Design Doc – Restructure v0.1

CardwithGifts Functional and Design Specification

* About
  + The information contained in this paper and document is the property of Vaughn Jeffers. No part of this paper may be reproduced, recreated, or redistributed in any form or by any means without prior written permission from Vaughn Jeffers. All inquiries should be addressed to Vaughn Jeffers @ [vbjeffers@comcast.net](mailto:vbjeffers@comcast.net).
  + This paper/Document is intended to provide accurate and authoritative information regarding the subject matter covered but not limited to subject matters listed.
* This document will be used for but not limited to create, revise, and rewrite any CardwithGifts Solutions.
* Project requirement will focus on providing an efficient user-friendly tool for creating, printing, reporting and displaying variable and static documents of defined sizes and design. Before development, a final review or all or part of involved parties will examine whether each requirement has been met. A partial approval must include ½ of the team and must include approved by Vaughn Jeffers Although, requirements will change through the course of this project, with the result that the product may develop several target markets, I Vaughn Jeffers reserve the right to approve development start and completion time.
* Terms Defined
  + Document refers to a digital object. The digital object in this solution is a "Card" for use with gifts.
* Overview & Concept

The CardwithGifts project will provide a greeting card solution for e-commerce retailers. The project requirement will focus on providing an efficient, secure, and portable interface for e-Retailers to integrate. Additional tools will for creating, printing, reporting, and displaying variable and static documents of defined sizes and design.

* CardwithGifts Document Solutions provides the ability to create a variable document from an exported delimited file for a single or multiple target output. This will be based on a predefined document composed of elements created by the CardwithGifts Solutions or the user. However, this does not limit CardwithGifts Document Solutions from developing and implementing other forms, output, and designs of any kind.
* General information
  + TBD
* Market Information
  + Billions of customers order gifts online each year. Although we were in a troubled economy retailer daily reported, “During the 63-day holiday shopping period between November 1 and December 31, 2009, U.S. consumers spent $29.1 billion online. According to digital market research firm [comScore](http://www.comscore.com), this marked a [4% increase](http://www.comscore.com/Press_Events/Press_Releases/2010/1/comScore_Reports_29.1_Billion_in_U.S._Retail_E-Commerce_Spending_for_Full_November-December_Holiday_Season_Up_4_Percent_vs._Year_Ago) from $27.9 billion U.S. consumers spent online during the equivalent period in 2008 (<http://www.retailerdaily.com>). If provided the opportunity I would strive to increase Hallmark’s U.S. revenue by 20-35 million in the first 3-5years. I would also seek the opportunity to increase this market for Hallmark to billions before my retirement.
* Application Capacity
  + Table providing a high level of potential consumer volume or transactions?

|  |  |
| --- | --- |
| Prospective Clients |  |
| Retailer Name | Possible Volume |
| Mrs. Beasleys | 6848 |
| NB Smokehouse | 5452 |
| Hickory Farms | 77939 |
| Godiva | 38772 |
| MMs Brand Shop | 12723 |
| Ethel M Chocolates | 2402 |
| Fairytale Brownies | 11174 |
| Mrs. Fields | 18862 |
| Wine Enthusiast | 7914 |
| Sees Candies | 25470 |
| Givens and Company | 25 |
| Sundance | 3633 |
| Wine Country Gift Baskets | 186 |
| Ghirardelli | 2580 |
| WineShop At Home | 345 |
|  |  |
| On Board | 12300 |
| Prospective | 202025 |
| Total | 214325 |

