**Table of Contents**

[1.1 Revision History 5](#_Toc364961156)

[1.2 Acronyms and Definitions used in this document 5](#_Toc364961157)

[1.2.1 Acronyms 5](#_Toc364961158)

[1.2.2 Definitions 5](#_Toc364961159)

[1.3 Issues 5](#_Toc364961160)

[1.3.1 Open Issues 5](#_Toc364961161)

[1.3.2 Resolved Issues 5](#_Toc364961162)

[1.3.3 Deferred Issues 5](#_Toc364961163)

[2 Feature Description 6](#_Toc364961164)

[2.1 Feature Overview 6](#_Toc364961165)

[2.2 Main Entities Overview 6](#_Toc364961166)

[2.3 FRS Capabilities Overview 6](#_Toc364961167)

[2.4 Assumptions 7](#_Toc364961168)

[3 Requirements – Functional 8](#_Toc364961169)

[3.1 General Requirements 8](#_Toc364961170)

[3.2 Capability 1. Person Creation 8](#_Toc364961171)

[3.2.1 Capability Description 8](#_Toc364961172)

[3.2.2 Capability Assumptions/Dependencies 8](#_Toc364961173)

[3.2.3 Capability Use Cases 8](#_Toc364961174)

[3.2.3.1 NPA0010 - Add persona (New) 8](#_Toc364961175)

[3.2.3.2 NPA0100 - New person (New) 10](#_Toc364961176)

[3.2.4 Application requirements 10](#_Toc364961177)

[3.3 Capability 2. Person Management 10](#_Toc364961178)

[3.3.1 Capability Description 10](#_Toc364961179)

[3.3.2 Capability Assumptions/Dependencies 11](#_Toc364961180)

[3.3.3 Capability Use Cases 11](#_Toc364961181)

[3.3.3.1 PEM0010 - View persona summary (New) 11](#_Toc364961182)

[3.3.3.2 PEM0020 - Modify existing person details (New) 11](#_Toc364961183)

[3.3.3.3 PEM0030 - Modify person legal address (New) 12](#_Toc364961184)

[3.3.3.4 PEM0060 - Modify persona role (New) 13](#_Toc364961185)

[3.3.3.5 PEM0070 - Deactivate persona (New) 14](#_Toc364961186)

[3.3.3.6 PEM0100 - Change owner (New) 15](#_Toc364961187)

[3.3.3.7 PEM0200 - Disassociate persona from account (New) 17](#_Toc364961188)

[3.3.3.8 PEM0300 - Associate persona to subscription (New) 17](#_Toc364961189)

[3.3.3.9 PEM0310 - Dissociate persona from subscription (New) 18](#_Toc364961190)

[3.3.3.10 PEM0430 - Merge persons (New) 18](#_Toc364961191)

[3.3.3.11 PEM0500 - List personas (New) 20](#_Toc364961192)

[3.3.4 Application requirements 21](#_Toc364961193)

[3.4 Capability 3. Person Search 21](#_Toc364961194)

[3.4.1 Capability Description 21](#_Toc364961195)

[3.4.2 Capability Assumptions/Dependencies 21](#_Toc364961196)

[3.4.3 Capability Use Cases 21](#_Toc364961197)

[3.4.3.1 PEM0150 - Search Person (New) 21](#_Toc364961198)

[3.5 Capability 4. Basket Creation 22](#_Toc364961199)

[3.5.1 Capability Description 22](#_Toc364961200)

[3.5.2 Capability Assumptions/Dependencies 22](#_Toc364961201)

[3.5.3 Capability Use Cases 22](#_Toc364961202)

[3.5.3.1 BKM0100 - Update person details during shopping (New) 22](#_Toc364961203)

[3.5.3.2 BKM0110 – Remove persona from basket (New) 23](#_Toc364961204)

[3.5.4 Application requirements 23](#_Toc364961205)

[3.6 Capability 5. User and access management 23](#_Toc364961206)

[3.6.1 Capability Description 23](#_Toc364961207)

[3.6.2 Capability Assumptions/Dependencies 25](#_Toc364961208)

[3.6.3 Capability Use Cases 25](#_Toc364961209)

[3.6.3.1 UAM0200 – Add login to persona (New) 25](#_Toc364961210)

[3.6.3.2 UAM0210 – Allow persona self access (New) 26](#_Toc364961211)

[3.6.3.3 UAM0300 – Disallow persona self access (New) 26](#_Toc364961212)

[3.6.3.4 UAM0010 – View login information (Modified) 27](#_Toc364961213)

[3.6.3.5 UAM0020 - Edit login information (Modified) 27](#_Toc364961214)

[3.6.3.6 UAM0080 - Register login (Modified) 27](#_Toc364961215)

[3.6.4 Application requirements 28](#_Toc364961216)

[3.7 Capability 6. Checkout 28](#_Toc364961217)

[3.7.1.1 CHK0030 - Review order (Modified) 28](#_Toc364961218)

[3.7.1.2 CHK0060 - Set order ‘reported/affected by’ person (New) 29](#_Toc364961219)

[3.8 Capability 7. Order Management 30](#_Toc364961220)

[3.8.1.1 OFU0030 - View order details (New) 30](#_Toc364961221)

[3.8.1.2 OFU0010 – Search Order (Modified) 31](#_Toc364961222)

[3.9 Capability 8. Problem management and CIT 31](#_Toc364961223)

[3.9.1.1 CM0001 - List Cases - for Channel and CSR Portal (New) 31](#_Toc364961224)

[3.9.1.2 CM0005 - List Cases - for Business 32](#_Toc364961225)

[3.9.1.3 CM0010 - Create case - for Channel/CSR portal (New) 33](#_Toc364961226)

[3.9.1.4 CM0015 - Create Case - for Business (Modified) 34](#_Toc364961227)

[3.9.1.5 CM0020 - View existing cases and details - for Channel and CSR Portal (New) 35](#_Toc364961228)

[3.9.1.6 CM0025 - View Existing Case and Details - for Business 36](#_Toc364961229)

[3.9.1.7 CM0200 - Update case (Modified) 37](#_Toc364961230)

[3.9.1.8 CM0230 - Cancel case (New) 37](#_Toc364961231)

[3.9.1.9 INT0120 - Display event log for account dashboard (New) 38](#_Toc364961232)

[3.9.1.10 INT0100 - Display event logs (Modified) 39](#_Toc364961233)

[3.9.1.11 INT0110 - Display event logs details (Modified) 40](#_Toc364961234)

[3.9.1.12 INT0010 - Create Interaction (Modified) 41](#_Toc364961235)

[3.9.1.13 INT0300 - Create Interaction note (Modified) 41](#_Toc364961236)

[3.9.1.14 INT0020 - Edit interaction (New) 42](#_Toc364961237)

[3.10 Capability 9. Customer-subscriber Acquisition 42](#_Toc364961238)

[3.10.1.1 NCA0010 - New Customer (Modified) 42](#_Toc364961239)

[3.10.1.2 NCA0020 - Capture administrative data (Modified) 44](#_Toc364961240)

[3.10.1.3 NSA0025 - Update administrative data (Modified) 45](#_Toc364961241)

[3.10.1.4 NSA0010 - New subscriber for an existing customer (Modified) 46](#_Toc364961242)

[3.10.1.5 NSA0040 - New subscriber (Modified) 48](#_Toc364961243)

[3.10.1.6 NSA0090 - Configure subscriber external id (Modified) 49](#_Toc364961244)

[3.10.1.7 NSA0100 - New subscriber configuration (New) 51](#_Toc364961245)

[3.11 Capability 10. Existing Customer and Subscriber management 53](#_Toc364961246)

[3.11.1.1 BAM0020 - Modify billing contact (Modified) 53](#_Toc364961247)

[3.11.1.2 BAM0010 - View and manage billing account (Modified) 54](#_Toc364961248)

[3.11.1.3 SUM0010 - View and manage subscriber (Modified) 54](#_Toc364961249)

[3.11.1.4 SUM0100 - Swap primary offer/subscriber bundle (Modified) 55](#_Toc364961250)

[3.11.1.5 MIH0001 - View C-one policies (3.5.90) 56](#_Toc364961251)

[3.11.1.6 MIH0010 - View failed policies for C-one policies (3.5.90) 57](#_Toc364961252)

[3.11.1.7 MIH0011 - View pending policies for C-one policies (3.5.90) 57](#_Toc364961253)

[3.11.1.8 MIH0020 - View policy history (3.5.90) 58](#_Toc364961254)

[3.11.1.9 MIH0030 - Compare with MIH (3.5.90) 58](#_Toc364961255)

[3.11.1.10 MIH0101 - View MIH policies (3.5.90) 59](#_Toc364961256)

[3.11.1.11 MIH0130 - Compare with C-One (3.5.90) 60](#_Toc364961257)

[3.11.1.12 MIH0230 - View quota (3.5.90) 61](#_Toc364961258)

[3.12 Capability 11. Customer identification – IDC (Channel/CSR Portal) 62](#_Toc364961259)

[3.12.1 Capability Description 62](#_Toc364961260)

[3.12.2 Capability Assumptions/Dependencies 62](#_Toc364961261)

[3.12.3 Capability Use Cases 62](#_Toc364961262)

[3.12.3.1 IDC0010 - Identify customer (Modified) 62](#_Toc364961263)

[3.12.3.2 IDC0020 - Search customers (Modified) 63](#_Toc364961264)

[3.12.3.3 IDC0100 - Search persona (New) 63](#_Toc364961265)

[3.13 Capability 12. Product selection 64](#_Toc364961266)

[3.13.1.1 PRS0040-Browse and select account bundle (Modified) 64](#_Toc364961267)

[3.13.1.2 PRS0090-Add account bundle for new account (Modified) 66](#_Toc364961268)

[3.13.1.3 PRS0095-Add account bundle for existing account (New) 67](#_Toc364961269)

[3.14 Capability 13. Checkout 70](#_Toc364961270)

[3.14.1.1 CHK0010 – Checkout (Modified) 70](#_Toc364961271)

[3.15 Capability 14. Consumption Control Items 72](#_Toc364961272)

[3.15.1.1 CCI0010 - View Control Consumption items (New) 72](#_Toc364961273)

[3.15.1.2 CCI0020 - Reconfigure Control Consumption items (New) 72](#_Toc364961274)

[3.16 Capability 15. Account subscriber activity history (PPCV related 3.7.6) 74](#_Toc364961275)

[3.16.1.1 ACA0200 View phonebook history 74](#_Toc364961277)

[3.16.1.2 ACA0210 View home location history details 75](#_Toc364961278)

[4 Requirements - Non-functional 76](#_Toc364961279)

[4.1 Reliability, Availability, and Maintainability Requirements 76](#_Toc364961280)

[4.2 Encryption Requirements 76](#_Toc364961281)

[4.3 Cost of Goods Sold Considerations 76](#_Toc364961282)

[4.4 Performance Considerations 76](#_Toc364961283)

[4.5 Documentation Considerations 76](#_Toc364961284)

[4.6 Out of the Box/Quick Start 76](#_Toc364961285)

[4.7 Migration 76](#_Toc364961286)

[4.8 Installation 76](#_Toc364961287)

[4.9 Upgrade 77](#_Toc364961288)

[4.10 Archiving 77](#_Toc364961289)

[4.11 Disaster Recovery 77](#_Toc364961290)

[4.12 Operations Manual 77](#_Toc364961291)

[4.13 Acceptance Test Plan Considerations 77](#_Toc364961292)

[5 Requirements Summary 78](#_Toc364961293)

[5.1 Requirements List Grouped by “Capability” 78](#_Toc364961294)

[5.2 Additional Requirements Information 79](#_Toc364961295)

**Table of Figures**

No table of contents entries found.

## Revision History

Please increment the revision number each time the document is updated, note the date it is being revised, by whom, and the specific revisions being made. Use as much detail as appropriate when describing the revisions without duplicating them here. For updates that come from items in the RSR (review record) note the RSR # for the specific revisions noted.

It ‘s very important to make sure that requirement numbers are frozen after the first major reviewed version.

|  |  |  |  |
| --- | --- | --- | --- |
| **Rev. #** | **Date** | **Revised by** | **Summary of Changes and Comments** |
|  |  |  |  |

## Acronyms and Definitions used in this document

### Acronyms

|  |  |
| --- | --- |
| **Acronym** | **Description** |
|  |  |
|  |  |

### Definitions

|  |  |
| --- | --- |
| **Term** | **Definition** |
|  |  |
|  |  |

## Issues

This section is the table of contents for issues that exist within the document Remember to update as these tables as issues are created or closed. Note that issues are created using the “Issue” and “Issue Body” styles and are resolved by changing the styles to “Issue Resolved” and “Issue Resolve – Body”.

### Open Issues

No table of contents entries found.

### Resolved Issues

No table of contents entries found.

### Deferred Issues

No table of contents entries found.

# Feature Description

This FRS defines software requirements for one or more Capabilities defined for a Feature. Section 2 is written at the Feature level. Section 2.1 contains a high level description of the feature. Section 2.2 briefly describes the Feature Capabilities, and any refinement of those Capabilities with respect to the Source (FCD, PWR.SysRS, etc) In other words, if the FRS breaks a Feature down in a manner that is different from how the Feature is broken down in the FCD; such that FRS Capabilities don’t exactly correspond to FCD Capabilities that should be discussed in 2.2. Section 2.3 lists Feature-level assumptions. Section 2.4 provides an end-to-end functional description of the Feature, identifying the Functional Components involved in providing the Feature, and discussing their interaction in the context of the Feature.

The overriding guidance for Section 2 is to not provide so much detail that Section 3 becomes a repeat of the same material as well as a maintenance nightmare when things change over time.

## Feature Overview

## Main Entities Overview

Provide an overview of the main data model entities affected by the feature.

Not described.

## FRS Capabilities Overview

## Assumptions

* Sample

# Requirements – Functional

The requirements in this section should begin with any general requirements that are common across all the capabilities. Create sub-section headings if necessary to improve readability. Potential types of general requirements (or sub-section headings) include usability for GUI applications, data needs, security needs, business logic requirements, etc. Following the general requirements, create as many capability sub-sections as needed to group the functional requirements by specific capabilities that were introduced in section 2. Within each capability) identify any requirements for the potentially impacted functional area, and how these areas must interact with each other to provide the capability. It may be necessary to receive input from the appropriate functional area experts to ensure thorough coverage of the requirements for that module. For more information, please refer to the [Functional Matrix Listing](http://cmadevsp01/sites/SQPM/BA/Work%20Areas/Reference%20Material/Functional%20Areas%20for%20FRS%20template.doc). For the major areas on the left most column a BA is required to make a conscious decision whether the feature impacts the functional area or not, and must also consult the SysRs.

