a good first impression for the guest speaker.

System Features:

- Allows user to sign-in on an electronic form as they enter room
- Simple form allows for quick entry
- Saves time and eliminates the need for a separate sign in sheet
- Saves user information in a database
- Can send emails to teachers for extra credit attendance verification

Business Benefits:
One of the primary selling points of a membership in the FMA is the connection that can be made with real industry professionals. If the club brings them in as a guest speaker and then conducts the meeting very poorly, it reflects negatively on all the students involved. This system will ideally have the opposite effect. Instead of disappointing speakers, they will be very impressed at the streamlined functions and the use of current technology to support the FMA's business model. When a speaker is impressed, he is much more likely to share his contact information or offer somebody an opportunity to shadow or intern with him.

Event Coordination

Current Environment:

While meetings with guest speakers are the primary activity for the FMA, the club also holds several other events throughout the semester. The two annual trips (mentioned in the Business Background) require an extensive amount of planning between several officers. Because trip spots are limited, priority is given first to seniors and juniors, and then to members with the best club attendance. All attendees of these trips must be paying members. Currently, the Event Coordinator will keep a list of the students who are attending, and the Treasurer will keep track of how much those individuals have paid.

Problems:

In the past, there has been a miscommunication between the Event Coordinator and the Treasurer concerning who was “approved” to go on a trip. This causes obvious problems when someone has paid money for a trip when there is not a spot for them. There have also been problems in the past with guy/girl ratios. When there are four individuals to a hotel room, it is very important that those hotel rooms do not mix genders as per ECU rules. Another common problem was missed payments. Because of unkempt payment documentation, the officers were not entirely sure who has paid in full. Not knowing who to collect more money from, the group usually lets the issue slide. The same problem occurs with individuals attending a trip who are not actual paying members.

System Features:

- Non-paying members can be identified and excluded from trips
- Metadata can enforce trip priority rules
- Keeps record of how much members have paid

Business Benefits:

Because record keeping was so poor in the past, trip payments were often not fully collected, and non-members went on trips without paying club dues. When minimum club dues are $30, and minimum trip payments are $25, the club can lose a significant amount of money on every trip. Having unified and accurate records can reduce this amount entirely. The system can also help to ensure that there is an even amount of men and women on each trip, and that trip priority is given to juniors and seniors.

Alumni Database

Current Environment:

The Alumni Database is a brand-new initiative started by the FMA to reach out to current members as they graduate and become alumni. This effort will also tied to a collection of special guest speaker info, regardless of their alumni status. Since this is a new initiative, there is no real current environment for this business function.

Problems:
Since the Alumni Database value is derived from a long-term collection of data, there is a huge risk that any redesign of the system would cause previous years of data to be incompatible. Any data loss or damage to this part of the system could also be catastrophic.

System Features:

- Past member database of graduated members
- New information will be gathered for future contacts
- A database will be kept of non-alumni including speakers and guests

Business Benefits:
The benefits of having a list of alumni and speaker guest contact info are numerous. First, building up a list of contacts over time will present many opportunities for alumni to return to the FMA as guest speakers. It will also create a professional network for the club in which members can connect with alumni for employment or internship opportunities. Having this network will give the FMA a competitive advantage over the other College of Business groups, as well as a potential model to strive for. Since the alumni initiative is a long-term project, a long-term business benefit from this system is the potential to generate alumni donations from previous members of the FMA.

Marketing

Current Environment:
Marketing in the FMA consists of a variety of tasks run by the marketing officers. Several major social media sites are used to promote both club meetings and career events. Flyers are printed out for free at the SGA Marketing committee, and then displayed throughout the Bate Building. At the beginning of each semester, the club visits finance classes and promotes to all students from freshman to seniors.

Problems:
Currently, there is no real way to assess the effectiveness of marketing strategies. Any sort of marketing initiative is done based more on tradition than proven results.

System Features:

- Emails can be generated to students from interested majors
- Performance Metrics created from metadata to analyze the effectiveness of initiatives
- Ad-hoc reporting functionality or exportability to excel for custom analysis

Business Benefits:
When it comes to marketing the Student Government Association offers a few free services to groups for the purpose of promoting their events on campus. If the FMA can effectively analyze their data, they can use fewer club resources and effectively utilize the free resources while maximizing the value of those resources. The specific market strategies will not necessarily be in scope for this project, but flexible ad-hoc reporting will allow for customized analytics. For

example, if the FMA visits freshman business classes, they should review the attendance records for the next meeting to see how many freshmen attended. Then the marketing officers could assess the value of visiting the freshman class rooms every semester.

Accounting

Current Environment:
The accounting procedure is currently documented almost entirely by two-sheet carbon copy receipts. The receipts mark the payment amount received, whether the payment was received in cash or check, and what the payment was for. The receipts are then matched up to their corresponding capital, and documented into an excel sheet. Any mismatching amounts are then documented in the spread sheet until they can be reconciled. The money amounts are then deposited into the bank.

Problems:
Using paper receipts with cash becomes very difficult during a reconciliation process. If change is given back to someone, then it is hard to tie each individual receipt to cash. If someone else writes a receipt and doesn't document exactly what the money is for, it can be difficult to locate the account to tie the cash to. Since membership status is driven by the accounting process, members can even be improperly labeled if the paper trail is incorrectly documented.

System Features:

- Email receipt can be sent to members
- Eliminates the need for paper receipts
- Can easily sort income and expenses
- Track bank account information
- Allows ECU to audit the club easily
- Exporting data to excel for function analysis

Business Benefits:
Part of the accounting procedure during a meeting is to create a carbon copy receipt when receiving a payment. This occurs every time any payment is collected, usually for new member dues, or trip payments. Since trip payments occur in small stages, many receipts are written. The FMA usually works through about 4-5 receipt books a semester. At a cost of about $4 a book, this creates instant savings of about $30-$40 per year. That might not sound like much, but over time, those saving will compound. Having the records digitally available will also allow for the process to be streamlined with instant and accurate calculations. Since the membership status will be recorded in the system at the point of sale, there is very little room for membership status errors.

Record Keeping

Current Environment:

The record keeping procedures in the FMA consist of managing several sources of information (most of which have been previously mentioned in this document) that reside with several different officers. This information is transferred primarily by email, and many different versions of documents sit with different officers. The records are then filed into a binder notebook, which is passed down from president to president each year.

Problems:

The major problem experienced in the FMA is loss of information and the corrosion of information. When an excel sheet is emailed to someone, there is no guarantee that the data won't be modified and presented as accurate. Information is also lost in a handoff at the end of every year when the departing seniors are supposed to train the new officers. This leaves very little organizational consistency from year to year. For example, several members paid for a yearlong membership in the spring semester last year. Since all membership records were scattered between several officers, it is impossible to currently tell who is still a member for this fall.

System Features:

- All records compiled into one place
- Categories of group members and their personal information
- Easily sortable via major, year, paying member, and club leadership
- Allows email to be sent to certain categories instead of a blast email
- Update emails can be sent for meeting details, speaker events and trips

Business Benefits:

One of the assumed business benefits of this system is the long-term retention of records. From year-to-year, records on paper are lost from students transferring information by hand. Designing a system that allows for the easy and safe transfer of information will ensure that records are preserved for years to come. This also allows for all of the group officers to have a central location for information instead of trying to piece together several sources of info from different people; this will then lead to more organizational consistency from year to year.

System Constraints

Due to the limited budget that we face the costs must be minimal to zero. Due to the student run nature of the club leadership is subject to constant change. As a result of this the program solution must be easy to learn and use. New people must be able to learn the system very easily. Measures will be taken to ensure that the data is secured and properly backed up.

Anticipated Hardware and Software Requirements

In order to have an electronic sign in process there must be a laptop computer to facilitate the process. The computer must have the necessary software, such as Access and Excel. There must also be a backup location such as a base computer or the cloud. An Internet connection will also be needed preferably wireless.

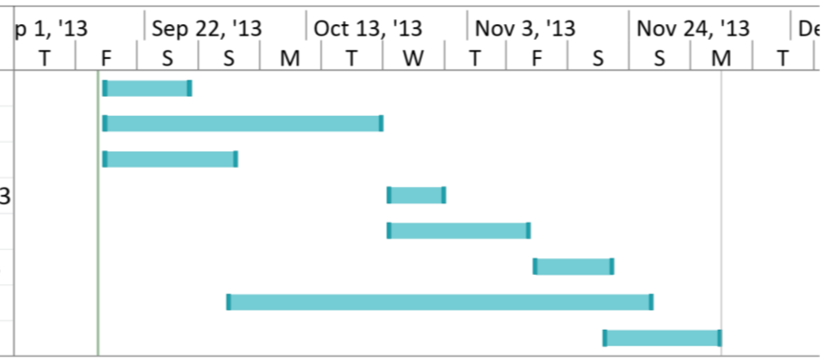
Stakeholders

- **Members** – The students who are paying members will benefit from this system by receiving a quicker sign-in and more effective communications.
- **Officers** – The students who run the organization will benefit in many of the aforementioned functional areas of the group management. Their time spent on the organization will be reduced, while still generating a net-gain in productivity.
- **Alumni** – Creating a long-term, two-way relationship with alumni will allow ECU students to get internships and jobs, while providing alumni employers with quality labor from their Alma matter.
- **Teachers and Administration** – As a College of Business student group, the FMA is required to regularly report financial information to faculty advisors and administration. If this information is not well documented or organized, College of Business funding may be withheld, and an audit can occur.
- **Student Government Association** – Every year in the spring, the FMA goes to the Student Government in order to request funding for its trip to NYC. The SGA holds a panel where the officers of the FMA are asked questions on anything related to the trip, the group's financial information, or the way the club is run from an operational standpoint. Having an information system would allow them to easily determine the correct amount of funding to provide the club with.

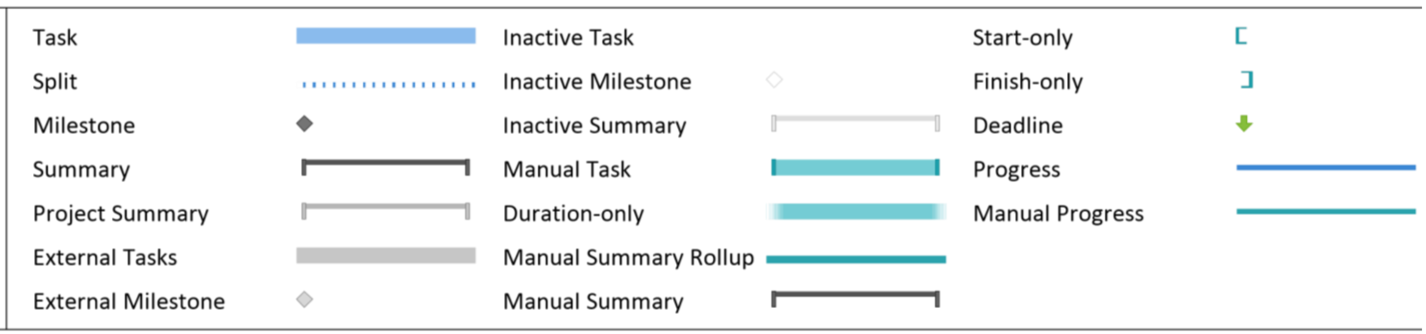
Project Plan

In line with a waterfall project lifecycle model, we are planning to take on each milestone individually. We have built in time—right around a week—for analyzing and assigning the tasks at the beginning of each milestone, and we have also given a 48-hour time cushion before the major due dates to edit our deliverables. As the details for the individual milestones become clearer, we sub categories the Gantt chart below.

ID	Task Mode	Task Name	Duration	Start	Finish
1		MS 3 Tasks Assigned	9 days	Tue 9/17/13	Fri 9/27/13
2		MS 3 Analysis	26 days	Tue 9/17/13	Tue 10/22/13
3		Exam 1	13 days	Tue 9/17/13	Thu 10/3/13
4		MS 4 Tasks Assigned	5 days	Thu 10/24/13	Wed 10/30/13
5		MS 4 Design Phase	13 days	Thu 10/24/13	Sun 11/10/13
6		Individual Project Review	8 days	Tue 11/12/13	Thu 11/21/13
7		Exam 2	39 days	Thu 10/3/13	Tue 11/26/13
8		Final Project Presentations	11 days	Thu 11/21/13	Thu 12/5/13



Project: Microsoft Project MS2
Date: Mon 9/16/13



Page 1

Milestone 1 - Group Time Sheets

Milestone 1 Time Sheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Timesheet & Templates Created	9/7/2013	12:00 PM	2:00 PM	2
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Started Gantt Chart	9/9/2013	7:00 PM	9:00 PM	2
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish Powerpoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21

Milestone 1 Time Sheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Create Timeline	9/3/2013	3:30 PM	4:00 PM	.5
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Attended FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Task Breakdown	9/7/2013	4:00 PM	5:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Business Benefits & Overview	9/11/2013	6:00 PM	9:00 PM	3
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish Powerpoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				23

Milestone 1 Time Sheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Outline & System Features	9/10/2013	7:00 PM	9:30 PM	2.5
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 System Constraints	9/12/2013	8:00 PM	9:00 PM	1
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Hardware & Software Requirements	9/15/2013	3:30 PM	4:30 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish Powerpoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21.5

Milestone 1 Time Sheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Business Environment	98/2013	8:00 PM	9:00 PM	1
MS2 Problems with Business Environment	9/9/2013	7:00 PM	8:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish Powerpoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				20

Milestone Evaluation Sheet

Progress and Accomplishments

The idea to begin with was abstract. The idea in MS2 is now becoming clearer due to the process now being more relatable to a business context. The progress is now going at a good speed with everyone pitching in with the documents and assignments needed to be accomplished. Being able to go to an actual FMA meeting has helped tremendously with the progress of this milestone because the group can describe the environment and speak on the problems they are having. It is important to not understate the importance of working with a non-hypothetical situation. Afterwards an assessment can be made into what needs to be done to fix the problems.

Problems Encountered

Many problems arise with this milestone with time being the main issue. Many of the members had a hard time trying to meet due to tight schedules, which include jobs, internships, and other projects. Hours at work really interfered with scheduling because members have long hours during the evening, which was when most of the other members were available. Another conflict was other classes. All MIS classes at ECU have group projects and this can create a tough situation, especially when due dates are around the same time.

Very quickly we realized that we had to find another way to meet when we just needed to check in. While trying to find alternative ways to meet, we decided to try out online conferences. Lync 2013 was brought up as a solution to try to fix our meeting schedules. Many members found it difficult to use this program because of numerous technical issues. Some members had the program already installed while others did not have the program on their respective hardware. The issues that occurred in this milestone should no longer being an issue in the next milestone because they are now resolved. The ability to have online meetings has been very beneficial because it has allowed us to check in and make sure that we were all on the same page.

