

BeHeardPhilly Insight

Project Name: BeHeardPhilly Client Facing Tool

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1 Landing Page Interaction

1.1 Request for Quote

Use Case ID:	UC-1.1		
Use Case Name:	Request Quote		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/6/2016	Last Revision Date:	4/13/2016
Actors:	Prospective Client		
Description:	Prospective client has been directed by a BeHeardPhilly (BHP) employee to the landing page. By interacting with the landing page, the client is taken to a page that allows him/her to request a quote for a survey.		
Trigger:	Prospective client is either directed to the landing page by a BHP employee in person, or the prospective client follows a link to the landing page on the home screen of BHP's official website.		
Preconditions:	<ol style="list-style-type: none"> 1. Prospective client's organization has need for feedback from Philadelphians on a particular topic/issue. 2. Prospective client has not personally used BHP previously while representing his/her current organization. 		
Postconditions:	<ol style="list-style-type: none"> 1. Request for Quote is sent to Employee portal and is immediately stored under 'Proposals' tab of the portal. 2. Prospective client receives email response from BHP employee containing temporary username and password. 3. Prospective client's Request for Quote is ultimately approved by a BHP employee. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Prospective client opens landing page. 2. Prospective client clicks 'Learn More' option in bottom left corner of screen. 3. Prospective client reviews taglines that appear and then clicks 'Find Out' button in bottom right corner of next screen. 4. Prospective client reads BHP's value proposition that appears as a series of further taglines. 5. Prospective client clicks arrow in the bottom right of screen directly next to text that reads "Ready to find out what Philly really thinks?" 6. Prospective client is brought to "Request a Quote" screen, and is prompted to fill out his/her contact information, the topic and target demographics of the survey, and the survey timeline and logistics. 7. Prospective client completes form and clicks "Submit" button in bottom left of screen. 8. Prospective client is taken to a confirmation screen, which shows that the request has been successfully sent. 9. The prospective client's submission is received, and an assigned BHP employee will send him/her a temporary username and password via email, to be used to log in to the client-facing portal, which will be his/her means of communicating with the assigned BHP employee. 		
Variations:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, if the client is a current client and has already been given an account username and password: <ol style="list-style-type: none"> 1. Client will click "Sign in" in top right of landing page. 2. Aforementioned interaction will prompt client to begin Use Case 1.2. 		
Exceptions:	<ol style="list-style-type: none"> 6a. If prospective client does not enter correct email address: <ol style="list-style-type: none"> 1. Client will not receive confirmation email with username and password. 2. BHP employee contacts client with temporary login credentials via provided phone number. 		

1.2 *Current Client Sign In*

Use Case ID:	UC-1.2		
Use Case Name:	Client Sign In		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/9/2016	Last Revision Date:	4/13/2016
Actors:	Current Client		
Description:	Client has already signed up with BeHeardPhilly (BHP) by submitting a Request for Quote. After submitting the request, the former prospective client becomes a current client upon being assigned and sent a username and password. Current clients can sign in to the Client Portal by going through the landing page and entering an approved username and password.		
Trigger:	Current client enters landing page, and clicks “Log In” button in the top right of the screen.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has submitted a Request for Quote. 2. Client has received a username and password. 		
Postconditions:	<ol style="list-style-type: none"> 1. Current client is taken to home page of Client Portal. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks “Sign In” button on the BHP landing page. 2. Current client is brought to BHP Insight Sign In page. 3. Current client selects “client” from drop-down menu. 4. Current client types in temporary username and password. 5. Current client clicks sign in button after inputting all relevant information. 6. The current client is taken to the dashboard of the BHP Insight “Client Portal.” 		
Variations:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, if the client clicks on the “Home” button in the top right of the screen: <ol style="list-style-type: none"> 1. Client is returned to the BHP Insight Landing Page. 2. Use case re-starts at step 1. 		
Exceptions:	<ol style="list-style-type: none"> 3a. If current client does not select an option from the drop-down menu: <ol style="list-style-type: none"> 1. Client will be unable to sign in. 2. Client will receive error message that states, “Please check account type, username, and password.” 3. Client will then select “client “ from drop-down menu. 4. Use Case resumes at step 4. 4a. If current client has already signed in for the first time and has updated his/her username and password: <ol style="list-style-type: none"> 1. Client enters updated username and password. 2. Use Case resumes at step 5. 5a. If current client does not enter a valid username and/or password: <ol style="list-style-type: none"> 1. Client is not directed to BHP Insight “Client Portal.” 2. Client receives error message that states, “Please check account type, username, and password.” 3. Use Case resumes on step 4/4a. 		