* Use Case/Scenario - Workflow
  + Web Order Workflow
    - A web order begins with a customer logging into a ecommerce site (i.e. Mrs. Beasley’s, Mrs. Fields, Walmart etc). They select a product for that site based on ordering it for a gift or personal use. The CardwithGifts Document Creator solution allows them to add a greeting card. A JavaScript or any punch out link allows them to securely link to the greeting card solution site and a personalized greeting card. The customer must be allowed to return to the Ecommerce retailer site at any stage.
      * **Order Creation:** The ECommerce retailer consumer selects a product and is provided the option to add a greeting card. The retailer will provide a notification which link to the Greeting Card Solution website. The consumer selects a greeting card, personalize, preview, and add the greeting card to their order. ECommerce retailer must pass a retailer identifier, unique identifier, and card price.
      * **Word Filters:** The Ecommerce retailer will be provided the option to log any words, which the consumer will not be allowed to type in the message personalization.
      * **Order Cancellation:** If the retailer cancels the order, the greeting card solution will log and return the consumer to the Ecommerce retailer’s site. In the event it is a new greeting card order, the greeting card solution will return the consumer and append to the query string, “gcorder\_cancelled”, the unique identifier, and retailer identifier. Although the order is cancelled it must be created in the web database and flagged as status=’cancelled’.
      * **Updating Order:** The Ecommerce consumer will have the option to update their order until it is flagged as printed or shipped. To update the order the Ecommerce site must pass the retailer identifier and the unique identifier of the greeting card order. The order must be updated in the web database and status=’updated’
      * **Image Filters:** If the retailer requires the option to review the card contents before printing the order must be flagged as status=’not approved’. It is the responsibility of the retailer to review and update each order by bulk or single order update.
      * **Order Syncing:** The consumer order will be synced from the web database to the Ecommerce print production server within a configurable time. Upon successful completion of the order created in the orders table, the production system will postback to the web database and update the order status to status=’downloaded’.
      * **Production Order Printing:** The retailer will pass an order file with the required data fields to the production server when the order is to be printed. The order status will be changed to status=’Printed’ or status=’Shipped’ after the PDF is created. The PDF will be deleted after a configurable time. See print release file for transfer and file layout specification. \*Note: XML is the preferred file layout.
      * **Reprint:** A configured option to allow or deny reprints will be available. All Ecommerce retailers will default to allowreprint=’yes’ or ‘1’. If the retailer requires denial of reprint it must be configured. A new record will be inserted into the Billing\_Data table for each reprint with a BIL\_Print\_Status=’reprint’.
      * **Postback Parameters??pg23**

Retailer Identifer

Card order Identifier

Card Sku

Order Status

Price

Personalized messages

Font information

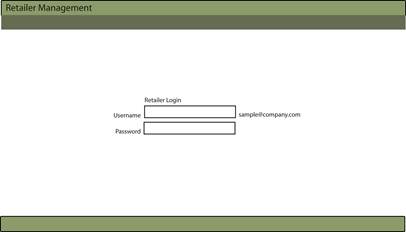
Consumer Uploaded Image status

* **Card Display Identification**
  + The retailer will be given the option to display their card sku or greeting card solution sku.
* Web Order Workflow Model
  + Each Action in the model is a User Story
  + Each Function in the document is a Feature Story (application function)
  + c erce retailer 
    der creation neb±lte 
    Host: Retailer Host Site 
    ch cards by: 
    recipients, cud 
    Retailer Host Site or 
    Designs Site 
    Web 
    Designs greeting card 
    website 
    Retailer Host Site or 
    image 
    Host: Retailer Host Site or 
    an Designs Site 
    Pus retailer 
    mænge 
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    Host: Retailer Host Site or 
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    order creation 
    Host: Retailer Host Site 
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    Host: Retailer Host Site or 
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* Additional Workflows??-See diagram
* Order Creation Sample (worflow)- based on web order workflow?
  + Web Order - (What are the main user scenarios in the web order based on b2b integration models?)
  + Customer completes a gift order on retailers site
    - 
    - Workflow Steps
    - Technical Note: Implementation

Retailer greeting card offer placement on site. This can be placed on before the checkout which eliminates SSL certificate. However most sites prefer SSL. Remember each card must have a unique identifier. This will help identify which cards is shipped with a gift and to what shipping address. Additional identifiers are recipient name and address. Remember the url string limit…

*\*Note: Servers should be cautious about depending on URI lengths above 255 bytes, because some older client or proxy implementations may not properly support these lengths. The spec for URL length does not dictate a minimum or maximum URL length, but implementation varies by browser. On Windows: Opera supports ~4050 characters, IE 4.0+ supports exactly 2083 characters, Firefox 65,536, Safari 80,000+, Opera 190,000+, and Apache 4000.*