Staying on Schedule

We were very effective in meeting the due dates and milestone for this part of the project. The parts that we needed to turn into Dr. Paul were on time. More important for the group was the internal due dates. Instead of waiting until the last minute we set dates for different parts of the project to be done. For example we split of the different parts of the milestone into the person's role. We wanted to have all the parts done by the Thursday before it was due. We accomplished this and this gave us the weekend to perfect the parts and compile them. The only thing that we waited too long to do was the PowerPoint. While we were very effective at getting things done there is always room for improvement. However in total we believe that this group is one of the best that we have ever been in. To improve we are going to start the next milestone right away and start working towards the next due date.

Looking Ahead

For the coming milestone we are going to focus on the Analysis part of the project. This is the part of the project we are going to get more into the specific details of the project. For the previous milestone we had to focus more on the idea itself and overall a very broad overview. Also in the previous milestone we kept the technical details to a minimum. This was evident in our systems features document where we did not mention too many of the specifics. The goal for the next part will be to decide what the design is going to be like. This next phase is going to be important hands on experience.

Other Thoughts

When we first were introduced to this project we all knew that it was going to be a hard time and a lot of work. As a team we decided to be proactive and meet ahead of time instead of waiting to the last minute. One of the difficulties that we have encountered is the fact that we had a long week break in the middle of our project. That Tuesday we had Monday classes and Thursday we had a late football game. Those two things put us behind and we had to play catch up. I can see why Dr. Paul was hesitant to cancel class that Thursday because it did really put us behind.

We were unsure what direction to take the project in because we do not have a strong background in this area to make the tough decisions that we had to. As we learned more about the requirements and what we needed to focus on we became more comfortable on guiding the project. Also at first some of the group was not sure what the project actually was. Once Madison explained the Finance club and exactly what the project was improving the group was better able to grasp the situation.

This project is different from other projects because there is not a step-by-step guide on what we need to do. We had a two-page requirements document and previous examples to work with. While we initially viewed this as a negative it caused us to think more critically and we think that it has created a better milestone in general. I believe that the project is setup this way because in the real world we will not have everything laid out in a perfect outline but it is your job to figure out how the project will be completed. This project will be great training for our future careers. It will be interesting to see how this will affect our next milestones and how different it will be.

Analysis Package

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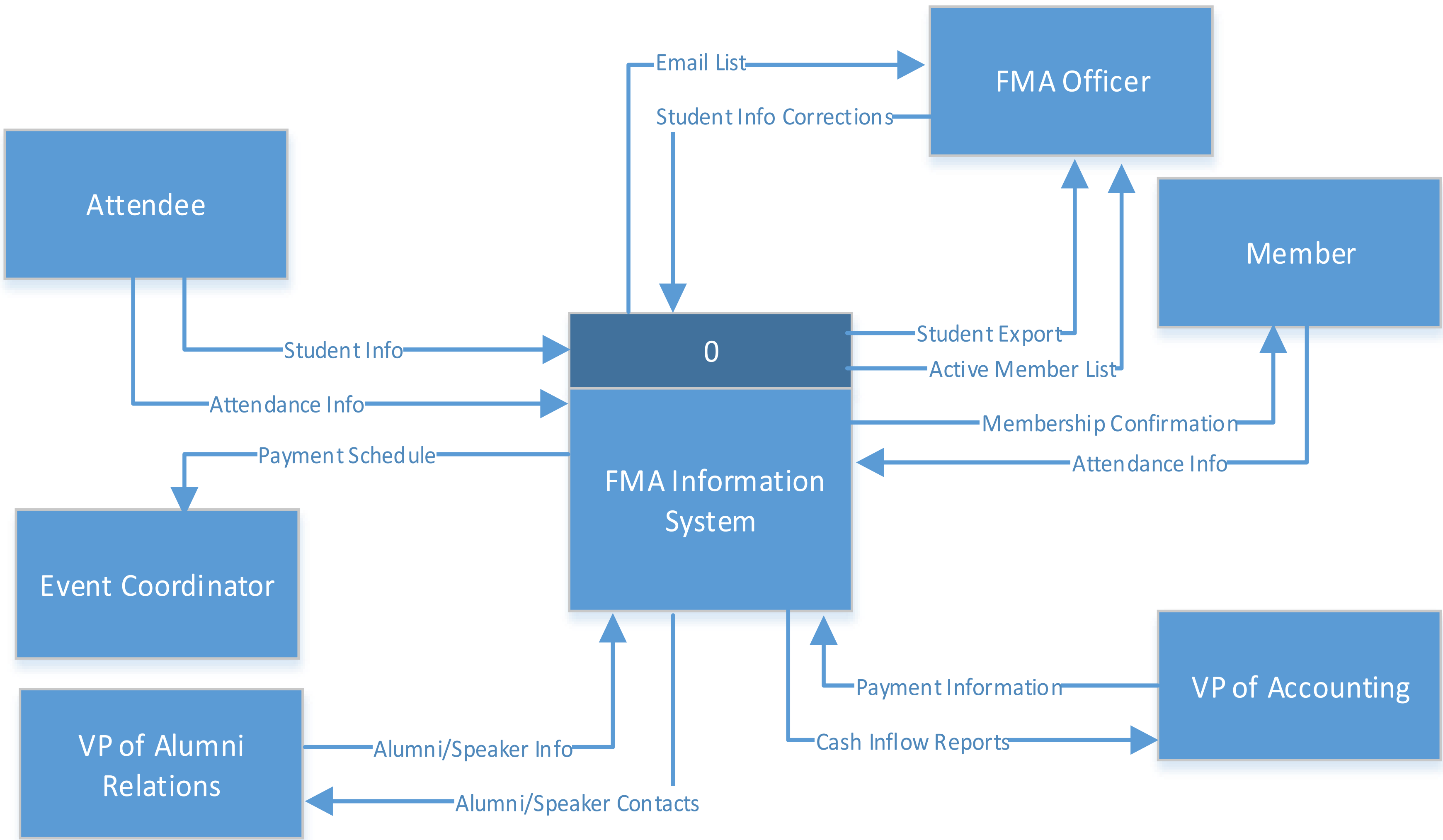
Executive Summary

The following documents contain a thorough analysis of the FMA Information System project. It contains a Context Diagram of major informational flows, a Use Case Package specifying step-by-step what the system will do, and a milestone evaluation. It also includes timesheets to document the work put into the project.

The Use Case Package contains specifications on the following functions: Record Attendance, Manage Payment, Obtain Membership, Check Payment Schedule, Manage Non-Member Contact Information, Retrieve Student Information, and Manage Student Submitted Information. The use cases contains the basic flows, as well as alternative flows documenting what the system will do in case of a deviation from the ideal scenario.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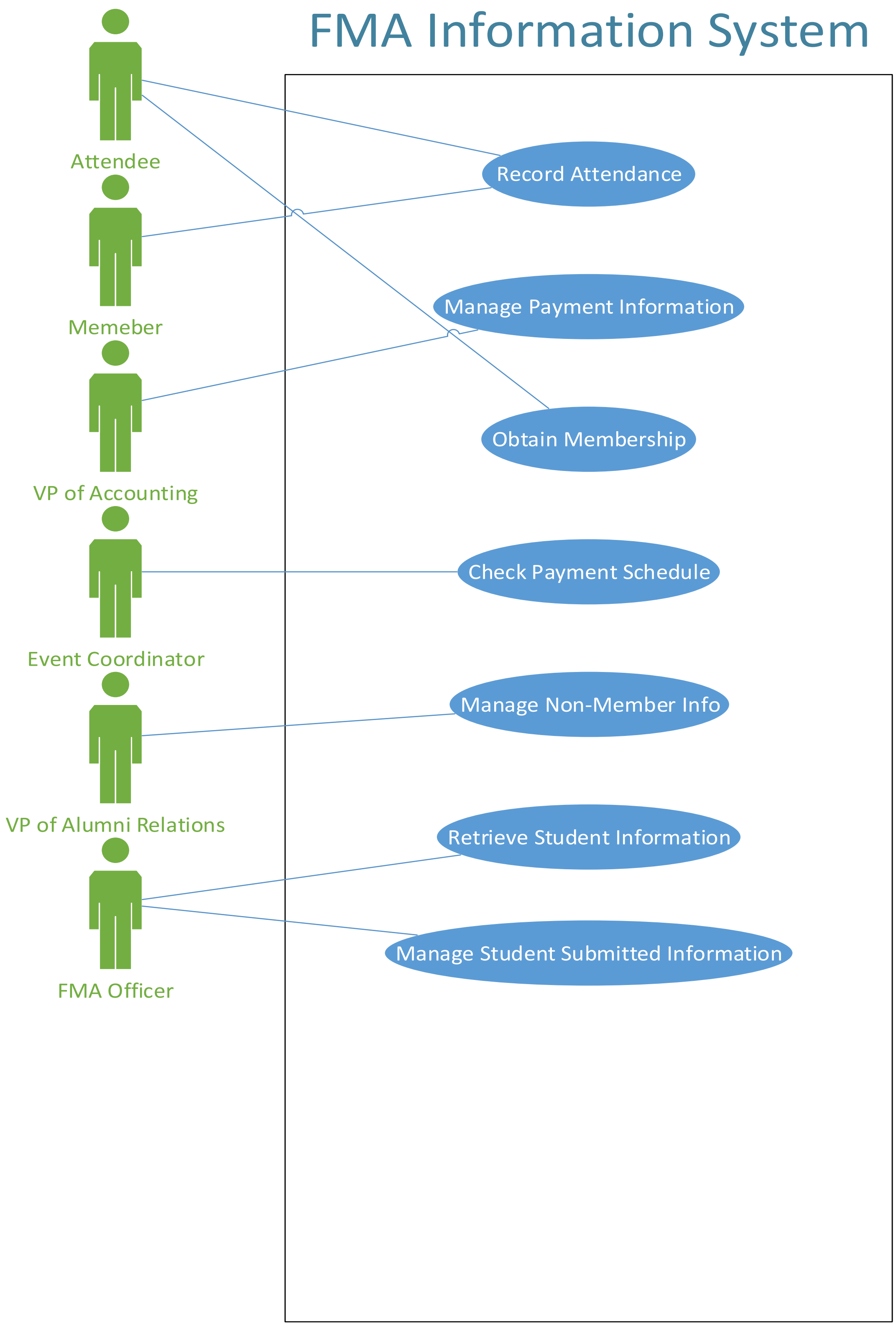
Cash Inflow Reports
VP of Alumni Relations
Alumni/Speaker Info
Alumni/Speaker Contacts


FMA Information System
Attendee
Memeber
VP of Accounting
Event Coordinator
VP of Alumni Relations
FMA Officer
Record Attendance
Manage Payment Information
Obtain Membership
Check Payment Schedule
Manage Non-Member Info
Retrieve Student Information
Manage Student Submitted Information

The FMA Information System

Use Case Specification: Manage Attendance Information

Version 2.0

Revision History

Date	Version	Description	Author
10/17/13	0.1	Draft	Madison Gardner
10/21/13	0.2	Added Special Requirements, Pre and Post Conditions	Madison Gardner
10/23/13	0.3	Reviewed w/ Team	Madison Gardner
10/24/13	1.0	Milestone 3 Submission	Madison Gardner
11/5/13	1.1	Revised w/ Team. Changed Use Case to Manage Attendance Information. Added basic flows for FMA Officers	Madison Gardner
11/10/13	2.0	Reviewed & Finalized	Madison Gardner

Use Case Specification: Manage Attendance Information

Brief Description

When members of the FMA or attendees of the FMA meetings come to an FMA event, they need to sign in to document that they attended the meeting. FMA Officers will also need to be able to manually modify this information separate from the sign-in procedure. Members and Attendees should be able to enter this information, but they should not be able to edit or delete the information. FMA Officers will be able to add, edit, or delete information.

Flow of Events

I. **Basic Flow – Student (Member or Attendee)**
   A. The user wishes to sign in at an FMA event
   B. The system will ask the user the yes/no question, "Have you attended an FMA meeting this semester, and did you sign in at that event?"
   C. Once the user selects an answer, one of the following sub flows is executed:
      1. If the user indicated that they had not yet attended an FMA meeting this semester by selecting "First Time Attendee," or that they did not sign in at a previous event by selecting "First Time Attendee," the **First-Time Attendee Sign-In** sub flow is executed
      2. If the user indicated that they had signed in at a previous meeting by selecting "Returning Attendee and have previously signed in," the **Returning Attendee Sign-In** sub flow is executed
         i. **First-Time Attendee Sign-In**
            a. The system will prompt the user to enter the following information: PirateID, First Name, Last Name, Major, Expected Graduate Date, and Year (Freshman, Sophomore, etc.)
            b. Once the user has entered the information, they will submit the form
            c. The system will retain the user-provided information, along with the Current Date and Current Time to note when the information was documented
            d. The system will display thank-you message saying, "Thank you for signing in. Enjoy the meeting!"
         ii. **Attendee Sign-In**
            a. The system will prompt the user to enter their PirateID
            b. Once the user has entered the information, they will submit the form
            c. The system will retain the user-provided information, along with a Date/Timestamp to note when the information was documented
            d. The system will display a thank-you message saying, "Thank you for signing in. Enjoy the meeting!"

I. **Basic Flow – FMA Officer**
   A. The user wishes to manage attendance information.
   B. The system will ask the user if they would like to "Add Attendance Information," "Edit Attendance Information," or "Delete Attendance Information."
   C. Once the user has selected an answer, one of the following sub flows is executed:
      1. If the user selects "Add Attendance Information," the **Add Attendance Information** sub flow is executed.
      2. If the user selects "Edit Attendance Information," the **Edit Attendance Information** sub flow is executed.
      3. If the user selects "Delete Attendance Information," the **Delete Attendance Information** sub flow is executed.
         i. **Add Attendance Information**
            a. The system will prompt the user to enter the following information: PirateID, Date, First Name, Last Name, Major, Expected Graduation Date, and Year (Freshman, etc.)
            b. Once the user has entered the information, they will submit the form.
         ii. **Edit Attendance Information**
            a. The system will prompt the user for a date range.
            b. The user will enter a date range.
            c. The system will return all attendance records for the user-provided date range.
            d. The user will edit any information
         iii. **Delete Attendance Information**
            a. The system will prompt the user for a date range.
            b. The user will enter a date range
            c. The system will return all attendance records for the user-provided date range.
            d. The user will select any records that need to be deleted
            e. The system will delete the selected records

II. **Alternative Flows**
   A. Student indicates that they have previously signed in at an event when they actually haven't
      1. The student submits a **Returning Attendee Sign-In** function with a PirateID that has not been provided before in the **First-Time Attendee Sign-In** function.
      2. The system will display an error message that says, "The PirateID provided is not in our records. Please check the spelling and try again. If you haven't signed in before, return to the first page and select 'First-Time Attendee.'"
      3. The system will then provide the student with the following options:

i. Retry the PirateID on the current form
ii. Return to the first page and select “First-Time Attendee, initiating the **First-Time Attendee Sign-In** function.

