The KWCS Use Case Actors are identified and defined as:

- KWCS System

- New Broker

- Broker In Transition

- Transfer Broker

- Staff member

- Administrator

**The KWCS System**

This actor represents the system itself. Most automated tasks will be the result of event triggers and state processes defined by the developers for specific tasks. The automatic generation of user requirements on a new broker, the application of a staff member’s unique user ID to an interaction, and the tracking of staff logging in/out are examples of the System’s duties.

**New Broker**

A new broker is defined as a broker who has been newly added to the team without prior involvement with the company. New Brokers exist in the use cases as actors for representation purposes only and do not ever interact directly with the system.

**Broker in Transition**

A broker in transition is defined as a broker who is currently employed by Keller Williams but due to extenuating circumstances has been inactive for some significant amount of time and needs reorientation into Keller Williams systems, policies, and practices. A broker in transition does not have the same mandatory requirements that a new broker does and never interacts with the KWFCI system directly.

**Transfer Broker**

A transfer broker is a broker who has been moved from one Keller Williams office to another. These broker’s require the same amount of interactions with a Keller Williams staff as the other two types of brokers, but are already integrated into the Keller Williams system and therefore do not require additional management. Like the other types of brokers, transfer broker’s never directly interact with the KWFCI system.

**Staff Member**

Staff members are any Keller Williams employees whose job it is to assist brokers through the orientation period. The KWFCI’s primary user will be the Keller WIlliams staff member, and it is for them that this system is being designed. Staff members are responsible for managing new brokers, brokers in transition, and transfer brokers through the KWFCI system.

**Administrator**

The administrator is the/a Keller Williams employee who has been given authority to manage other Keller Williams staff members. The administrator’s responsibilities include managing staff members and modifying details normal staff members shouldn’t, such as the unique user ID of a staff member who created an interaction. Other responsibilities will include permanently removing data from the database as needed, such as interactions and brokers whose information is no longer required to keep.

\*CRUD is an abbreviation for the common set of database functions that must exist for each entity within a database. Those functions are Create/Retrieve/Update/Delete. It is being used here to shorten the list of repetitive use cases present with each entity within the KWFCI Database by turning 4 use cases into 1.

\*\* A staff member will have the ability to archive brokers and interactions, but not remove them from the database. This action simulates the Delete function of CRUD, but the actual removal of these objects from the database is the administrator’s responsibility.

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| --- | --- | --- | --- |
| **Actor** | **Use Case** | **Type** | **Description** |
| Administrator | CRUD\* Staff Members | External | - Create, Retrieve, Update, and Delete staff members |
|  | Log In/Out | External | - Log the administrator into and out of the system |
|  | Modify recorded staff member of interaction | External | - Change the userID of the Staff Member applied to an interaction |
|  | Delete interaction | External | - Remove an interaction from the database |
|  | Delete Broker | External | - Remove a broker from the database |
| System | Track logging of members | State | - Create a timestamp in the database automatically each time a staff member or Administrator logs into or out of the system |
|  | Track interactions | State | - Add to count of interactions out of 10 each time a new interaction is saved |
|  | Generate Requirements list | Trigger | - When new Broker is created automatically apply list of onboarding tasks to new Broker |
|  | Display Alerts | State | - Display all alerts whose due-date is within defined period (i.e. 1 day, 1 week, etc.) on Staff Member’s Alerts page. Display critical alerts on all pages |
|  | Record staff member of interaction | State | - Apply unique employee userID to interaction to each interaction Staff Member creates |
|  | Generate onboarding tasks | Trigger | - Create an individual task of type “onboarding” for each item on the requirements list for a new broker when a new broker is created and assign them to this broker. |
|  | Validate user input | State | - Ensure proper error messages are displayed when input formatting is incorrect |
|  | Delete onboarding tasks | Trigger | - Automatically delete all onboarding tasks for a new broker when all existing tasks are marked as complete |
| Staff Member | CRUD\* Broker | External | - Create, Retrieve, Update, and Delete\*\* Brokers |
|  | CRUD\* Broker Interactions | External | - Create, Retrieve, Update, and Delete\*\* Interactions between Brokers and Staff Members |
|  | Change Broker Status | External | - Change whether a Broker’s status is “Active”, “Away”, or “Inactive” |
|  | Send group email | External | - Send email to all Brokers whose “Receive Group Emails” property is set to “true” |
|  | Modify email recipients | External | - Change a Broker’s “Receive Group Email” property to “true” or “false” |
|  | CRUD\* Tasks | External | - Create, Retrieve, Update, and Delete Tasks |
|  | Change Onboarding task status | External | - Mark a new Broker’s onboarding task as complete or incomplete |
|  | Opt in/out of group emails | External | - Staff members change their own setting for receiving group emails or not on settings page |
|  | Reset password | External | - Staff member sends themselves an email with link to reset their password |
|  | Change broker type | External | - Change the type of a broker to “New Broker”, “Broker In Transition”, or “Transfer” |
|  | Assign staff to task | External | - Change the staff member assigned to a task or assign to no one |
|  | Reassign interaction to different broker | External | - Change which broker an interaction is assigned to |
|  | Change task/alert priority | External | - Manually select a priority from 1 to 5 |
|  | Change alert date | External | - Change or clear the date the system will alert staff members about this task |

**KWCS Use Case Diagram:**