1.3 Employee Sign In

Use Case ID:	UC-1.3		
Use Case Name:	Employee Sign In		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/10/2016	Last Revision Date:	4/15/2016
Actors:	BeHeardPhilly Employee		
Description:	Employee signs in to access “Employee Portal.”		
Trigger:	Employee clicks on “Sign In” button on Landing Page.		
Preconditions:	<ol style="list-style-type: none"> 1. User is a BeHeardPhilly employee. 2. Employee has a username and password. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee is taken to BHP “Employee Portal.” 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Sign In” on the BHP “Landing Page.” 2. System takes employee to the “Employee Sign In” page. 3. Employee selects “Employee” from drop down list. 4. Employee enters their username and password. 5. Employee clicks on “Sign In” button. 6. System verifies employee username and password. 7. Employee is taken to BHP “Employee Portal.” 		
Variations:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, if the employee clicks on “Home” button <ol style="list-style-type: none"> 1. Employee is returned to BHP “Landing Page.” 2. Use case resumes on step 1. 		
Exceptions:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, if the employee does not click on “Employee” from the drop down list when signing in to portal <ol style="list-style-type: none"> 1. Employee is unable to sign-in. 2. An error message appears on screen saying “Please check account type, username, and password.” 3. Employee selects “Employee” from drop-down list. 4. Use Case resumes on step 4. 4a. In step 4 of the normal flow, if the employee does not enter a valid username and/or password <ol style="list-style-type: none"> 1. Employee is unable to sign-in. 2. An error message appears on screen saying “Please check account type, username, and password.” 3. Use Case resumes on step 4. 		

2 Client Portal Usage

2.1.1 Dashboard – View Current Survey

Use Case ID:	UC-2.1.1		
Use Case Name:	Current Survey		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/11/2016	Last Revision Date:	4/17/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client is initially taken to the “Current Survey” tab under the “Dashboard” category of the Navigation Toolbar.		
Trigger:	Current client logs into account.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BHP and has an account. 2. Client properly enters username and password information. 3. Client has an active survey with BHP. 		
Postconditions:	<ol style="list-style-type: none"> 1. Information, graphs, and data points will displayed in accordance with the specifications outlined by the client. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client is brought to “Current Survey” section of Dashboard by signing in (Use Case 1.2). 2. Four widgets are immediately displayed to client: <ul style="list-style-type: none"> ○ Current and expected survey timelines. ○ Responses organized by zip code and displayed on Google Maps. ○ Response timeline, detailing daily response volume since survey initiation. ○ Response demographics, organized by race, gender, age, and level of education achieved. 3. Client hovers mouse over Current timeline and expected Total timeline, which displays an information box containing date ranges and total duration in days. 4. Client clicks on mapped zip codes to visualize response volume for each location, displayed by pop-up information box. 5. Client hovers mouse over response timeline, which initiates an information box to display response volume on specific dates. 6. Client clicks on either “Race,” “Gender,” “Age,” or “Education,” which will show percentage distribution of various specifications under these categories. 		
Variations:	<ol style="list-style-type: none"> 6a. In step 6 of the normal flow, if the client selects “Race,” he/she will be given the option to view a pie chart that displays the volume of responses from specific, selected races relative to one another. 		
Exceptions:	<ol style="list-style-type: none"> 2a. When submitting a Request for Quote, the client will have the option to ask for specific data points to displayed on his/her dashboard that are different than the standard template. The standard template consists of the four aforementioned widgets in step 2 of the normal flow. 		