To number the requirements ensure that the requirement identifier starts with the feature initials and a unique identifying number following the standard numbering format described in Section 2.7

General Requirements

PEM-3.1.10 – Sample

Capability 1 Person Creation

### Capability Description

.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### NPA0010 - Add persona (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Add persona | | EXT | NPA0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows creating a new persona in C-one system (i.e. backend). Either by also creating a new person either by searching an existing person. | | |
| Pre-conditions | Persona does not already exist | | |
| Trigger | Either   * User chooses to add a new persona for an existing account/ subscriber * User chooses to add a new persona during acquisition (basket) * NCA0010 – New customer | | |
| Minimum guarantees | Person is not created if already exist. | | |
| Success guarantees: | The application has created the new persona and linked it to the correct entity | | |
| Normal Flow: | 1. The user chooses to add a new persona on an existing person(A1) 2. The user chooses to search for an existing person(A2) 3. The user chooses to search by person criteria 4. The user enters the information in the different fields he wants to use for the search 5. The user run the search 6. The application process the search using all the values set in the mandatory fields of the person and the values set in the other 7. The application retrieve all the persons having the mandatory values set and the optional values equals to the values set by the user or empty. 8. The application displays a list of persona corresponding to the search criteria(A4) 9. The user select one of the persona(A5) 10. The application displays the details of the person 11. The user validates(A6) 12. The application sets all the person fields with the selected person information 13. The application set all the person fields to read only 14. The user chooses the persona role between: (A7)(A8)     1. Manager     2. Ordering User     3. Non Ordering User 15. The users chooses the subscriber to link to the persona for Ordering and non ordering users 16. The user confirms 17. The application create the persona set its role and associate it to the correct entity | | |
| Alternative Flows: | A1 : The user chooses to create a new person   1. Redirect user to NPA0100 - New person   A2 : The persona is added during NCA/NSA and the user chooses to use a person created during the shopping flow   1. The user chooses the person in the list of created persons   A3 : The user chooses to search by external ID   1. The user enters the external Id without wildcards 2. The application perform a search for all the subscribers having this external ID 3. The application retrieve all the persons having a persona link to the subscriber or the parent account of the retrieved subscriber 4. Redirect to N7   A4 : The number of persons retrieved exceed a configurable value set to 20 by default   1. The application displays the list of first records retrieve 2. The application display a warning message to the user indicating the fact that persons are available but a search refine is needed. 3. Return to N7   A5 : The user selects the first line of the person list flagged as “None”   1. The application removes the link between the persona and the existing person if it was created 2. The application allows the user to update all the persons fields 3. Redirect to N14   A6 : The user cancels   1. The application redirects the user to N4   A7 : The persona is a COP   1. The application does not display the role section 2. Redirect to N16   A8 : The user uses the previous search button   1. The application does not perform a search again and redisplay the exact same result as the last search 2. Redirect to N9 | | |

#### NPA0100 - New person (New)

|  |  |  |  |
| --- | --- | --- | --- |
| New person | | EXT | NPA0100 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows creating a new person in C-one system (i.e. backend). | | |
| Pre-conditions | Persona does not already exist | | |
| Trigger | ‘New persona’ use case  ‘NCA’ use case | | |
| Minimum guarantees | Person is not created and an error message is displayed | | |
| Success guarantees: | The application has created the new person | | |
| Normal Flow: | 1. The application displays all the fields available for the person indicating the mandatory fields 2. The application default the marketing preferences according to application configuration for default marketing preferences 3. The user sets the person information in the different person fields including person Legal address and marketing preferences(A1) 4. Redirect user to NPA0010 - Add persona N14 | | |
| Alternative Flows: | A1 : The fields corresponding to the preferred channels for communication have not been set   1. The application indicates to the user the fields to set according to the selected marketing preferences 2. Return to N4 | | |

Application requirements

Capability Person Management

### Capability Description

### Capability Assumptions/Dependencies

### Capability Use Cases

#### PEM0010 - View persona summary (New)

|  |  |  |  |
| --- | --- | --- | --- |
| View persona summary | | EXT | PEM0010 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows the user to view the summary of the person from the account dashboard | | |
| Pre-conditions | Persona already exists in C-One  The user has access the account using a search person | | |
| Trigger | The user has search for a person  The user has chosen to view the account details | | |
| Minimum guarantees |  | | |
| Success guarantees: | The persona summary is displayed | | |
| Normal Flow: | 1. The application displays the summary of the persona including:    1. First and Last name    2. Address    3. Language    4. Date of birth    5. Persona status 2. The application displays person social score (A1) 3. The application displays visual cue on the contextual entities (Account/Subscriber ) to indicate the right(Read/Write/Not allowed) of the persona on the contextual entities 4. The application allows user to view and select other persona of the contextual person (if any) 5. The application allows user to view and select other person having a persona associated to the current billing hierarchy (if any) | | |
| Alternative Flows: | A1 : Social Score feature is disabled   1. The application does not display person social score 2. Next steps are similar to nominal flow | | |

#### PEM0020 - Modify existing person details (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Modify existing person details | | EXT | PEM0020 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows modifying person details excluding legal address. | | |
| Pre-conditions | Persona already exists in C-One  The user is in the context of a persona  Or  The user has selected a persona | | |
| Trigger | User has selected the option to modify persona details | | |
| Minimum guarantees | The details are not modified and an error message is displayed | | |
| Success guarantees: | The details are correctly updated | | |
| Normal Flow: | 1. The application displays person details in editable mode populated with existing values in following sections:    1. Person core attributes (email, national id, etc)    2. Address details    3. Marketing preferences including preferred channel and allowed channels    4. Person extended attributes 2. The user updates the persona details(A1)(A2)(A3) 3. The user chooses the save option (A4) 4. The application updates the persona details (A5) | | |
| Alternative Flows: | A1 : The person modifies the legal address   1. Redirect to use case PEM0030 : Modify person legal address   A2: Person has one COP persona   1. User updates data information upon customer inputs and informs the user that at least one account is linked to this person legal address and will be also updated accordingly. 2. Next steps are similar to nominal flow   A3 : The fields required by the selected communication channel are not set   1. The application indicates to the user to fields to set according to the selected communication channel   A4 : The user chooses the “cancel” link   1. The application goes back to the previous screen without applying any change to the person/persona details   A5 : The application is not able to save all the modifications   1. The application revert already applied changes 2. The application displays an error message indicating to the user the fact that the update is not possible for the moment and asks him to try later. | | |

Note: Modify person details and modify persona details are different use cases because consequences of such modification may not have the same impacts. For example, for modifying person details, user should understand that this modification will impact all the persona belonging to this person.

#### PEM0030 - Modify person legal address (New)

##### Use case flow

##### Use case

|  |  |  |
| --- | --- | --- |
| Modify person legal address | | PEM0030 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to modify a person legal address | |
| Pre-conditions | User is logged in.  Application is in the context of a person | |
| Trigger | User has selected the option to modify the person address | |
| Minimum guarantees | Person legal address has not been modified.  Application informs the user that the modification is not possible because of a failure | |
| Success guarantees: | Person legal address has been updated  Person legal address and associated Billing address(es) are updated (when linked) | |
| Normal Flow: | 1. The application displays person legal address in editable mode populated with existing values. 2. User updates data information upon customer inputs (A1). 3. The user submits. 4. The application posts the modification request (A2) 5. The application confirms to the user the legal address has been updated | |
| Alternative Flows: | A1: Person has one COP persona   1. User updates data information upon customer inputs and informs the user that at least one account is linked to this person legal address and will be also updated accordingly. 2. Next steps are similar to nominal flow   A2: System is not able to update the person legal address   1. Application informs the user that the modification failed (display of an error message). 2. Use case ends | |

#### PEM0060 - Modify persona role (New)

##### Use case flow



##### Use case

|  |  |  |  |
| --- | --- | --- | --- |
| Modify persona role | | EXT | PEM0060 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows modifying persona role (e.g. CMP, CUP). | | |
| Pre-conditions | Persona already exists in C-One and is either:   * Consumer Manager * Consumer User   Note: Consumer Owner role cannot be changed | | |
| Trigger | User has selected the option to modify persona role | | |
| Minimum guarantees | Persona will have either CMP or CUP CRM role in the end | | |
| Success guarantees: | The application has sent an update of persona role, and backend has updated the persona role successfully. | | |
| Normal Flow: | 1. The application proposes the possible roles allowed for the current persona to migrate to 2. The application default the list of roles with the current role of the persona including the subscriber id for CUP 3. The user chooses the new role 4. The persona role is CMP and want to migrate to CUP(A1)(A2) 5. The application list all the subscribers belonging to the current hierarchy 6. The user chooses a subscriber 7. The user chooses between ordering and non ordering CUP role 8. The system associates the persona to the selected subscriber(A3) 9. If the person do not have the removed role on other persona, the application will have remove the role from the person 10. The systems confirms to the user the fact that the role has been successfully changed | | |
| Alternative Flows: | A1 : The persona role is CUP and want to migrate to CMP   1. The user confirms the role modification 2. The system remove the link between the subscriber and the persona(A3) 3. Redirect to step 8   A2 : The persona role is CUP ordering or non ordering and want to migrate to CUP ordering or non ordering   1. Redirect to N9   A3 : The system is not able to change the persona role   1. The system warns the user on the fact that the role has not been changed and ask him to try later | | |

#### PEM0070 - Deactivate persona (New)

##### Use case flow

##### Use case

|  |  |  |  |
| --- | --- | --- | --- |
| Deactivate persona | | EXT | PEM0070 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows deactivating a persona | | |
| Pre-conditions | * Persona already exists in C-One * CUP has been disassociated * COP/CMP has been manually removed from the root account | | |
| Trigger | User has selected the option to deactivate the persona | | |
| Minimum guarantees | Persona is not deactivated and a warning message is displayed | | |
| Success guarantees: | The system deactivate the persona | | |
| Normal Flow: | 1. The system proposes to the user to deactivate the persona 2. The user confirms 3. The system deactivate the persona(A1) | | |
| Alternative Flows: | A1 : The system is not able to deactivate the persona   1. The system warns the user indicating him the fact that the deactivation has failed and ask him to try again later. | | |

#### PEM0100 - Change owner (New)

##### Use case flow



##### Use case

|  |  |  |
| --- | --- | --- |
| Change owner | | PEM0100 |
| Primary actors | CSR user | |
| Summary Goal | This use case allows a user to change the owner person for an account | |
| Pre-conditions |  | |
| Trigger | User wants to the account owner | |
| Minimum guarantees | The account owner is not modified  The user is warned about failure | |
| Success guarantees: | Account owner is successfully updated | |
| Normal Flow: | 1. The system displays the current owner 2. The system proposes to user to create a new persona or to search for a an existing persona (A1) 3. The user chooses to search an existing person (refer to PEM0150 – Search Person use case) 4. The system ask to the user if he wants to link the billing address to the person legal address 5. The user requests to link the addresses(A4) 6. The system copy the new person legal address to the billing address(A5) 7. The system create the new persona(A5) 8. The system inactivate the old persona(A5) 9. The system confirms to the user the owner switch | |
| Alternative Flows: | A1 : The user wants to create a new person   1. Redirect to create person use case   A2 : The system is not able to find a person corresponding to the user criteria   1. The system displays a message indicating to the user that no person corresponds to the entered criteria 2. Redirect the user to step 5   A3 : The system is not able to retrieve a list of persons   1. The system warns the user indicating the fact that the system is not available for the moment and ask him to retry later 2. Redirect the user to step 6   A4 : The user don’t want to link the billing address with the person legal address   1. Redirect to N12   A5 : an error is return by the system   1. The system cancel the performed action 2. The system displays an error message indicating to the user the fact that the owner has not be changed and ask him to retry later 3. Redirect the user to step 1   A6 : Too many persons correspond to the entered criteria   1. The system displays a message indicating to the user the fact that the first x records have been returned but more are available 2. The user pick one of the person or refine his search | |

#### PEM0200 - Disassociate persona from account (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Disassociate persona from account | | EXT | PEM0200 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows disassociating a CMP from an account | | |
| Pre-conditions | Persona Exist  Persona is a CMP  Persona is associated to a root account | | |
| Trigger | User has selected the option to disassociate the persona | | |
| Minimum guarantees | The person is not disassociated and an error message is displayed to the user indicating the reason of the failure | | |
| Success guarantees: | The persona is de associated from the root account | | |
| Normal Flow: | 1. The user chooses the disassociate option. 2. The system disassociates the CMP from the account(A1) 3. The system deactivate the CMP(A1) | | |
| Alternative Flows: | A1 : System is not able to disassociate the CMP   1. The system displays an error message and ask the user to try again later | | |

#### PEM0300 - Associate persona to subscription (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Associate persona to subscription | | EXT | PEM0300 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows associating a persona to a subscriber | | |
| Pre-conditions | Persona exists  Persona is a CUP  Persona is not associated to another subscriber | | |
| Trigger | User has selected the option to associate the persona | | |
| Minimum guarantees | The person is not associated and an error message is displayed to the user indicating the reason of the failure | | |
| Success guarantees: | The persona is associated to a subscriber | | |
| Normal Flow: | 1. The system displays the list of subscribers belonging to the current hierarchy 2. User selects the subscriber to associate to current CUP 3. The system associates the CUP to the subscriber(A1) | | |
| Alternative Flows: | A1 : System is not able to associate the CUP   1. The system displays an error message and ask the user to try again later | | |

#### PEM0310 - Dissociate persona from subscription (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Dissociate persona from subscription | | EXT | PEM0310 |
| Primary actors | Dealer user  CSR user | | |
| Summary Goal | This use case allows disassociating a CUP from a subscriber | | |
| Pre-conditions | Persona is a CUP w/o ordering authority, associated to the contextual subscriber | | |
| Trigger | User has selected the option to disassociate the persona | | |
| Minimum guarantees | The person is not disassociated and an error message is displayed to the user indicating the reason of the failure | | |
| Success guarantees: | The persona is dissociated from the subscription, and associated to its parent account | | |
| Normal Flow: | 1. The user chooses the disassociate option of the contextual CUP 2. The system disassociates the CUP from the subscriber(A1) | | |
| Alternative Flows: | A1 : System is not able to disassociate the CUP   1. The system displays an error message and ask the user to try again later | | |

#### PEM0430 - Merge persons (New)

##### Use case Flow



##### Use case

|  |  |  |  |
| --- | --- | --- | --- |
| Merge persons | | INCL | PEM0430 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the system to merge persons being the same one. | | |
| Pre-conditions | * The user is logged in. * The user is searching for a person | | |
| Trigger | User is selecting one or more persons to be merged | | |
| Minimum guarantees | The persons are not merged and an error message is displayed | | |
| Success guarantees: | Selected Persons will be merged in one person in C-One. | | |
| Normal Flow: | 1. The user chooses a persona to start the merging process 2. The application allows the user to search for persons according to UC : IDC0100 - Search persona 3. The application displays a list of person corresponding to the search criteria(A1) 4. The user selects one or more persons to merge with the current one 5. The application asks the user to confirm and indicate the fact that all the persona of the selected person will be moved to the current person 6. The user confirms 7. The application moves all the persona to the persona chosen to start the merge(A2)(A5) 8. The application links the billing addresses of all the accounts attached previously to the selected person to the current person 9. The application confirms the merge to the user | | |
| Alternative Flows: | A1 : the user wants to view the details of a persona   1. The application displays the of the selected persona 2. The user validate 3. The application redirects the user to the step N3   A2 : At least one of the selected persona legal address is link to an account billing address   1. The application indicates to the user the fact that some legal address are linked to account billing addresses 2. The application displays the list of persona legal addresses linked to billing account 3. The application ask the user how he wants to proceed, proposing 3 choices:    1. Cancel merge    2. Break the links between selected persona legal addresses and billing account    3. Copy the starting persona legal address to the billing account linked to the selected persona and attach the current person legal address to these account 4. The user chooses to copy legal address(A3)(A4) 5. The application copy the legal address of the starting persona in the billing address of the accounts linked to the selected persona(A5) 6. The application link the starting persona legal address to the billing address linked to the selected persona(A5) 7. Continue to step N7   A3 : The user cancel the merge   1. Redirect to step N1   A4 : The user chooses to break the link between selected persons Legal Addresses and Billing Addresses   1. Continue to step N7   A5 : An error occurs   1. The application cancel the merge 2. The application displays an error message to the user indicating the fact that the merge is not possible and ask him to try later | | |

#### PEM0500 - List personas (New)

|  |  |  |  |
| --- | --- | --- | --- |
| List personas | | EXT | PEM0500 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to view the personas associated to an account and its child objects | | |
| Pre-conditions | * The user is in the context of an account | | |
| Trigger | The user chooses to view the list of hierarchy persona | | |
| Minimum guarantees | An error message is displayed if the application is not able to display the list of persons | | |
| Success guarantees: | The person list is displayed | | |
| Normal Flow: | 1. The application displays the list of persona including: (A1)(A2)(A3)(A4)(A5)(A6)(A7)(A8)(A9)  * Person First Name / Last Name * Persona Role * Account Reference(when relevant) * Subscriber Primary External Id (when relevant) * Persona status * User login * Login status | | |
| Alternative Flows: | A1 : The user chooses to click on the login   1. The application display the login detail page according to use case : UAM0010 – View login information 2. Redirect to N1   A2 : The user chooses to view/edit the person details   1. The application display the view/edit person page according to use case : PEM0020 - Modify existing Person details 2. Redirect to N1   A3 : The user chooses to change the persona type and the persona is not a COP   1. The application allows the user to change the persona type according to use case : PEM0060 - Modify persona role 2. Redirect to N1   A4 : The user chooses to change the account owner and the persona is a COP   1. The application allow the user to change the COP according to use case : PEM0100 - Change Owner 2. Redirect to N1   A5 : The user chooses to add a login to a person (no login) and selects one of his persona   1. Refer to use case : UAM0200 - Add login to persona 2. Redirect to N1   A6 : The user chooses to allow self access to a persona (person has already a login)   1. Refer to use case : UAM0210 – Allow persona self access 2. Redirect to N1   A7 : The user chooses to disallow a persona self access(persona has already a login)   1. Refer to use case : UAM0300 - Disallow persona self access 2. Redirect to N1   A8 : The user chooses to deactivate a persona   1. The application deactivate the persona according to use case : PEM0070 - Deactivate persona 2. Redirect to N1   A9 : The user chooses to Merge persons   1. The application merge the persons according to use case : PEM0430 - Merge persons 2. Redirect to N1 | | |

Application requirements

Capability 1 Person Search

### Capability Description

### Capability Assumptions/Dependencies

### Capability Use Cases

#### PEM0150 - Search Person (New)

|  |  |  |
| --- | --- | --- |
| Search Person | | PEM0150 |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case allows a user to search for a person in the system | |
| Pre-conditions |  | |
| Trigger | User wants to search a person for changing owner, or setting order ‘reported by’ association, etc | |
| Minimum guarantees |  | |
| Success guarantees: | Searched Person has been found | |
| Normal Flow: | 1. The system proposes to search for a an existing person, by displaying a list of criteria 2. The user sets the criteria 3. The system search for the persons corresponding to the criteria(A1)(A2)(A3) 4. The user chooses a person | |
| Alternative Flows: | A1 : The system is not able to find a person corresponding to the user criteria   1. The system displays a message indicating to the user that no person corresponds to the entered criteria 2. Redirect the user to step 5   A2 : The system is not able to retrieve a list of persons   1. The system warns the user indicating the fact that the system is not available for the moment and ask him to retry later 2. Use case ends   A3 : Too many persons correspond to the entered criteria   1. The system displays a message indicating to the user the fact that the first x records have been returned but more are available 2. The user pick one of the person or refine his search | |



## Capability 1 Basket Creation

### Capability Description

.