B. Student misspells their PirateID

1. The student has incorrectly entered their PirateID at the **Returning Attendee Sign-In** function.
2. The system will check to ensure that the PirateID has been provided before.
3. If the PirateID has not been provided before, the system will display an error message that says, “The PirateID provided is not in our records. Please check the spelling and try again. If you haven’t signed in before, return to the first page and select ‘First-Time Attendee.’”
4. The student will then be provided with the option to correct their PirateID and resubmit the form.

Special Requirements

None

Pre-conditions

System Access

- The user has access to the system and has accessed the Manage Attendance Information function

Post-conditions

Retention of Information

- The system will retain the information submitted or modified by the user.

The FMA Information System

Use Case Specification: Manage Payment Information

Version 2.0

Revision History

Date	Version	Description	Author
10/18/13	0.1	Draft	Madison Gardner
10/22/13	0.2	Changed Use Case to 'Manage Payment Information,' redesigned the use case	Madison Gardner
10/23/13	0.3	Reviewed w/ Team	Madison Gardner
10/24/13	1.0	Milestone 3	Madison Gardner
11/5/13	1.1	Revised w/ Team. Added Basic Flow for entering Payment Accounts	Madison Gardner
11/10/13	2.0	Finalized for Project Submission.	Madison Gardner

Use Case Specification: Manage Payment Information

Brief Description

The FMA collects payments from students for different purposes including membership dues and trip payments. The students will submit a payment to the VP of Accounting. The VP of Accounting will then come to the system to record the payment information. The VP of Accounting can then edit payments to make adjustments to documented payments. The VP of Accounting can then view the payments for a date range with the totals broken down by cash/check and by purpose. The VP of Accounting must also create Payment Accounts to specify what the payments were for. Deletion functions are not included in this use case to ensure that payment records are not deleted. This is to ensure transparency in the system and the organization. The user in this use case is the aforementioned VP of Accounting.

Flow of Events

I. **Basic Flow**
   A. The user wishes to manage the payment information
   B. The system will ask the user if they want to "Add Payment Account", "View the Payment Information," "Add Payment Information," or "Edit Payment Information"
   C. Once the user makes a selection, one of the following sub flows will be executed:
      1. If the user selects "Add Payment Account," the **Add Payment Account** sub flow will be executed.
      2. If the user selects "View Payment Information," the **View Payment Information** sub flow will be executed.
      3. If the user selects "Add Payment Information" the **Add Payment Information** sub flow will be executed.
      4. If the user selects "Edit Payment Information" the **Edit Payment Information** sub flow will be executed.
         i. **Add Payment Account**
            a. The user wishes to Add a Payment Account to the system
            b. The system will display a current list of Payment Accounts and ask the user if they would like to add a Payment Account
            c. The user indicates that they would like to add a Payment account
            d. The system prompts the user to enter the following information:
               1. Account Name
               2. Account Information
            e. The user will enter the information into the system

f. The system will retain the information, and will then use the Payment Accounts to populate the Payment Purpose options in the **Add Payment Information** and **Edit Payment Information** sub flows.

ii. **View Payment Information**

a. The user wishes to view the current payment information
b. The system will prompt the user for a date range for payments
c. The user will provide a date range
d. The system will then return the following values within the date range: Student Name, Date, and Payment Amount. The results will be grouped first by Cash or Check and then by Payment Purpose. A subtotal for cash and a subtotal for check will be included, along with a cash + check total. An example provided by a stakeholder is shown below for clarity.

Cash			Check		
Membership			Membership		
Date	Name	Amount	Date	Name	Amount
1/1/2013	Student Member	$50	1/1/2013	Student Member	$30
	Cash Subtotal	$50		Check Subtotal	$30
		TOTAL	$80		

iii. Add Payment Information

a. The user wishes to add payment information
b. The system will prompt the user for the following information: PirateID, Student Name, Date, Payment Amount, Payment Method, and Payment Purpose
c. The user will enter all of the information and submit the form
d. The system will retain the information and return to a blank payment entry form

iv. Edit Payment Information

a. The user wishes to edit payment information
b. The system will prompt the user to enter a date range to filter payments
c. The user will provide a date range
d. The system will return the following information within the date range provided: Date, Name, Payment Amount, Payment Purpose, and Payment Method. The data will be sorted first by date, and then by name
e. The system will allow the user to edit any of the information presented. However, the system will NOT allow the user to delete any payment instances.
f. The user will edit the instance

g. The system will retain the updated instance

II. **Alternative Flows**

A. Incorrect Payment Information when a payment is added
1. The user has entered the wrong information into the Add Payment function and the system has retained the incorrect information.
2. The user will access the **Edit Payment Information** function
3. The system will ask the user to enter a date range to filter payments
4. The user will enter a date range which includes the incorrect payment instance
5. The system will return the payment results within the provided date range
6. The user will locate the incorrect payment instance and edit the information
7. The system will retain the updated instance

B. User does not know the date of the desired payment
1. The user wishes to manage the information of a payment, but they do not know the date range of the desired instance
2. The system will ask the user for a date range
3. The user does not enter a date in the date range
4. The system will return all of the payment records in the system

Special Requirements

None

Pre-conditions

The user has access to the system, and has accessed the Manage Payment function.

Post-conditions

The system will retain the information provided or modified by the user.

The FMA Information System

Use Case Specification: Manage Membership Information

Version 2.0

Revision History

Date	Version	Description	Author
10/20/2013	0.1	Draft	Rodolfo Castillo
10/21/2013	0.2	Added Special Requirements section	Rodolfo Castillo
10/22/2013	0.3	Worked w/ Team	Rodolfo Castillo
10/23/2013	1.0	Final corrections	Rodolfo Castillo
11/4/2013	1.1	Revise Use Case name to Managing Membership Information	Rodolfo Castillo
11/10/2013	2.0	Updated Draft	Rodolfo Castillo

Use Case Specification: Manage Membership Information

Brief Description:

Attendees who wish to become a member of the FMA will come to FMA meetings where they will enter required information which will be recorded in the FMA system. The system will record the attendee as a member if the needed requirements for membership are met. An officer will also be included in this use case since someone will be needed to add, edit, or delete information. The attendees and members can have the ability to add information into the system, but they should not be allowed to edit or delete those records. A second basic flow will show how the FMA officers can manage the information manually.

Flow of Events

I. **Basic Flow - Attendee**
   A. Attendee wishes to become a member at a FMA Meeting. Attendee goes to system.
   B. System displays form to attendee (*Required)
      1. First Name*
      2. Last Name*
      3. Non ECU Email
      4. PirateID *
      5. Interests
      6. Banner
      7. Phone Number
      8. Graduation Date*
   C. Attendee enters information
   D. Attendee submits information

II. **Basic Flow - FMA Officer**
   A. The user wishes to manage student submitted information within the system.
   B. The system will prompt the user for a date range
   C. The user will enter a date range
   D. The system will return all Membership records for the user provided range
   E. The user can then choose to manually add a record, edit a current record, or delete a record

III. **Alternative Flow – Attendee**
   A. The user submits information that is incorrect
      1. If the information is incorrect an FMA officer will edit the incorrect information in the system as per the specifications listed in the Manage Student Submitted Information Use Case.
   B. Required field is left blank

1. Error message will appear once the information is submitted. The error message will say “A required field needs to be filled before submitting”

IV. Alternative Flow – FMA Officer

A. User enters a date range that has not occurred yet
   1. The system will prompt the user for a date range.
   2. The user enters a date range that has not yet occurred.
   3. The system will display an error message that says, “The date range invalid. Please check the dates and try again.”
   4. The system will then allow the user to reenter the date range.

Special Requirements

None

Preconditions

The user will have access to the system and will have accessed the Managing Membership Information function.

Post conditions

System retains the information

The FMA Information System

Use Case Specification: Check Payment Schedule

Version 2.0

Revision History

Date	Version	Description	Author
10/18/2013	0.1	Basic Flows	Caroline Rankin
10/20/2013	0.2	Pre-Conditions and Post-Conditions	Caroline Rankin
10/21/2013	1.0	Review as group	Caroline Rankin
11/5/2013	1.1	Revised w/ Group. Made minor changes	Caroline Rankin
11/10/2013	2.0	Review, Revise and Finalize	Caroline Rankin

Use Case Specification: Check Payment Schedule

Brief Description

The check payment is where the event coordinator comes to the system for a count of who has paid for the upcoming trips, then displayed as a report. The two trips that the event coordinator is looking for are the trip to DC and the New York trip. The only people that will be displayed for the event coordinator are the people that have already paid for the *trip. The user in this Use Case is the Event Coordinator.*

Flow of Events

A. Basic Flow

A. The user wishes to check the payment schedule for trips.
B. The system will ask the user to specify which trip and which year they wish to check the payment schedule for.
C. The user selects a trip from the list of payment accounts.
D. The system will return the following information concerning payments associated with the user-selected trip:
    1. First Name
    2. Last Name
    3. Date Paid
    4. Payment Amount
    5. Grouped by the trip

B. Alternative Flows

If the user cannot find the desired trip in the list of payment accounts then they will need to add the trip to the list of accounts as per specifications in the Manage Payment Information Use Case.

Special Requirements

None

Pre-conditions

The user has access to the FMA system and has accessed the check payment schedule use case.

Post-conditions

System retains information.

The FMA Information System

Use Case Specification: Manage Non-Member Contact Information

Version 2.0

Revision History

Date	Version	Description	Author
10/17/2013	0.1	Basic Flows	Caroline Rankin
10/19/2013	0.2	Pre-Conditions and Post-Conditions	Caroline Rankin
10/22/2013	1.0	Review as group	Caroline Rankin
11/5/2013	1.1	Revised w/ group. Minor Corrections, added Payment Account reference.	Caroline Rankin
11/10/13	2.0	Review, Revise and Finalize	Caroline Rankin

Use Case Specification: Manage Non-Member Contact Information

Brief Description

The purpose of the record Non-Member Contact Information for the vice president of the alumni relations enter the system to access information on trip contacts, alumni contacts and guest speaker contact information saved for future use. These will be displayed on a report as business cards and be differentiated by their occupation and what type of contact the information is. Since there are three different types of people used (Trips Contacts, Alumni Contacts, and Guest Speaker Contact Information) and different information entered, there will be different parts in the "add" section but "edit" and "delete" will be the same for all three types of information.

Flow of Events

I. Basic Flow

A. The user wants to add, edit or delete a non-member contact information.

B. The system request the user to specify the function they would like to perform "Manage Non-Member Contact Information."

A. Once "Manage Non-Member Contact Information" is selected one of the steps below are executed:

B. If the user selects "Add Alumni Contact Information," the **Add Alumni Contact Information** sub flows is executed.

C. If the user selects "Add Guest Speaker Contact Information," the **Add Guest Speaker Contact Information** sub flows is executed.

D. If the user selects "Add Trips Contact Information," the **Add Trips Contact Information** sub flows is executed.

E. If the user selects "Edit Contact Information," the **Edit Contact Information** sub flows is executed.

F. If the user selects "Delete Contact Information," the **Delete Contact Information** sub flows is executed.

G. If the user selects "View All Contact Information," the **View All Contact Information** sub flows is executed.

1. **Add Alumni Contact Information**

   i. The user wants to add new Alumni Contact Information in the system.

   ii. The system requests to add Alumni's Contact Information into the system.

      a. First Name
      b. Last Name
      c. Telephone Number
      d. E-mail Address
      e. Company or Organization Alumni Works for
      f. Job title

    g. Industry
    h. Major when attended East Carolina University
    i. Graduation Year
  iii. The user saves information.
2. **Add Guest Speaker Contact Information**
  i. The user wants to add new Guest Speaker Contact Information in the system.
  ii. The system requests to add Guest Speaker's Contact Information into the system.
    a. First Name
    b. Last Name
    c. Telephone Number
    d. E-mail Address
    e. Company or Organization Guest Speaker Works for
    f. Job title
    g. Industry
  iii. The user saves information.
3. **Add Trips Contact Information**
  i. The user wants to add new Trips Contact Information in the system.
  ii. The system requests to add Trips Contact Information into the system.
    a. First Name
    b. Last Name
    c. Telephone Number
    d. E-mail Address
    e. Company or Organization they work for
    f. Job title
    g. Industry
  iii. User saves information.
4. **Edit Contact Information**
  i. The user wants to edit Contact Information in the system.
  ii. The system will ask the user to enter first and last name.
  iii. The user provides the first and last name of the contact desired.
  iv. The system returns first and last name of contact desired.
    a. If the user only enters first name the system returns all related first names.
    b. If the user only enters last name the system returns all related last names.
  v. The user edits the Contact Information.
  vi. The user saves edited information.
  vii. The system retains information.
5. **Delete Contact Information**
  i. The user wants to delete Contact Information in the system.

ii. The system will ask the user to enter first and last name.
iii. The user provides the first and last name of the contact desired.
iv. The system returns first and last name of contact desired.
    a. If the user only enters first name the system returns all related first names.
    b. If the user only enters last name the system returns all related last names.
v. The user selects the contact they want to delete.
vi. The system will display a new message window asking the user are you sure you want to delete the contact information selected.
vii. The system deletes contact information.

Special Requirements

None

Pre-conditions

The user has access to the FMA system and has accessed the manage non-member contact information use case with the Alumni’s Contact Information, Guest Speaker’s Contact Information and Trips Contact Information.

Post-conditions

If all contact information for all non-member’s has been properly entered and the use case is completed successfully, the Alumni Contact Information, Guest Speaker Contact Information and Trips Contact Information is saved and updated in the system for future use.

The FMA Information System

Use Case Specification: Query Student Information

Version 2.0

Revision History

Date	Version	Description	Author
10/18/2013	0.1	Started basic flow	Walker Stanley
10/19/2013	0.2	Finished alternative flows	Walker Stanley
10/20/2013	0.3	Work w/ team	Walker Stanley
10/22/2013	1.0	Final edits	Walker Stanley
11/4/2013	1.1	Corrections made	Walker Stanley
11/6/2013	1.2	Added alternate flow	Walker Stanley
11/11/2013	2.0	Updated Draft	Walker Stanley

Use Case Specification: Query Student Information

Brief Description

An FMA officer can retrieve a list of students that are current and up to date. The system will provide methods to either export the lists or view them. The purpose for this use case is the ease of access to important student information. It will allow for access to student data. This use case is provided to address this feature. The users for this use case are individuals that need access to the list of student users. It can be any FMA officer as all group leaders will need access to this data.

Flow of Events

I. **Basic Flow**

This use case starts when the user wants to retrieve the current list of all students.