2.1.2 Dashboard – Past Surveys

Use Case ID:	UC-2.1.2		
Use Case Name:	Past Surveys		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/11/2016	Last Revision Date:	4/18/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client then enters the “Past Surveys” tab under the “Dashboard” section of the Navigation Toolbar. This tab will show historical data from previously completed surveys.		
Trigger:	Current client clicks on “Past Surveys” on the Navigation Toolbar.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BeHeardPhilly (BHP) and has an account. 2. At least one of the client’s surveys that BHP administered has been completed. 		
Postconditions:	<ol style="list-style-type: none"> 1. Information, graphs, and data points will displayed in accordance with the specifications outlined by the client. The client will have the option of viewing data from multiple completed surveys if more than one has past its expiration. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks on “Past Surveys,” located under “Dashboard” in the Navigation Toolbar on the left side of the screen. 2. The client will have the option of selecting to view the statistics of any past completed surveys. 3. The data requested from the selected survey will appear as a series of widgets, just as the information is displayed under “Current Survey.” 		
Variations:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, the client may only have one survey that has been previously completed. If such is the case, this past survey will be automatically displayed. 		
Exceptions:	<ol style="list-style-type: none"> 2a. Not all clients will have surveys that have already been completed. If a client has no previously completed surveys, a message that reads “There is no past survey data to display” will be shown on the screen. 		

2.1.3 Dashboard – Request New Survey

Use Case ID:	UC-2.1.3		
Use Case Name:	Request New Survey		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/15/2016	Last Revision Date:	4/19/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client then enters the “Request New Survey” tab under the “Dashboard” section of the Navigation Toolbar. The page that opens will allow the client to submit a request for a new survey to his/her BeHeardPhilly (BHP) employee contact.		
Trigger:	Current client clicks on “Past Surveys” on the Navigation Toolbar.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BeHeardPhilly (BHP) and has an account. 2. Client is logged in to Client Portal. 3. The client has at least one current survey and has submitted a previous Request for Quote. 		
Postconditions:	<ol style="list-style-type: none"> 1. The client’s request for a new survey will be sent to his/her employee contact. This will prompt the employee to begin interacting with the client in order to gather all information necessary to begin the requested survey. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks on “Request a Survey,” located under “Dashboard” in the Navigation Toolbar on the left side of the screen. 2. A page containing the same form as was displayed in Use Case 1.1 will appear. <ul style="list-style-type: none"> o Previously submitted contact information will automatically populate. 3. The client then must select his/her preferred method of contact. 4. Next, the client enters the topic and target demographics of the survey, and the survey timeline and logistics. 5. The client clicks the “Submit” button on the bottom of the screen, and the request is sent to the assigned BHP employee. 6. The client is taken to a confirmation page that displays the message, “Submission Successful.” 		
Variations:	<ol style="list-style-type: none"> 2a. In step 2 of the normal flow, or during any step thereafter, the client may choose to cancel the request. Cancelling the request deletes all data that the user manually typed or selected. 		
Exceptions:	<ol style="list-style-type: none"> 2a. Not all clients are guaranteed to have supplied all contact information in the initial Request for Quote. If this is the case, contact information will be left blank in the request for a new survey. This can be edited by the client under “Account Information,” which is explained further in Use Case 2.3.1. 		

2.2.1 Messages – Send Message

Use Case ID:	UC-2.2.1		
Use Case Name:	Send Message		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/19/2016	Last Revision Date:	4/21/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client has a question for the BeHeardPhilly employee assigned to him/her and wants to send the employee a message. This can be done by selecting and using the “Send Message” function under the “Messages” tab of the Navigation Toolbar.		
Trigger:	Current client clicks on “Send Message” on the Navigation Toolbar.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BeHeardPhilly (BHP) and has an account. 2. Client is logged in to Client Portal. 		
Postconditions:	<ol style="list-style-type: none"> 1. The client’s message is sent and delivered to the employee contact’s “View Messages” inbox. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks Send Message under the “Messages” tab of the Navigation Toolbar. 2. A page will appear with the client’s Contact Name and Organization information populated at the top. 3. The client will select the Subject of the message from a drop-down menu that contains the following options: <ul style="list-style-type: none"> ○ DASHBOARD ○ Widgets ○ Data ○ USERS ○ Add User ○ Delete User ○ Other 4. Next, the client will type out his/her message in the text box displayed under the “Message” header. 5. The client clicks the “Send” button on the bottom of the screen, and the message is sent to the assigned BHP employee. 6. The client is taken to a confirmation page that displays the message, “Message Sent.” 		
Variations:	<ol style="list-style-type: none"> 3a. Though not ideal for the organizational purposes of the BHP team, the client is not required to select a Subject for the message. 		
Exceptions:	<ol style="list-style-type: none"> 2a. Not all clients are guaranteed to have supplied all contact information in the initial Request for Quote. If this is the case, the Contact Name and Organization at the top of the screen may be left blank. This can be edited by the client under “Account Information,” which is explained further in Use Case 2.3.1. 		

