Your Company Name

Use Case Template

Date

Revision History

Date	Version	Author	Change

Table of Contents

Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1   Purpose

Purpose describes the intent of the document, which is to define the business requirements for the project using a use case methodology.
  o *Problems or issues to resolve.*
  o *Objectives or goals met with this solution.*
  o *Solution to be implemented.*
  o *Why the solution is being implemented.*

2   Project Information

This section of the document should contain project background information including the project's objectives and major system functionality.

2.1   Project Description

The Project Description section provides a high level view of the project; background, vision, approach, timeframe, etc.

2.2   Project Approach

The Project Approach statement provides a complete description of the approach to be taken for the delivery of the project. Outline the phases of the project including the high-level activities. If applicable, describe how a specific phase relates to the overall project.

2.3   Goals, Objectives, and Scope

The objectives statement describes the goals of the project. The Project Scope statement defines the scope of the project.

List the high-level project deliverables and specify whether they are included or excluded from the project.

ID	Description	Included / Excluded

ID	Description	Included / Excluded

2.4 Business Drivers

Describe why the project is being implemented. This may be to reduce costs, increase revenue, streamline processes, etc.

2.5 Stakeholders

The Stakeholders statement and table outlines the project stakeholders and their respective roles.

Name	Department	Role
John Smith	*Accounting*	*Manager*

2.6 Assumptions, Dependencies, and Constraints

List assumptions, dependencies, and constraints that could constrain the project team, development, or implementation, e.g., system hardware or software availability or access.

2.7 Risks

Provide information about any risks associated with the project. Provide any work-around or mitigation information for each risk identified.

2.8 Costs

Provide estimated total costs for implementing the proposed solution. These amounts should be detailed in a Project Capital and Expense Costs Worksheet, if applicable. Note any assumptions used to estimate the costs.

2.9 Delivery Dates

List high-level deliverables / milestones for the project and their associated target dates.

Milestone / Deliverable	Target Date

3 Process Information

3.1 Current Processes

Provide Business Process Diagrams for any complex processes or steps that are used to do a specific job. Consider systems involved, users, when tasks are performed, and what the results are. Describe the process using text or a graphic process flow.

Any business rules, such as calculations, decisions / if-then, algorithms, or procedures should be clearly defined and broken down to the individual steps. Include the following information in the process diagrams:

- o *Inputs, processes, and outputs*
- o *Business workflow*
- o *Business rules, edits, validations, and/or formulas*
- o *Exception handling and processing.*

3.1.1 Current Process Flow

Provide detailed information about current processes.

3.1.2 Current Process Description

Provide detailed step information about current processes in the following table, if applicable.

#	Description	User	Issues

3.2 New Processes or Future Enhancements

Provide Business Process Diagrams for any new complex processes or steps that must be performed to do a specific job. Consider systems involved, users, when tasks are performed, and what the results are. Describe the process using text or a graphic process flow.

Any business rules, such as calculations, decisions / if-then, algorithms, or procedures should be clearly defined and broken down to the individual steps. Include the following information in the process diagrams:

- o *Inputs, processes, and outputs*
- o *Business workflow*
- o *Business rules, edits, validations, and/or formulas*
- o *Exception handling and processing.*

3.2.1 New Process Flow

Provide detailed information about the new processes.

3.2.2 New Process Description

Provide detailed step information about the new processes in the following table, if applicable.

#	Description	User	Issues

4 Requirements Information

4.1 High-Level Business Requirements

This section includes details about the business requirements. Business requirements are those items needed to support user goals, tasks, and activities. It may include high-level modifications or enhancements. They can be either mandatory or desirable.

- o *Mandatory: "Must Have" represents the core functionality and must be included in the solution.*
- o *Desirable: "Nice to Have" requirements can be implemented after all mandatory requirements are fulfilled and there are sufficient resources available.*

This section should also include business rules that impact the project. A Business Rule defines or constrains some aspect of the business, e.g., products sold with a 50% or more discount must include an authorized approval code.

#	Function	Description	Priority	Comments

Note: Priority may be defined as Mandatory or Desirable.

4.2 System Interfaces

Provide information about the systems or applications that solution must interface with, e.g.,
- o *Communication hardware, software and their requirements, methods, and functionality.*
- o *Data, formats, messages, and transfer schedules*
- o *Performance and capacity.*
- o *Security designs and considerations.*
- o *Names of reference manuals and other documentation along with their location.*

4.3 Infrastructure Requirements

Provide infrastructure information when there are equipment and network additions or changes to, e.g., servers, printers, network devices, network configuration or management changes, new or upgraded middleware or operating system software, or changes to data centers.

5 Use Case Specifications

5.1 Overview

Decide which use case method to use, i.e., in summary form or traditional form using detailed specifications. Both methods can be used with major company software, e.g., Rational's RequisitePro.

Use Case Description:
- *A use case starts when the actor performs an action.*
- *The use case provides a dialog between the actor and the system.*
- *It includes a description of what the actor does and the system's response.*
- *It describes what happens inside the system, not how or why. Be specific about what is passed back and forth, e.g., the representative enters product information (e.g., company, product, quantity).*

5.2 Simplified Method

The simplified format provides basic requirements information, with each type having their own numbering, e.g.,
- *Use Case: UC # (e.g., UC1: System Access).*
- *Business Requirement: BR # (e.g., BR1: System must control access to the application for all users).*
- *Rule: RU # (e.g., RU1: Users must use a unique User ID and Password (with 6 alpha-numeric characters) that is changed every 3 months).*

UC / BR / RU #	Description
UC1	
BR1	
BR2	
RU1	

5.3 Traditional Method

Repeat the tables in the following sections for each use case situation (see a sample template in the next major section).