### Capability Assumptions/Dependencies

### Capability Use Cases

#### BKM0100 - Update person details during shopping (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Update person details during shopping | | EXT | BKM0100 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to update person details during shopping. | | |
| Pre-conditions | * The user is logged in. * The user is doing a shopping flow * The person has been created during the shopping flow | | |
| Trigger | The person chooses the person update link | | |
| Minimum guarantees | The person is not updated and an error message is displayed to the user | | |
| Success guarantees: | The persona is successfully updated in the system | | |
| Normal Flow: | 1. The application displays the person details 2. The user update the person details including address 3. The user edit the person role(A1) 4. The user validate 5. The application updates modified person and persona | | |
| Alternative Flows: | A1 : The person edited was the Owner   1. The application do not displays the edit role section. 2. Redirect to N4 | | |

#### BKM0110 – Remove persona from basket (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Remove persona from basket | | EXT | BKM0110 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to remove a persona that is currently in the basket. | | |
| Pre-conditions | * The user is logged in. * The user is doing a shopping flow, on the view basket screen * The persona is not a COP | | |
| Trigger | The person chooses the delete option for a persona | | |
| Minimum guarantees |  | | |
| Success guarantees: | The persona is successfully removed from the basket | | |
| Normal Flow: | 1. The user selects the persona to remove (A1) 2. The application removes the selected persona from the basket | | |
| Alternative Flows: | A1 : The selected persona is the Owner   1. The application does not allow to remove the owner (COP) | | |

Application requirements

## Capability 1 User and access management

### Capability Description

1. CSR Portal User and Access Management use case / role matrix

**Self access** management use cases (only Telco users)

|  |  |  |  |
| --- | --- | --- | --- |
| Use case |  | CSR/Referral Actor | |
| Telco Admin | Admin | User |
| UAM0010-View login information |  |  |  |
| UAM0030-Change my password |  |  |  |
| UAM0050-Change my secret question and answer | No |  |  |
| UAM0100-Get my forgotten password | No |  |  |

**Telco and Customer users access** management use cases (Telco user managing another user)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Managed user | | |
| Use case | Telco | Residential | Business |
| UAM0010-View login information |  |  |  |
| UAM0020-Edit login information |  | NA (see ‘Modify persona role’) | No (only 1 business role supported) |
| UAM0040-Reset password of another user |  |  |  |
| UAM0060-Lock login manually |  |  |  |
| UAM0070-Unlock login |  |  |  |
| UAM0080-Register login |  | NA (see ‘Create person login’) |  |
| UAM0110-Change password on next login |  |  |  |
| UAM0120-Deactivate login |  |  |  |
| UAM0130-Reactivate login |  |  |  |
| UAM0140-Force user to change password on next login |  |  |  |
| UAM0200-Add login to persona | NA |  | NA |
| UAM0210-Allow persona self-access | NA |  | NA |
| UAM0300-Disallow persona self access | NA |  | NA |

1. Channel Activator User and Access Management use case / role matrix

**Self access** management use cases (Telco and Dealer users)

|  |  |  |  |
| --- | --- | --- | --- |
| Use case |  | Dealer/Referral Actor | |
| Telco Admin | Admin | User |
| UAM0010-View login information |  |  |  |
| UAM0030-Change my password |  |  |  |
| UAM0050-Change my secret question and answer | No |  |  |
| UAM0100-Get my forgotten password | No |  |  |

**Telco and Customer users access** management use cases (Dealer user managing another user)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Managed user | | |
| Use case | Dealer | Residential | Business |
| UAM0010-View login information |  |  |  |
| UAM0020-Edit login information |  | NA (see ‘Modify persona role’) | No (only 1 business role supported) |
| UAM0040-Reset password of another user |  |  |  |
| UAM0060-Lock login manually |  |  |  |
| UAM0070-Unlock login |  |  |  |
| UAM0080-Register login |  | NA (see ‘Create person login’) |  |
| UAM0110-Change password on next login |  |  |  |
| UAM0120-Deactivate login |  |  |  |
| UAM0130-Reactivate login |  |  |  |
| UAM0140-Force user to change password on next login |  |  |  |
| UAM0200-Add login to persona | NA |  | NA |
| UAM0210-Allow persona self-access | NA |  | NA |
| UAM0300-Disallow persona self access | NA |  | NA |

1. Business User and Access Management use case / role matrix

**Self access** management use cases (Telco and Business users)

|  |  |  |
| --- | --- | --- |
| Use case | Telco Admin | Business Admin |
| UAM0010-View login information |  |  |
| UAM0030-Change my password |  |  |
| UAM0050-Change my secret question and answer | No |  |
| UAM0100-Get my forgotten password | No |  |

**Telco and Customer users access** management use cases (Telco admin managing another user)

|  |  |  |
| --- | --- | --- |
|  | Managed user | |
| Use case | Telco | Business |
| UAM0010-View login information |  |  |
| UAM0020-Edit login information |  | No (only 1 business role supported) |
| UAM0040-Reset password of another user |  |  |
| UAM0060-Lock login manually |  |  |
| UAM0070-Unlock login |  |  |
| UAM0080-Register login |  |  |
| UAM0110-Change password on next login |  |  |
| UAM0120-Deactivate login |  |  |
| UAM0130-Reactivate login |  |  |
| UAM0140-Force user to change password on next login |  |  |

### Capability Assumptions/Dependencies

### Capability Use Cases

#### UAM0200 – Add login to persona (New)

|  |  |  |  |
| --- | --- | --- | --- |
| UAM0200 – Add login to persona | | EXT | UAM0200 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to create a login for a person and allow self access to the contextual persona | | |
| Pre-conditions | * The user is logged in. * Person has no login * Persona is not a COP (i.e. refer to self enrollment/registration in consumer) | | |
| Trigger | The user chooses the add login option | | |
| Minimum guarantees | The login is not added and an error message is displayed to the user | | |
| Success guarantees: | The login is successfully added to the person and persona | | |
| Normal Flow: | 1. The user enters the login value for the selected person 2. The user enters a temporary password and confirm it (entered twice) 3. The user confirms. 4. Application validates information set (A1) 5. Application creates the new login with the temporary password 6. Application sets this new persona as having self access enabled 7. Application sets the change password on next login flag. | | |
| Alternative Flows: | A1: The login is already used in the system   1. Application displays an error message informing the user he must set another login value 2. User sets a new login 3. Next steps are similar to nominal case   A2: The password entered is not valid   1. Application displays an error message to inform user the entered password is incorrect   A3: Entered values for password are not equal   1. Application informs user that two values of password differ   A4: New password does not conform to one of the password rules. By default, the password has a minimum length of 6 characters and a maximum of 10 characters   1. Application displays an error message indicating rules must be respected | | |

#### UAM0210 – Allow persona self access (New)

|  |  |  |  |
| --- | --- | --- | --- |
| UAM0210 – Allow persona self access | | EXT | UAM0210 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to enable the ability for a persona user (i.e. person with a login) to self manage billing entity (account or subscriber) | | |
| Pre-conditions | * The user is logged in. * A persona, having a person with a login, has been selected | | |
| Trigger | The user chooses the Allow self access option | | |
| Minimum guarantees | The self access is not enabled and an error message is displayed to the user | | |
| Success guarantees: | The self access is successfully set for the persona | | |
| Normal Flow: | 1. Application ask user to confirm allowing self access for the selected persona 2. The user confirms. 3. Application sets this new persona as having self access enabled | | |
| Alternative Flows: |  | | |

#### UAM0300 – Disallow persona self access (New)

|  |  |  |  |
| --- | --- | --- | --- |
| Disallow persona self access | | EXT | UAM0300 |
| Primary actors | Dealer admin/user  CSR admin/user | | |
| Summary Goal | This use case allows the user to disable the ability for a persona user (i.e. person with a login) to self manage billing entity (account or subscriber) | | |
| Pre-conditions | * The user is logged in. * The persona is linked to a person user (existing login) | | |
| Trigger | The user chooses the option to disallow self access for a given persona | | |
| Minimum guarantees | The self access is not removed and an error message is displayed | | |
| Success guarantees: | The self access for the selected persona is successfully removed | | |
| Normal Flow: | 1. The user chooses the disallow option 2. The application disable the self access for the selected persona (A1) | | |
| Alternative Flows: | A1 : The application is not able to disable the self access of the persona   1. The application displays an error message indicating that the self access cannot be disabled. | | |

#### UAM0010 – View login information (Modified)

|  |  |  |
| --- | --- | --- |
| View Login Information | | UAM0010 |
| Primary actors | Telco user  Dealer user  Business User | |
| Summary Goal | This use case allows the user to view the login information of a user. | |
| Pre-conditions | The user has access to another user (i.e. Dealer, Telco, Business or Residential user) | |
| Trigger | The user chooses the option to view login information | |
| Minimum guarantees | A message is displayed if the user doesn’t have a login | |
| Success guarantees: | Login information of the user is displayed. | |
| Normal Flow: | 1. The system displays the user role (A1) | |
| Alternative Flows: | A1. The system displays a message specifying that the user has no login. | |

#### UAM0020 - Edit login information (Modified)

|  |  |  |
| --- | --- | --- |
| Edit Login Information | | UAM0020 |
| Primary actors | Telco user  Dealer user  Business User | |
| Summary Goal | This use case allows the user to modify role. | |
| Pre-conditions | The user is in the context of a Dealer, Telco or Business employee | |
| Trigger | The user choose selects the option to edit login information | |
| Minimum guarantees | Login information is not modified | |
| Success guarantees: | Login information of the employee is only modified locally. | |
| Normal Flow: | 1. Application displays available roles for the user 2. The user selects a new role. 3. The user confirms.(A1) | |
| Alternative Flows: | A1. The user cancels the modification.   1. Application redirects the user to the previous step | |

#### UAM0080 - Register login (Modified)

|  |  |  |
| --- | --- | --- |
| Register Login | | UAM0080 |
| Primary actors | Telco user  Dealer user  Business User | |
| Summary Goal | This Use Case allows the user to set login information to a Dealer, Telco or Business employee. | |
| Pre-conditions | Either   * The user is in the context of an employee with no login. * The user is creating a new employee | |
| Trigger | Either   * The user selects the option to create a new login * The user is at the login creation step when creating a new employee. | |
| Minimum guarantees |  | |
| Success guarantees: | The employee has an active login only created locally. | |
| Normal Flow: | 1. The user enters the new Login value 2. The selects a role (A3) 3. The user confirms. 4. Application validates information set (A1) 5. Application generates a temporary password 6. Application sends the temporary password on the user email (A2) 7. Application creates the new login and set the ‘change password on next login’ flag. Refer to use case UAM0140 – Force user to change password on next login’. | |
| Alternative Flows: | A1. The login is already used in the system   1. Application displays an error message informing the user he must set another login value   User set a new login  Next steps are similar to nominal case  A2: The person has no email address or sending password by email is not active   1. Application displays the temporary generated password 2. Next steps are similar to the nominal case   A3: The user is setting up a dealer   1. Application only proposes the dealer administrator role | |

Application requirements

## Capability 1 Checkout

#### CHK0030 - Review order (Modified)

|  |  |  |
| --- | --- | --- |
| Review order | | CHK0030 |
| Primary actors | Dealer admin/user  CSR admin/user | |
| Summary Goal | This use case allows the user to review the order for the last time before finalizing the checkout process. | |
| Pre-conditions | A valid order is in the checkout process. | |
| Trigger | User has been redirected by Application in checkout process | |
| Minimum guarantees | If the customer does not agree with the order, user can change the content of the order by returning to ‘view and manage basket’ (directly or indirectly through discussion with customer, except for recharge promotion offer (RPO) | |
| Success guarantees: | User had the agreement of the customer on the order to review. | |
| Normal Flow: | 1. Application displays the order to review with following information:  * New or Existing billing account reference * New or updated Billing account information * Details of charges to pay immediately (if any) * Basket or order content   + Account bundle, if any   + Account offers, if any   + New subscribers, if any   + Subscriber to migrate, if any   + Supplementary offers (new offers and/or offers to remove), if any   + Recharge promotion offers, if any   + Total amount in basket, if any  1. Application displays the default ‘affected by’ and ‘reported by’ persons (automatically preselected). Refer to use case CHK0060 – Set order ‘reported/affected by’ person (A3) 2. User selects the pretty print option, prints the order and gives it to the customer for review. (A1) 3. User submits the order 4. Application posts the order 5. Application confirms the submission has been done and displays the order number | |
| Alternative Flows: | A1: User does not select the pretty print option   1. User submits the order 2. Application posts the order 3. Application confirms the submission has been done and displays the order number   A2 : The user chooses to edit the persona   1. Redirect user to use case BKM0050 - Update person details during shopping 2. Redirect to N1   A3 : Customer is not a consumer customer (no person in basket)   1. Redirect to next step   A4 : Default ‘affected by’ person is not correct   1. User selects another person, either pre-listed or by searching a person (refer to use case PEM0150 – Search Person) | |

#### CHK0060 - Set order ‘reported/affected by’ person (New)

|  |  |  |
| --- | --- | --- |
| Set order ‘reported/affected by’ person | | CHK0060 |
| Primary actors | Dealer admin/user  CSR admin/user | |
| Summary Goal | This use case allows the user to set one person as the person who reported the order and another person as the person who is affected by the order. | |
| Pre-conditions | A valid order is in the checkout process (reviewing an order). | |
| Trigger | User is working on an order in progress (basket) of a consumer customer | |
| Minimum guarantees |  | |
| Success guarantees: | User successfully sets a person as reporting the order and another one as affected by the order | |
| Normal Flow: | 1. Application automatically preselects the ‘affected by’ and ‘reported by’ persons (A1) 2. Application confirms the selected persons | |
| Alternative Flows: | A1 : Default ‘affected by’ person is not correct   1. User selects another person, either pre-listed or by searching a person (refer to use case PEM0150 – Search Person) | |

Capability 1 Order Management

#### OFU0030 - View order details (New)

|  |  |
| --- | --- |
| View order details | OFU0030 |
| Primary actors | CSR user  Dealer user |
| Summary Goal | This use case allows user to view the billing orders linked to a request from CSS applications |
| Pre-conditions |  |
| Trigger | * The request has generated an order in the billing * The user has chosen to view the detail of the order |
| Minimum guarantees | The application displays a message indicating to the user the fact that it is not able to retrieve the order |
| Success guarantees | The application displays the order details including service order and order items |
| Normal Flow | 1. The application displays the billing order including the service order and the order items(A1) 2. The user chooses to view the job started on one of the service order of the order 3. The application displays the service order workflow(A2) |
| Alternative Flow | A1: The application is not able to display the billing order   1. The application displays an error message to the user indicating the fact that the order is not available and ask him to try again later 2. The user returns to the search order list preselected with the criteria set before viewing the order details   A2 : The application is not able to display the workflow   1. The application displays an error message indicating to the user the fact that it is not able to display the workflow 2. The user returns to the N1 |

