Requirements/

**BI Reporting Changes 01**

Revision History

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 2/18/2015 | 1.0 | Initial Version with Requirements | Roger Behm |
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# Business Requirements

## Purpose of the Design Specification

The Requirements/design document will describe the support for commercial carts for new and existing customers within the Capture system. This functionality will include Side Load as a route type option. Currently Capture does not support .

### Business Functional Requirements / Configuration

| **Business Functional Requirement** | **Notes** |
| --- | --- |
| Create point in time snapshots of a quote during specific quote actions. | The following actions will be recording during the lifespan of a quote   1. Create\_quote when entered a configurator 2. Configured\_quote once it hit the pricing page 3. Submitted for Approval 4. Approved or Rejected -(how to determine action) 5. Documents with Customer 6. Finalized |
| A list of reportable fields will be used to build the BI Capture tables | Please see attached mapping document |
|  |  |

### 

### Technical Design Requirements

| **Technical Design Requirement** | **Notes** |
| --- | --- |
| Within Capture create variable reportingStatus\_quote. | This variable should be populated based on the following text during associated actions:   1. Create\_Quote - when entered a configurator (3rd page of a quote) 2. Configured\_Quote - when the user enters the pricing page from config 3. Submitted\_for\_Approval – when the “Submitted for Approval” SalesEngine Commerce Process step is activated. This can be found Admin 🡪 Commerce Process Definition 🡪 SalesEngine Commerce Process (Steps) click List 4. Approved or Rejected – based on approval decision in step 3. Under “Submitted for Approval” 🡪 Admin: Next will signify an “Approved” status, Reject will signify a “Rejected” status. 5. Documents with Customer 6. Finalized |
|  |  |
|  |  |

# Assumptions

The following items are assumptionsout of scope

* The concept of a small\_container\_factors table for division specific variables
* Cost
* Cart Multipliers (1st vs 2nd and subsequent lifts)
* ROI Factor (currently 6.5 for all)
* Safety cost with driver leaving the truck
* The exercise of updating the configuration templates will need to be performed by the divisions.
* Changes to trucks data table to incorporate multipliers or time adjustments for carts on the basis of truck type (Operations suggested that the primary differential in service times is determined by the type of truck and any technology modifications to truck). Nonetheless, for divisions where carts are predominate, it is assumed that such factors are already included in their division stats.
* Container sizes not included in BFR001 will not be supported or translated into a different size.

Other Assumptions

* The cart sizes outlined in BFR001 will account for just over 98% of carts currently deployed.  Note that the specific cart code is dependent on waste type selection at a minimum.  As part of the process, we’ll need to make sure that any supported cart types (e.g., CA, RC and SL) have parts data fully populated (TDR-001).

# Technical Design

## Referenced Documents

None

## Process Flow and Mock Ups

Use current container process flow and logic

Mockups hopefully to come soon…

## Functional Logic

Use current container functional and pricing logic

## Data Sources & Mapping

For detailed mapping information, please refer to the BMI [Enterprise Mapping Document](http://itpmo-2013projects/Pricing%20Initiative/2.0%20Planning%20and%20Requirements/BMI%20Enterprise%20Mapping%20Document.xlsx).

## InfoPro Interface

Per email from Candace to Brittany on 9/29/14, InfoPro developers confirmed as long as the container type/size information comes to us in the existing XML tags there should be no issue on our side

# Report Changes

No Changes

# Technical Architecture

## Infrastructure Considerations

No changes to infrastructure.

## Data Retention

No changes to data retention.

## High Availability

Not Applicable.

## Backup, Rollback and Recover

No changes to backup and recovery procedures.

# Other Design Specifications

## Build/Configure Standards

Reference Aldon procedures for Capture.

## Policies and Procedures

Conforms to all published IT policies and procedures.

## Security Design

### New or Existing Security

No Changes.

### Hierarchal Data Access

No Changes.

### Infrastructure

No Changes.

## Environmental

No Additional environmental requirements.

# Appendix