2.2.2 Messages – View Messages

Use Case ID:	UC-2.2.2		
Use Case Name:	View Messages		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/20/2016	Last Revision Date:	4/21/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client would like to review the assigned BHP employee's correspondence with him/her. This can be done by selecting and using the "View Messages" function under the "Messages" tab of the Navigation Toolbar.		
Trigger:	Current client clicks on "View Messages" on the Navigation Toolbar.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BeHeardPhilly (BHP) and has an account. 2. Client is logged in to Client Portal. 		
Postconditions:	<ol style="list-style-type: none"> 1. The client's message is sent and delivered to the employee contact's "View Messages" inbox. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks View Messages under the "Messages" tab of the Navigation Toolbar. 2. A page will appear with a list of the messages that have been sent to the client. <ul style="list-style-type: none"> o The page will show who the message is from, the subject of the message, and the time and date that the message was delivered. 3. To view one of the messages, the client first needs to select the radio button next to the desired message. 4. After the message is selected, the client clicks the "View" button. 5. A screen displaying the subject of the message, the name of the message sender, and the text of the email will appear. 6. The client clicks "Reply" at the bottom of the screen. 7. A text box will appear in which the client can type his/her response. 8. The client clicks "Send," and the client has completed his/her message response. 		
Variations:	<ol style="list-style-type: none"> 6a. The client has the option of opting to not respond to the selected message, by clicking the "Back" button at the bottom of the screen. This will send the client back to the View Messages inbox. 8a. The client can decide to cancel his/her reply by clicking the "Cancel" button in the pop-up text box. 		
Exceptions:	<ol style="list-style-type: none"> 2a. If a client has just registered his/her account, he/she may not have a single message in the View Messages inbox. 		

2.3.1 Account Information

Use Case ID:	UC-2.3.1		
Use Case Name:	Account Information		
Created By:	John Matthews	Last Updated By:	John Matthews
Date Created:	4/22/2016	Last Revision Date:	4/23/2016
Actors:	Current Client		
Description:	Current client has logged in to Client Portal. The client would like to view and alter his/her account information that was submitted alongside the initial Request for Quote. This can be done by selecting and using the “Account Information” button on the Navigation Toolbar on the left of the screen.		
Trigger:	Current client clicks on “Account Information” on the Navigation Toolbar.		
Preconditions:	<ol style="list-style-type: none"> 1. Client has signed up with BeHeardPhilly (BHP) and has an account. 2. Client is logged in to Client Portal. 		
Postconditions:	<ol style="list-style-type: none"> 1. All updates that the client makes to his/her account are saved for future use. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Current client clicks Account Information on the Navigation Toolbar. 2. A page will appear that lists the following information about the client: <ul style="list-style-type: none"> ○ Username (non-editable) ○ Password (editable) ○ Name (editable) ○ Address (editable) ○ Title (editable) ○ Phone (editable) ○ Organization (non-editable) ○ Email Address (editable) 3. The editable information can be edited by clicking the pencil icon to the immediate right of the category. 4. The client clicks on a category to edit it, and types his/her alteration into a text box that pops up below the account information. 5. The client clicks “Save,” and the information automatically updates and populates on the screen. 		
Variations:	5a. The client may click “Cancel” if he/she decides not to edit the selected category.		
Exceptions:	2a. Certain information may not exist, only if the client did not include that information in his/her initial Request for Quote.		

3 Employee Portal Interaction

3.3.1 Clients - View Client List and Details

Use Case ID:	UC-3.1.1		
Use Case Name:	Client Listing		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/11/2016	Last Revision Date:	4/18/2016
Actors:	BeHeardPhilly Employee		
Description:	Employee can view the list of clients and can view client details.		
Trigger:	Employee clicks on “Client Listing” on navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee is shown a current list of clients. 2. Employee can view details about a client. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Client Listing” on navigation toolbar in the “Employee Portal.” 2. System displays a current list of clients and the following information: <ul style="list-style-type: none"> ○ Organization ○ Type ○ Date 3. Employee clicks on the radio button to select a client. 4. Employee clicks “Detail” button. 5. System displays details of the selected client, including: <ul style="list-style-type: none"> ○ Contact information <ol style="list-style-type: none"> i. Address ii. Type iii. Contacts (Name, Phone, Email) ○ Survey information <ol style="list-style-type: none"> i. Topic ii. Start Date iii. End Date iv. Status 		
Variations:	<ol style="list-style-type: none"> 1a. In step 1 of the normal flow, if the employee clicks on the “Clients” button on dashboard pane <ol style="list-style-type: none"> 1. System will take employee “Client Listing.” 2. Use Case resumes on step 2. 5a. In step 5 of the normal flow, if the employee clicks on the “X” button at the end of the contact information area, the contact information is deleted. 		
Exceptions:	N/A		