#### OFU0010 – Search Order (Modified)

|  |  |
| --- | --- |
| Search Order | OFU0010 |
| Primary actors | CSR user  Dealer user |
| Summary Goal | This use case allows user to retrieve some orders |
| Pre-conditions |  |
| Trigger | User has selected the option to search orders |
| Minimum guarantees |  |
| Success guarantees | CSR Portal application displays list of orders found |
| Normal Flow | 1. User sets search criteria and submits (A1) 2. CSR Portal application displays list of selected orders (A2)(A3)(A4)(A5) |
| Alternative Flow | A1: User selects the reset option  1. CSR Portal application reinitializes search criteria value with last values used in last search.  A2: There is no order found  1. CSR Portal application display an error message informing user there is no order found  A3: There are too many orders found  1. CSR Portal application displays orders list with maximum of orders allowed in a search  2. CSR Portal application displays an error message informing user there are too many orders selected and he should refined his criteria  A4: User sets new search criteria and submits   1. Next steps are similar to nominal case   A5: The order has generated an order in the billing system   1. The application displays a link allowing the user to view the billing order 2. The user clicks on the billing order link 3. Redirects the user to the UC OFU0030 - View order details |

Capability 1 Problem management and CIT

#### CM0001 - List Cases - for Channel and CSR Portal (New)

|  |  |
| --- | --- |
| List Cases for Channel and CSR Portal | CM0001 |
| Primary actors | CSR User  Dealer User |
| Summary Goal | This use case allows a user to search and list the cases associated to an account or a subscriber or a person |
| Pre-conditions |  |
| Trigger | The user has chosen the search or more menu on cases |
| Minimum guarantees | A message indicate to the user the reason why the case list can't be access |
| Success guarantees | The list of cases corresponding to the user search criteria is displayed |
| Normal Flow | 1. The application displays a search page allowing the user to search cases by :    1. Contextual persona    2. Case Id    3. Case Type    4. Problem Area    5. From/To creation date    6. Status    7. Justification Status    8. Account Only    9. Extended Cases    10. External ID 2. The user enters his search criteria and validate 3. The application displays sorted by date with latest modify cases at the top a list of case related to the current account with the following information (A1):    Case reference   * Attachment icon * Case External reference Id ??    Case creation date ??   Case modification date   Case type   ~~Case problem area~~   ~~Account Id~~   * Reported By person * Affected person * Subscriber Id(A2) * Associated case items flag    Case description   Case Status   Case justification status   1. The user selects a problem 2. The application displays the selected case according the view case Use case |
| Alternative Flow | A1 : The CRM is not available  1. The application displays a message indicating to the user fact that for a technical reason it is not able to retrieve the list of cases  2. The user click OK  3. The application redirects the user to step 1  A2 : More than one subscriber is attached to the case  1. The application display a "multiple" label instead of the subscriber primary external id |

#### CM0005 - List Cases - for Business

|  |  |
| --- | --- |
| List Cases | CM0005 |
| Primary actors | ~~CSR User~~  B2B User  ~~Dealer User~~ |
| Summary Goal | This use case allows a user to search and list the cases associated to an account or a subscriber |
| Pre-conditions |  |
| Trigger | The user has chosen the search or more menu on cases |
| Minimum guarantees | A message indicate to the user the reason why the case list can't be access |
| Success guarantees | The list of cases corresponding to the user search criteria is displayed |
| Normal Flow | 1. The application displays sorted by date with latest modify cases at the top a list of case related to the current account with the following information (A1):   Case reference   Case External reference Id   Case creation date   Case modification date   Case type   Case problem area   Subscriber Id(A2)   Case description   Case Status   Case justification status   Associated case items flag  2. The user selects a problem  3. The application displays the selected case according the view case Use case |
| Alternative Flow | A1 : The CRM is not available  1. The application displays a message indicating to the user fact that for a technical reason it is not able to retrieve the list of cases  2. The user click OK  3. The application redirects the user to step 1  A2 : More than one subscriber is attached to the case  1. The application display a "multiple" label instead of the subscriber primary external id |

#### CM0010 - Create case - for Channel/CSR portal (New)

|  |  |
| --- | --- |
| Create case | CM0010 |
| Primary actors | CSR User  Dealer User |
| Summary Goal | Create a case in order to resolve the customer’s problem |
| Pre-conditions | The user is in the context of an account or subscriber |
| Trigger | User has chosen option to create a case |
| Minimum guarantees | A message indicates to the user the reason why the case can't be created  If user is in context of a subscriber, by default application associate the case to the subscriber  Application proposes to specify affected and reported by persona only if at least a person is owning the root account  Application automatically default the affected persona to the person owning the root account |
| Success guarantees | A new case is created |
| Normal Flow | 1. User refines context of the case (specify an invoice and/or use navigation bar to change account/subscriber context) (A1)(A2) 2. The user choose the case type and problem area 3. The user enters details of the case (description, external id, affected persona and reported by persona) 4. The user can additionally enter a note (A3) 5. The user press the continue button(A9) 6. The application displays a summary page to the user including the case context, type, area and details. 7. The user can choose to:    Modify (A5)   Cancel (A6)   Confirm and Close (A7)   Confirm   1. The application displays a confirmation page indicating to the user the case submission and the Case reference. |
| Alternative Flow | A1: Application is configured to create case through Edialog   1. Application redirect user to Edialog screens with all contextual information   A2 : the user has selected the extended case creation option   1. User specifies a list of subscribers   1. The user enters a list of subscribers primary external id  2. The application validates the list of subscribers  3. The application indicates to the user the subscribers not belonging to the current account or in a disconnected rating state  4. The user removes the invalid subscribers (A4)   1. The user chooses to attach subscriber bundles to the new case   1. The application display the list of subscriber bundles available for the contextual account  2. The user select one or more subscriber bundles   1. The user chooses to attach invoices to the new case   1. The application display the list of invoices available for the contextual account  2. The user select one or more invoices   1. User specifies case type and problem area 2. User enters details of the case (description, external id) 3. User can additionally enter a note (A3) 4. User Validates (A8)(A9) 5. The application displays a confirmation page indicating to the user the case submission and the Case reference.   A3 : Depending on the configuration the user is able to choose between public and private note  1. The application redirects the user to step 6  A4 : The user do not removed the invalid subscribers  1. The application redirects the user to step 3  A5: The user chooses modify:  1. The application redirects the user to the case creation page already set with values already set  2. The application redirects the user to step 1  A6: The user chooses Cancel  1. The application redirects the user home page  2. The case is not created  A7: The user chooses Confirm and Close  1. The case is submitted with a “close” status  2. The application redirects the user to step 6  A8 : The user has left some invalid subscribers  1. The application warns the user on the fact that invalid subscribers are still in the still and will be removed (A9)  2. The application removes the invalid subscribers form the list  3. The application redirects the user to step 7  A9 : The user cancels the submission  1. The application redirects the user to the case creation page pre field with the values already set. |

#### CM0015 - Create Case - for Business (Modified)

|  |  |
| --- | --- |
| Create Case | CM0015 |
| Primary actors | ~~CSR User~~  ~~Dealer User~~  B2B User |
| Summary Goal | Create a case in order to resolve the customer’s problem |
| Pre-conditions | The user is in the context of an account or subscriber |
| Trigger | User has chosen option to create a case |
| Minimum guarantees | A message indicates to the user the reason why the case can't be created  If user is in context of a subscriber, by default application associate the case to the subscriber |
| Success guarantees | A new case is created |
| Normal Flow | 1. User refines context of the case (specify an invoice and/or use navigation bar to change account/subscriber context) (A1)(A2) 2. The user choose the case type and problem area 3. The user enters details of the case (description, external id) 4. The user press the continue button(A9) 5. The application displays a summary page to the user including the case context, type, area and details. 6. User can choose to:    Modify (A5)   Cancel (A6)   Confirm and Close (A7)   Confirm   1. The application displays a confirmation page indicating to the user the case submission and the Case reference. |
| Alternative Flow | A1 Application is configured to create case through Edialog   1. Application redirect user to Edialog screens with all contextual information   A2 : the user has selected the extended case creation option   1. User specifies a list of subscribers   1. The user enters a list of subscribers primary external id  2. The application validates the list of subscribers  3. The application indicates to the user the subscribers not belonging to the current account or in a disconnected rating state  4. The user removes the invalid subscribers (A4)   1. The user chooses to attach subscriber bundles to the new case   1. The application display the list of subscriber bundles available for the contextual account  2. The user select one or more subscriber bundles   1. The user chooses to attach invoices to the new case   1. The application display the list of invoices available for the contextual account  2. The user select one or more invoices   1. User specifies case type and problem area 2. User enters details of the case (description, external id) 3. User Validates (A8)(A9) 4. The application displays a confirmation page indicating to the user the case submission and the Case reference.   A4 : The user do not removed the invalid subscribers  1. The application redirects the user to step 3  A5: The user chooses modify:  1. The application redirects the user to the case creation page already set with values already set  2. The application redirects the user to step 1  A6: The user chooses Cancel  1. The application redirects the user home page  2. The case is not created  A7: The user chooses Confirm and Close  1. The case is submitted with a “close” status  2. The application redirects the user to step 6  A8 : The user has left some invalid subscribers  1. The application warns the user on the fact that invalid subscribers are still in the still and will be removed (A9)  2. The application removes the invalid subscribers form the list  3. The application redirects the user to step 7  A9 : The user cancels the submission  1. The application redirects the user to the case creation page pre field with the values already set. |

#### CM0020 - View existing cases and details - for Channel and CSR Portal (New)

|  |  |
| --- | --- |
| View Existing Case and Details for Channel and CSR portal | CM0020 |
| Primary actors | CSR User  Dealer User |
| Summary Goal | This use case allows a user to access the case created in the context of a customer |
| Pre-conditions | The user has searched for a case |
| Trigger | The user selects a case |
| Minimum guarantees | A message warns the user on the fact that the case can't be retrieved |
| Success guarantees | The Problem is displayed to the user |
| Normal Flow | 1. The application displays the case details including reporting and affected persons(A1)  2. The user chooses the back button(A2, A3, A4, A5, A6)  3. The application redirects the user to the page he was coming from |
| Alternative Flow | A1 : The application is not able to retrieve the case details  1. The application displays a message to user indicating the fact that due to a technical error the case can't be displayed  2. The user cancels  3. The application redirects the user to his coming page  A2 : The user click the edit button  1. The application redirects the user to the case edit page (Refer to case update Use case)  A3 : The user click the close button  1. The application close the case (Refer to FRS DR-2-012-994 Case Handling)  A4 : The user click the note tab  1. The application displays the notes associated to the current case (Refer to DR-4-004-255 Case Management and Session Logging In Converse One 3.2)  A5 : The user click the task tab  1. The application displays the tasks associated to the current case (Refer to DR-4-004-255 Case Management and Session Logging In Converse One 3.2)  A6 : The user click the attachment tab  1. The application displays the attachments associated to the current case (Refer to Attach document Doc) |

#### CM0025 - View Existing Case and Details - for Business

|  |  |
| --- | --- |
| View Existing Case and Details | CM0025 |
| Primary actors | ~~CSR User~~  ~~Dealer User~~  B2B User |
| Summary Goal | This use case allows a user to access the case created in the context of a customer |
| Pre-conditions | The user has searched for a case |
| Trigger | The user selects a case |
| Minimum guarantees | A message warns the user on the fact that the case can't be retrieved |
| Success guarantees | The Problem is displayed to the user |
| Normal Flow | 1. The application displays the case details(A1)  2. The user chooses the back button(A2, A3, A4, A5, A6)  3. The application redirects the user to the page he was coming from |
| Alternative Flow | A1 : The application is not able to retrieve the case details  1. The application displays a message to user indicating the fact that due to a technical error the case can't be displayed  2. The user cancels  3. The application redirects the user to his coming page  A2 : The user click the edit button  1. The application redirects the user to the case edit page (Refer to case update Use case)  A3 : The user click the close button  1. The application close the case (Refer to FRS DR-2-012-994 Case Handling)  A4 : The user click the note tab  1. The application displays the notes associated to the current case (Refer to DR-4-004-255 Case Management and Session Logging In Converse One 3.2)  A5 : The user click the task tab  1. The application displays the tasks associated to the current case (Refer to DR-4-004-255 Case Management and Session Logging In Converse One 3.2)  A6 : The user click the attachment tab  1. The application displays the attachments associated to the current case (Refer to Attach document Doc) |

#### CM0200 - Update case (Modified)

|  |  |  |
| --- | --- | --- |
| Update case | | CM0200 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | This use case allows a user to edit a case | |
| Pre-conditions | The case is either in status new or work in progress | |
| Trigger | The user selects the edit case menu | |
| Minimum guarantees | The case is successfully updated | |
| Success guarantees: | This use case allows a user to edit a case | |
| Normal Flow: | 1. The application displays the case in edit mode (A1)  2. The application displays the following fields in edit mode:   Justification status   Priority   Case items   * affected persona using one the persona of the current hierarchy * Text box to append case description   3. The user edits the required information (A2)  4. The user click the save button  5. The application save the case (A3)  6. The application displays the updated case | |
| Alternative Flows: | A1 : The application is not able to retrieve the case details  1. The application displays a message to user indicating the fact that due to a technical error the case can't be displayed  2. The user cancels  3. The application redirects the user to his coming page  A2 : The user chooses to update the list of case items  1. The application follow the same steps and rules than CM-6.1 Create Case for Channel/CSR-LITE (Without E-Dialog)  A3 : At least one subscriber is invalid  1. The application warn the user on the fact that X subscribers are invalid and will be removed from the case item  2. The user confirm (A4)  3. The application update the case with the new list of subscriber items  A4 : The user cancels  1. The application redirects the user to the edit case page | |

#### CM0230 - Cancel case (New)

|  |  |  |
| --- | --- | --- |
| Cancel case | | CM0230 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | This use case allows a user to cancel a case | |
| Pre-conditions | The case is either in status new or work in progress | |
| Trigger | The user selects the option to cancel the case | |
| Minimum guarantees |  | |
| Success guarantees: | The case is cancelled | |
| Normal Flow: | 1. Application requests user to set the justification by proposing list of justification status compatible to status cancel 2. User selects the justification status and submit 3. Application updates the case status and justification status(A1) | |
| Alternative Flows: | A1 : The application is not able to cancel the case  1. The application displays a message to user indicating the fact that due to a technical error the case can't be cancelled | |

#### INT0120 - Display event log for account dashboard (New)

|  |  |  |
| --- | --- | --- |
| Display event log for account dashboard | | INT0120 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | This use case allows user to view event logs summary on account dashboard | |
| Pre-conditions | The user is in the context of an account  The interaction management activated | |
| Trigger | The user access the account dashboard | |
| Minimum guarantees | An error message is displayed indicating to the user the fact that the application is not able to display the event log | |
| Success guarantees: | The last interactions impacting this account are displayed | |
| Normal Flow: | 1. The application displays the last x interactions occurred during the last y days impacting the current account or its subscribers(where x and y are configurable)(A1)(A2)(A3)(A4)(A5)(A6)(A7)(A8)(A9)(A10) | |
| Alternative Flows: | A1 : No interaction has been create within the period configured   1. The application displays a message indicating the fact that no session has been created within the last y days   A2 : The application is not able to retrieve the interactions   1. The application display an error message indicating the fact that it was able to retrieve the session and ask the user to retry later   A3 : the user wants to Edit interaction  1. The application proposes to the user to change the direction and the channel(A11)  2. The user completes his changes and submit(A12)  3. The application save the changes  4. The application redirects the user to the account dashboard  A4 : the user wants to create a note on a session  1. See use case "create note for a interactions"  A5 : the user wants to create a case from the event  1. See use case "Create case"  A6 : the user wants to view the details of the event  1. See use case "View event details" A7 : the user wants to send an Outbound  1. See use case " Send outbound communication"  A7 : the user wants to see the details of the created case attached to the event  1. See use case "View case details"  A8 : the event log is displayed on the account dashboard  1. The application displayed only the x(configured by default to 5 in the plad) last event order by date  2. Back to step 4  A9 : the user wants to filter the event and is not on the dashboard  1. The user chooses the filtering link  2. The application displays the filtering criteria  3. The user chooses his filtering criteria  4. The application filters the events according to the filtering criteria  A10 : A CTI ID is set in the interaction or the user tries to update a another interaction than the current one and is not administrator or the interaction has exceed the period of 7 days(set by the CRM)  1. The application do not allow the user to update the interaction  2. Return to step 1 | |

