**USE CASE: Add a User**

Document History

Document Location

This is a snapshot of an on-line document. Paper copies are valid only on the day they are printed. Refer to the author if you are in any doubt about the currency of this document.

The source of the document will be found …

Revision History

|  |  |  |
| --- | --- | --- |
| Revision Number | Revision Date | Summary of Changes |
| 1.0 | 05/30/2013 | Initial document |
| 1.1 | 6/3/2013 | Revised |
|  |  |  |
|  |  |  |

Approvals

This document requires following approval signature. Signed approval forms are filed in …

|  |  |
| --- | --- |
| **Name** | **Title** |
|  |  |
|  |  |
|  |  |
|  |  |

Distribution

This document has been distributed to:

|  |  |
| --- | --- |
| **Name** | **Title** |
|  |  |
|  |  |
|  |  |
|  |  |

Contents

1. Introduction 4

1.1 Purpose 4

1.2 References 4

1.3 Notation/Structure 4

2. Use Cases 4

2.1 Use Case Name 4

2.1.1 Use Case Overview…. 4

# Introduction

Use Cases are detailed descriptions of how users and systems interact with an application. These descriptions include ideal paths with alternate paths and post conditions. This information assists the structure and interface design for the best possible experience for the site’s users. Additionally, the Use Cases are used by the QA team to ensure all objectives and requirements were met and fulfilled successfully.

A set of Use Cases can be created to describe the majority of user interactions with the application. The Use Case will ultimately drive the User Experience team in defining the interface. With a clear distinction between user and system interactions written in use case form the UI can be developed in more detail.

Each Use Case follows and tracks back to business requirements.

## Purpose

This document describes the Use Cases for the outlined system.

Use Cases are used to explore and communicate the likely actions of users and the system when interacting with the application. Development of Use Cases helps the design team understand the business requirements and how they can ultimately drive the design and user experience.

## References

This document is based on the following documents:

* Document Name

## Notation/Structure

Use Cases typically have the following sections:

1. Overviews
2. Preconditions
3. Triggers
4. Main Flows
5. Alternate Flows
6. Business Rules
7. Messages (system generated)

