

**USE CASE 1:**  **BUY STOCKS OVER THE WEB** 

Primary Actor: Purchaser

Scope: Personal Advisors / Finance package ("PAF")

Level: User goal

Stakeholders and Interests:

Purchaser - wants to buy stocks, get them added to the PAF portfolio automatically.

Stock agency - wants full purchase information.

Precondition: User already has PAF open.

Minimal guarantee: sufficient logging information that PAF can detect that something went wrong and can ask the user to provide details.

Success guarantee: remote web site has acknowledged the purchase, the logs and the user's portfolio are updated.


Main success scenario:


1. User selects to buy stocks over the web.
2. PAF gets name of web site to use (E\*Trade, Schwabb, etc.) from user.
3. PAF opens web connection to the site, retaining control.
4. User browses and buys stock from the web site.
5. PAF intercepts responses from the web site, and updates the user's portfolio.
6. PAF shows the user the new portfolio standing.

Extensions:

- 2a. User wants a web site PAF does not support:
    - 2a1. System gets new suggestion from user, with option to cancel use case.
  - 3a. Web failure of any sort during setup:
    - 3a1. System reports failure to user with advice, backs up to previous step.
    - 3a2. User either backs out of this use case, or tries again.
  - 4a. Computer crashes or gets switched off during purchase transaction:
    - 4a1. (what do we do here?)
  - 4b. Web site does not acknowledge purchase, but puts it on delay:
    - 4b1. PAF logs the delay, sets a timer to ask the user about the outcome.
    - 4b2. (see use case *Update questioned purchase*)
  - 5a. Web site does not return the needed information from the purchase:
    - 5a1. PAF logs the lack of information, has the user *Update questioned purchase*.
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**USE CASE 22:**  **REGISTER LOSS** 

**Scope:** "System" means the claims-capturing computer system 

**Level:** Blue (User Goal) 

**Release:** 2 **Status:** Reviewed **Revision:** Current

**Context of use:** Capture loss fully

**Primary Actor:** Clerk

**Preconditions:** Clerk already logged in.

**Trigger:** Clerk has started entering loss already

**Success Guarantee:** loss information is captured and stored

**Minimal Guarantee:** Nothing happens.

**Stakeholder & interest:** as before

**Main Success Scenario:**

To speed up the clerk's work, the System should do its work asynchronously, as soon as the required data is captured. The Clerk can enter data in any order to match the needs of the moment. The following sequence is foreseen as the most likely.

1. Clerk enters insured's policy number or else name and date of incident. System populates available policy information and indicates claim is matched to policy.
2. Clerk enters basic loss information, System confirms there are no existing, possibly competing claims and assigns a claim number.
3. Clerk continues entering loss information specific to claim line.
4. Clerk has System pull other coverage information from other computer systems.
5. Clerk selects and assigns an adjuster.
6. Clerk confirms they are finished, System saves and triggers acknowledgement be sent to agent.

**Extensions:**

\*a. Power failure during loss capture:

\*a1. System autosaves intermittently (Possibly at certain transaction commit points, open issue.)

\*b. Claim is not for our company to handle:

\*b1. Clerk indicates to System that claim is entered "only for recording purposes" and either continues or ends loss.

1a. Found policy information does not match the insured's information:

1a1. Clerk enters correct policy number or insured name and asks System to populate with new policy index information.

1b. Using search details, System could not find a policy:

1b1. Clerk returns to loss and enters available data.

1c. Clerk changed policy number, date of loss or claim line after initial policy match:

1c1. System validates changes, populates loss with correct policy information, validates and indicates claim is matched to policy

1c1a. System cannot validate policy match:

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- 1c1a1. System warns Clerk.
- 1c1a2. Clerk Finds the policy using the search details for "policy"
- 1c2. System warns Clerk to re-evaluate coverage.
- 1d. Clerk wants to restart a loss which has been interrupted, saved or needs completion:
  - 1d1. Clerk Finds a loss using search details for "loss".
  - 1d2. System opens it for editing.
- 2-5a. Clerk changes claim line previously entered and no line specific data has been entered:
  - 2-5a1. System presents appropriate line specific sections of loss based on Clerk entering a different claim line.
- 2 - 5b. Clerk changes claim line previously entered and there is data in some of the line specific fields:
  - 2-5b1. System warns that data exists and asks Clerk to either cancel changes or proceed with new claim line.
  - 2-5b1a. Clerk cancels change: System continues with the loss.
  - 2-5b1b. Clerk insists on new claim line: System blanks out data which is line specific (it keeps all basic claim level data).
- 2c. System detects possible duplicate claim:
  - 2c1. System displays a list of possible duplicate claims from within loss database.
  - 2c2. Clerk selects and views a claim from the list. This step may be repeated multiple times.
    - 2c2a. Clerk finds that the claim is a duplicate:
      - 2c2a1. Clerk opens duplicate claim from list of claims for editing if not yet marked completed (base on Clerks security profile). Clerk may delete any data in previously saved.
      - 2c2b. Clerk finds that the claim is not a duplicate: Clerk returns to loss and completes it.
- 2d. Preliminary loss information is changed after initial duplicate claim check is done:
  - 2d1. System performs duplicate claim check again.
- 2e. Clerk can save the loss any time before completion of steps 2 through 6. (some reasons to save may be just a comfort level or that the Clerk must interrupt entry for some reason (e.g.. claim must be handled by & immediately transferred to higher level adjuster)).
  - 2e1. Clerk has System save the loss for completion at a later time.
- 4-5a. Either, claim line or loss description (see business rules) are changed after coverage was reviewed by Clerk:
  - 4-5a1. System warns Clerk to re-evaluate coverage.
- 6a. Clerk confirms they are finished without completing minimum information:
  - 6a1. System warns Clerk it cannot accept the loss without date of loss, insured name or policy number and handling adjuster:
    - 6a1a. Clerk decides to continue entering loss or decides to save without marking complete.
    - 6a1b. Clerk insists on existing without entering minimum information: System discards any intermediate saves and exits.
  - 6a2. System warns Clerk it cannot assign claim number without required fields (claim line, date of loss, policy number or insured name): System directs Clerk to fields that require entry.
- 6b. Time-out: Clerk has saved the loss temporarily, intending to return, System decides it is

## Chapter 5. Three Named Goal Levels

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time to commit and log the loss, but handling adjuster has still not been entered:

6b1. System assigns default adjuster (see business rule)

**Frequency of occurrence: ??**

**Business Rules:**

\*. When does saved loss goes to main system (timelines)?

1. Minimum fields needed for saving an loss (and be able to find it again) are: ...
  2. Claim number, once assigned by system, cannot be changed.
  2. Business rules for manual entry of claim number - needed?
  4. Loss description consists of two fields, one being free form, the other from a pull down menu.
  4. System should know how to find coverage depending on policy prefix
  6. Required fields in order to confirm a loss is finished are: ....
- 6b. Rules for default adjuster are: ...

**Data descriptions used:** Search details for policy, Policy index information, Preliminary loss information, claim-line-specific loss information, additional information, Search details for loss, duplicate claim check criteria, list of possible duplicate claims, a claim from the list, Finds a policy, Get Coverage

**UI Links:**

**Owner:** Susan and Nancy

**Critical Reviewers:** Alistair, Eric, ...

**Open Issues:**

How often does it autosave.

Agent acknowledgement cards, where and how do they print etc.?

## User Story Examples

When [Writing Effective User Stories](#), it is important to have descriptive summaries and detailed acceptance criteria to help the Team know when a user story is considered complete or “[done](#).” See the examples below:

EPIC	USER STORY	ACCEPTANCE CRITERIA
<p>As an <b>Acquisition Gateway User</b>, I need to access the Acquisition ordering platform behind a secure login <b>so that</b> I can purchase products.</p>	<p>As an <b>Acquisition Gateway User</b>, I need to select an Auction product in the Acquisition ordering platform <b>so that</b> I can bid on it.</p>	<p>Ensure the Acquisition Gateway User is able to:</p> <ul style="list-style-type: none"> <li>• log in to Acquisition Gateway</li> <li>• navigate to the Auction page</li> <li>• able to select a product(s) to bid on</li> </ul>
	<p>As an <b>Acquisition Gateway User</b>, I need to review my previous bids in the Acquisition ordering platform <b>so that</b> I can remove expired bids.</p>	<p>Ensure the Acquisition Gateway User is able to:</p> <ul style="list-style-type: none"> <li>• log in to Acquisition Gateway</li> <li>• navigate to a page to review items previously bid upon</li> <li>• select one, or multiple, expired bids</li> <li>• remove expired bids</li> </ul>
<p>As a <b>Marketing Data Analyst</b>, I want to create forecast and trend reports <b>so that</b> I can support the sales efforts of Region 9 Marketing Representatives.</p> <p>Source: <a href="#">How Does Agile Marketing Work?</a></p>	<p>As a <b>Marketing Data Analyst</b>, I need to run the Salesforce &amp; Google analytics reports <b>so that</b> I can build the monthly media campaign plans.</p>	<p>Ensure the Marketing Data Analyst is able to:</p> <ul style="list-style-type: none"> <li>• access the Salesforce &amp; Google Analytics reports</li> <li>• create the monthly media campaign plan for a specified region (e.g. Region 9)</li> <li>• access a Contacts list</li> <li>• email the prepared monthly media campaign to one or more selected contact(s)</li> </ul>