#### INT0100 - Display event logs (Modified)

|  |  |  |
| --- | --- | --- |
| Display event logs | | INT0100 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | Display all entries in the event log for the account at hand, with the option to filter by date and time range | |
| Pre-conditions | The user is in the context of an account  The interaction management activated | |
| Trigger | User wants to see the sessions and events attached to the current account | |
| Minimum guarantees | A message is displayed indicating to the user the fact that the service is not available | |
| Success guarantees: | Application displays all interactions or events in the specified date range | |
| Normal Flow: | 1. The application displays a search page allowing the user to define his date time search criteria(A1)(A2)(A9) 2. By default the application set the "from" date to today date minus the number of days defined for the max time of the dashboard summary view and "to" date to the current date. 3. The user enters his search criteria and press search 4. All sessions and events in the date range are displayed (number of events displayed in each screen is controlled by the PLAD property EVENTS\_LOG\_MAX\_LENGTH). (A3,A4,A5,A6,A7,A8,A10) 5. ~~User can also click Group by Events to view events grouped by date, regardless of session.~~ | |
| Alternative Flows: | A1: User clicks Reset  1. The From/To date fields are cleared  A2: User clicks Cancel  1. Application returns to previous screen  A3 : the user wants to Edit interaction  1. The application proposes to the user to change the direction and the channel(A11)  2. The user completes his changes and submit(A12)  3. The application save the changes  4. The application redirects the user to the account dashboard  A4 : the user wants to create a note on a interaction  1. See use case "create note for an interaction "  A5 : the user wants to create a case from the event  1. See use case "Create case"  A6 : the user wants to view the details of the event  1. See use case "View event details" A7 : the user wants to send an Outbound  1. See use case " Send outbound communication"  A8 : the user wants to see the details of the created case attached to the event  1. See use case "View case details"  A9 : the event log is displayed on the account dashboard  1. The application displayed only the x(configured by default to 5 in the plad) last event order by date  2. Back to step 4  A10 : the user wants to filter the event and is not on the dashboard  1. The user chooses the filtering link  2. The application displays the filtering criteria  3. The user chooses his filtering criteria  4. The application filters the events according to the filtering criteria  A11 : A CTI ID is set in the session or the user tries to update a another session than the current one and is not administrator or the session has exceed the period of 7 days(set by the CRM)  1. The application do not allow the user to update the interaction  2. Return to step 1  A12 : The user cancels   1. 1. The application redirects the user to step 1 | |

#### INT0110 - Display event logs details (Modified)

|  |  |  |
| --- | --- | --- |
| Display event logs details | | INT0110 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | See detailed information about an event | |
| Pre-conditions | User is viewing events | |
| Trigger | User wants to see the detail of an event | |
| Minimum guarantees | An error message is displayed indicating the fact that the service is not available | |
| Success guarantees: | Event details are presented | |
| Normal Flow: | 1. The application displays the details of the event and related OBCs including:    1. For event:       1. ~~Event~~ creation date and time       2. ~~Event~~ creator       3. ~~Event~~ Class       4. ~~Event~~ Type       5. ~~Event~~ short description       6. ~~Event~~ long description       7. ~~Event Case Type~~ Primary Reason       8. ~~Event Problem Area~~ Secondary Reason       9. Case Id (for case events or if a case has been created from the event)       10. Notes    2. For OBC:       1. Sent date       2. Template Name       3. Document Name       4. Target       5. Status       6. View(A4)       7. Resend(A5)   2. User clicks "Close" button to return to the event display. (A1,A2,A3) | |
| Alternative Flows: | A1 : the user wants to edit the event and the event has been created within a period of 7 days  1. See use case "Edit Event"  A2 : the user wants to send an Outbound  1. See use case " Send OBC for an event"  A3: the user wants to create a case from the event  1. See use case "Create case for an event"  A4: the user wants to view the sent communication  1. The application displays the document  A5: the user wants to resend the communication  1. the application ask to user to confirm communication destination information  2. The user confirms the submission(A6)  3. The application resend the communication  4. The user is redirected to the account dashboard  A6: the user cancels  1. The application redirect the user to the account dashboard | |

#### INT0010 - Create Interaction (Modified)

|  |  |  |
| --- | --- | --- |
| Create Interaction | | INT0010 |
| Primary actors | CSR User  Dealer User  Business user | |
| Summary Goal | Create a interaction | |
| Pre-conditions | The user is logged in the application  Interaction management is activated | |
| Trigger | The user enters in the context of an account | |
| Minimum guarantees |  | |
| Success guarantees: | The interaction is created | |
| Normal Flow: | 1. The application creates a interaction 2. The application set by default the interaction as non-interactive call session(A1) 3. The application stores all the user actions in the context of this account under the current interaction 4. The user leaves the context of the account 5. The application releases the interaction | |
| Alternative Flows: | A1: A CTI ID is passed  1. Refer to IDC0100 use case | |

#### INT0300 - Create Interaction note (Modified)

|  |  |  |
| --- | --- | --- |
| Create Interaction note | | INT0300 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | This use case allows the user to add a note to an interaction | |
| Pre-conditions | The user is in the context of customer or account  Interaction management is activated | |
| Trigger | The user enters in the context of an account | |
| Minimum guarantees | The note is not added, and the interaction is not updated and an error message is displayed to the user | |
| Success guarantees: | The note is successfully added on the interaction | |
| Normal Flow: | 1. The application displays the note creation page 2. The user choose the note type 3. The user chooses if the note is internal or not(allowed only depending on the PLAD configuration) 4. The user enters a note description 5. The user confirms the note creation(A1) 6. The application displays a confirmation screen | |
| Alternative Flows: | A1: The user decides to cancel   1. The application discards the note 2. The user is redirected to the account dashboard | |

#### INT0020 - Edit interaction (New)

|  |  |  |
| --- | --- | --- |
| Edit interaction | | INT0020 |
| Primary actors | CSR User  Dealer User | |
| Summary Goal | This use case allows the user to edit an interaction | |
| Pre-conditions | The user is the creator of the interaction or the user is a CSR Admin  The interaction has been created within the last 7 days | |
| Trigger | The user wants to update the interaction | |
| Minimum guarantees | The interaction is not updated and the application displays an error message | |
| Success guarantees: | The interaction is updated | |
| Normal Flow: | 1. The user update the Communication channel 2. The user updated the interaction direction 3. The user selects another person associated to the interaction (A1)(A2) 4. The user saves his changes 5. The application updates the interaction(A3) | |
| Alternative Flows: | A1: User dissociates the interaction and a person   1. User has to enter a free text when dissociating   A2: Billing hierarchy is not a Consumer one (Account category)   1. The application does not allow user to change the associated person   A3: The application is not able to save the modifications   1. The application displays an error message 2. The user is redirected to the account dashboard | |

Capability 1 Customer-subscriber Acquisition

#### NCA0010 - New Customer (Modified)

|  |  |  |
| --- | --- | --- |
| New Customer | | NCA0010 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows the user to enroll a new customer | |
| Pre-conditions | User is logged in. | |
| Trigger | User has selected the option to create a new customer  (either Prepaid or Postpaid) | |
| Minimum guarantees | User can cancel the customer acquisition process at any moment before the last confirmation step. | |
| Success guarantees: | The application has sent a new order to create the new customer with one account and optionally one to several subscribers Order reference is displayed to user | |
| Normal Flow: | 1. User sets Person information(refer to use case NPA0010 - Add persona )(A23)(A24) 2. User sets new account information (refer to use case Capture administrative data) (A1) (A1bis). 3. The application displays Primary Offers and Bundles available for the user (refer to use case Browse Primary Offers/Bundles) 4. User browses the catalog and selects a Primary Offer or Subscriber Bundle (A11)(A21) 5. The application redirects the user to Browse and Select Devices use case if any compatible and if application supports them 6. The application redirects the user to create a first Subscriber 7. User creates a Subscriber (refer to use case New Subscriber) 8. The application redirect the user to view his basket 9. User reviews the basket and validates that the order corresponds to customer ’s expectations (Refer to use case: View Basket) 10. User decides to checkout the basket following customer ’s acceptance (refer to use case: Checkout) (A2) 11. The application sends the order to the back office system 12. The application displays the order number | |
| Alternative Flows: | A1: User has selected create Postpaid customer option and automatic credit checking is active  1. The application calls an external system to process credit checking and wait for the answer  2. The application redirects the user to the browsing of Primary Offers and Bundles (A3)(A4)(A5)  A1bis: User has selected create Postpaid customer option and manual credit checking is active  1. User decides to continue (A6)  2. The application redirects the user to the browsing of Primary Offers and Bundles  A2: User decides to create another Subscriber for the new customer  1. The application redirects the user to the catalog browsing  2. Next steps are similar as nominal case  A3: The application can’t access the credit checking service for any technical reason  1. The application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking  2. User selects to skip credit checking (A3bis)(A6)(A7)  3. The application redirects the user to the catalog browsing  4. Next steps are similar to nominal case  A3bis: User decides to retry credit checking step  1. The application redirects to (A1) A4: Credit checking refuses the customer  1. The application displays an error message informing user he can’t create this Postpaid customer  2. The application redirects the user to the catalog browsing in Prepaid mode only.  3. Next steps are similar to the nominal case  A5: Credit checking requires approval from service provider  1. The application displays an error message informing user creation of this customer requires service provider approval.  2. The application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms  3. The application sends the order to referral management  4. The application redirects the user on the Referred customers page  A6: User has selected send to referral option  1. The application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user  2. The application sends the order to referral management  3. The application informs the user that the request is in referral  4. The application redirects the user on the Referred customers page  ~~A9: Order processing fails~~  ~~1. The application displays an error message informing the user the order has failed for technical reason.~~  A11: User has selected an account Bundle   1. User configures the account Bundle (refer to add account Bundle use case) 2. Next steps are similar to the nominal case   A21: User select the option to browse Devices  1. Application redirects user to browse and select  Devices use case  2. Application redirects user to browse and select  Primary Offer use case (A22)   1. Application redirects user to new Subscriber use case   A22: User has not selected a Primary Offer   1. Application redirects user to the view and manage basket, Subscriber is not created and Device is added at the account level   A23 : The account category is not configured to support persons   1. Redirect to N2   A24: User has selected the option to create an account only (no subscriber)   1. Application displays an option to confirm the account creation 2. Application sends the order to the back office system 3. Application displays order number to user | |

#### NCA0020 - Capture administrative data (Modified)

|  |  |  |
| --- | --- | --- |
| Capture administrative data | | NCA0020 |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | This use case allows a user capturing customer information and administrative information, reviewing all information to get customer acceptance. | |
| Pre-conditions | User has already specified the customer type he wants to create | |
| Trigger | User has selected one new customer option | |
| Minimum guarantees | User can’t process new customer acquisition without customer acceptance | |
| Success guarantees: | Customer information and billing account information has been set for the new customer | |
| Normal Flow: | 1. User sets the customer identity(A5) 2. User sets the phone & email 3. User sets the customer address (A4) 4. The application requests additional administrative information 5. User set additional administrative information 6. The application validates all information set (A1) 7. The application redirects user to set billing account information 8. User set billing account information (refer to use case capture billing account information) 9. ~~The application displays all information set for review~~ 10. Use case ends (A2) | |
| Alternative Flows: | A1: Information set by the user are not correct or not complete   1. The application request again to set information and highlights mistakes 2. User corrects set information   A2: Application is configured to request acceptance of terms and conditions:   1. The application requests for acceptance of terms and conditions and return policy 2. User accepts and continue (A3)   A3: User has not validated terms and conditions and return policy   1. The application displays an error message to inform user he must accept terms and condition and return policy to continue 2. User accepts and continues 3. Next step are similar to nominal case   A4: User selects the option to search an address, instead of entering it   1. User selects an address in the referential. Refer to use case ‘Search and select address in referential’ 2. Next step are similar to nominal case   A5 : Account category support Person Management   1. Application displays Person creation area according to use case NPA0010 - Add persona 2. Application proposes to the use the customer address as billing address 3. The user accept 4. The application links the customer address to the billing(A6) 5. Redirect the user to N7   A6 : The user wanted to create a billing address different from the billing address   1. The application displays the fields to allow the user to set the billing address including Title, first Name, Last Name 2. The user set the different information 3. Redirect the user to N7 | |

#### NSA0025 - Update administrative data (Modified)

|  |  |  |
| --- | --- | --- |
| Capture administrative data | | NCA0020 |
| Primary actors | Dealer user  CSR user | |
| Summary Goal | This use case allows a user viewing current administrative data set and updating them | |
| Pre-conditions | User is either:   * Adding a new subscriber on an existing account * Migrating a prepaid to postpaid subscriber | |
| Trigger | User has selected the option to update administrative data for a an existing account | |
| Minimum guarantees |  | |
| Success guarantees: | Administrative data are set | |
| Normal Flow: | 1. CSR Portal application displays current administrative data method and relevant parameters with values if already set 2. User updates administrative data (including account contact and address) and relevant parameters he is authorized to modify of the current existing account (A2) 3. Account Owner Person legal address is linked to the account billing address(A3) 4. The application indicates to the user the fact that modifying the billing address will break the link between the account owner and the billing address 5. The user confirms(A4) 6. The application breaks the link between the account owner persona and the billing account 7. CSR Portal application validates information set (A1) 8. CSR Portal application updates new administrative data on the existing account. | |
| Alternative Flows: | A1: User has not set correctly requested information   1. CSR Portal application requests the user to set again information and highlights mistakes 2. User sets requested information   A2: User has selected the option to search and select an address in a referential   1. User updates administrative data (including account contact and address selection thanks to the address referential. Refer to use case “Search and select address in referential”) and relevant parameters he is authorized to modify of the current existing account   A3 : The account owner address is not linked to the Billing account address   1. Redirect to N7   A4 : The user refuses   1. The application remove the link between the billing address and the person account owner 2. Redirect to N2 | |

#### NSA0010 - New subscriber for an existing customer (Modified)

|  |  |  |
| --- | --- | --- |
| New subscriber for an existing customer | | NSA0010 |
| Primary actors | Dealer user  CSR user  Business user | |
| Summary Goal | This use case allows a user creating either:   * One or several additional Subscribers to an existing account * One or several additional Subscribers for a new sub account * A new sub account only | |
| Pre-conditions | User is in context of a given account | |
| Trigger | User has selected the option to create a new Subscriber either Prepaid or Postpaid | |
| Minimum guarantees | User can cancels the use case at any step  If user cancels the us case, no order is submitted | |
| Success guarantees: | Order has been submitted  Order number is displayed to user | |
| Normal Flow: | 1. User Reviews and updates administrative data (refer to use case Review administrative data) (A1) (A1bis). 2. Application displays Primary Offers and Bundles available for the user (refer to use case Browse Primary Offers/Bundles) 3. User browses the catalog and selects a Primary Offer or Subscriber Bundle (A11)(A21) 4. Application redirects user to browse and select Devices use case if any compatible and if application support them 5. Application redirects the user to new Subscriber use case 6. Application redirects the user to view its basket 7. User reviews the basket and validates that the order corresponds to customer ’s expectations (Refer to use case: View Basket) 8. User decides to checkout the basket following customer ’s acceptance (Refer to use case: Checkout) (A2) 9. Application sends the order 10. Application displays the order reference to user | |
| Alternative Flows: | A1: User has selected create Postpaid Subscriber option and automatic credit checking is active  1. Application redirects the user to the create first Subscriber step similarly as the nominal case (A3)(A4)(A5)  A1bis: User has selected create Postpaid Subscriber option and manual credit checking is active  1. User decides to continue(A6)  2. Application redirects the user to the new  Subscriber creation  A2: User decides to create another Subscriber for the existing customer  1. Application redirects the user to the catalog browsing  2. Next steps are similar as nominal case  A3: Application can’t access to credit checking service for any technical reason  1. Application displays an error message informing the user the system is temporarily unavailable and propose two options to the user: retry, skip credit checking  2. User selects to skip credit checking (A3bis)(A6)(A7)  3. Application redirects the user to the catalog browsing  4. Next steps are similar to nominal case  A3bis: User decides to retry credit checking step  1. Application redirects to (A1)  A4: Credit checking refuses the customer   1. Application displays an error message informing user he can’t add additional Postpaid Subscriber 2. Application redirects the user to the catalog browsing in Prepaid mode only. 3. Next steps are similar to the nominal case   A5: Credit checking requires approval from service provider  1. Application displays an error message informing user that adding a Postpaid Subscriber requires service provider approval.  2. Application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms  3. Application sends the order to referral management  4. Application redirects the user on the Referred customers page  A6: User has selected send to referral option  1. Application allows the user to enter a note associated to the referral request (‘Requester free text note’), intended for the referral user and confirms  2. Application sends the order to referral management  3. The application informs the user that the request is in referral  4. Application redirects the user on the Referred customers page  A9: ~~Order processing fails~~  ~~1. Application displays an error message informing the user the order has failed for technical reason.~~  A11: User has selected an account Bundle  1. User configure the account Bundle (refer to add account Bundle use case)  2. Next steps are similar to the nominal case  A12: User selects the new account option  1. Application set the context with a ‘new account’  2. Application redirects the user to ‘Capture administrative data’ step  3. Next steps are similar to nominal case (A12 bis)  A12 bis: User has selected the option to create a new account only   1. User confirms creation of the account only 2. Application submits the order 3. Application displays the order number to user   A21: User select the option to browse Devices  1. Application redirects user to browse and select  Devices use case  2. Application redirects user to browse and select  Primary Offer use case (A22)  3. Application redirects user to new Subscriber use case  A22: User has not selected a Primary Offer  1. Application redirects user to the view and manage basket, Subscriber is not created and Device is added at the account level | |