5.3.1 Basic Information

Topic	Description
Use-Case Name	
Description	*Purpose and role of the use case.*
Actors	*All the actors involved in the use case. Indicate any diagrams, if any.*
Pre-conditions	*Explain any pre-conditions that must be satisfied before a use case is performed.*

5.3.2 Flow of Events

- *Basic Flow: Provide a sentence or two to describe the action and response.*
- *Complex Flow: Use this table for more complex action oriented events.*
- *Provide work flows, diagrams, and other graphics to help explain the event.*

Basic Flows:

Provide limited information (e.g., a sentence or two) to describe the action and response.

Step	User Action	System Response
	Describe the event or condition that triggers this flow.	

Complex Flows:

Provide more detailed information to describe a more complex action and response event.

Step	User Action	System Response
	Describe the event or condition that triggers this flow.	*Describe the point in the basic flow where the use case resumes.*

5.4 Sample Template

Use the following tables as a guide to enter use case information.

Topic	Description
Use Case #	*Buy Product*
Goal	*Buyer purchases product from company and product is shipped and billed.*
Scope & Level	*Corporate and Summary*
Preconditions	*Company knows purchaser's address and billing information..*
Success-Ending Condition	*Purchaser obtains product and product is paid for.*
Failed End Condition	*No money sent. Product not sent.*
Primary, Secondary Actors	*Purchaser, any representative working on behalf of the customer, e.g., credit card company, bank, shipping service.*
Trigger	*Request arrives.*
Description and Step	*Action*
1	*Purchaser contacts company with a purchase request.*
2	*More steps…….*
.	*.*
.	*.*
.	*.*

Topic	Description
10	*Purchaser pays for product.*
Side Step	*Branching Action*
4a	*Product out of stock and order put on backorder* *Renegotiate order.*
Related Information	*Purchase Product*
Priority	*High*
Performance	*10 minutes for order, 30 days until paid*
Frequency	*100 per day*
Open Issues	*Partial orders can be filled.* *Problems with credit card, e.g., past expiration date*
Due Date	*Jan 20xx*
Other Information	

5.5 Product, Organizational, System, and External Requirements

This section includes details about other requirements that can cover product, organization, system (e.g., performance, operations), and external requirements (e.g., security).

Audience	*Indicate the users of the system or application.*
Security	*Provide information about the standard or unique security system or application situations, e.g., access / authentication / authorization processes; client, user or server certificates; encryption, password rules, security procedures.*
Volume and Performance Metrics	*Indicate system or application volume and performance metrics to be performed, e.g., database records or transactions to be processed within a certain time period.*
Capacity and Scalability	*Indicate capacity and growth information or concerns that will have to be met over time.*
Support Considerations	*Indicate system or application support, e.g., who will support it, hardware / software to support it, service level agreements or contractual obligations.*
Audit	*Indicate any system or application audit requirements or constraints.*
Design Constraints	*Indicate system or application design constraints, e.g., software languages, developmental tools, architectural and design constraints.*
Output	*Indicate reports, files or other export output.*
Data Retention	*Indicate any special data retention requirements.*
Legal or Regulatory	*Indicate any legal or regulatory requirements that can impact the system or application.*

5.6 Usability, Performance, Operations, and Maintenance Requirements

Provide requirements information related to product usability, system performance, operations, maintenance or conditions that must be met by the proposed application or system. These requirements can have a more detailed title / description or be in a numbered list.

#	Function	Description	Priority	Comments

5.7 Content / Data / Sample Report Requirements

Provide information about reports or data that must be provided or modified.

- o *Samples of all content and data.*
- o *Examples of input / output files and their schema.*
- o *Necessary content. List all content with brief description.*
- o *Who will provide the content? List who is responsible for what and when, e.g., one-time, other content must be maintained on a regular basis.*
- o *Who will maintain the content when the application is operational?*

5.8 Screen Requirements

Provide any business rules or information related to screen information that must be included.

Element	Description & Rules	Source	Req	Default Value

5.9 Training and Documentation Requirements

Provide training and documentation information that is required to support the application or system to be implemented, e.g., training plans, training materials, support documentation, and user documentation.

Training / Documentation	Resource	Schedule	Comments

6 Glossary

List any document terms that may not be fully understood without some explanation.

Term	Definition
Business Requirements	Business requirements identify a necessary attribute, capability, characteristic, or quality of a system that has value and utility to a user. Sets of requirements are used as input into the design stages of product development. The requirements phase can be preceded by a feasibility study or a conceptual analysis phase of the project. Requirements-gather requirements from stakeholders. Analysis-check for consistency and completeness. Definitions-write down descriptive requirements for developers. Specifications-create details that are an initial bridge between requirements and design.
Functional Requirements	Functional requirements define the internal workings of the software, i.e., the calculations, technical details, data manipulations, and other specific functionality that show how the events are to be satisfied. The core of the requirement is the description of the required behavior, which must be a clear and readable description of the behavior. This behavior can come from organizational or business rules, or it can be discovered through working sessions with users, stakeholders, and other experts within the organization. Functional requirements generally contain a unique name and number, a brief summary, and reason for it. This information is used to help the reader understand why the requirement is needed, and to track the requirement through the development of the system. Functional requirements are supported by non-functional requirements, which impose constraints on the design or implementation.

Term	Definition
Non-Functional Requirements	Non-functional requirements specify criteria that can be used to judge the operation of a system, rather than specific behaviors. They impose constraints on the design or implementation. Typical non-functional requirements are performance, reliability, security, scalability, and cost. Other terms for non-functional requirements are "constraints", "quality attributes" and "quality of service requirements".

7 APPENDIX