3.3.2 Clients - Add a New Client

Use Case ID:	UC-3.1.2		
Use Case Name:	Add New Client		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/13/2016	Last Revision Date:	4/18/2016
Actors:	BeHeardPhilly Employee		
Description:	BHP employee adds a new client to the database.		
Trigger:	Employee clicks on “Add a New Client” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page 		
Postconditions:	<ol style="list-style-type: none"> 1. “Client Listing” page in “Employee Portal” is updated with new client information. 2. Client can view and edit “Account Information” in the “Client Portal.” 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Add New Client” on navigation toolbar in the “Employee Portal.” 2. System displays a form for adding new client information and main account information.. 3. Employee fills in new client information: <ul style="list-style-type: none"> ○ Organization <ul style="list-style-type: none"> i. Select type of organization from a drop down list. Options include: Government, Non-Profit, Education, or Other. ○ Type ○ Street ○ City ○ State ○ Zip 4. Employee fills in “Main Account” information: <ul style="list-style-type: none"> ○ First Name ○ Last Name ○ Username ○ Password ○ Title ○ Email ○ Phone 5. Employee clicks “Save” button. 6. Database is updated with new client details. 7. “Client Listing” details are updated on “Employee Portal.” 8. “Account Information” is updated in “Client Portal.” 		
Variations:	N/A		
Exceptions:	N/A		

3.2.1 Surveys - Client Survey Management

Use Case ID:	UC-3.2.1		
Use Case Name:	Client Survey Management		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/14/2016	Last Revision Date:	4/19/2016
Actors:	BeHeardPhilly Employee		
Description:	BHP employee views “Active Surveys” and it’s data as well as “Inactive Surveys.”		
Trigger:	Employee clicks on “Surveys” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee can view both active and inactive surveys. 2. Employee can edit/view survey data. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Surveys” on navigation toolbar in the “Employee Portal.” 2. System displays “Active Surveys” and “Inactive Surveys.” 3. Employee can view: <ul style="list-style-type: none"> ○ “Active Surveys” <ol style="list-style-type: none"> i. Topic ii. Organization iii. End Date ○ “Inactive Surveys” <ol style="list-style-type: none"> i. Topic ii. Organization iii. End Date 4. Employee clicks on radio button to select an “Active Survey.” 5. Employee clicks on “Data” button. 6. Employee is taken to Google Sheets where the data from the selected “Active Survey” is kept. 7. Employee can edit/view the data. 		
Variations:	<ol style="list-style-type: none"> 1a. In step 1 of the normal flow, if the employee clicks on the “Surveys” button on dashboard pane <ol style="list-style-type: none"> 1. System will take employee “Surveys.” 2. Use Case resumes on step 2. 		
Exceptions:	<ol style="list-style-type: none"> 1. Only employees can access the data stored in Google Sheets. 		

3.3.1 Proposals - View Client Survey Proposals

Use Case ID:	UC-3.3.1		
Use Case Name:	View Client Proposals		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/16/2016	Last Revision Date:	4/20/2016
Actors:	BeHeardPhilly Employee		
Description:	Employee can view a list of client proposals for surveys.		
Trigger:	Employee clicks on “Proposals” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee is shown a current list of proposals. 2. Employee is shown details about the proposals. 3. Employee can respond to client proposal via email. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Proposals” on the navigation toolbar in the “Employee Portal.” 2. System displays a current list of client’s survey proposals. <ul style="list-style-type: none"> o Date o First Name o Last Name o Organization o Type 3. Employee reviews the proposal. 4. Employee emails details to the client regarding their proposal. A new client will also be emailed a temporary username and password. 		
Variations:	<ol style="list-style-type: none"> 1a. In step 1 of the normal flow, if the employee clicks on the “Proposals” button on dashboard pane <ol style="list-style-type: none"> 1. System will take employee to “Proposals.” 2. Use Case resumes on step 2. 		
Exceptions:	N/A		