#### NSA0040 - New subscriber (Modified)

|  |  |  |
| --- | --- | --- |
| New subscriber | | NSA0040 |
| Primary actors | Dealer user  CSR user  Business user | |
| Summary Goal | This use case allows user creating a new subscriber | |
| Pre-conditions | User is in a new customer or new subscriber for existing customer process | |
| Trigger | User has either   * Selected a primary offer or subscriber bundle outside an account bundle * Selected a subscriber bundle in context of an account bundle * Selected a new account bundle with mandatory subscriber bundles | |
| Minimum guarantees | New subscriber is not added into basket with mandatory configuration not highlighted in basket view. | |
| Success guarantees: | New subscriber has been added to the basket | |
| Normal Flow: | 1. Application adds the new subscriber in the basket (A1),(A2),(A3) 2. Application redirects user to the view basket page | |
| Alternative Flows: | A1: User has selected a subscriber bundle in context of an account bundle or subscriber bundle is mandatory for a new account bundle   1. System proposes user to select selective supplementary offers if any 2. Application adds the new subscriber in the basket (A3) 3. Application redirects user to the view basket page   A2: User has selected primary offer/subscriber bundle outside an account bundle but there are selective offers (subscriber bundle case) or offer prerequisite rules on the primary offer   1. Application redirects user to Browse and select subscriber supplementary offers 2. Application adds the new subscriber in the basket (A3) 3. Application redirects user to the view basket page   A3: There are mandatory subscriber attributes or mandatory supplementary offers attributes to configure (and not defaulted or hidden)   1. Application redirects user to configure new subscriber use case. 2. Application adds the new subscriber in the basket 3. Application redirects user to the view basket page | |

#### NSA0090 - Configure subscriber external id (Modified)

|  |  |  |
| --- | --- | --- |
| Configure subscriber external id | | NSA0090 |
| Primary actors | Dealer user  CSR user  Business user | |
| Summary Goal | Allows the user to configure external ID type for the new subscriber | |
| Pre-conditions | There is a new subscriber under subscription | |
| Trigger | User is creating a new subscriber  User is reconfiguring external ids of a subscriber selection in the basket | |
| Minimum guarantees | Application displays error message if either:   * The co-requisite rule specifies an inventory line with no external ID type * the co-requisite rule doesn't specify an inventory line and the external ID type is configured as hidden and is mandatory in the co-requisite rule   Even if the external id type is configured as hidden in the application, if there are more than one inventory type in the inventory line associated to the co-requisite rule, application requests user to configure the external id  User is able to leave this configuration screen without configuring all inventory but without cancelling the new subscriber creation | |
| Success guarantees: | Subscriber external id are configured | |
| Normal Flow: | 1. Application displays list of different external id to configure 2. For every external id, application displays: - The external id value and inventory type if already set (A1) - A form to assign a new inventory item or to set a manual place holder (A2) - A visual cue specifying the external id is not set 3. For a given external id, user specifies an inventory type, enters a value (wildcards allowed and empty is considered as ‘\*’) and click on assign option (A3)(A4) 4. Application research in inventory module available inventory item matching user entered criteria and ‘assign’ it to the external id (A5)(A6)(A7) 5. User set all external id and validate the form (A8) 6. Use case returns | |
| Alternative Flows: | A1: there is no inventory line associated to the co requisite rule   1. Application displays only the external id value 2. Next steps are similar to nominal case   A2: Either there is no inventory line associated to the co requisite rule or inventory module doesn’t allow manual place holder for this external id   1. Application doesn’t display the option to set a manual place holder 2. Next steps are similar to nominal case   A3: Either there is no inventory line associated to the co requisite rule or There is only one inventory type associated to the inventory line   1. User doesn’t specify the inventory type 2. Next steps are similar to nominal case   A4: User selects the advanced search option   1. Application displays similar criteria as in previous form plus additional criteria to refine the search of the inventory item 2. User enters criteria and submits 3. Application searches in inventory module available inventory item matching user entered criteria and ‘assigns’ it to the external id (A6)(A7)(A4bis) 4. Application redirects user to previous form 5. Next steps are similar to nominal case   A4bis: Application is configured to propose more than one inventory to user and more than one available inventory item is matching user criteria   1. Application displays the list of returned inventory item 2. User selects one of them 3. Application ‘assigns’ it to the external id(A7) 4. Application redirects user to previous form 5. Next steps are similar to nominal case   A5: There is no inventory line associated to the co-requisite rule   1. Application set the entered value to the external id   A6: There is no inventory item available for user criteria or inventory module doesn’t answer   1. Application displays relevant error message   A7: Validating an external id causes other external id to be  automatically configured (container concept in  inventory)  1. The application validates with inventory module if reference sets by the user are correct and updates additional external ids with identifiers and types returned from the inventory.  2. Next step are similar to nominal case  A8: User validates the form without having set all external id (even mandatory ones)   1. Use case returns | |

#### NSA0100 - New subscriber configuration (New)

|  |  |  |
| --- | --- | --- |
| New subscriber configuration | | NSA0100 |
| Primary actors | Dealer user  CSR user  Business user | |
| Summary Goal | This use case allows user configuring subscriber attributes, identities and service address, offers parameters and subscriber balances for a new subscriber | |
| Pre-conditions | There is a new subscriber under subscription | |
| Trigger | Either:   * User is in process of acquiring a new subscriber and there is mandatory subscriber information to set and not defaulted * User has selected option from basket to reconfigure a new subscriber | |
| Minimum guarantees | Application prevent to go to next step of subscriber acquisition process if there are mandatory subscriber information to configure  A block of information to set is displayed only if there is something to configure  Blocks can be fold, unfold. By default, if there is mandatory information to set (and not defaulted), application shall present the block as unfold | |
| Success guarantees: | Subscriber information are configured (other than external id) | |
| Normal Flow: | 1. Application displays different blocks of subscriber information to configure (refers to set subscriber attributes, set subscriber contact, configure offer parameters and configure balances use case) 2. User set information and submits 3. Application validates set information 4. Application updates subscriber in basket (A1) 5. Use case returns | |
| Alternative Flows: | (A1) Information have not been correctly set by user (empty mandatory fields or incorrect values)   1. Application displays an error message 2. Next steps are similar to nominal cases | |

Capability 1 Existing Customer and Subscriber management

#### BAM0020 - Modify billing contact (Modified)

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| --- | --- | --- |
| Modify billing contact | | BAM0020 |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | This use case allows the user to modify a billing contact | |
| Pre-conditions | User is logged in.  Application is in the context of a billing account | |
| Trigger | User has selected the option to modify the billing contact | |
| Minimum guarantees | Billing contact has not been modified. | |
| Success guarantees: | Billing contact modification request has been posted | |
| Normal Flow: | 1. The application displays billing contact in editable mode populated with existing values. 2. User updates data information upon consumer inputs (A3). 3. The user submits (A1). 4. The application posts the modification request (A2) 5. The application confirms to the user the request has been posted | |
| Alternative Flows: | A1: User decides to cancel this action   1. Application redirects the user to ‘View billing account information’ use case.   A2: There is a pending billing contact modification for the account   1. Application displays an error message informing the user he can’t submit this modification until previous request has been processed   A3: Account is a Root Residential account and billing address is linked with COP’s person legal address   1. Application informs user that changing the billing address will not be cascade to the owner address (address link break) 2. User updates data information. 3. Next steps are similar to nominal flow | |

#### BAM0010 - View and manage billing account (Modified)

|  |  |  |
| --- | --- | --- |
| View and manage billing account | | BAM0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to view billing account information (account offers and bundle, payment method, billing address and billing extended attributes ~~and pending requests impacting a billing account ,~~ cases and recent interaction impacting this billing account), as a dashboard or synthetic view. | |
| Pre-conditions | * User is logged in * Customer has been identified | |
| Trigger | * User selects ~~a billing account in the customer dashboard~~ to view the account summary | |
| Minimum guarantees | The application is not able to retrieve the account information and display an error message | |
| Success guarantees: | Billing account dashboard is displayed to the user | |
| Normal Flow: | 1. ~~CSR Portal~~ The application displays the contextual customer name, customer reference ~~and customer type~~ 2. ~~CSR Portal~~ The application displays main characteristics of the account (i.e Billing account reference, account active date, account status and account holder) 3. ~~CSR Portal~~ The application displays subscribed offers (i.e. account’s bundle and account offers instances) 4. ~~CSR Portal~~ The application displays billing contact 5. ~~CSR Portal~~ The application displays payment method and parameters if any 6. ~~CSR Portal~~ The application displays all visible account attributes 7. ~~CSR Portal~~ ~~application displays account pending requests~~ 8. The application displays the contextual person (refer to UC PEM0010 - View persona summary) (A1) 9. The application displays the event log (refer to UC INT0100 - Display event logs) 10. The application displays the navigation panel allowing the user to navigate through the hierarchy of the current account | |
| Alternative Flows: | A1: The customer is a business customer   1. The application do not display person section 2. Continue to N9 | |

#### SUM0010 - View and manage subscriber (Modified)

|  |  |  |
| --- | --- | --- |
| View and manage subscriber | | SUM0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows a user viewing a dashboard of the subscriber, summarizing main subscriber information as a dashboard or synthetic view. | |
| Pre-conditions | * User is logged in * Customer has been identified | |
| Trigger | * User selected a subscriber to view its details | |
| Minimum guarantees |  | |
| Success guarantees: | Subscriber dashboard is displayed to the user | |
| Normal Flow: | 1. The application displays the contextual person (refer to UC PEM0010 - View persona summary) (A1) 2. The application displays the parent account name, parent account reference and status 3. The application displays main characteristics of the subscriber (i.e primary identifier, active date, subscriber status, service category) 4. The application displays subscribed offers (i.e. subscriber’s bundle and offers instances) 5. The application displays subscribed recharge promotion offers (RPO) 6. The application displays subscriber contact and address 7. The application displays all visible subscriber attributes 8. ~~The application displays subscriber pending requests~~ 9. The application displays the navigation panel allowing the user to navigate through the hierarchy of the current account | |
| Alternative Flows: | A1: The customer is a business customer   1. The application do not display person section 2. Continue to N9 | |

#### SUM0100 - Swap primary offer/subscriber bundle (Modified)

|  |  |  |
| --- | --- | --- |
| Swap primary offer/subscriber bundle | | SUM0100 |
| Primary actors | Dealer user  CSR  Business User | |
| Summary Goal | This use case allows user reconfiguring the subscriber to complete the swap. | |
| Pre-conditions | User is either migrating a subscriber or changing primary offer and supplementary offers | |
| Trigger | User has selected the primary offer | |
| Minimum guarantees |  | |
| Success guarantees: | New subscriber configuration has been set in the order. | |
| Normal Flow: | 1. Application shall display impact on current balance of the swap specifically if he can lose some money (A1) (A2) (A4) 2. User reviews and updates subscriber attributes (refer to use update subscriber attributes) 3. User selects subscribers supplementary offers he wants (refer to select subscriber supplementary offers use case) 4. User Configures primary offer and offer parameters (refer to configure primary offer parameters use case) 5. User configures new F&F list (refer to use case configure new F&F list) 6. User configures balances (refer to configure balances use case) 7. Application set the migrated subscriber in the basket | |
| Alternative Flows: | A1: User cancels the swap   1. Application redirects user to the customer main page.   A2: Global RP Offer configuration is enabled, user is informed of the impacts of this new PO or SB on subscribed RP Offer, and new RP Offer that will be added automatically   1. Application informs the user with a list of RP Offer that will become suspended and/or disconnected. 2. Application informs the user with a list of RP Offer that will become active again. 3. Application informs the user with a list of RP Offer that will be automatically added (subscribed). 4. User confirms those changes of RP Offer (A3) 5. Next steps are similar to the nominal case   A3: User is informed of the impacts of this new PO or SB on subscribed RP Offer but does not confirm them   1. User selects the cancel option 2. Application redirects the user to parent use case, normal flow to select another Primary Offer or Subscriber Bundle.   A4: CCI specific validation raises an error (e.g. will end with more than N CCIs after swapping, Min value for N = 5)   1. Application redirects the user to parent use case, normal flow to select another Primary Offer or Subscriber Bundle. | |

#### MIH0001 - View C-one policies (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View C-one policies | | EXT | MIH0001 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays list of the policies applies the subscriber based on the policies attached to the offers subscribed | | |
| Pre-conditions | The user is in the context of a subscriber | | |
| Trigger | The user chooses the View Cone policies menu | | |
| Minimum guarantees | A message indicates to the user the fact policies are not available | | |
| Success guarantees: | The application displays the list of policies applied to the subscriber | | |
| Normal Flow: | 1. User chooses the view Cone policies Menu  2. The list of policies applied to the different offers (Primary or Supplementary) is displayed(A1)(A2)   1. The user clicks on view details 2. The application displays the details of the policy (A2) 3. The user click the back link 4. The application redirects the user to step 1 | | |
| Alternative Flows: | A1 : No policy is available   1. The application indicates to the user the fact that no policy is available on this subscriber   A2 : The application is not able to retrieve the Cone policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later. | | |

#### MIH0010 - View failed policies for C-one policies (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View failed policies for C-one policies | | EXT | MIH0010 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the failed policy list for the subscriber | | |
| Pre-conditions | * The user is viewing the Cone policies list * The subscriber is not an “Idle” state | | |
| Trigger | The user chooses the view failed policies link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no failed policy | | |
| Success guarantees: | The application displays the list of failed policies for the subscriber | | |
| Normal Flow: | 1. User chooses the view failed policies Menu 2. The list of failed policies is displayed(A1)(A2) 3. The user chooses the re-queues provision menu(A3) 4. The application re-queues the failed policies 5. The application displays a confirmation message | | |
| Alternative Flows: | A1 : No policy is failed   1. The application indicates to the user the fact that no policy is failed on this subscriber   A2 : The application is not able to retrieve the Cone policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later.   A3 : The user chooses the back menu   1. The application redirects the user to the “MIH0001 - View Cone Policies” use case | | |

#### MIH0011 - View pending policies for C-one policies (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View pending policies for C-one policies | | EXT | MIH0011 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the pending policies list for the subscriber | | |
| Pre-conditions | * The user is viewing the Cone policies list * The subscriber is an “Idle” state | | |
| Trigger | The user chooses the view pending policies link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no pending policy | | |
| Success guarantees: | The application displays the list of pending policies for the subscriber | | |
| Normal Flow: | 1. User chooses the view failed policies Menu 2. The list of failed policies is displayed(A1)(A2) 3. The user chooses the back menu 4. The application redirects the user to the “MIH0001 - View Cone Policies” use case | | |
| Alternative Flows: | A1 : No policy is pending   1. The application indicates to the user the fact that no policy is pending on this subscriber   A2 : The application is not able to retrieve the Cone policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later. | | |

