

**Basic Use Case Template**

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*Sample:*

<b>USE CASE 5</b>	Buy Goods	
<b>Description</b>	Buyer issues request directly to our company, expects goods shipped and to be billed.	
<b>Used by</b>	Manage customer relationship (use case 2)	
<b>Preconditions</b>	We know Buyer, their address, and needed buyer information.	
<b>Success End Condition</b>	Buyer has goods, we have money for the goods.	
<b>Failed End Condition</b>	We have not sent the goods, Buyer has not spent the money.	
<b>Actors</b>	Buyer, any agent (or computer) acting for the customer. Credit card company, bank, shipping service	
<b>Trigger</b>	purchase request comes in.	
<b>DESCRIPTION</b>	<b>Step</b>	<b>Action</b>
	1	Buyer calls in with a purchase request
	2	Company captures buyer's name, address, requested goods, etc.
	3	Company gives buyer information on goods, prices, delivery dates, etc.
	4	Buyer signs for order.
	5	Company creates order, ships order to buyer.
	6	Company ships invoice to buyer.
	7	Buyers pays invoice.
<b>EXTENSIONS</b>	<b>Step</b>	<b>Branching Action</b>
	3a	Company is out of one of the ordered items: 3a1. Renegotiate order.
	4a	Buyer pays directly with credit card: 4a1. Take payment by credit card (use case 44)
	7a	Buyer returns goods: 7a. Handle returned goods (use case 105)
<b>VARIATIONS</b>		<b>Branching Action</b>
	1	Buyer may use phone in, fax in, use web order form, electronic interchange
	7	Buyer may pay by cash or money order check credit card
<b>Exceptions</b>	4a	Credit card not accepted. 4a2. End of use case, fail
<b>Other Information</b>	5 minutes for order, 45 days until paid, expect 200 per day	
<b>OPEN ISSUES</b>	What if we have part of the order? What is credit card is stolen?	
<b>Due Date</b>	release 1.0	

## Using, Staging, Tailoring the Template

My (and others') experience is that at early stages of the project the template is too long and *too complete* to fill out all at one time - at the beginning of the project, it is appropriate to work with less information (see the chapter, "Managing Precision, Accuracy and Scale" in my book, Surviving Object-Oriented Projects). Therefore...

1. Learn to fill in all the fields of the template in several passes, at several moments in the project's requirements gathering and project setup work. Here is a sample sequence. First, fill in just these fields, for all the use cases you need to consider at this time:

*Use Case:* <number> <the name should be the goal as a short active verb phrase>

*Goal in Context:* <a longer statement of the goal, if needed>

*Scope:* <what system is being considered black-box under design>

*Level:* <one of: Summary, Primary task, Subfunction>

*Primary Actor:* <a role name for the primary actor, or description>

*Priority:* <how critical to your system / organization>

*Frequency:* <how often it is expected to happen>

2. Stare at what you have so far. Think. Examine. Can you merge or remove some of them? Can you partition them into ones that should be developed together, or written later? For the ones you determine to pursue now, fill in the following fields:

*Trigger:* <the action upon the system that starts the use case, may be time event>

*MAIN SUCCESS SCENARIO*

3. Now you have enough information to check your project's scope and look for surprises. Before you are done describing the system's functioning, you have to fill out:

*EXTENSIONS*

*VARIATIONS*

*Used by Use Case:* <optional, name of use case that includes this one>

4. You now have the system's functionality captured. When you are ready to work on your estimations, fill in:

*other information:* <the amount of time this use case should take>

*OPEN ISSUES*

*SCHEDULE*