A. The system will give the option to view the active student list, view the active student email list, or export the full list of student users.
B. Depending on the option chosen the system will execute the following options
   1. The user chooses the student member list
      i. The system will show all active student members.
      ii. System will display the following fields: first name, last name
      iii. Email addresses will be listed in an easily copied format
         a. For the purpose of this system an email address will be considered inactive if the current date is 6 months past the user provided graduation date. This will only apply to university provided email addresses for students.
   2. The user selects to have a full export of student information
      i. All student users, including members and attendees will be included
      ii. A file will be exported in csv file format, separated values
      iii. Export will contain the following fields: graduation date, major, year, pirate id, first name, last name, and email

II. **Alternative Flows**

A. Multiple email addresses listed

   If a user has multiple email addresses listed then there are several options that the user can select.
   1. If the user does not select a specific address then the system will automatically select the default email address.
   2. If a student the default email will be the school issued email.
   3. If no school issued email available then the default will be the email address used the most often.
B. No file path
   1. If user does not select file path for full export
   2. the system will prompt the user to select file path before continuing

Special Requirements

None

Pre-conditions

A list of current student information must be in the system

Post-conditions

After exiting the system will resort back to the default state

Milestone Evaluation

Progress and Accomplishments

After finishing milestone 2 we decided to directly move into the next milestone. We accomplished this by taking the next week and correcting our previous paper and taking the next steps for milestone 3. In order to get a better idea of what we needed to do with our project we met with the Financial Management Officers. The FMA had a lot of great input and gave us great ideas on how to automate their group processes. They made themselves available often, and we were able to call them anytime we had a question or needed a clarification. We also held a JAD session with them to discover dependencies between their processes. There were also several documents that we could analyze in order to maintain the integrity of the current business processes. We also corrected some of our mistakes from the last milestone. For example we waited too long to make the PowerPoint last time that we didn't have a chance to practice it. Luckily it still went well even without out practice. For this next milestone we had plenty of time to practice the presentation and our speaking ability. We are confident that this presentation will be better because of the extra practice.

Problems Encountered

The main problem we encountered was getting a grasp on what exactly we needed to accomplish for the paper part of the milestone. We didn't have a full understanding on what a use case was and how it would need to be incorporated into the milestone. With the in-class activities and the examples in the book, we easily started to comprehend the assignment. Another small problem we dealt with was how each of the use cases were going to be assigned. We initially started by assigning different use cases to different people. This created a problem because we realized later on that some of the use cases were similar and we needed to combine some of them. After all the shuffling around the use cases we managed to cut some out and found out that we needed to add a couple.

Staying on Schedule

Our original scheduled timetable was difficult to adhere to because there were many conflicts interfering with our project. The first main obstacle was midterms, especially the midterm in this class. We had heard from Dr. Paul that the midterm was going to be hard so we wanted to focus on that. We spent almost that entire week meeting with other groups in late night study sessions in order to prepare for the test. Directly after the midterm was fall break, which delayed us almost another week. After all this we had to play some catch up but we eventually did get back on schedule.

Looking Ahead

We are looking forward to the next phase of our project. The design phase will be a welcome change from the analysis stage. This will allow us to get into the "nit and gritty" of the project and actually design what we need. It will also be important to get everything done on time because we will once again have conflicts with our time schedule. Our goal will be to not drag the project out to the end of November. That time will be very crowded with Thanksgiving, final exams, and other due dates.

Other Thoughts

The project is getting easier to understand as we go along. Now that we are learning more about the SDLC, the different tasks in the project are starting to make more sense. Going through the class notes also helps give a better understanding as to what is going on in the project. As a team we are becoming very adept at working together. This has led to a camaraderie where we can get a lot done in a short amount of time.

Milestone 2 - Group Timesheets

Milestone 2 Timesheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Timesheet & Templates Created	9/7/2013	12:00 PM	2:00 PM	2
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Started Gantt Chart	9/9/2013	7:00 PM	9:00 PM	2
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21

Milestone 3 Timesheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Use Cases	10/20/13	11:00AM	1:00PM	2
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				46

Milestone 2 Timesheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Create Timeline	9/3/2013	3:30 PM	4:00 PM	.5
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Attended FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Task Breakdown	9/7/2013	4:00 PM	5:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Business Benefits & Overview	9/11/2013	6:00 PM	9:00 PM	3
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				23

Milestone 3 Timesheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Meeting with Stakeholders	10/20/13	11:00AM	12:00PM	1
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/13	12:00 PM	2:00 PM	2
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				47

Milestone 2 Timesheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Outline & System Features	9/10/2013	7:00 PM	9:30 PM	2.5
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 System Constraints	9/12/2013	8:00 PM	9:00 PM	1
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Hardware & Software Requirements	9/15/2013	3:30 PM	4:30 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21.5

Milestone 3 Timesheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS 3 Use Case Outline	10/16/2013	9:00 PM	12:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Use Cases	10/20/13	6:00AM	1:00PM	7
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				54

Milestone 2 Timesheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Business Environment	98/2013	8:00 PM	9:00 PM	1
MS2 Problems with Business Environment	9/9/2013	7:00 PM	8:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				20

Milestone 3 Timesheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Meeting with Stakeholders	10/20/13	11:00 AM	12:00 PM	1
MS3 Use Cases	10/20/2013	2:00 PM	5:30 PM	3.5
MS3 Use Cases	10/20/2013	8:00 PM	11:00 PM	3
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				45.5

Design Package

Caroline Rankin, Madison Gardner,
Rodolfo Castillo and Walker Stanley
Financial Management Association

Design Analysis

Confidential

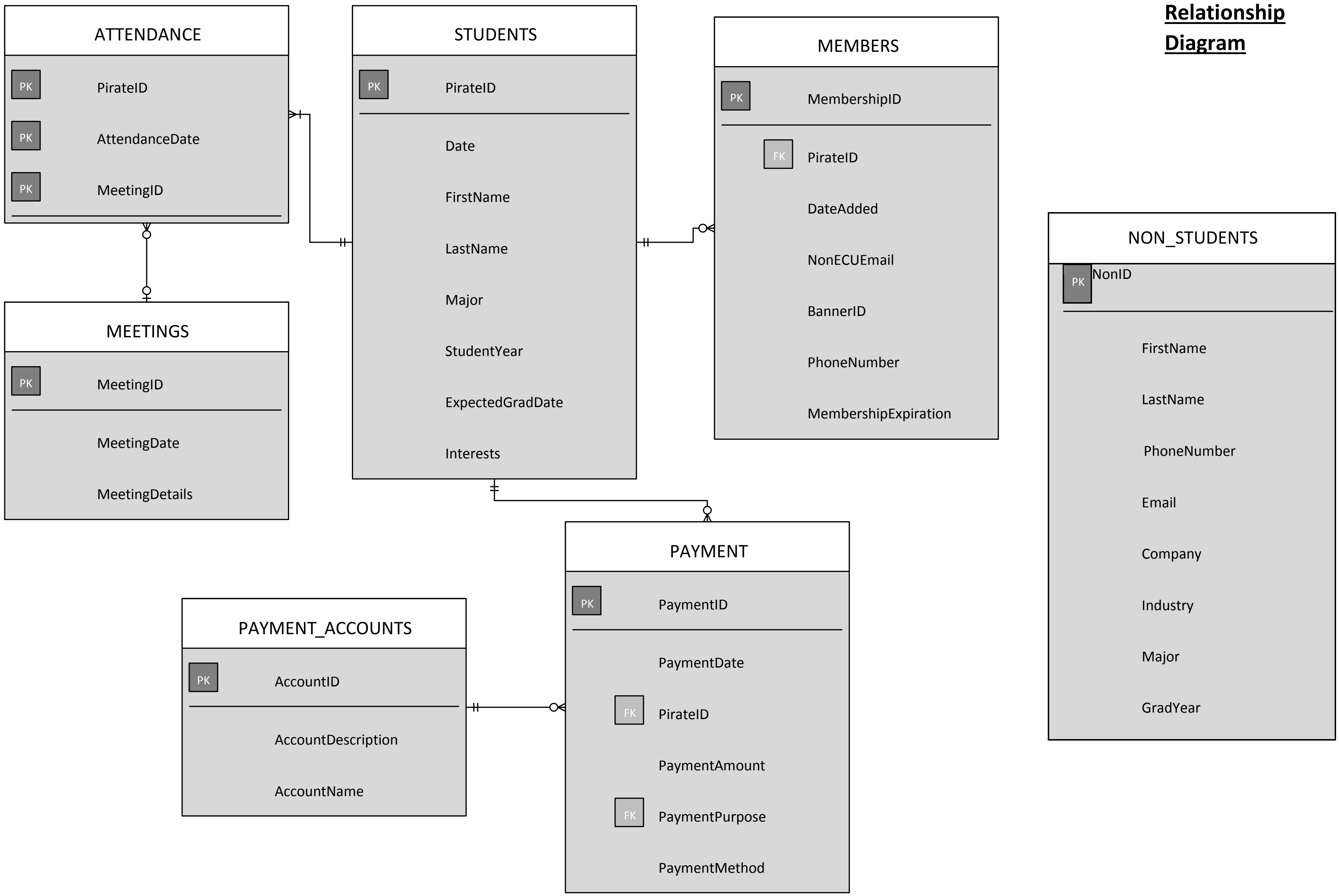
Executive Summary

This Design Package contains documents outlining the structure for the development and launch of the FMA Information System. It contains the following documents:

- Entity Relationship Diagram
- User Interface Mockups
- Supporting Documents

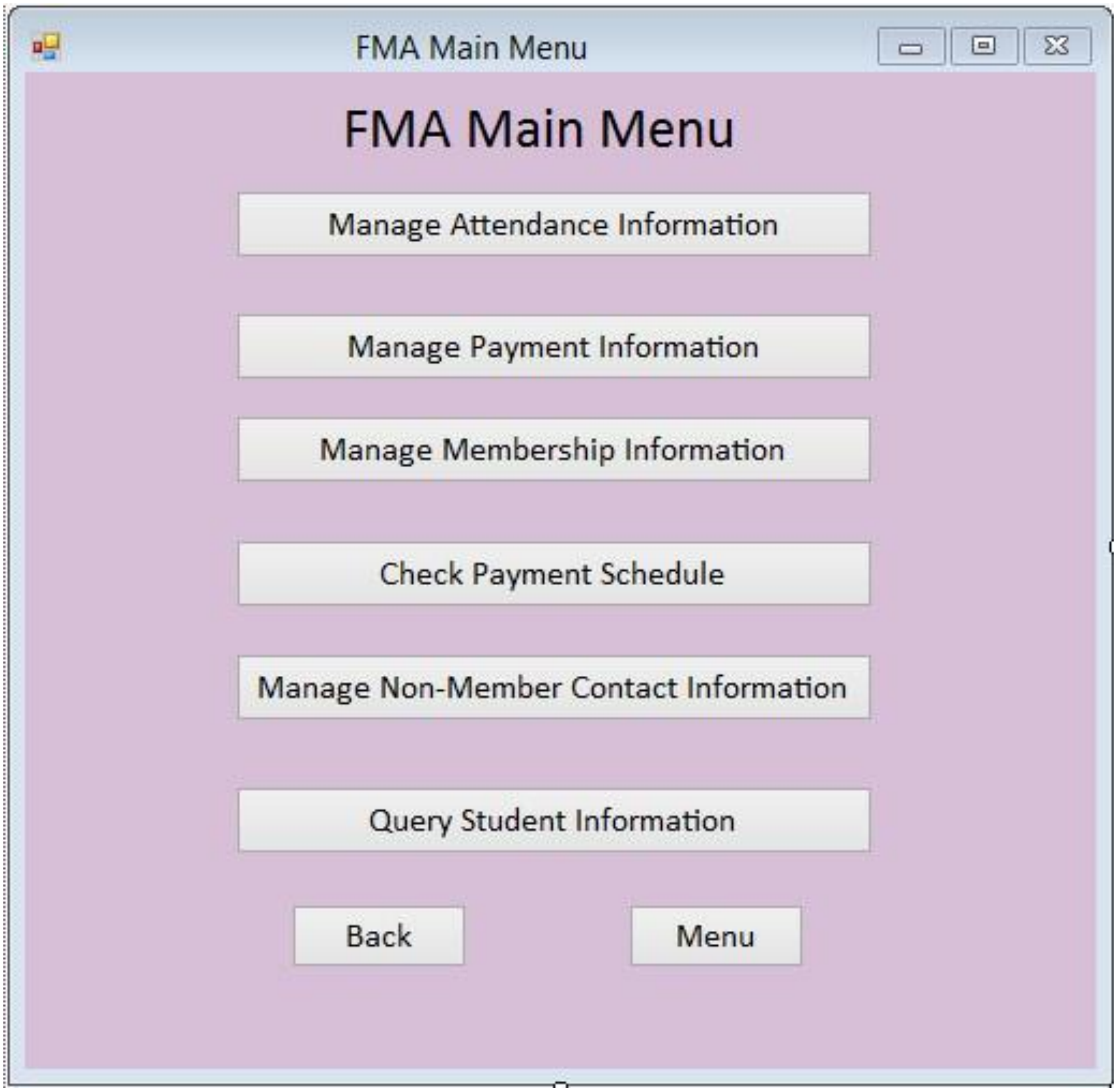
The User Interface mockups are organized in an outline format, where each form is a logical step from the previous one along the outline.