3.4.1 Messages - Send Client a Message

Use Case ID:	UC-3.4.1		
Use Case Name:	Send Message		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/20/2016	Last Revision Date:	4/21/2016
Actors:	BeHeardPhilly Employee		
Description:	BHP employee sends a client a message.		
Trigger:	Employee clicks on “Send Message” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee sent a client a message. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Send Message” on the navigation toolbar in the “Employee Portal.” 2. System displays a form for the message. 3. Employee enters message details into the form: <ul style="list-style-type: none"> ○ Organization ○ Contact Name ○ Subject <ol style="list-style-type: none"> i. Select a subject from the drop down list categories: <ol style="list-style-type: none"> 1. DASHBOARD 2. Widgets 3. Data 4. USERS 5. Add User 6. Delete User ○ Message 4. Employee clicks on the “Send” button to send the client the message. 5. Message is sent to client. 		
Variations:	N/A		
Exceptions:	N/A		

3.4.2 View Client Messages

Use Case ID:	UC-3.4.2		
Use Case Name:	View Messages		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/21/2016	Last Revision Date:	4/21/2016
Actors:	BeHeardPhilly Employee		
Description:	Employee can view all messages sent by the client and can reply to the messages.		
Trigger:	Employee clicks on “View Messages” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 1. Employee is shown a current list of messages. 2. Employee can reply to messages. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “View Messages” on the navigation toolbar in the “Employee Portal.” 2. System displays a current list of client messages and the following information: <ul style="list-style-type: none"> o From o Subject o Date o Time 3. Employee selects a message using the respective radio button. 4. Employee clicks on the “View” button to read the message. 5. System displays the client’s message. 6. Employee clicks “Reply” to respond to the client. 7. Employee replies to client. 8. Employee then clicks “Back” button to return to “View Messages.” 9. Employee is returned to “View Messages.” 		
Variations:	<ol style="list-style-type: none"> 1a. In step 1 of the normal flow, if the employee clicks on the “Messages” button on dashboard pane <ol style="list-style-type: none"> 1. System will take employee to “Messages” 2. Use Case resumes on step 2. 6a. In step 6 of the normal flow, if the employee clicks on the “Back” button on dashboard pane <ol style="list-style-type: none"> 1. System will take employee to “View Messages.” 2. Use Case resumes on step 9. 		
Exceptions:	N/A		

3.5.1 View Employee Account Information

Use Case ID:	UC-3.5.1		
Use Case Name:	View Employee Account Information		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/21/2016	Last Revision Date:	4/23/2016
Actors:	BeHeardPhilly Employee		
Description:	Employee can view their respective account information.		
Trigger:	Employee clicks on “Account Information” on the navigation toolbar in the “Employee Portal.”		
Preconditions:	<ol style="list-style-type: none"> 1. User is an Employee of BHP. 2. Employee enters correct username and password on “Sign In” page. 		
Postconditions:	<ol style="list-style-type: none"> 2. Employee is shown all of their account information. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Employee clicks on “Account Information” on the navigation toolbar in the “Employee Portal.” 2. System displays a current summary of the employee’s account information including: <ul style="list-style-type: none"> ○ Username ○ Password ○ Name ○ Email Address ○ Title 3. Employee views their respective account information. 		
Variations:	N/A		
Exceptions:	N/A		

4 Client/Employee Portal Interaction

4.3.1 Signing Out of the Portal

Use Case ID:	UC-4.1.1		
Use Case Name:	Portal Sign-out		
Created By:	Kevin Hamilton	Last Updated By:	Kevin Hamilton
Date Created:	4/23/2016	Last Revision Date:	4/23/2016
Actors:	BeHeardPhilly Employee Current Client		
Description:	Signing out of both the “Client Portal” and the “Employee Portal.”		
Trigger:	Client/Employee clicks on “Sign Out” on the navigation toolbar in their respective portal.		
Preconditions:	<ol style="list-style-type: none"> 1. User is a Client/Employee of BHP. 2. Client/Employee is signed in to their portal. 		
Postconditions:	<ol style="list-style-type: none"> 1. Client/Employee is signed out of their portal and directed to the sign-in page. 		
Normal Flow:	<ol style="list-style-type: none"> 1. Client/Employee clicks “Sign Out” on navigation toolbar in the Client/Employee Portal. 2. System signs out Client/Employee. 3. System directs Client/Employee to “Sign In” page. 4. System displays “Sign In” page. 		
Variations:	N/A		
Exceptions:	N/A		