Requirements/Design Specification

**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 – Beckie to provide * The key for the header data will be quoteNumber\_quote and reportingStatus\_quote (net yet created) * The key for the detail will remain the same pul the reportingStatus\_quote |
|  |  |

### 

### 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 – triggered once the users moves from the pricing page to generate docs 6. Quote\_Finalized – created during our current finalized action processed |
| Send quote information to InfoPro | TIBCO will continue to send InfoPro quotes but only if the isSaleFinalized\_quote is equal to True (1) |
| Sending qutoes to BI | TIBCO will send all quotes it received to BI |

# Assumptions

The following items are assumptionsout of scope

# 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

No change. InfoPro will continue to receive the same data from TIBCO

# 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