* *??Punch out/Activate CardwithGifts greeting card website. Customer must pass a unique identifier and order number. This will be passed back on the query string as a handshake along with the personalization. It is the retailer’s option to capture some or all the data.??-->p27*
* I am unsure of how the above content fits into the flow of the document based on the context of the placement…please define
* UI - the following information is pulled from p26 - 36
  + Most if not all of the callouts are technical app specifications and user stories to be defined along with the UI spec
    - 
    - Data layout and population - Specifications (the information crosses into implementation. The information can be leveraged as part of acceptance criteria if the DB matches the model defined in the document.
      * **Landing Page Header**
        + Table: Client\_Catalog
        + Query: Select ImageID from Client Catalog where ImageName=Header and ImageStatus=1 and activation\_date =>curdate and <deactivationdate
      * **Occasion Nav header**
        + Table: Client\_Catalog
        + Query: Select ImageID, month, occasion, classification, OccassionNav\_List\_Order from Client\_Catalog where Image\_Type=card and activation\_date => curdate and <deactivation\_date order by month, occasion, Card\_Sequence
      * **Landing Page Adds - Define "Adds"**
        + Table: Client\_Catalog
        + Query: Select ImageID from Client Catalog where ImageName=Header and ImageStatus=1 and activation\_date =>curdate and <deactivationdate order by Add\_sequence
  + Login
    - 
    - Specifications - see UI general specifications-TBD
  + Main Page? - the initial image is missing a title so I think it is the main page - This design reflects a Search feature
    - Step m gæetins xd 
      Ths 
      step 
      i. step 
      S h ould 
      Satic tut o 
      page 
      On Deault to 
      mNt greting 
      ard Ekcted by 
      selectim_ 
      Lugæt Elling 
      Græting 
      List pagæ of 
      greting This list 
      must a so to 
      a" xds wRh key 
      on r"ipieng, ard static 
      Dmp will list 
      Will list wd; to age 
      style of 
  + Personalizing the Greeting Card
    - of 
      opt] o m 
      5 
      This avo 
    - Specifications
      * Box dimension
      * Buttons
    - Application Function - this function is a user story
      * Font of card with text personalization option
      * Fonts - 5 system fonts - TBD
  + Inside Personalization with text only
    - 一 e Personalization with text on 一 、 
      Text p on 巴 n 
      Of image 2 
    - Specification
      * UI window value should be pulled from general UI specs
      * Any static text must feed from the database. This will allow flexibility of image size and placement. - this functionality requires a user story and defining which aspects of UI are dynamic and static
  + Inside Personalization with text and image
    - Inside personalization with text and innge 
      If 150 dpi 
      size of 
      Hut the 
      is at 20Cdpi 
      of 
      this mÆt 
      from 
      i mge_ 

* Back of Card Personalization
  + Back of Card Personalization 
    the ; = go 2-r.d 
    on the 4 
    3 = OW 0n3 
  + Same comments as previous UI and workflow step described above
* Previewing and Approving the Greeting Card order - User Story
  + Back Prev ew 
    一 m , n b ktO 2 
    c 3 , d 
    This = 3 = 
    5 叿 : ; r - Add 
* Greeting Card added to retailer's shopping cart
  + Greeting Card added to retailer's shopping cart 
    to 
    ce%ajleds shoppinz 
    que-y string 
    to 
    edit up to 
    æinted 
    setus of 
    httpswcardwithgifts. 
    comicwg2/Re ta i We 
    O/customerid.aspx?R 
    56789abc 
* Call Center Order
* Print Process
* Form Creation Process (form?)
* Data & Data Objects
  + Document
  + Databases
  + Schema
    - Table Name: **CardPublisher** – defines the publisher, publisher main phone address and location number information.
    - Schema Card
    - Table Name: **ContactTypeID** – defines the contact person or company type i.e. Publisher, Artist, Vendor, Support etc.
    - **Schema** - CONTACT
    - Table Name: **Contacts** – defines the publisher, publisher main phone address and location number information.
    - **Schema** - CONTACT
    - Placeholder
    - Card Content Management System Database Requirements
    - Table Name: **CardImage**
* IAM
  + Login Requirements - (customer options for integration?? - LDAP/AD, or IAM - ie IBM Lighthouse)
    - Login should be defined based on username, password and cu\_user role authentication.
    - Select username, password, cu\_type from CU\_CardwithGifts\_Users where cu\_username=’name@companyname.com’ and password=’password’
  + User Role & Content Access