Entity Relationship Diagram

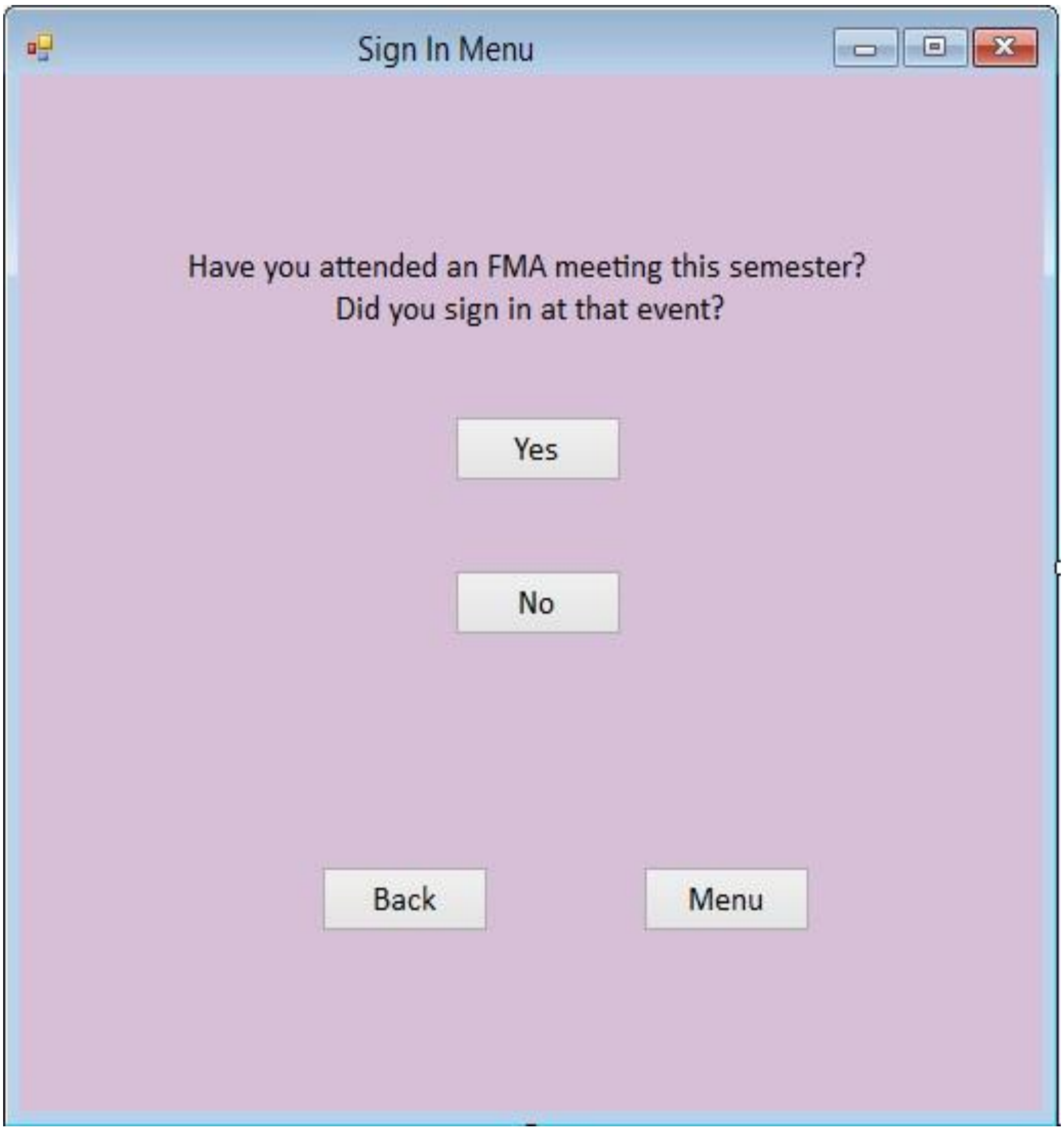


User Interface Mockups

Main Menu

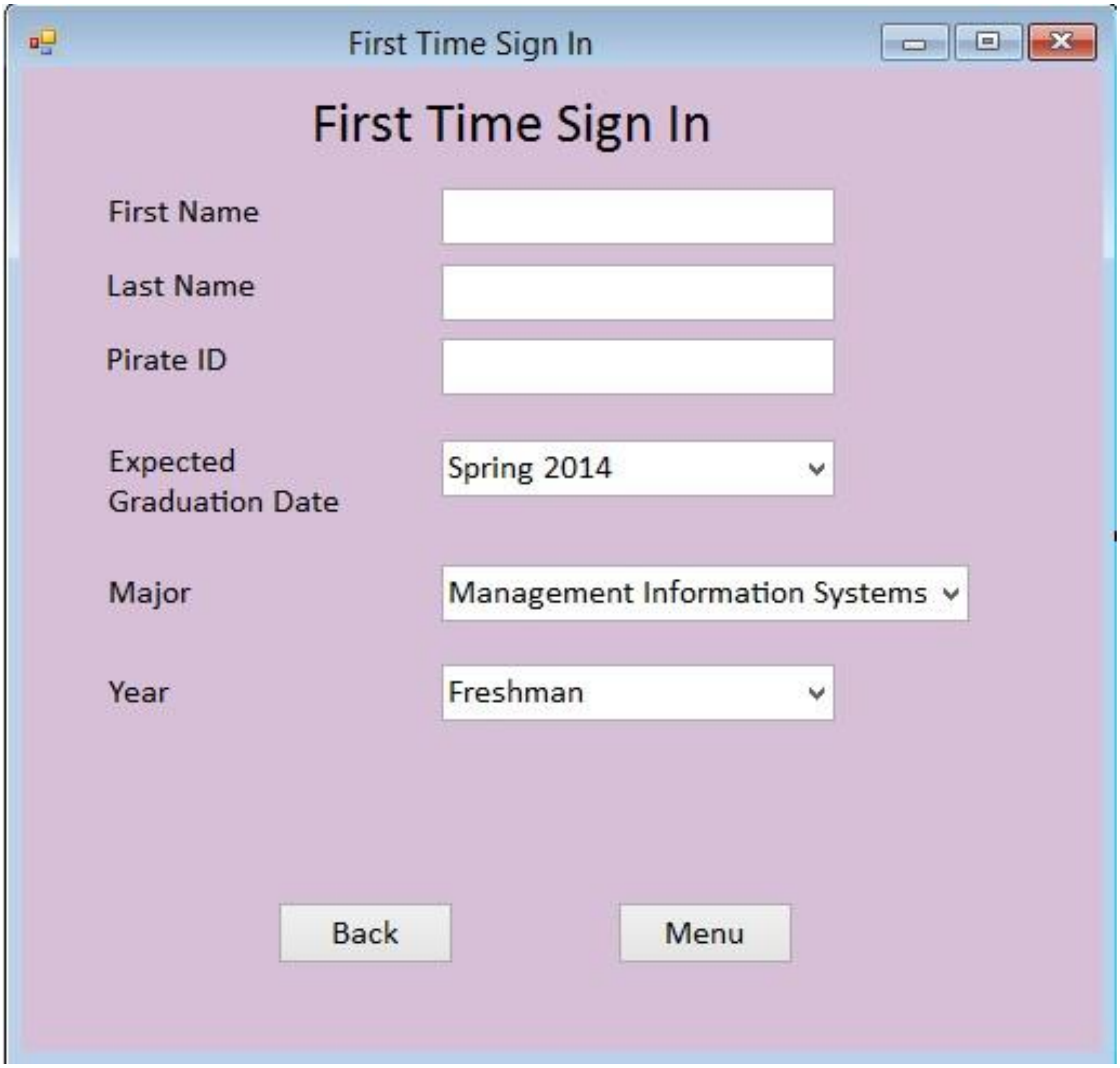


1. Manage Attendance Information

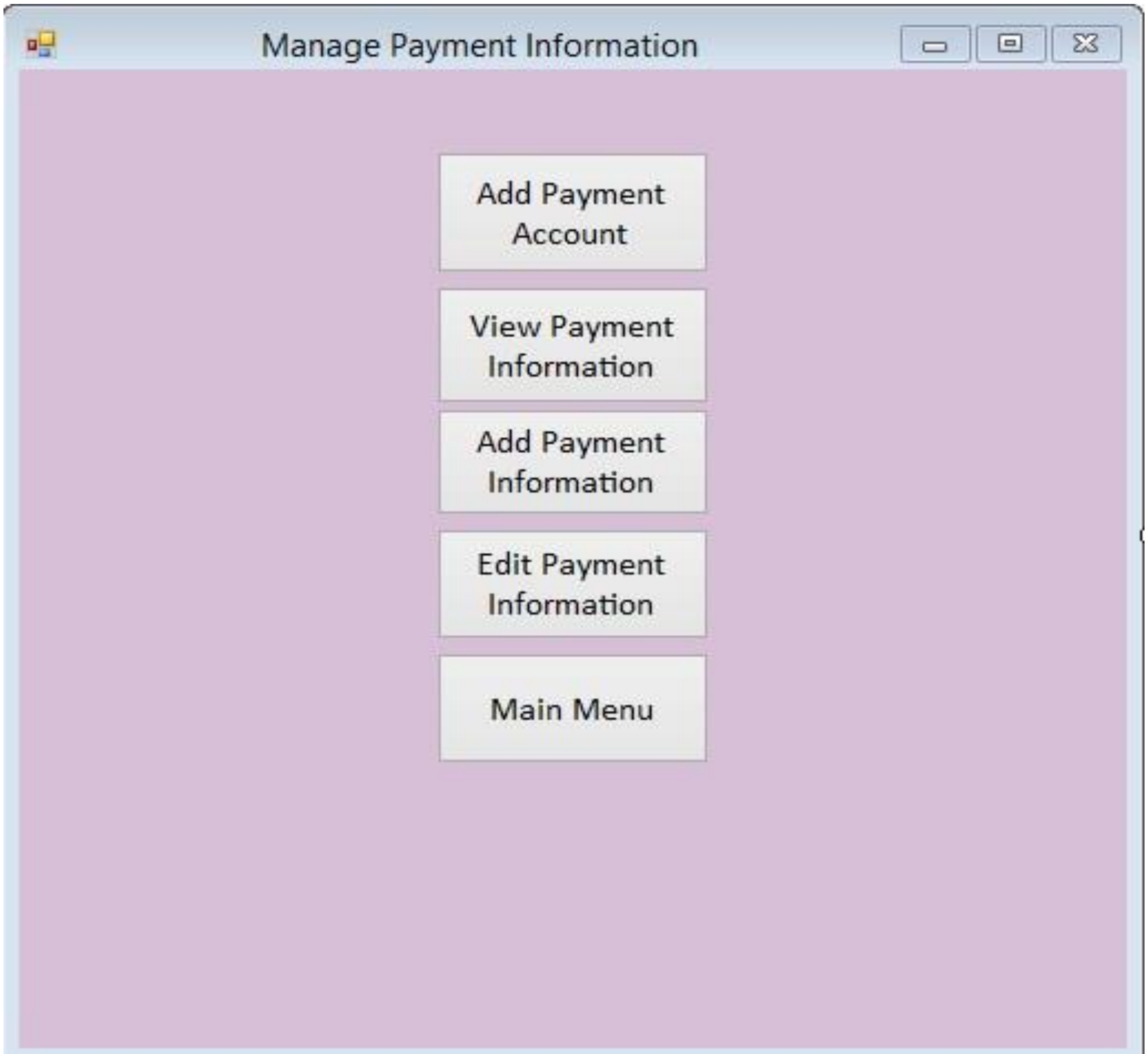


a. Returning Sign-In Form (clicked Yes)