#### MIH0020 - View policy history (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View policy history | | EXT | MIH0020 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the history of the policies applied on the subscriber | | |
| Pre-conditions | The user is viewing the Cone policies list | | |
| Trigger | The user chooses the view policies history link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no policy history | | |
| Success guarantees: | The application displays the history of the policies for the subscriber | | |
| Normal Flow: | 1. User chooses the view policies history Menu 2. The history of the policies is displayed including active or disabled policies(A1)(A2) 3. The user clicks on view details(A3) 4. The application displays the history of the details of the policy ordered by last state change date 5. The user click the back link 6. The application redirects the user to step 1 | | |
| Alternative Flows: | A1 : No policy is failed   1. The application indicates to the user the fact that no policy is failed on this subscriber   A2 : The application is not able to retrieve the Cone policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later.   A3 : The user chooses the back menu   1. The application redirects the user to the “MIH0001 - View Cone Policies” use case | | |

#### MIH0030 - Compare with MIH (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| Compare with MIH | | EXT | MIH0030 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the list of COne and MIH policies and highlight the differences | | |
| Pre-conditions | The user is viewing the Cone policies list | | |
| Trigger | The user chooses the compare policies link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no policy for this subscriber | | |
| Success guarantees: | The application displays the list of COne and MIH policies | | |
| Normal Flow: | 1. User chooses the compare with MIH Menu 2. The application displays (A1)(A2):    1. The list of Cone policies (Active or Disabled)    2. The list of MIH policies 3. The application Highlight the COne policies which are different from MIH policies 4. The user selects one or more policies 5. The user chooses the Reset on MIH link(A3)(A4)(A5) 6. The application reset the selected policies 7. The application displays a confirmation message 8. The user clicks Ok 9. The application redirects the user to step 1 | | |
| Alternative Flows: | A1 : No policy is available   1. The application indicates to the user the fact that no policy is available   A2 : The application is not able to retrieve the policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later.   A3 : The user has not selected a policy   1. The application indicates to the user the fact that at least one policy should be selected 2. The user confirms 3. The application redirect the user to step 3   A4 : The user chooses the Reset All on MIH link   1. The application reset all the MIH policies according to COne policies 2. The application displays a confirmation message 3. The user confirms 4. The application redirect the user step 3   A5 : The user chooses the back menu   1. The application redirects the user to the “MIH001 - View Cone Policies” use case | | |

#### MIH0101 - View MIH policies (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View MIH policies | | EXT | MIH0101 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays list of the policies applies in MIH for the subscriber based on the policies attached to the offers subscribed | | |
| Pre-conditions | The user is in the context of a subscriber | | |
| Trigger | The user chooses the View MIH policies menu | | |
| Minimum guarantees | A message indicates to the user the fact policies are not available | | |
| Success guarantees: | The application displays the list of policies applied to the subscriber | | |
| Normal Flow: | 1. User chooses the view MIH policies Menu  2. The list of policies applied to the different offers (Primary or Supplementary) is displayed(A1)(A2)   1. The user clicks on view details 2. The application displays the details of the policy (A2) 3. The user click the back link 4. The application redirects the user to step 1 | | |
| Alternative Flows: | A1 : No policy is available   1. The application indicates to the user the fact that no policy is available on this subscriber   A2 : The application is not able to retrieve the Cone policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later. | | |

#### MIH0130 - Compare with C-One (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| Compare with C-One | | EXT | MIH0130 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the list of COne and MIH policies and highlight the differences | | |
| Pre-conditions | The user is viewing the Cone policies list | | |
| Trigger | The user chooses the compare policies link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no policy for this subscriber | | |
| Success guarantees: | The application displays the list of COne and MIH policies | | |
| Normal Flow: | 1. User chooses the compare with MIH Menu 2. The application displays (A1)(A2):    1. The list of Cone policies (Active or Disabled)    2. The list of MIH policies 3. The application Highlight the COne policies which are different from MIH policies 4. The user selects one or more policies 5. The user chooses the Reset on MIH link(A3)(A4)(A5) 6. The application reset the selected policies 7. The application displays a confirmation message 8. The user clicks Ok 9. The application redirects the user to step 1 | | |
| Alternative Flows: | A1 : No policy is available   1. The application indicates to the user the fact that no policy is available   A2 : The application is not able to retrieve the policies   1. The application indicates to the user the fact that due to a technical error the policies cannot be displayed and proposes him to retry later.   A3 : The user has not selected a policy   1. The application indicates to the user the fact that at least one policy should be selected 2. The user confirms 3. The application redirect the user to step 3   A4 : The user chooses the Reset All on MIH link   1. The application reset all the MIH policies according to COne policies 2. The application displays a confirmation message 3. The user confirms 4. The application redirect the user step 3   A5 : The user chooses the back menu   1. The application redirects the user to the “MIH001 - View Cone Policies” use case | | |

#### MIH0230 - View quota (3.5.90)

|  |  |  |  |
| --- | --- | --- | --- |
| View quota | | EXT | MIH0230 |
| Primary actors | CSR user | | |
| Summary Goal | The application displays the list of Quota applies to the subscriber | | |
| Pre-conditions | The user is in the context of a subscriber | | |
| Trigger | The user chooses the view quota link | | |
| Minimum guarantees | A message indicates to the user the fact that there is no quota applied on this subscriber | | |
| Success guarantees: | The application displays the list of quota applied to this subscriber | | |
| Normal Flow: | 1. User chooses the view quota menu 2. The application displays the list of quota applied to the subscriber including their detail(A1)(A2) 3. The user chooses the back menu 4. The application redirects the user to the previous screen | | |
| Alternative Flows: | A1 : No quota is available   1. The application indicates to the user the fact that no quota is available   A2 : The application is not able to retrieve the quota   1. The application indicates to the user the fact that due to a technical error the quota cannot be displayed and proposes him to retry later. | | |

Capability 1 Customer identification – IDC (Channel/CSR Portal)

### Capability Description

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### Capability Assumptions/Dependencies

### Capability Use Cases

#### IDC0010 - Identify customer (Modified)

|  |  |  |
| --- | --- | --- |
| Identify customer | | IDC0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows user to retrieve a specific customer | |
| Pre-conditions | User is logged in Application | |
| Trigger | User has selected any option requiring first to identify a customer | |
| Minimum guarantees |  | |
| Success guarantees: | Customer has been retrieved | |
| Normal Flow: | 1. Application proposes the different search options available (refer to search customers, search subscribers and search persona use cases) 2. User selects a customer(A1)(A2)(A4) 3. Application sets the application context with the selected customer and redirect the user to a summary of the customer | |
| Alternative Flows: | A1: Customer can’t be synchronized and time out is reached   1. Application displays an error message to inform the user that for technical reason, the customer can’t be accessed.   A2: User chooses refresh link (Business application only)   1. The application warns the user on the potential impact on the systems of the resynchronization of a large company 2. The user confirm the resynchronization(A3) 3. The application trigger a resynchronization and indicate to the user the fact that a resynchronization is in progress   A3 : The user reject the resynchronization   1. The user is redirected to step 1   A4 : The CSR admin is in the context of the business application only   1. The application redirects the user to the customer hierarchy management | |

#### IDC0020 - Search customers (Modified)

|  |  |  |
| --- | --- | --- |
| Search customers | | IDC0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows a dealer to search customers based on customer criteria (i.e. root account criteria) | |
| Pre-conditions | Dealer is logged in Application | |
| Trigger | Dealer wants to identify a customer | |
| Minimum guarantees | In case of integrated with billing, Application will limit number of customers retrieved through the search | |
| Success guarantees: | Customer list is displayed to the user | |
| Normal Flow: | 1. Application displays customer attributes (criteria) supported to search customers 2. User set attributes and submit 3. Application processes the search (A1) 4. Application display list of found customers (A2)(A3) | |
| Alternative Flows: | A1: Application is integrated with Comverse one billing   1. Application call a search service to process the search in the billing 2. Next step is similar as nominal case (A4)   A2: There is no customer matching criteria   1. Application displays an error message to inform the user there is no customer matching criteria   A3: There are too many customers matching criteria   1. Application displays an error message to inform the user there are too many customers matching criteria and suggest him to refine his search   A4: Application can’t process the search for any technical reason   1. Application display an error message to inform user that for technical reason the service is temporarily unavailable | |

#### IDC0100 - Search persona (New)

|  |  |  |
| --- | --- | --- |
| Search persona | | IDC0100 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows a user to search customers based on person criteria (i.e. person criteria) | |
| Pre-conditions | User is logged in Application | |
| Trigger | User wants to identify a customer | |
| Minimum guarantees | Application will limit number of customers retrieved through the search | |
| Success guarantees: | Customer list is displayed to the user, including personas per customer | |
| Normal Flow: | 1. Application displays person attributes (criteria) supported to search customers 2. User set attributes and submit 3. Application processes the search (A3) 4. Application display list of found customers (A1)(A2) | |
| Alternative Flows: | A1: There is no customer matching criteria   1. Application displays an error message to inform the user there is no customer matching criteria   A2: There are too many customers matching criteria   1. Application displays an error message to inform the user there are too many customers matching criteria and suggest him to refine his search   A3: Application can’t process the search for any technical reason   1. Application display an error message to inform user that for technical reason the service is temporarily unavailable | |

Note: Criteria to be defined as requirements see wireframe for a default list of core attributes

Capability 1 Product selection

#### PRS0040-Browse and select account bundle (Modified)

|  |  |  |
| --- | --- | --- |
| Browse and select account bundles | | PRS0040 |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | This use case allows a user to browse account bundles | |
| Pre-conditions | Only account bundles with no selective subscriber bundles and account bundles eligible for the account are proposed  In case of swap primary offer use case, there is already an account bundle for the subscriber parent account. | |
| Trigger | Either:   * User is browsing the catalog in browse catalog to inform * User wants to subscribe to an account bundle for a new account * User wants to subscribe to an account bundle for an already existing account * User wants to subscribe to a new subscriber in context of account bundle already subscribed * User is swapping a subscriber to a subscriber bundle part of an account bundle already subscribed | |
| Minimum guarantees | Application displays only eligible account bundles  Application allows user to:   * Access to detail of the account bundle (refer to view account bundle use case detail) * Access to detail of any subscriber bundle of the account bundle (refer to view subscriber bundle detail)   Application allows user to select only one account bundle at a time when several account bundle are proposed. | |
| Success guarantees: | Account bundle and subscriber bundles inside the account bundle are displayed | |
| Normal Flow: | 1. User selects account bundle tabs to subscribe an account bundle for a new account (A1)(A2)(A3)(A4) 2. Application displays all eligible account bundles with the first one selected by default 3. For selected account bundle, Application displays - Mandatory and selective account offers to configure - Mandatory subscriber bundles to configure - Optional subscriber bundles that can be subscribed 4. User configures the selected account bundle (refer to use case add account bundle for new account) | |
| Alternative Flows: | A1: User is browsing catalog in browse catalog to inform   1. Application displays all eligible account bundles with the first one selected by default 2. For selected account bundle, Application displays in read only mode (user can’t configure anything) - Mandatory and selective account offers - Mandatory subscriber bundles - Optional subscriber bundles 3. User accesses to detail of account bundle and subscriber bundles as well as in nominal case   A2: User selects account bundle tab to subscribe to an account bundle for an account already existing   1. Application displays all eligible account bundles with the first one selected by default 2. For selected account bundle, Application displays (in read only mode) - Mandatory subscriber bundles  - Optional subscriber bundles   A3: User selects account bundle tab to subscribe a new subscriber in context of an account bundle (already subscribed or in basket)   1. Application displays only the subscribed account bundle 2. Application displays the list of optional subscriber bundles similarly as in nominal cases (A3 bis) 3. User subscribe new subscribers same way as in add account bundle for a new account   A4: User selects the account bundle tab to swap a subscriber   1. Application displays the account bundle already subscribed on the account as selected (A4bis) 2. Application displays ‘compatible ‘ subscriber bundles with current primary offers of the subscriber to swap 3. User selects the target subscriber bundle   A4 bis: there is no optional subscriber bundle ‘compatible’ with the current subscriber primary offer/bundle   1. Application displays a message explaining there is no account bundle compatible with the subscriber | |

#### PRS0090-Add account bundle for new account (Modified)

|  |  |  |
| --- | --- | --- |
| Add account bundle for new account | | PRS0090 |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | This use case allows a user to subscriber to an account bundle in context of a new account (NCA or NSA for new sub account) | |
| Pre-conditions | User is in context of creating a new account | |
| Trigger | User has selected an account bundle | |
| Minimum guarantees | Application prevents user to add account bundle without configuring correctly selective account offers and selective SO in mandatory subscriber bundle and optional subscribed subscriber bundles | |
| Success guarantees: | Account bundle, mandatory account offers, selective account offers with respect of max selective offers, subscribers for mandatory subscriber bundles are added to the basket  Additional optional subscriber bundles selected by the user are added to the basket | |
| Normal Flow: | 1. User configure account selective offers 2. User configures selective offers of mandatory subscriber bundles 3. User selects zero to more optional subscriber bundles 4. User submits 5. Application adds the account bundles and account mandatory and selective offers to the basket 6. Application subscribes mandatory subscriber bundles and optional selected subscriber bundles thanks to new subscriber use case (refer to new subscriber use case) | |
| Alternative Flows: |  | |

#### PRS0095-Add account bundle for existing account (New)

|  |  |  |
| --- | --- | --- |
| **Add account bundle for existing account** | | **PRS0095** |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | This use case allows a user to subscriber to an account bundle in context of an already existing account | |
| Pre-conditions | User is in context of an existing account  There is no already subscribed account bundle on the account | |
| Trigger | Either:   * User has selected option to subscribe an account bundle from the account * User is acquiring a new subscriber for an existing account and have selected an account bundle | |
| Minimum guarantees | Application prevents user to add an account bundle is there is already a pending request to add an account bundle on the account  Application prevents user to add an account bundle without respecting the rule regarding mandatory subscriber bundles either by creating a new subscriber or transferring in an existing subscriber  Application prevents user to transfer in two existing subscribers for the same mandatory subscriber bundle  Application prevents user to add account bundle without configuring correctly selective account offers and selective SO in mandatory subscriber bundle and optional subscribed subscriber bundles  Application prevents transferring into the account bundle a subscriber with a current primary offer/subscriber bundle not compatible with any subscriber bundle provided in the context of the account bundle.  Application prevents transferring in a subscriber that can’t be swapped for any reason (status, swap of the subscriber already in progress…) | |
| Success guarantees: | Account bundle, mandatory account offers, selective account offers with respect of max selective offers, subscribers for mandatory subscriber bundles are added to the basket  Additional optional subscriber bundles selected by the user are added to the basket  For subscriber , it can be either a new subscriber or a swap of an existing subscriber  If there are already subscribed account offers or supplementary offers for a transferred in subscriber and mandatory in the account bundle or in the target subscriber bundle, application automatically transfer them as mandatory | |
| Normal Flow: | 1. Application displays candidate account bundles (refers to browse account bundle use case)(A5) 2. Application displays already existing subscribers of the current account with the primary offer/subscriber bundle 3. User selects an account bundle 4. Application displays detail of the selected account bundle (refers to browse account bundle use case) 5. User selects the option to calculate the target account bundle distribution (A1)(A2) 6. Application displays the future distribution automatically creating new subscribers for mandatory subscriber bundles 7. Users continues (A3) 8. Application displays included account offers plus selective account offers to configure 9. Application displays all subscribers either created or transferred in with their included offers and their selective offers to configure 10. User configures selective offers for account and subscribers (A4)(A5) 11. User submits 12. Application displays balance impacts for swapped subscribers 13. User continues 14. Application adds the new account bundle in the basket plus account offers to add, account offers to disconnect and account offers to transfer in the account bundle   11. Applications adds new subscribers (refer to new subscriber use case)  12. Application adds subscriber to swap (refer to swap subscriber use case)  13. Application redirects user to view basket | |
| Alternative Flows: | A1: there is at least one ‘swappable’ subscriber on the current account and user decides to transfer it on the account bundle and the subscriber has already a subscriber bundle provided in context of the account bundle  1. User selects the subscriber  2. User selects the option to calculate the target account bundle distribution (A1 bis)  3. Application displays the future distribution including the subscriber either as mandatory subscriber bundle or optional depending if the current subscriber bundle is declared as mandatory or optional in the account bundle  4. Next steps are similar to nominal case  A1 bis: The subscriber bundle of the current subscriber maps with a mandatory subscriber bundle in the account bundle but there is already another existing subscriber with same subscriber bundle (current or swapped) selected  1. Application advises user the subscriber can’t be transferred in because of another transferred in subscriber for same mandatory subscriber bundle.  A2: there is at least one ‘swappable’ subscriber on the current account and user decides to transfer it on the account bundle and the subscriber has a primary offer or a subscriber bundle not proposed in the account bundle  1. User selects the subscriber  2. Application displays a visual cue alerting user he can’t transfer in without swapping  3. User selects the option to swap the the subscriber  4. Application displays allowed target subscriber bundles part of the account bundle according to swap logic (A2bis)  5. User selects a subscriber bundle  6. Application recalculates the target distribution list  A2 bis: there is no candidate subscriber bundle for the swap  1. Application displays a message specifying the subscriber can’t be swapped because there is no target subscriber bundles compatible  A3: User decides to add a subscriber for an optional subscriber bundle  1. User selects the add option in the target account distribution  2. Application proposes optional subscriber bundles  3. User selects a bundle  4. Application adds the new subscriber to the target distribution list  A4: there is an account offer or a Subscriber supplementary offer already subscribed that can be used as selective  1. Application by default proposes it as selective  2. User unselect it  3. Application displays by default information that the offer will be transferred as optional (A4 bis)(A4 ter)  4. User confirms  A4 bis: the supplementary offer can’t be transferred as optional in the subscriber bundle and can be outside the subscriber bundle  1. Application shows to user offers will be disconnected  A4 ter: the offer (account offer or supplementary offer) can be transferred as optional or can be subscribed outside bundle but the user prefers to disconnect it   1. User selects the disconnect option   A5: There is already a pending request on the account to add an account bundle   1. Application displays an information message explaining user he can subscribe to an account bundle as there is already one requested to be subscribe | |