# Use Cases

## Use Case Name: Add a User

### Use Case Overview….

|  |  |  |
| --- | --- | --- |
| **Use Case ID** | **Add a User** | |
| **Use Case Overview** | User with adequate role/permissions adds a new user to the system and provisions the user with a license. When a user is added, that user is also being provisioned with a billable license. | |
| **Precondition** | 1. User is logged in; user has necessary role to add a new user to the system (either doc admin or system admin roles); 2. User has necessary permissions to provision the new user with a software license (add user licenses permission) | |
| **Trigger(s)** | 1. User selects "New user" during the add/change decision maker dialog while in the process of attaching opinion providers or decision makers during the uploading and describing a new master document. --🡪 2. User selects "New user" during the add opinion provider dialog while in the process of attaching opinion providers or decision makers during the uploading and describing a new master 🡪 does this a new user addition trigger? 3. User selects "New user" while in the "system setup, users" context. | |
|  | | |
| **B - Main Flow** | | |
|  | B0 | System displays "list of all users" (see listofusers.png below for sample treatment). The list of all users has columns <action> (Labeled "Action" and formatted as a checkbox) and for each data row, the word "edit" showing next to the checkbox as hypertext, <full\_name> (Labeled as "Full Name" and displaying of <last\_name>, <first\_name>), <username> (Labeled as "Username"), <active> (Labeled as "Active" and formatted as a checkbox), <role> (Labeled as "Role"). Hovering over any column header that is sortable causes the pointer to change to a hand (or similar) so the user knows they can sort on this column. The column headers that are sortable are: <full\_name>, <username>, <active>, and <role>. Clicking on any sortable column header sorts the users in the table in descending order based on the data in that column. Clicking again on the column header sorts the users in the table in the opposite order (ascending). There are two buttons the user can click on: one labeled "New User" and another labeled "Reset Password(s)".  User clicks on "New User"  If user clicks on "Reset Password(s)", see alternate flow A3 |
|  | B1 | System displays ‘Add New User’ Form with the following required fields: <first\_name> (Labeled "First Name"), <last\_name> (Labeled "Last Name"), <email\_address> (Labeled "Email Address"), and <role> (Labeled "Role"). There is also an optional field <escalation\_contact>, and <delegate> field that is visible but cannot accept an entry. All fields are free form user text entry except role and escalation contact, which are drop down list. The "role" field displays "none selected" by default. The drop down list of roles includes the following roles: "Deal Owner", "Doc Admin", "Executive", "Legal", and "Sales Manager" (the role of "System Admin" is the only role not displayed). The escalation contact field displays "none selected" by default. A drop down will only be available for this field if the user is the sys admin. The drop down list displays all the users in the system, alphanumerically sorted in ascending order by last name. 🡪 system is related to company/customer or the product owner?  On the bottom of the form, the user can choose from 3 buttons: "Save and New", "Save", or "Cancel" |
|  | B2 | User submits information requested and selects ‘Save’.  If User selects ‘Save and New', see A1 'Save and Add Another New User'.  If User selects ‘Cancel', see A2 'Cancel Add New User'. |
|  | B3 | System validates user selections. The rules for validation are:  1. All fields must have entries in them  2. The email address must be properly formed  3. The combination of email address and company must be unique. Email cannot be associated with an existing user that is attached to this company account.  If validation fails, redisplay B1 with red highlighting next to the field(s) that need to be corrected/completed, along with informative text in red to help the user know how to correct. The field correction help text to be displayed is as follows:  1. If a field has not been filled in, the red highlighted text displayed should say, "You must enter a value" (M1)  2. If the email address entered is not properly formed, the red highlighted text displayed should say, "Enter a properly formed email address. For example john@company.com". (M2)  3. If the email address is associated with an existing user that is attached to the account, the red highlighted text displayed should say, "Email address already in use." (M3)  4. If the user has not selected a role for the user in the role field, the red highlighted text should say, "You must enter a value" (M1) |
|  | B4 | System executes <task: create new user>. System displays "list of all users" with the newly created user included. When returning the user to the "list of all users", it should be within the context that the user was in when they decided to add the new user. For example, if the user had selected "add new user" during the add/change decision maker dialog while in the process of attaching opinion providers or decision makers during the uploading and describing a new master document, then the user should be able to return to that context from the "list of all users". |
| **Post-**  **conditions** | * Successfully created User Account | |
|  | | |
| **A1** | **Save and Add Another User** | |
|  | A1.1 | User selects ‘Save and New'. |
|  | A1.2 | System does step B3 validation.  If passing validation, system executes <task: create new user>. System returns user to ‘Add New User’ (B1) Page. <END> |
| **Post-**  **conditions** | * Successfully created User Account | |
|  | | |
| **A2** | **Cancel Add New User** | |
|  | A2.1 | User selects ‘Cancel’. |
|  | A2.2 | System displays a list of all system users. |
| **Post-**  **conditions** | * No new User Account created | |
|  | | |
| **A3** | **Reset User Password** | |
|  | A3.1 | User selects ‘Reset Password(s)’. |
|  | A3.2 | If "Action" checkbox was checked for one or more users, system displays a toast with message M4 and an "OK" button. On click of "OK", display a page that says "A new password for the following user(s) has been sent via email. The user will be required to enter a new password upon initial login to Cosentium. Below the message, display the following columns: <Full Name>, <Username>, and <email>. |
|  | A3.3 | If "Action" checkbox was NOT checked for one or more users, system displays a toast with message M5. On click of "OK", return user to B0, list of all users with state preserved exactly as it was when the user clicked on "Reset Password(s)". |
| **Post-**  **conditions** | * Generate a temporary password for users that need to reset password * Generate email and send to user(s) that need to reset passwords. The email comes from "support@cosentium.com" and is sent to the email address(es) of the user's whose passwords need to be changed. The email says, "Dear <full\_name>, Your Cosentium password has been reset by your administrator. Your username and temporary password are below. Username: <display username>, Temporary password: <display temporary password> Click here to login: <display link>. If you have questions, please contact your administrator: <display administrator email address>. Thank you, Cosentium.com | |
|  | | |
| **Messages** | M1 | "You must enter a value" |
|  | M2 | "Enter a properly formed email address. For example john@company.com" |
|  | M3 | "Email address already in use." |
|  | M4 | "Reset password for these users?" |
|  | M5 | "No users selected" |
|  | | |
| **BRs** | 1 | When creating a user account, take the user's email address and create a username for the user that is the same as the user's email address. |
|  | 2 | When creating a user account, set the flag for that user account as "active=yes". |
|  | 3 | When creating a user account, take the user's first name and last name and create a "full name" for the user in format lastname, firstname. Stuff this into a database field called "full\_name". |

Listofusers.png