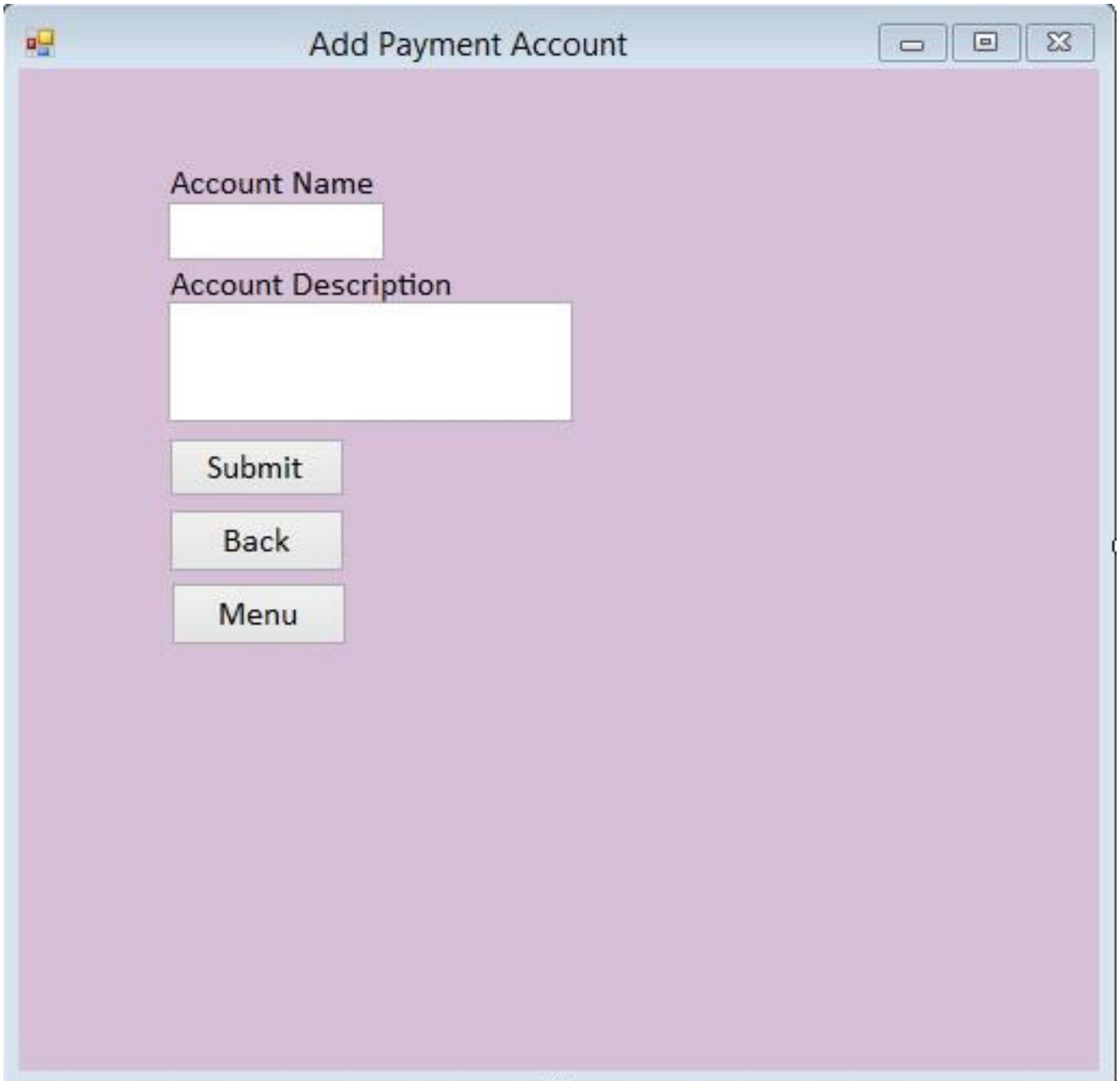
b. First-Time Sign-In Form



2. Manage Payment Information



a. Add Payment Account



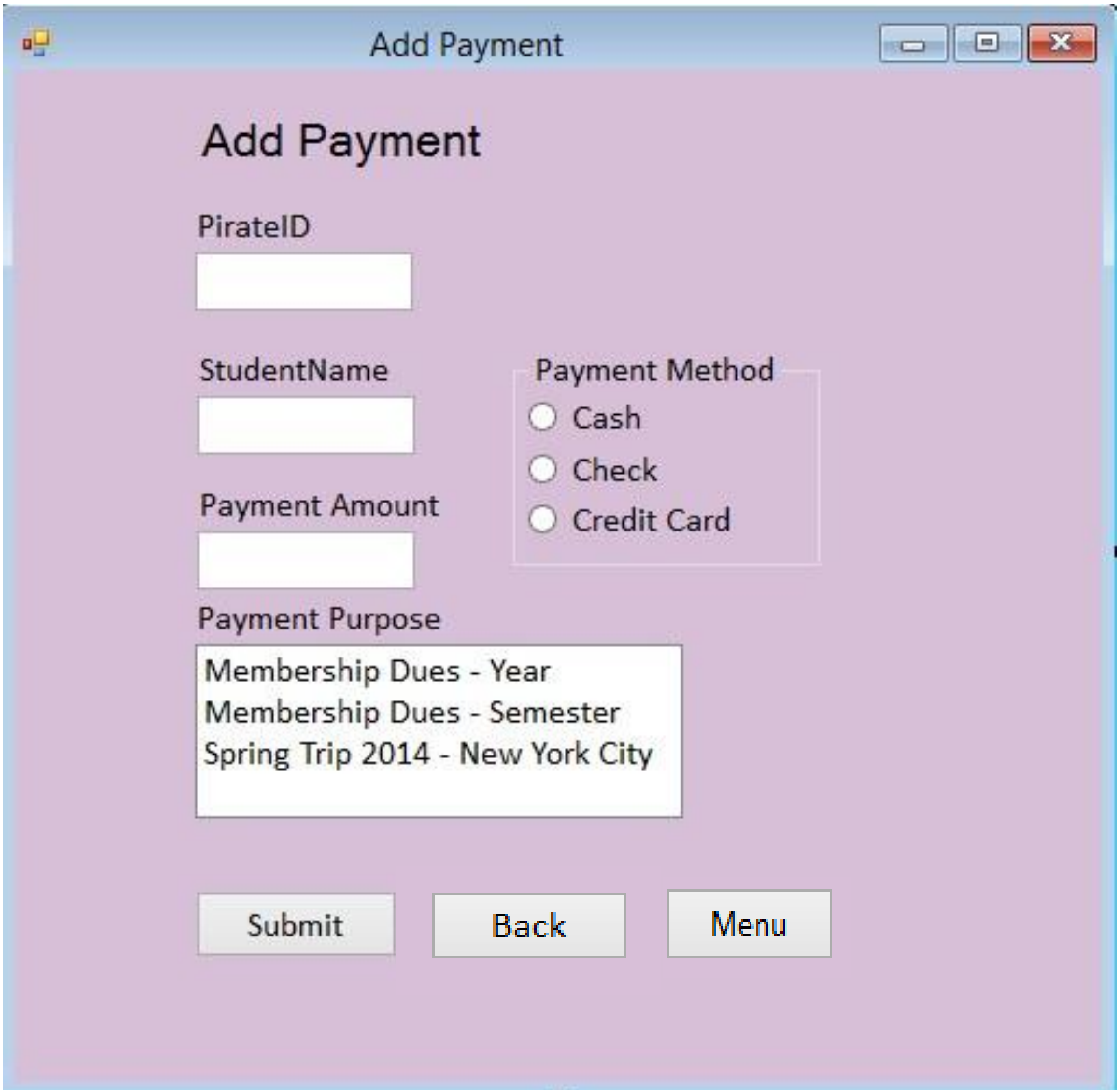
b. View Payment Info

Payment Report

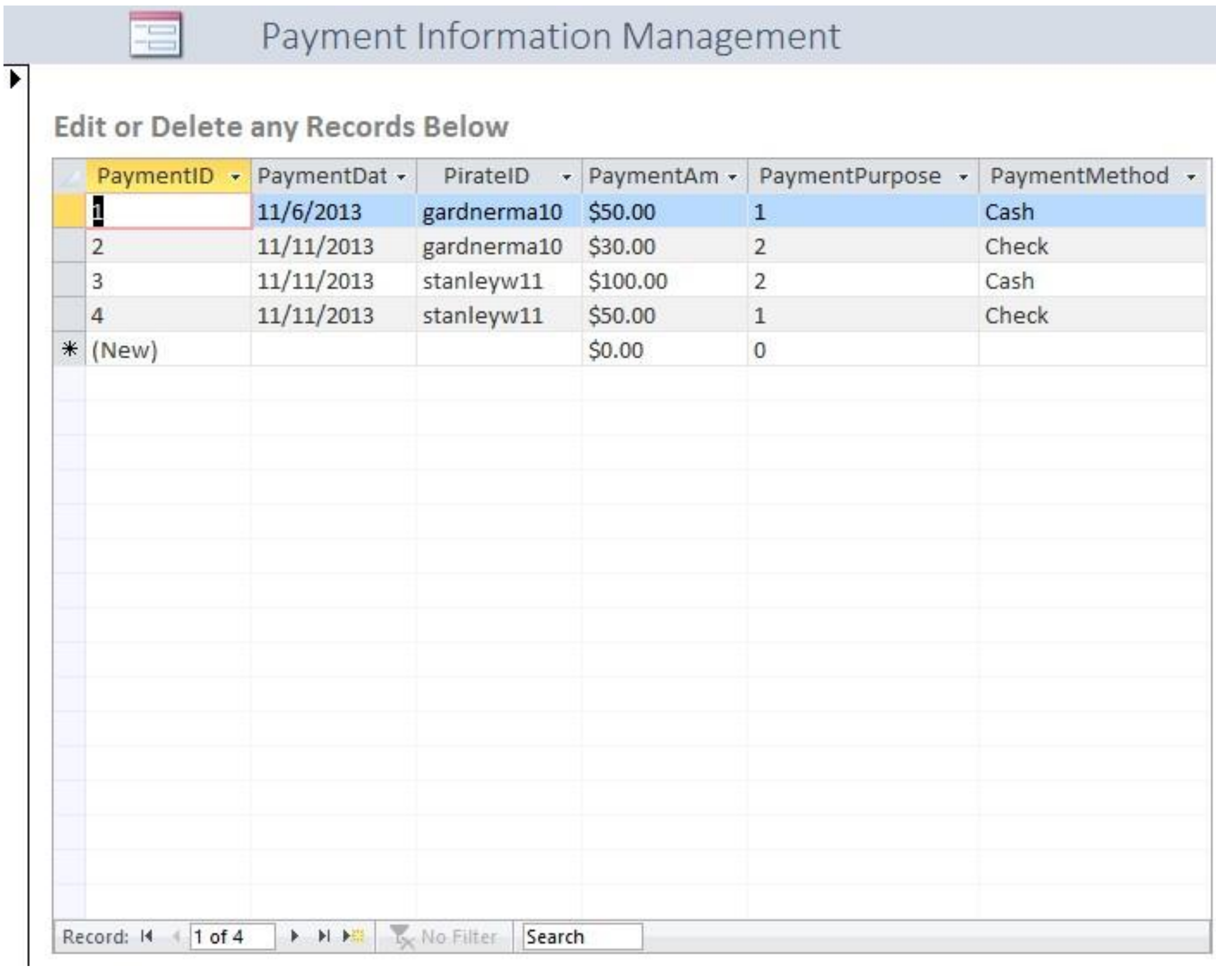
PaymentMethod	AccountName	PaymentDate	Student_Name	PaymentAmount
Cash				
	Membership - Year			
		11/6/2013	Madison Gardner	$50.00
			Total	$50.00
	NYC Trip 2014			
		11/11/2013	Walker Stanley	$100.00
			Total	$100.00
			Total	$150.00
Check				
	Membership - Year			
		11/11/2013	Walker Stanley	$50.00
			Total	$50.00
	NYC Trip 2014			
		11/11/2013	Madison Gardner	$30.00
			Total	$30.00
			Total	$80.00
			Grand Total	$230.00

Tuesday, November 12, 2013 Page 1 of 1

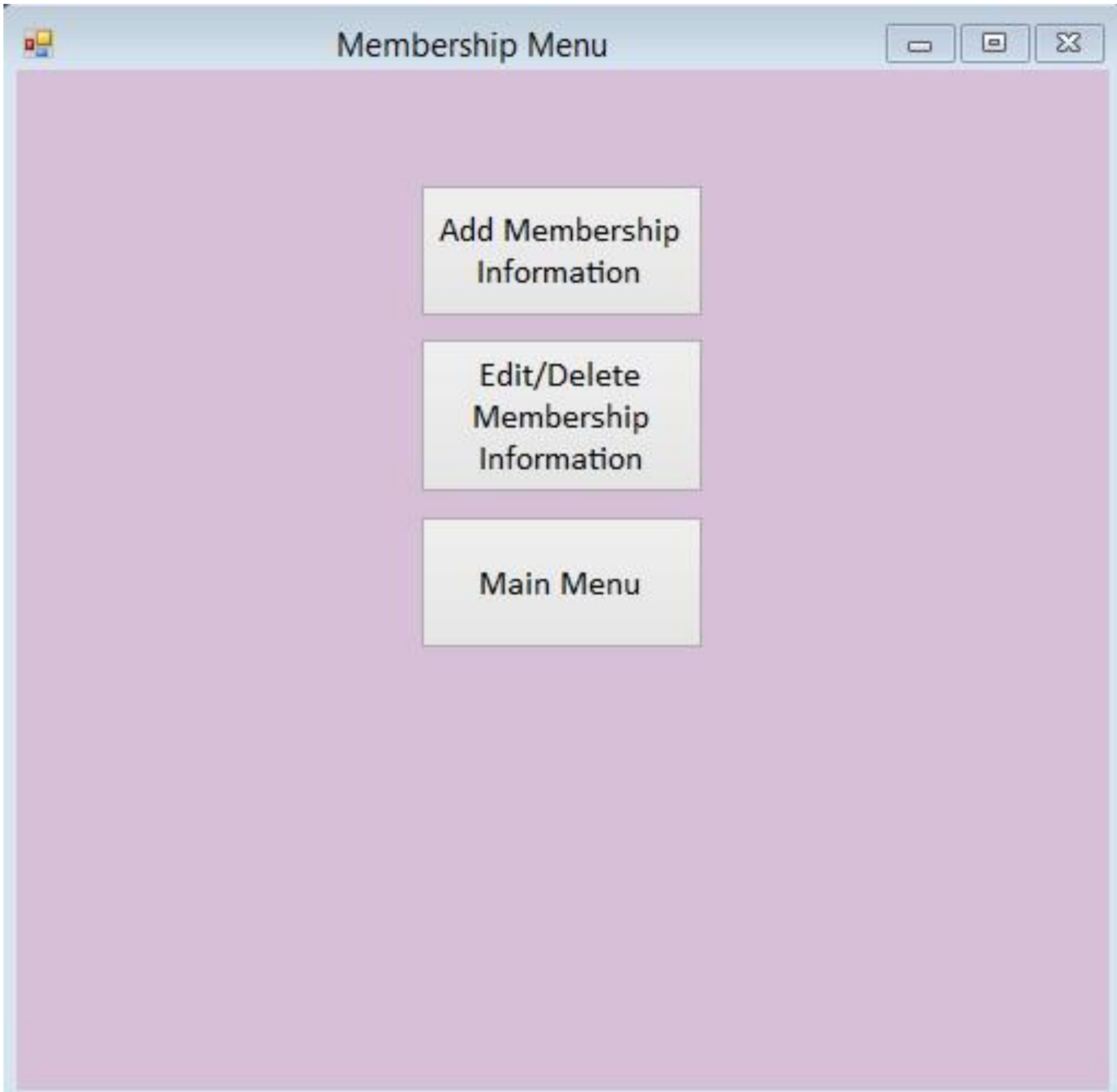
c. Add Payment Information



a. Edit Payment Information

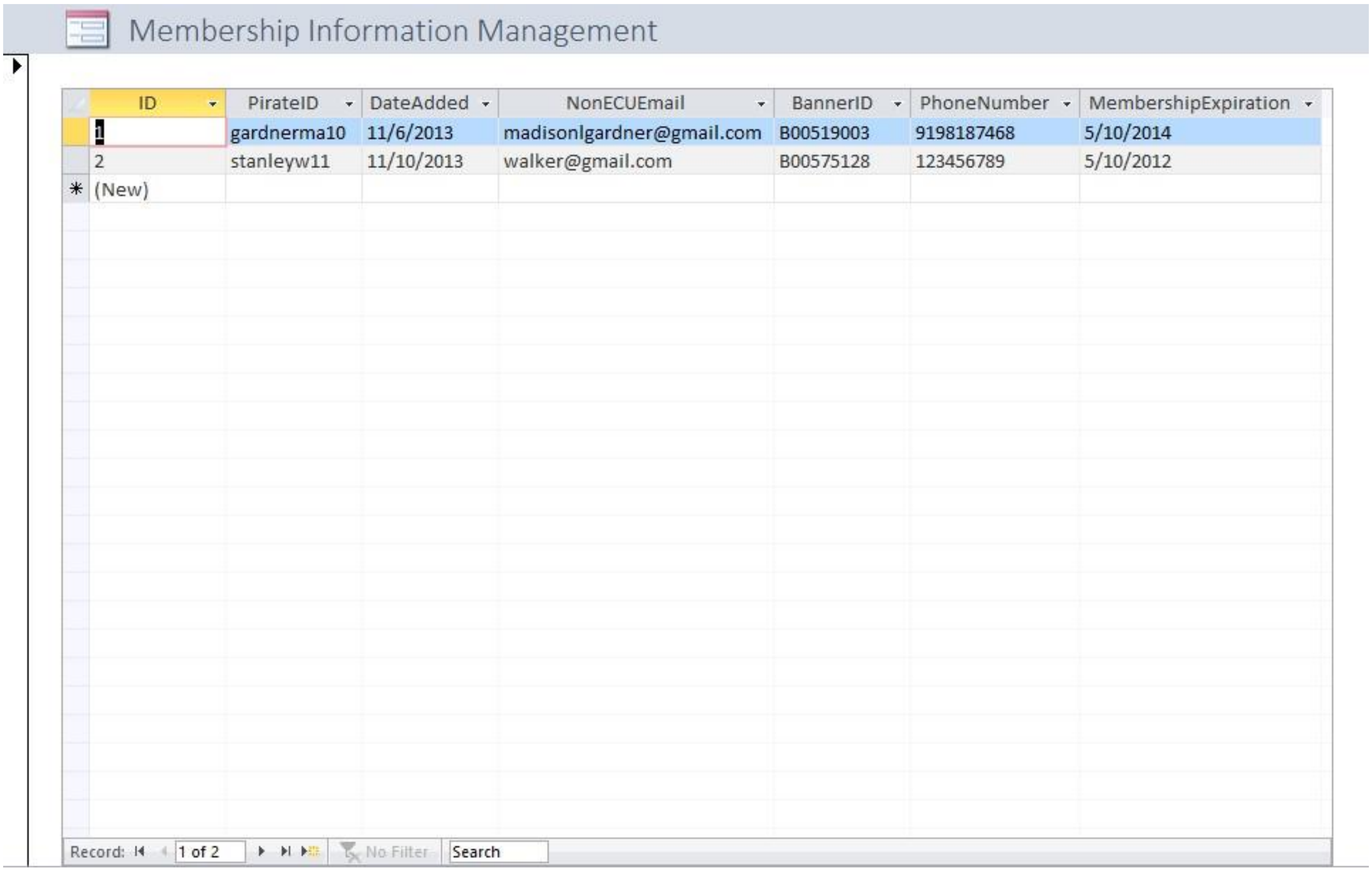


3. Manage Membership Information



a. Add Membership Information

b. Edit/Delete Membership Information



ID	PirateID	DateAdded	NonECUEmail	BannerID	PhoneNumber	MembershipExpiration
1	gardnerma10	11/6/2013	madisonlgardner@gmail.com	B00519003	9198187468	5/10/2014
2	stanleyw11	11/10/2013	walker@gmail.com	B00575128	123456789	5/10/2012
(New)						