Capability 1 Checkout

#### CHK0010 – Checkout (Modified)

|  |  |  |
| --- | --- | --- |
| Checkout | | CHK0010 |
| Primary actors | Dealer user  CSR user  Business User | |
| Summary Goal | Allows the user to checkout his basket. | |
| Pre-conditions | The basket content is valid  User has accepted terms and conditions in basket. | |
| Trigger | User has selected checkout option | |
| Minimum guarantees | The user can cancel the checkout at any moment before the last confirmation step, the submission. | |
| Success guarantees: | The user has entered successfully all information required by the checkout and has submitted the order.  Application has posted a new order with all the order information necessary to the backend.  Order number has been assigned and displayed | |
| Normal Flow: | 1. Application basket or RPO selection is ready for checkout (A2)  2. ~~Application displays terms and conditions (A4)~~  3. User accepts terms and conditions for the customer (A5)(A12)  4. Application displays a confirmation of the order to review with the customer. Refer to use case Review order. (A1)  5. After getting customer agreement, user submits the order (A3)(A6)(A7)(A8)(A9)  6. Application displays a message informing the user that the order has been successfully submitted and an order number is returned. User must give this order number to the customer, for further communication with the CSR. | |
| Alternative Flows: | A1: User cancels (A1bis)  1. Application redirects the user to the view and manage basket use case  A1bis: Basket contains only RPO or user cancels his  RPO selection  1. Application redirects the user to the ‘view and manage subscriber ’ use case  A2: The content of the basket is not valid for checkout  1. Application displays an error message informing the user why the basket is not valid for checkout  A3: Does not apply to RPO selections  ~~A4: No terms and conditions exist for any selected products~~  ~~1. Application redirects the user to the next nominal flow step 3~~  ~~A5: User refuse terms and conditions after discussing them with the customer~~  ~~1. User selects the deny option~~  ~~2. Application redirects the user to the ‘view and manage basket’ use case. (A1bis)~~  A6: User adds one deposit to the order  1. Channel application redirects user to add deposit use case  2. User sets deposit  3. Channel application adds the deposit to the order at the account level  4. Channel application redirects user to step 5 of nominal use case  A7: User removes a deposit from the order  1. Channel application removes the deposit from order  2. Channel application redirects user to step 5 of nominal use case  A8: User adds a prepayment to the order  1. Channel application redirects user to register prepayment use case  2. User registers the prepayment  3. Channel application adds the prepayment to the order at the account level  4. Channel application redirects user to step 5 of nominal use case  A9: User removes a prepayment from the order  1. Channel application removes the prepayment from order  2. Channel application redirects user to step 5 of nominal use case  A10: There are upfront costs to pay immediately and user has either selected the option to pay now and be debited immediately or the option to pay now and be debited at shipping  1. Application redirects user to the pay order ’s upfront cost by credit card use case (A11)  2. System submits the order  A11: Payment or authorization fails  1. Application redirects user to order review  A12: Application is configured to support delivery address and there are some goods to deliver  1. Application redirects user to use case set order delivery address  2. Next steps are similar to nominal case | |

Capability 1 Consumption Control Items

#### CCI0010 - View Control Consumption items (New)

|  |  |  |
| --- | --- | --- |
| View Consumption Control items | | CCI0010 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to view control consumption items for an account or subscriber, in a list. | |
| Pre-conditions | * User is logged in * Customer has been identified   Either   * User is in viewing the account dashboard * User is in viewing a subscriber dashboard | |
| Trigger | User selects the option to view the list of Control Consumption items | |
| Minimum guarantees | The application is not able to retrieve the CCIs and display an error message | |
| Success guarantees: | A list of CCIs instances is displayed to the user | |
| Normal Flow: | 1. Application calls the billing to get the list of CCIs 2. Application displays a waiting message if process is too long (A1)(A2) 3. Application displays the CCIs    1. Name    2. Accumulator value    3. Max Consumption Limit    4. Indicator (higher or lower than limit)    5. Percentage consumed | |
| Alternative Flows: | A1: Timeout is reached   1. Application displays an error message informing the user the service is temporarily unavailable and invite to try later   A2: There are no CCIs to display   1. Application displays an error message informing the user there is no CCI to display | |

#### CCI0020 - Reconfigure Control Consumption items (New)

|  |  |  |
| --- | --- | --- |
| Reconfigure Consumption Control items | | CCI0020 |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to reconfigure (override) control consumption items that allow being reconfigured. | |
| Pre-conditions | * User is logged in * Customer has been identified * CCI configuration allows for a Max Consumption Limit value modification (i.e. override)   Either   * User is viewing the list of CCI instances * User is viewing details of a CCI | |
| Trigger | User selects the option to configure a Control Consumption item | |
| Minimum guarantees | The application is not able to retrieve the CC item details and display an error message | |
| Success guarantees: | The selected CCI has been reconfigured. | |
| Normal Flow: | 1. Application calls the billing to get the selected CCI details (A1)(A2) 2. Application displays the existing configuration of the CCI 3. User sets a new value for the Max Consumption Limit (e.g. unlimited, new value or in %) 4. Applications calls the billing to set this new limit value 5. Application validates the new limit value (i.e. New value of Max Consumption Allowance is higher than current accumulator value) (A1) (A2) 6. Application displays a waiting page (A3) 7. Application displays a message to confirm the new configuration has been done 8. User confirms 9. Application redirects the user to the list of CCIs, updated with the new limit configuration | |
| Alternative Flows: | A1: User has not set a correct limit value (e.g. incompatible with accumulator type)   1. Application displays an error message informing the limit value is not correct 2. User sets a new value and submits 3. Next steps are similar to the nominal cases   A2: New value of Max Consumption Allowance is lower than current accumulator value   1. Application displays a warning message like “The entered Value is less than the current accumulator value so future usage will be prohibited” 2. User selects confirms 3. Next steps are similar to the nominal cases   A3: Timeout has been reached or an error has occurred   1. Application displays an error message informing the service is temporally unavailable and to try later   A4: User sets the limit to Unlimited   1. Application calls the billing to set the limit to unlimited 2. Next steps are similar to nominal case. | |

Capability 1 Account subscriber activity history (PPCV related 3.7.6)

#### ACA0200 View phonebook history

|  |  |  |
| --- | --- | --- |
| **View phonebook history** | | **ACA0200** |
| Primary actors | Dealer User  CSR user | |
| Summary Goal | This use case allows the user to view phonebook history for a specific subscriber | |
| Pre-conditions | * User is logged in * Customer has been identified * User is in the context of a subscriber | |
| Trigger | The user chooses the view phonebook history link | |
| Minimum guarantees | * Everytime the application displays the history, the list will reflect the current backend state of the history, if not, then application will propose user to refresh it. * In case of action in the application, that would have an impact on history (e.g. adding, removing a home location), application shall ensure the list will be automatically refreshed * If no history exist, then application shall inform the user that there is no history for the current subscriber | |
| Success guarantees: | The applications displays the list of phonebook history items for the contextual subscriber | |
| Normal Flow: | 1. User enters criteria to search home location history (start & end date/time) 2. Application searches and displays retrieved history, respecting entered search criteria (A1)(A2) 3. The user selects one of the history line 4. The application displays the details of the history (Refer to use case ACA0210 - View phonebook record details) | |
| Alternative Flows: | A1: There is no history for the entered criteria  1. Application displays a message specifying no history has been found  A2: There are more returned history matching criteria than maximum number allowed   1. Application displays a message to inform user that more than X history have been found and he should refine his search criteria 2. Application displays the maximum number of histories allowed (limited to X) 3. Redirect the user to step 1 | |

#### ACA0210 View phonebook record details

|  |  |  |
| --- | --- | --- |
| **View phonebook record details** | | **ACA0210** |
| Primary actors | CSR user  Dealer user | |
| Summary Goal | This use case displays the details of a phonebook record. | |
| Pre-conditions | User is in the context of a phonebook record | |
| Trigger | User has selected the option to view details of a phonebook record | |
| Minimum guarantees | * In case of action in the application, that would have an impact on home location record details, application shall ensure they will be automatically refreshed | |
| Success guarantees: | System displays phonebook record details. | |
| Normal Flow: | 1. User selects the option to view details of a phonebook record 2. Application displays details, i.e. the following information    * Account category    * Active Date    * Creation Date    * Currency Code    * Current State    * Date Enter Active    * Destination number 1 to 10    * Home location 1 to 4    * Inactive Expire Date    * Inactive Date    * Previous State | |
| Alternative Flows: |  | |

# Requirements - Non-functional

Reliability, Availability, and Maintainability Requirements

For systems, and in particular real time systems used in critical areas telecommunication control, RAM requirements need to be stated.

Availability: The ability of a system to be in a state to perform a required function under given conditions at a given instant of time or during a given time interval. At its simplest level,. Availability = Uptime / (Downtime + Uptime). From the design area of concern this equation translates to Availability(Intrinsic) Ai = MTBF / (MTBF + MTTR) where MTBF = Mean time between failures and MTTR = Mean time to repair / Mean time to replace. The time units are generally hours and the time base is 1 year. Availabilities range from 0 to 1 corresponding from no availability to 100% availability. Where this feature is critical to the customer’s business objective, availability requirement must be stated.

Reliability: The ability of a system to perform a required function under given conditions for a given time interval. The reliability is expressed as a probability (0-1 or 0 to 100%). The reliability is essentially an indication of probability that the item will not fail in the given time period. Where this feature is critical to the customer’s business objective, availability requirement must be stated.

Maintainability: The ability of a system under given conditions of use, to be retained in, or restored to, a state in which it can perform a required function, when maintenance is performed under given conditions and using stated procedures and resources. Where this feature is critical to the customer’s business objective, Maintainability requirements must be specified.

No new requirements.

Encryption Requirements

No new requirements.

Cost of Goods Sold Considerations

Describe the monetary cost impact of the feature on the overall system. It must also address 3PP software license costs as well as changes in platform hardware that will alter the hardware cost elements of a system.

No new requirements.

Performance Considerations

No new requirements.

Documentation Considerations

*This section is not intended to be a cut-and-paste of the manual, but rather a list of key topics to be addressed in the manual, and key considerations from this feature.*

No new requirements.

Out of the Box/Quick Start

No new requirements.

This section should contain requirements for the Quick Start configuration for this feature. This includes static, business and example data. There is a specific DR for each release for OOTB/Quick Start and this information should be reflected in that document as well.

*Use your best judgment as to whether you think your feature would be applicable to an update of the static, business or example data.*

## Migration

This section should contain any considerations for data migration. Discuss whether this feature implements a business model that may be existing in another system (and thus require migration), or whether all accounts are set to some initial state for this feature upon migration. Discuss any dependencies between databases or account models (i.e. multi-play accounts) that would need to be addressed during a migration.

No new requirements.

## Installation

This section should discuss any initial configuration needs that should be part of installation. For each component affected or introduced by this feature, discuss whether the component is new or existing (and as result can use existing or new installers), and any dependencies which would influence the order of installation of the components.

No new requirements.

## Upgrade

*This section should discuss any configuration changes that should be part of an upgrade. For each component affected or introduced by this feature, discuss whether the component is new or existing (and as result can use existing or new upgrade utilities), and any dependencies which would influence the order of upgrade of the components.*

No new requirements.

## Archiving

*This section should discuss any considerations for archiving. This includes any storage requirements for historic data (i.e. number of days), and any dependencies among the data that would influence archiving (so as not to create incomplete data by only archiving a portion).*

No new requirements.

## Disaster Recovery

*This section should discuss how the data model and physical distribution of the feature affect the DR solution. In particular, what should users of this feature experience during or after a switchover? What data must be synchronized before normal activities can resume, vs. data that can be rolled back or overwritten?*

No new requirements.

## Operations Manual

*Any operational considerations (startup, shutdown, troubleshooting, monitoring, regular administrative activities, etc.) should be documented here. This section is not intended to be a cut-and-paste of the manual, but rather a list of key topics to be addressed in the manual, and key considerations from this feature.*

No new requirements.

Acceptance Test Plan Considerations

No new requirements.

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# Requirements Summary

This section will attempt to do some degree of requirements management. A word template and document mostly manually this section attempts to capture requirements data that is input to or output from scoping and prioritization activities.

## Requirements List Grouped by “Capability”

This is a table of contents that should be updated as requirements are added or “removed”. To update, right click in the table, choose Update Field.

[3.1 General Requirements 7](#_Toc338768185)

[PEM-3.1.10 – Sample 7](#_Toc338768186)

[3.2 Capability 1. Person Creation 7](#_Toc338768187)

[3.2.4 Application requirements 9](#_Toc338768188)

[3.3 Capability 2. Person Management 9](#_Toc338768189)

[3.3.4 Application requirements 15](#_Toc338768190)

[3.4 Capability 3. Person Search 15](#_Toc338768191)

[3.5 Capability 4. Person Creation 20](#_Toc338768192)

[3.5.4 Application requirements 21](#_Toc338768193)

[4.1 Reliability, Availability, and Maintainability Requirements 22](#_Toc338768194)

[No new requirements. 22](#_Toc338768195)

[4.2 Encryption Requirements 22](#_Toc338768196)

[No new requirements. 22](#_Toc338768197)

[4.3 Cost of Goods Sold Considerations 22](#_Toc338768198)

[No new requirements. 22](#_Toc338768199)

[4.4 Performance Considerations 22](#_Toc338768200)

[No new requirements. 22](#_Toc338768201)

[4.5 Documentation Considerations 22](#_Toc338768202)

[No new requirements. 22](#_Toc338768203)

[4.6 Out of the Box/Quick Start 22](#_Toc338768204)

[No new requirements. 22](#_Toc338768205)

[No new requirements. 22](#_Toc338768206)

[No new requirements. 22](#_Toc338768207)

[No new requirements. 23](#_Toc338768208)

[No new requirements. 23](#_Toc338768209)

[No new requirements. 23](#_Toc338768210)

[No new requirements. 23](#_Toc338768211)

[4.13 Acceptance Test Plan Considerations 23](#_Toc338768212)

## Additional Requirements Information

This section is maintained manually as there does not appear to be any way to get each individual requirement cross referenced into individual table cells. For Priority the values should be 1=Must Have, 2=Conditional, 3=Nice to Have. Target phase is either a targeted release or perhaps OOS for out of scope requirements.

| **Requirement** | **Priority** | **Target Phase** | **Comments** |
| --- | --- | --- | --- |
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