Business Requirement Document

**Pepco Promotions Data Monitoring**

Prepared For:

Pepco

February 2024

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1. Document Acceptance and Revision History
   1. Acceptance Signoff

| **Name** | **Project Role** | **Signature** | **Date** |
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* 1. Document Revision History

| **Version** | **Date** | **Author** | **Revision Notes** |
| --- | --- | --- | --- |
| 1 | 22-Feb-24 | João Valente | Draft Version |
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1. Introduction

This document outlines the business requirements for the Promotions data Monitoring Dashboard, focusing on ensuring promotional data and corresponding pricing accuracy and representation across Pepco’s systems.

1. Assumptions and Exclusions
   1. Assumptions

* **Data Accuracy:** Promotions configured in the Multibuy App are the source of promotional data at Pepco.
* **System Integration:** Seamless data integration is assumed between the Multibuy App, XOCS, POS (Point of Sale), and SEL (Shelf Edge Label) App systems.
* **Promotion Types:** Only two types of promotions are considered for FMCG products - “New Price” and “Percentage Off”. "Buy Get" promotions are excluded.
* **Data Flow:** Promotions are configured in the Multibuy App and flow through XOCS to POS and from the Multibuy App to SEL, with final promotion prices visible only in POS.
* **MNT File Handling:** MNT files are generated by the Multibuy App, containing promotion configuration details, and will be utilized by Observability dashboards for reporting.
* **Price Visibility:** XOCS holds current price information. However, final promotion prices are confirmed and visible only in POS.
* **GM & Clothing Promotions:** The first phase of the project will focus on FMCG Products promotion data monitoring. To cater for GM & Clothing promotions, the dashboard will be developed with an in-built scalability option to report on additional promotion types and products categories.
  1. Exclusions
* "Buy Get" promotions are not considered for FMCG products within this dashboard for the first phase of the project.

1. High Level Business Requirements

The dashboard will provide comprehensive monitoring of promotional pricing activities, specifically targeting:

* **Accuracy**: Ensure promotional prices and details are consistent across all systems.
* **Visibility**: Provide clear visibility into promotional setups and their reflection in the systems.
* **Exception Reporting**: Focus on identifying and reporting discrepancies in promotional data.

1. Requirements Detail
   1. Dashboard Requirements

* **Systems in Scope:**
  + Multibuy App
  + XOCS
  + POS
  + Shelf Edge Label App (SEL)
* **Key Monitoring Points:**
  + SKU ID
  + Promotion ID (consistent across systems)
  + Promotion Type (New Price, Percentage Off)
  + Promotion Value
  + Current Price (as in XOCS)
  + Promotion Dates (Start and End date)
  + Promotional price in POS (Additional data for POS data)
  + Additional data in SEL App (**TBC**)
  1. Dashboard Sections
     1. Pipeline Data Flow Report – Summary Report

Provides an overarching perspective of the Promotions data flow across different systems. Consolidated view of data flow, similar present in the FMCG Pallet Monitoring Dashboard.

The systems in scope will be monitored as shown in the diagram in section 6.1:

* Multibuy to XOCS to POS
* Multibuy to SEL
  + 1. Multibuy App vs. XOCS Comparison

This report aims to compare **promotion types** configured in the Multibuy App against the promotional data processed in XOCS, ensuring consistency in promotional setups across both systems.

* **Tiles for Promotion Type Discrepancies:**
  + **First Tile**: Total count of promotion type discrepancies for the next 30 days.
  + **Second Tile**: Total count of promotion type discrepancies for the next 10 days.
  + **Third Tile**: Total count of promotion type discrepancies for the next 3 days.
* **Bar Chart** (30-Day Promotion Type Discrepancy Distribution): Visualizes daily promo type discrepancies per day, over the next 30 days.
  + 1. Multibuy App vs. SEL

Compares how accurately promotional information from the Multibuy App is represented in the SEL (Shelf Edge Label) application, focusing on promotional detail integrity.

* **Tiles for Incorrect Promotional Details:**
  + **First Tile:** Total count of promotions with incorrect details for the next 30 days.
  + **Second Tile:** Total count of promotions with incorrect details for the next 10 days.
  + **Third Tile:** Total count of promotions with incorrect details for the next 3 days.
* **Bar Graph (30-Day Mismatch Promotional Details Distribution):** Displays daily discrepancies in promo details between Multibuy App and SEL per day, for the next 30 days. The bar graph should show the four different issues, per day (promotion start date), to facilitate issue filtering.
* **Drilldown Capabilities:** Upon drilling down from the tiles or the bar graph, users will be able to view detailed discrepancy information for specific promotions, including:
  + **Promotion ID:** Promotion identifier.
  + **Promotion Type**
  + **SKU ID (Item Discrepancy):** SKU ID not matching or missing between systems.
  + **Promotion Value (Promotion Value Discrepancy):** Specifics on how the promotion values do not match or are missing. Column should exist for both systems.
  + **Promotion Dates (Promotion Date Discrepancy):** Insights into discrepancies in promotion start and end dates. Column should exist for both systems.
    1. XOCS vs. POS Comparison

Compares promotion prices and dates between XOCS and POS systems, ensuring that the final prices customers see at POS match the intended promotional configurations.