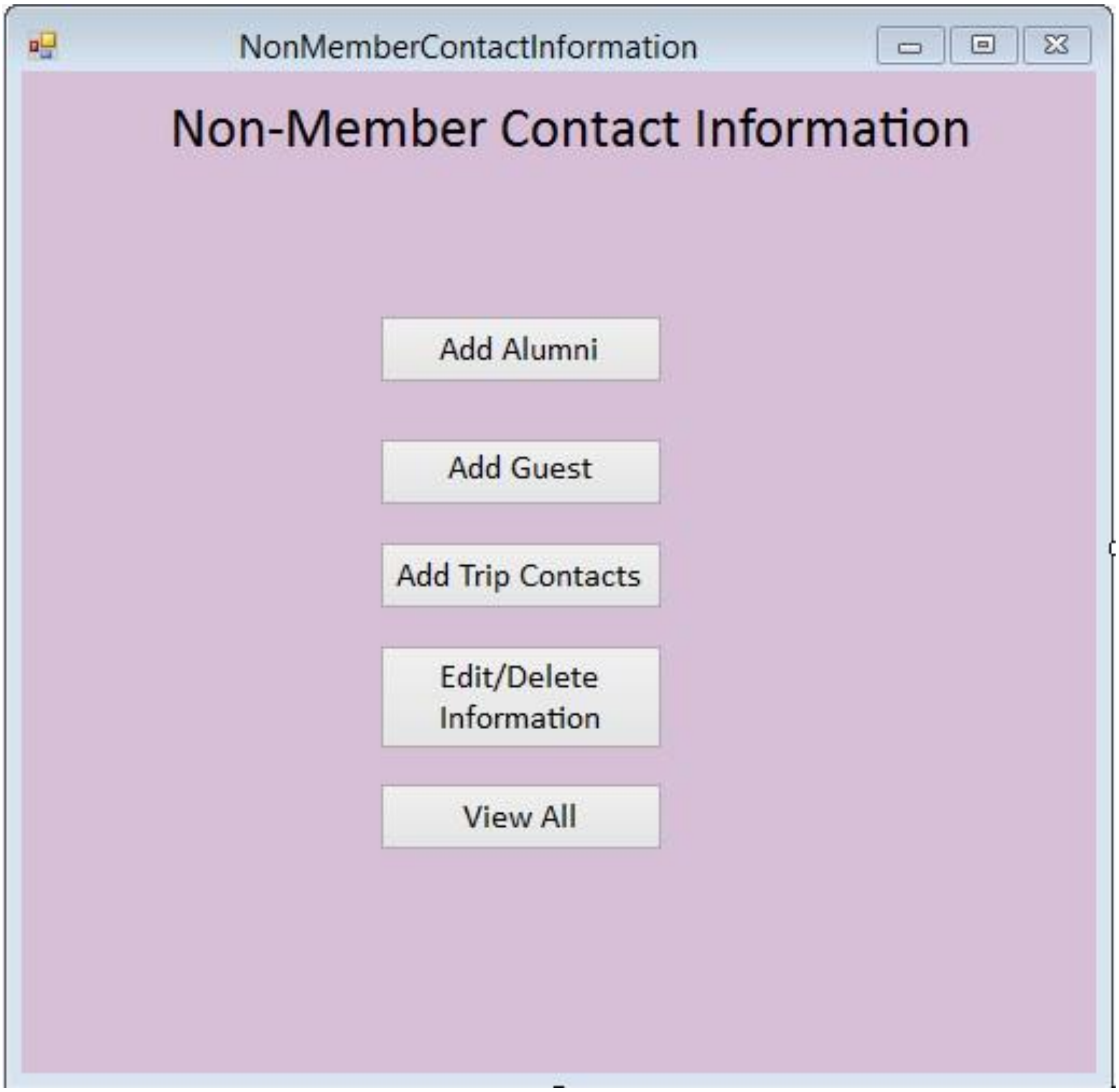
4. Check Payment Schedule

Payment Schedule

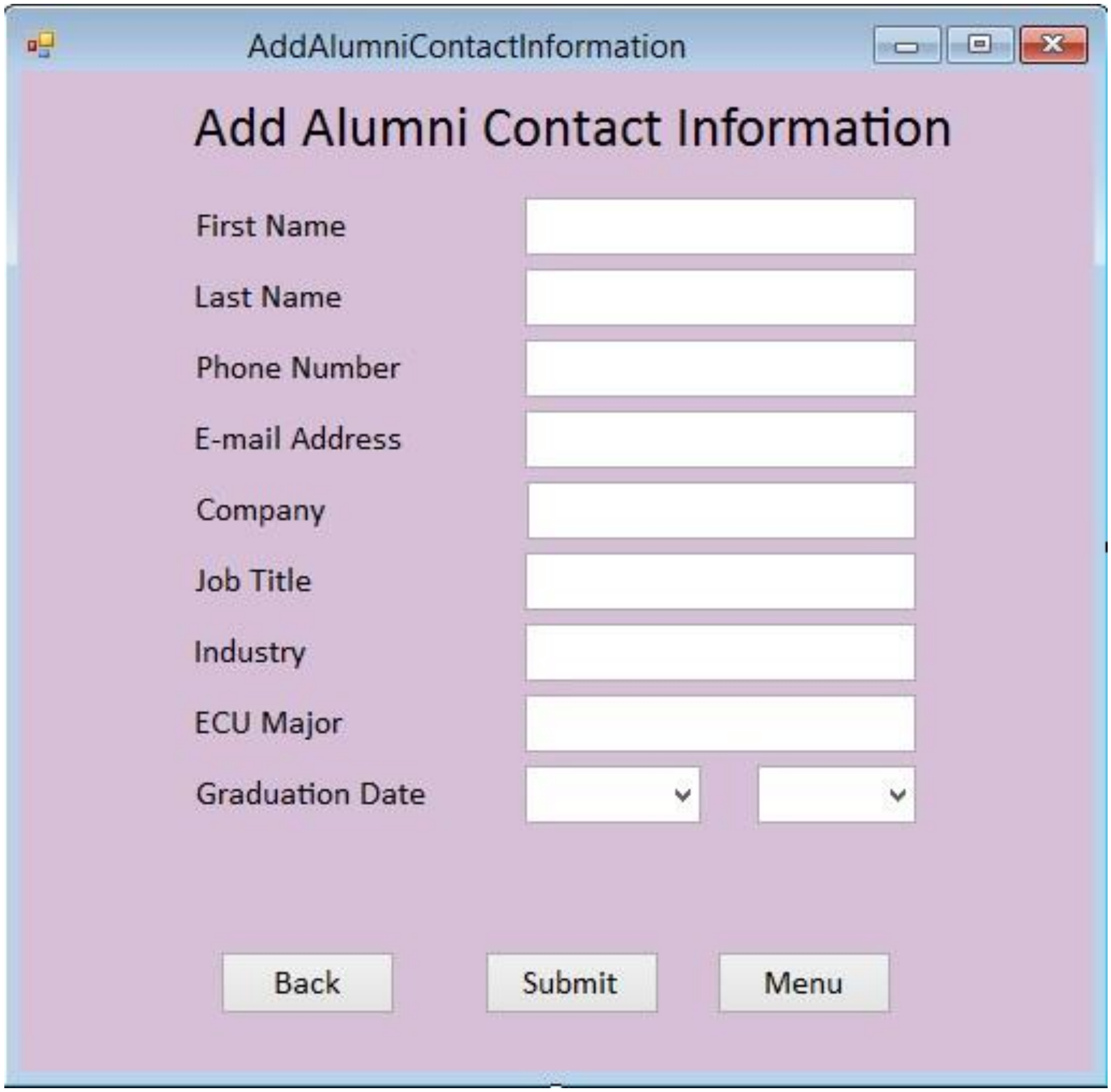
AccountName	PaymentDate	Student_Name	PaymentAmount
Membership - Year			
	11/6/2013	Madison Gardner	$50.00
		Total	$50.00
NYC Trip 2014			
	11/11/2013	Walker Stanley	$100.00
		Total	$100.00
		Total	$150.00
Membership - Year			
	11/11/2013	Walker Stanley	$50.00
		Total	$50.00
NYC Trip 2014			
	11/11/2013	Madison Gardner	$30.00
		Total	$30.00
		Total	$80.00
		Grand Total	$230.00

Thursday, December 5, 2013 Page 1 of 1

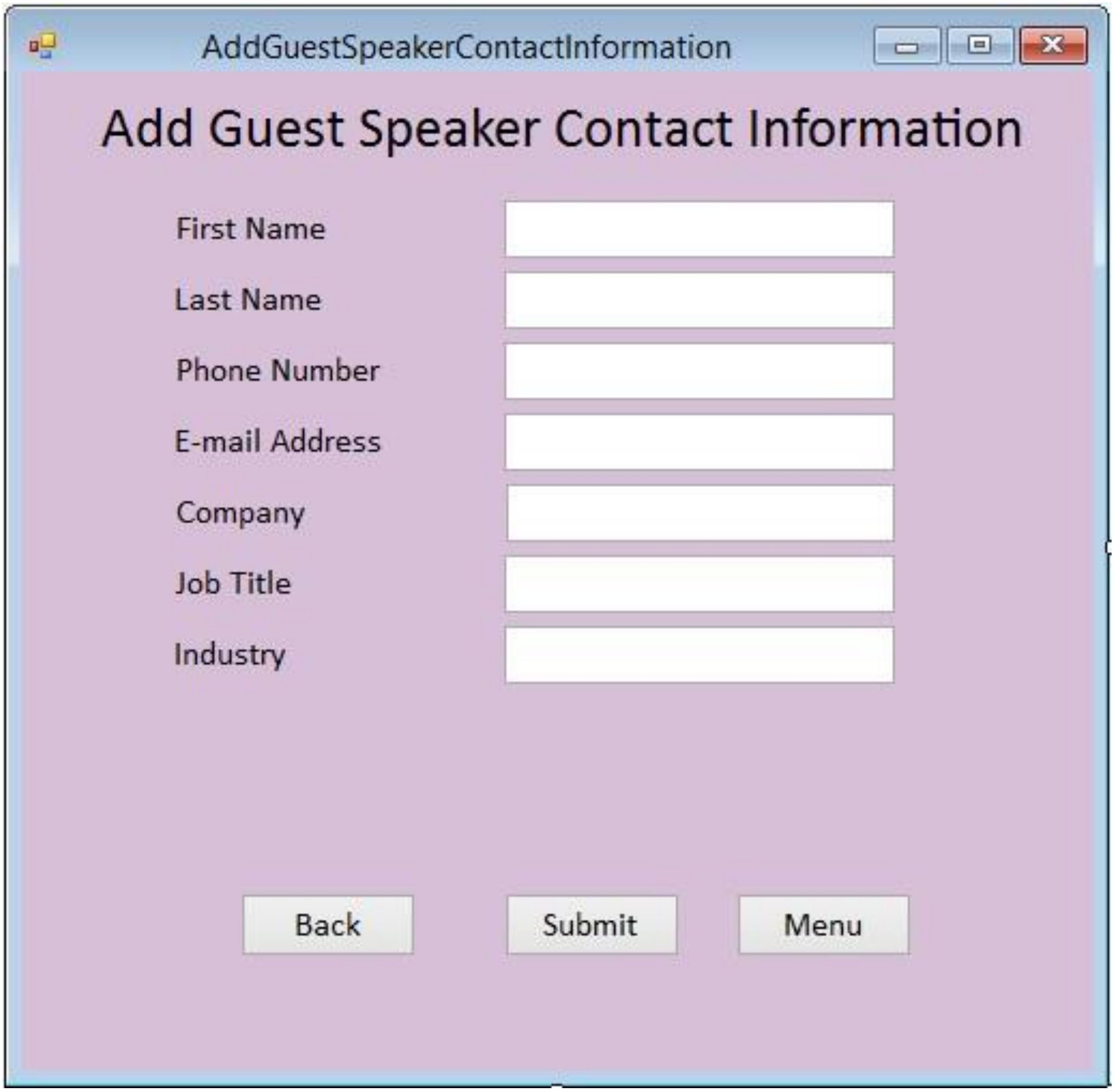
5. Manage Non-Member Contact Information