Allowed access and pages for user roles:

|  |  |  |  |
| --- | --- | --- | --- |
| User\_Type | User\_Role | Site Pages Access | Rights |
| CEGS Employee | Administrative | All Pages, All Clients | All rights |
| CEGS Employee | Customer\_Service | All Pages, All Clients | View |
| Vendor | All Roles | Retailer Management Reports | View print export |
| Client | Administrative | All pages for the clientid assigned to the user record | All rights for client pages which the user is logged into |
| Client | Executive | All pages for the clientid assigned to the user record | View, print, export |
| Client | Customer Service | The following pages for the clientid assigned to the user: Order Management, Reports, Support, Suggestion Box | View for all pages except order management.    Order Management-update table CO\_Consumer\_Orders, CO\_CEGC\_Card\_Sku, |

* Content Management System
  + Overview
    - The document management system will store all image information that required creating a document. The individual images must be unique. The Images Management will allow publishers and user to upload images and must be a reference number if they are related to another retailer, publisher, artist or any other uploaded images.
  + Feature
    - The document/content management system will store and manage all document creator variables. Each variable will be prefix by CU\_ followed by a unique name based on the placement, date, ecommerce retailer id with incremented ID and file format extension. Example CU\_LI\_04102010\_0101.jpg. The incremental ID should be allowed reset base on year. Example Multiple documents may use the same variables.
  + Platform Requirements
    - Platform: can be configured to take content of any kind, from any source, and output it to any network device.
    - Image Upload: The system must allow upload of up to 5 megabytes with the following specifications:
* Application Feature (functionality)
  + Print Management
    - Order Replication: If the user has integrated the Document creator into their web site functions any order created on the web or user order entry system must replicate to the production PC or server database within a configurable time to guarantee production is not delayed during print production.
    - Document Proofing: All documents must be proofed and approved before a production order is placed. This lessens or eliminates the possibility of file errors of any kind when printing the document.
    - Document Order Confirmation: Document order confirmation confirms the document was successfully created by the user or user customers, the order exist in the user database and CardwithGifts Document Creator database. This must be performed prior to print request to assure a delay is not caused when the print release request is submitted and an order is not available for printing.
    - Print Release: All print release must be in the format CardwithGifts Document Creator supports and is required all necessary fields to for successful processing and printing. Successful process and printing is another task/function which will assure production and fulfillment are not delayed. See export file formats on …sentence ends??
  + Inventory management
    - **Track successful printing:** Successful printing must be tracked by the copies of printed documents successfully sent to the target printer queue. This must be based on a status flag. I.E. original print, reprint, test print etc.
    - **Track reprints:** Reprints must be tracked to identify the cause, amount, time/date, origin, and individual or department performing the reprint.
    - **Track cover sheets:** Although cover sheets will only be assigned to batches it consumes paper stock. This will affect inventory and user cost. There fore it must be tracked to minimize the impact.
    - **Track page/image size:** Print coverage and consumable usage is dependent on size. To identify and minimize the impact of page size it is very important size consumptions are tracked.
    - Track simplex and Duplex files
    - Track images
  + Billing - TBD
    - B2B
      * Billing will be based on the order processed.