* **Tiles for Promotional Issues:**
  + **First Tile:** Total count of promotional issues for the next 30 days.
  + **Second Tile:** Total count of promotional issues for the next 10 days.
  + **Third Tile:** Total count of promotional issues for the next 3 days.
* **Bar Graph (30-Day Promo Price Discrepancy Distribution)**: Outlines daily promotional discrepancies between XOCS and POS per day, for the next 30 days. The bar graph should show the four different issues, per day (promotion start date), to facilitate issue filtering.
* **Drilldown Capabilities:** Upon drilling down from the tiles or the bar graph, users will be able to view detailed discrepancy information for specific promotions, including:
  + **Promotion ID:** Promotion identifier.
  + **Promotion Type**
  + **SKU ID:** SKU ID not matching or missing between systems.
  + **Current Price:** Item current retail price as present in XOCS.
  + **Promotion Value:** Specifics on how the promotion values do not match or are missing. Column should exist for both systems.
  + **Promotional Price:** Final promotional price as present in POS.
  + **Promotion Dates:** Insights into discrepancies in promotion start and end dates. Column should exist for both systems.
    1. Conflicting Promotion Report (Multibuy App)

Identifies instances where multiple promotions are applied to the same SKU on the period.

* **Tiles for Overlapping Promotions:**
  + **First Tile:** Total count of items with multiple promotions for the same day for the next 30 days.
  + **Second Tile:** Total count of items with multiple promotions for the same day for the next 10 days.
  + **Third Tile:** Total count of items with multiple promotions for the same day for the next 3 days.
* **Bar Graph (30-Day Overlapping Promotions Distribution):** Shows daily instances of items with overlapping promotions per day, for the next 30 days.
* **Drilldown Capabilities:** Upon drilling down from the tiles or the bar graph, users will be able to view detailed discrepancy information for specific promotions, including:
  + **SKU ID**
  + **Promotion ID 1:** Promotion identifier.
  + **Promotion Type 1**
  + **Promotion Value 1 (Promotion Value Discrepancy):** Specifics on how the promotion values do not match or are missing.
  + **Promotion Dates 1 (Promotion Date Discrepancy):** Insights into discrepancies in promotion start and end dates.
  + **Promotion ID 2:** Promotion identifier.
  + **Promotion Type 2**
  + **Promotion Value 2 (Promotion Value Discrepancy):** Specifics on how the promotion values do not match or are missing.
  + **Promotion Dates 2 (Promotion Date Discrepancy):** Insights into discrepancies in promotion start and end dates.

1. Technical System Requirements

This section details the integration requirements and data flow between the Multibuy App, XOCS, POS, and SEL, ensuring seamless data exchange and accuracy.

* 1. Systems In-Scope

The diagram shown below shows the new system set-up required to enable automated advanced monitoring:

[Diagram placeholder]

**Note:** The databases in “yellow” are the ones that Logic would need access to, to fetch the required pallet data. The details of the databases have been mentioned later in this document.

The red dotted lines represent the databases that Logic requires access to.

* 1. Database Access Requirements

The list of all the databases to which Logic would need “**Read-only**” **access** has been given below. This consists of both Production and Test environments:

|  |  |  |  |
| --- | --- | --- | --- |
| DatabasE Name | Production  (IP Address /Name) | Test  (IP Address / Name) | Provided?  Y/N |
| **Multibuy (MNT files)** |  |  |  |
| **XOCS** |  |  |  |
| **POS** |  |  |  |
| **SEL** |  |  |  |

**Note:** Pepco will provide details of SQL queries and database table structure required to fetch pallet data from the databases mentioned above.

1. UAT Success Factors

A successful UAT process is essential for the effective launch and adoption of the FMCG Promotion Price Dashboard. The UAT ensures the dashboard is robust, accurate, and aligns with the business users' needs.

* 1. UAT Exit Criteria
* No outstanding critical and very high defects and issues
* A plan exists to resolve all low priority issues.
* The business team has functionally validated the required alerts.
* Verification of data accuracy and consistency across all systems.
  1. UAT Recommended Approach

The UAT process will involve various checks and validations to ensure the dashboard meets business needs and technical requirements.

**Confirm Dashboard Accuracy Against the Following:**

* Verification of promotion flow from Multibuy to XOCS to POS and SEL.
* Spot checking data accuracy and consistency.

**Validate Dashboard Against Business Requirements:**

* Promotion type: Validate the accuracy, timeliness, and completeness of order data.
* Formatting/Order: Check the visual layout, information order, and ease of understanding.
* Drilldown Fields: Verify the functionality of drilldown features, ensuring they provide detailed insights.
* Totals: Confirm the accuracy of total quantities and status calculations across different reports.

**Additional UAT Checks:**

* Data Processing Verification: Ensure that data is correctly processed across the systems and accurately reflected on the dashboard.
* Drilldowns: Test drilldown functionality in various scenarios to confirm detailed information accessibility.
  1. UAT Reporting and Feedback

The UAT process should also include a mechanism for capturing and addressing feedback, as well as a structured reporting process to track progress, issues, and resolutions.

1. Open Questions

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| **Question** | **Pepco Response** | **Decision** | **Status** |
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