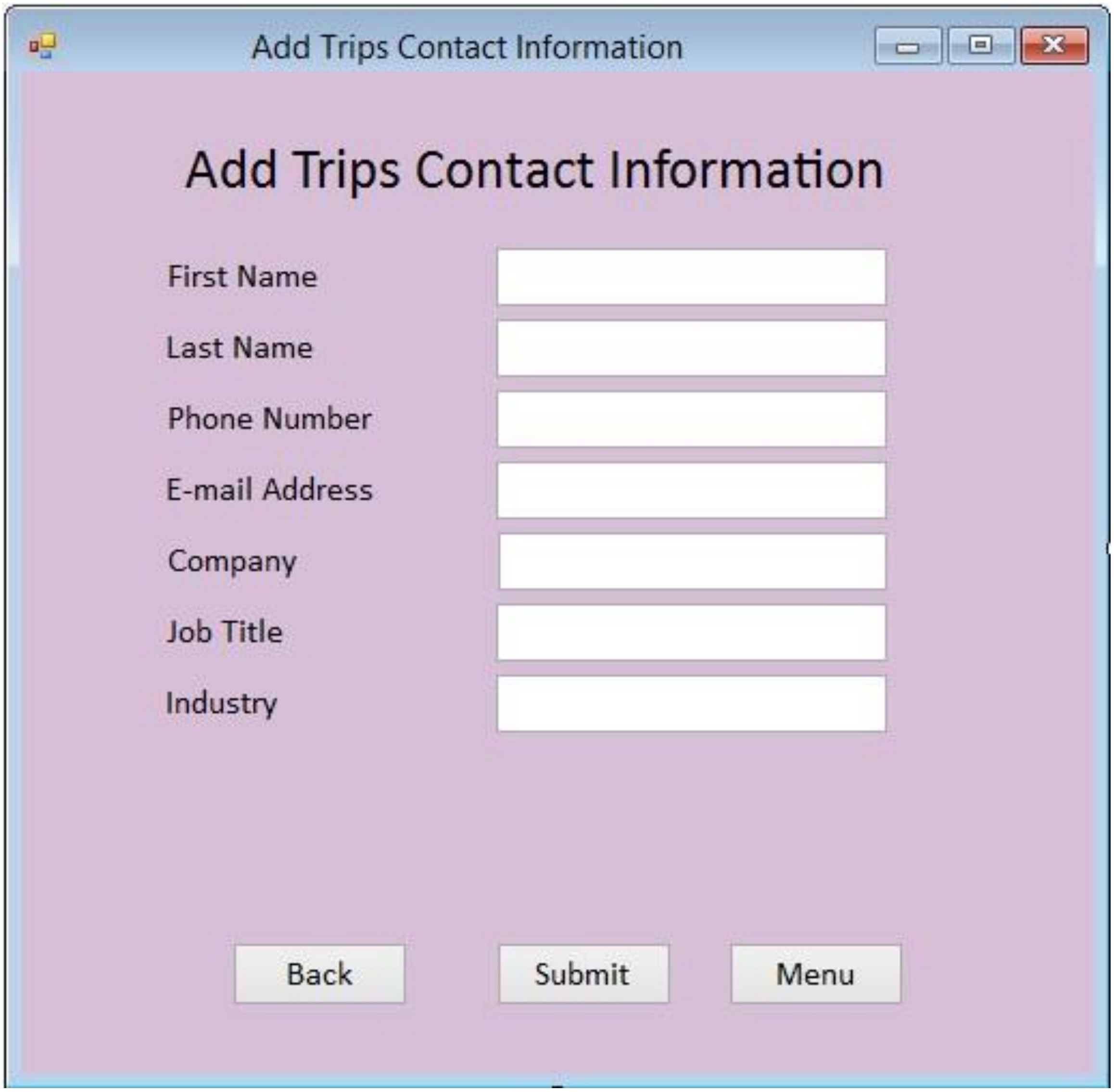
a. Add Alumni


AddAlumniContactInformation
Add Alumni Contact Information
First Name
Last Name
Phone Number
E-mail Address
Company
Job Title
Industry
ECU Major
Graduation Date
Back
Submit
Menu

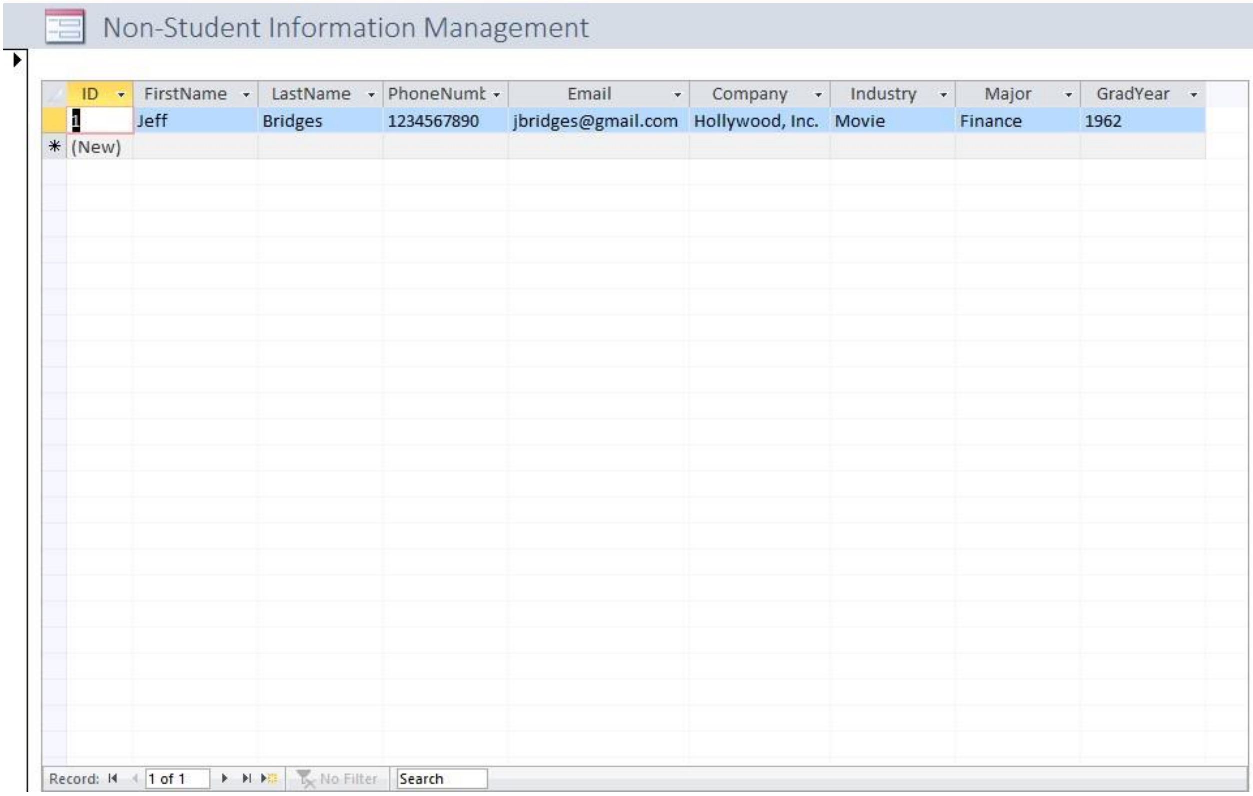
b. Add Guest


AddGuestSpeakerContactInformation
Add Guest Speaker Contact Information
First Name
Last Name
Phone Number
E-mail Address
Company
Job Title
Industry
Back
Submit
Menu

c. Add Trip Contacts



d. Edit/Delete Information



6. Query Student Information

FirstName	LastName	Major	StudentYear	ExpectedGradDate	Interests	Email
Madison	Gardner	MIS	Senior	Spring 2014	Investments	gardnerma10@students.ecu.edu
Walker	Stanley	MIS	Senior	Spring 2014	Real Estate	stanleyw11@students.ecu.edu
*						

Milestone Evaluation

Progress and Accomplishments

Overall we are pleased with what we have accomplished over the course of this project. Going into this milestone we decided to correct the previous milestone. Due to the nature of use cases we had tons of errors and corrections that we needed to make. We also think that the UI design that we have created is excellent.

Problems Encountered

One problem that we encountered was with the special requirements section of milestone 3. We thought we understood it but on all of our use cases they were incorrect. Some just needed to be moved to the basic flow and others deleted. When deciding how to best design the use cases we needed to decide access or visual basic. We decided that the best option was a mixture of both and chose the best fit for the milestone. Another problem is the fact that we are trying to actually build the project. We had to make some concessions that when we actually build the project we will have to change back.

Staying on Schedule

For this milestone we had limited time to finish the requirements. As a result of this we had a fast scheduling method in use. We met immediately to correct our milestone and proceed to the next step. Due to the nature of the design part we easily split up the different use cases. This allowed us to easily stay on schedule. We met the last week before to put together the designs and make them consistent. It took some late nights but in the end we stayed on schedule.

Looking Ahead

After this milestone there is little left to do. The first step will be the individual peer reviews on other group projects. This will be interesting because we have not had the chance to compare the work we have done with other projects. After this will come the final presentation. Since we have so much time to prepare for it we are going to practice it as much as possible. Overall since we have done several presentations already it will not be hard to present one more time.

Other Thoughts

When we first started this project we were not sure where we would end up at the end of it, or if we would survive it at all. As a group we were not familiar with each other but decided to take this project head on and make the most of it. Over the course of this project we became very comfortable and meshed very well as a group. We did not have any conflicts and had the same goals and work ethics. We could not imagine where this project would have led us at the end. Dr. Paul warned us this project would be extremely time consuming. We now fully understand the meaning of this as we have come to the agreement that we have spent more time on this project than any other. It was an extremely rewarding experience and I am glad the project is set up the way it is. Now that we have gone through the first couple of stages we can see how use cases really do create a better design. Doing this project concretes the material that we having been covering in class.

Total Group Timesheets

Milestone 2 Timesheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Timesheet & Templates Created	9/7/2013	12:00 PM	2:00 PM	2
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Started Gantt Chart	9/9/2013	7:00 PM	9:00 PM	2
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21

Milestone 3 Timesheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Use Cases	10/20/13	11:00AM	1:00PM	2
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				46

Milestone 4 Timesheet for Caroline Rankin

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS4 Group Meeting	10/27/2013	4:00 PM	6:00 PM	2
MS4 Corrections on MS3	10/28/2013	6:30 PM	7:30 PM	1
MS4 Corrections on MS3	11/3/2013	3:00 PM	7:00 PM	4
MS4 Create Mock Forms in Visual Basic	11/5/2013	7:00 PM	9:00 PM	2
MS4 Visual Basic	11/6/2013	7:00 PM	11:00 PM	4
MS4 Timesheets and Visual Basic Finalized	11/10/2013	5:00 PM	9:00 PM	4
Finish MS4 and Submit	11/11/13	7:00 PM	12:00 AM	5
MS4 PowerPoint	12/4/13	7:00 PM	10:00 PM	3
Total				25

Milestone 2 Timesheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Create Timeline	9/3/2013	3:30 PM	4:00 PM	.5
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Attended FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Task Breakdown	9/7/2013	4:00 PM	5:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Business Benefits & Overview	9/11/2013	6:00 PM	9:00 PM	3
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				23

Milestone 3 Timesheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Meeting with Stakeholders	10/20/13	11:00AM	12:00PM	1
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/13	12:00 PM	2:00 PM	2
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				47

Milestone 4 Timesheet for Madison Gardner

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS4 Group Meeting	10/27/2013	4:00 PM	6:00 PM	2
MS4 Corrections on MS3	10/28/2013	6:30 PM	7:30 PM	1
MS4 Corrections on MS3	11/3/2013	3:00 PM	7:00 PM	4
MS4 Create Mock Forms in Visual Basic/Excel	11/5/2013	7:00 PM	9:00 PM	2
MS4 Reports in MS Access	11/6/2013	7:00 PM	11:00 PM	4
MS4 Timesheets and Visual Basic Finalized	11/10/2013	5:00 PM	9:00 PM	4
Finish MS4 and Submit	11/11/13	7:00 PM	12:00 AM	5
MS4 PowerPoint	12/4/13	7:00 PM	10:00 PM	3
Total				25

Milestone 2 Timesheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Outline & System Features	9/10/2013	7:00 PM	9:30 PM	2.5
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 System Constraints	9/12/2013	8:00 PM	9:00 PM	1
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Hardware & Software Requirements	9/15/2013	3:30 PM	4:30 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				21.5

Milestone 3 Timesheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS 3 Use Case Outline	10/16/2013	9:00 PM	12:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Use Cases	10/20/13	6:00AM	1:00PM	7
MS3 Use Cases	10/20/2013	1:00 PM	7:00 PM	6
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				54

Milestone 4 Timesheet for Walker Stanley

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS4 Group Meeting	10/27/2013	4:00 PM	6:00 PM	2
MS4 Corrections on MS3	10/28/2013	6:30 PM	7:30 PM	1
MS4 Corrections on MS3	11/3/2013	3:00 PM	7:00 PM	4
MS4 VB Use Case	11/5/2013	7:00 PM	9:00 PM	2
MS4 ERD work	11/6/2013	7:00 PM	11:00 PM	4
MS4 Milestone Evaluation	11/10/2013	5:00 PM	9:00 PM	4
Finish MS4 and Submit	11/11/13	7:00 PM	12:00 AM	5
MS4 PowerPoint	12/4/13	7:00 PM	10:00 PM	3
Total				25

Milestone 2 Timesheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS2 Group Meeting	9/1/2013	4:00 PM	7:00 PM	3
MS2 Proposal Review	9/2/2013	9:00 PM	10:00 PM	1
MS2 Timeline & Due Dates	9/3/2013	9:00 PM	10:00 PM	1
MS2 FMA Meeting	9/4/2013	6:00 PM	7:30 PM	1.5
MS2 Tasks Assigned	9/8/2013	11:00 AM	12:00 PM	1
MS2 Business Environment	98/2013	8:00 PM	9:00 PM	1
MS2 Problems with Business Environment	9/9/2013	7:00 PM	8:00 PM	1
MS2 Check-in Conference Call	9/10/2013	9:30 PM	11:00 PM	1.5
MS2 Check-in Conference Call	9/13/2013	7:00 PM	8:00 PM	1
MS2 Finish MS2 and Start PowerPoint	9/15/2013	5:00 PM	9:00 PM	4
Finish PowerPoint and MS2	9/16/13	7:00 PM	11:30 PM	4.5
Total				20

Milestone 3 Timesheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS3 Group Meeting with Stakeholders	9/22/2013	4:30 PM	7:30 PM	3
MS3 JAD Session with Stakeholders	9/29/2013	1:00 PM	6:00 PM	5
MS3 Use Case Meeting	10/13/2013	12:00 PM	3:00 PM	3
MS3 Use Case Review	10/18/2013	12:00 PM	2:00 PM	2
MS3 Use Cases Tasks Assigned	10/19/2013	5:00 PM	9:00 PM	4
MS3 Meeting with Stakeholders	10/20/13	11:00 AM	12:00 PM	1
MS3 Use Cases	10/20/2013	2:00 PM	5:30 PM	3.5
MS3 Use Cases	10/20/2013	8:00 PM	11:00 PM	3
MS3 Use Cases	10/21/2013	7:30 PM	1:00 AM	5.5
MS3 Presentation	10/22/2013	7:30 PM	2:30 AM	7
MS3 Review and Finished MS3	10/23/2013	7:30 PM	4:00 AM	8.5
Total				45.5

Milestone 4 Timesheet for Rodolfo Castillo

Specific Task	Date	Start Time	Stop Time	Hours Worked
MS4 Group Meeting	10/27/2013	4:00 PM	6:00 PM	2
MS4 Corrections on MS3	10/28/2013	6:30 PM	7:30 PM	1
MS4 Corrections on MS3	11/3/2013	3:00 PM	7:00 PM	4
MS4 Create Mock Forms in Visual Basic	11/5/2013	7:00 PM	9:00 PM	2
MS4 Use Case Changes	11/6/2013	7:00 PM	11:00 PM	4
Finish MS4 and Submit	11/11/13	7:00 PM	12:00 AM	5
MS4 PowerPoint	12/4/13	7:00 PM	10:00 PM	3
Total				21