* Pre Design Documents and Templates - this area seems like templates but then sounds like actual "Customer Install or Integration Requirements"

Shipping

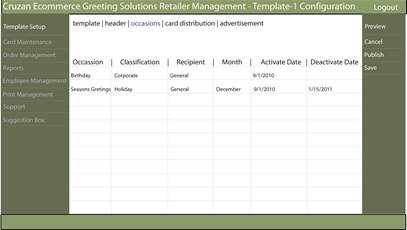
1. Shipping Label Image
2. Shipping Label Data

Equipment requirements

1. Power
2. Size/footprint
3. Packing Materials
4. Temperature tolerances
5. Errors

Installer Requirements

1. Date
2. Time
3. Hours of operation
4. Manual assistance
5. Technology Assistance
6. Programming
7. Networking
8. Power
9. Workflow
10. Equipment

* Admin Interface - Product Team?
* Admin Interface - B2B Retailer - each requires a User Story
  + **Retailer Management - Template Setup -** 
    - Template setup will be used to select and configure the landing page header, colors, featured cards, client advertisement/s. The setup is user friendly and anyone who can navigate on the web will be successful configuring it. After selecting the template should be allowed to distribute to CC\_Client\_Catalog.
    - **Query:** Select WT\_TemplateID, WT\_Template\_Review, from WT\_Web\_Template
    - 
  + **Retailer Management – Template - header**
    - Template header will be used to design the header for the landing and personalization pages. The landing page will only display the banner, and/or the client logo. The personalization page includes the condition to allow addtocartbtn, backbtn, cancelbtn, helpbtn buttons. No fields will be editable.
    - **Query:** Select ac\_image\_name, ac\_image\_type, ac\_clientid, ac\_activate\_date, ac\_deactivate\_date, from AC\_Asset\_Catalog where ac\_clientid=the logged in clientid, and image\_type not in (card, label)
    - 
  + **Retailer Management – Template - header**
    - The occasion list will is listed by occasion activation\_date, month and sequence number.
    - **Query:** Select ac\_image\_name, ac\_image\_type, ac\_clientid, ac\_activate\_date, ac\_deactivate\_date, from AC\_Asset\_Catalog where ac\_clientid=the logged in clientid, and image\_type not in (card, label)
    - 
  + **Retailer Management – Template - header**
    - The card distribution will copy the selected cards from AC\_Asset\_Catalog to CC\_Client\_Catalog. Once in the CC\_Client\_Catalog they will display on the landing page based on CC\_ClientID, CC\_Active\_Status, PK\_Client\_Catalog and CC\_Deactivate\_Date.
    - **Query:** Insert
    - 
  + **Retailer Management – Template - header**
    - The card distribution will copy the selected cards from AC\_Asset\_Catalog to CC\_Client\_Catalog. Once in the CC\_Client\_Catalog they will display on the landing page based on CC\_ClientID, CC\_Active\_Status, PK\_Client\_Catalog and CC\_Deactivate\_Date.
    - **Query:** Insert
    - 
* 3rd Party Software/Solutions - (architecture discussion)
  + **VDP:** To avoid complicated based application we will need to take advantage of adobe VDP. Adobe acrobat 9 pro provides the flexibility to create dynamic forms which will increase edit, workflow, application design, and output
* Support - (support model required, currently not present)
  + Turnaround
  + Support Call Notification
  + Error file notification

* Misc - noticed these floating in the document, I believe these are tentative section headers of the document.
  + Action items?? P19
    - Database
      1. Tables
      2. Fields
      3. Architecture
  + Functional Requirements
  + User Requirements
  + Security
  + Integration Requirements

<<GreetingCardAppv1.vsdx>>

Machine generated alternative text:
Retailer Sys 
Eomm Retailer Order 
Creation Website 
323 Vendor Portal Login 
Retailer 03 
GreetingCardApp Sys 
Connect to 
GreetingCard Site App 
Select a Greeting Card 
or Sea rc h 
Personalize 
Preview 
Confirm 
Post back to Ecomm 
Retailer Site 
CardApp Tablz 
Web Database 
Log 
Reporting 

Machine generated alternative text:
Presentation 
Retailer Ecomm 
Business Logic 
Order Creation 
Order 
Can cellation 
Support 
Functon5 (Order 
Syncing, TBD) 
Retailer Admin 
Site Search 
Admin Panel 
(Sync), 
Resync Orders 
Retailer CMS 
Instance 
Templates 
Resync 
Data 
CardpubIi5her 
ContactTypS O 
Reporting 
Retailer 