Requirements/Design Specification

**BI Reporting Changes 01**

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 2/18/2015 | 1.0 | Initial Version with Requirements | Roger Behm |
| 2/26/2015 | 1.1 | Updated design with Beckie’s mapping doc | Roger Behm |
| 2/27/2015 | 1.2 | Draft | Mike Boylan |
| 3/11/2015 | 1.5 | Added mechanism to determine who approved/reject a quote with reason txt | Roger Behm |
|  |  |  |  |

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# Business Requirements

## Purpose of the Design Specification

This project will facilitate the development of transaction-level analysis and reporting using Capture data.  The successful completion of this project will result in a less labor intensive and error-prone method for transferring Capture line item level data from Capture to our BI data warehouse.  This data will then be used to support various sales and pricing initiatives including sales compensation reporting, general Capture reporting, pricing analysis, and sales agent performance analysis.  This process will replace the current reliance on the Big Machines reporting interface, which has proven to have significant load limitations and is not a viable solution for enterprise reporting.

### 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 recorded during the lifespan of a quote, sending a snapshot to TIBCO:   1. **Created** – The quote progresses to ***3) Select Service Offering*** 2. **Configured** – The quote progresses to ***4) Provide Pricing*** 3. **Submitted** – The quote progresses to ***5) Obtain Approvals***. 4. **Approved** **–** All approval levels are met within ***5) Obtain Approvals*** or no approvals are necessary and the quote progresses to ***6) Generate Documents***. 5. **Rejected** – any one approval level is rejected within ***5) Obtain Approvals.*** 6. **Finalized** – the quote is finalized and cannot be revised after completing ***7) Finalize Quote***. 7. **Deleted –** the user marks the quotes as deleted and is no longer counted toward any metrics 8. **Abandonded –** after 90 days of inactivity the quote is marked abandonded, cannot be reopened and should not be reported on by normal metrics   Note that status can move back and forth as the user moves back and forth through the quote. |
| A list of reportable fields will be used to build the BI Capture tables | * Please see attached mapping document * The key for the header data will be quoteNumber\_quote, \_last\_modified\_date (timestamp) and reportingStatus\_quote (not 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 actions:   1. **Created**  – The ***Next*** button is clicked within *2) Enter Customer Site Information.* 2. **Configured** – when either of the following conditions are met:    1. The ***Next*** button is clicked within *3) Select Service Offering*.    2. The ***Next*** button is clicked within the line item grid for *Additonal Items*. 3. **Submitted** - when the ***Submit*** button is clicked within the *Submit Comment* dialog box. 4. **Approved** - when either of the following conditions are met:    1. No approvals are necessary and the ***Next*** button is clicked in *4) Provide Pricing*    2. All green check mark icons have been clicked within *5) Obtain Approvals* 5. **Rejected** – when any red X mark icon has been clicked within *5) Obtain Approvals*. 6. **Finalized** – when the ***Finalize*** button is clicked within *7) Finalize Quote*. 7. **Deleted** – when the delete button is clicked anywhere within the application. 8. **Abandoned** – 90 days after no activity the quote will be marked abandonded automatically by internal scheduler.   XML must be sent to TIBCO only after all action processing has been complete and the reportingStatus\_quote variable has been correctly set.  The ***Previous, Reconfigure*** and ***Revise*** buttons will never change status on their own. Status will only change according to the conditions above as the user moves forward from the landing spot after clicking ***Previous, Reconfigure*** or ***Revise***. See assumptions for justifications. |
| 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 |
| Determine which approver rejected or approved a quote | Here is the snippet of XML that will provide that information. The performer is the user login (network id) that peformed the action  <approval\_history>  <approval\_history\_attr var\_name="approval\_history\_submit\_quote">  <approval\_history\_attr\_record>  <performer\_name>  <![CDATA[ behmro ]]>  </performer\_name>  <action\_type>Submit</action\_type>  <reason\_name>  <![CDATA[ null ]]>  </reason\_name>  <reason\_var\_name>  <![CDATA[ null ]]>  </reason\_var\_name>  <perform\_date>2015-03-10 16:51:37</perform\_date>  <comment>  <![CDATA[ Roger Test Level 1 Approval ]]>  </comment>  </approval\_history\_attr\_record>  <approval\_history\_attr\_record>  <performer\_name>  <![CDATA[ behmro ]]>  </performer\_name>  <action\_type>Reject</action\_type>  <reason\_name>  <![CDATA[ Level 1 Approval Required ]]>  </reason\_name>  <reason\_var\_name>  <![CDATA[ level1ApprovalRequired ]]>  </reason\_var\_name>  <perform\_date>2015-03-10 16:57:00</perform\_date>  <comment>  <![CDATA[ test reject level 1 ]]>  </comment>  </approval\_history\_attr\_record>  </approval\_history\_attr>  </approval\_history> |

# Assumptions

* 1. Any quote with status ***Work in Progress*** before this functionality is implemented will not have status set or XML sent to TIBCO unless it is opened and one of the operations described in **TDR-001** is completed inside the quote.
  2. Any quote started will not receive a status or send XML to TIBCO until configuration starts as described in **TDR-001.**
  3. Leaving the quote at any point will have no effect on status .
  4. Moving back through a quote using the ***Reconfigure***, ***Previous*** or ***Revise*** buttons will have no effect on status until one of the operations described in **TDR-001** is completed.
  5. Re-assigned and claimed quotes will go through the normal process described in **TDR-001.**

# Technical Design

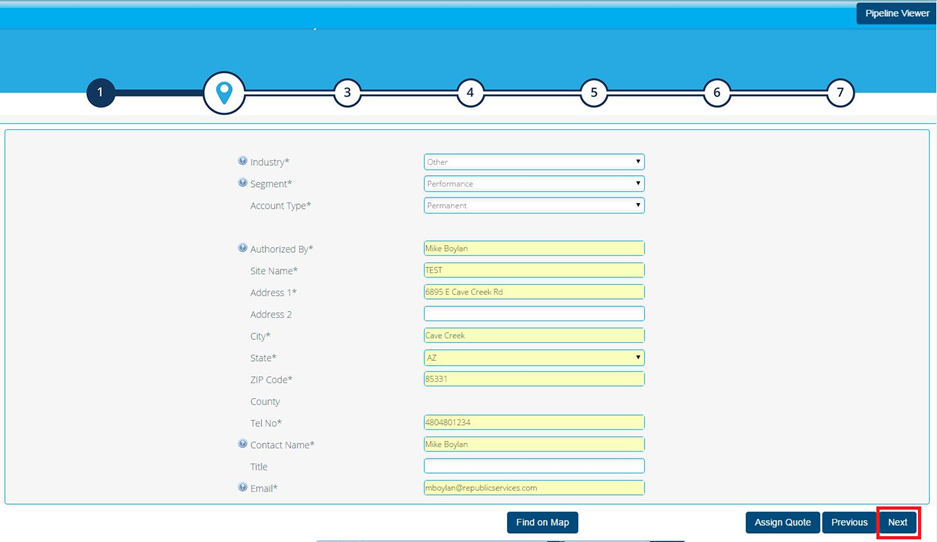
## Referenced Documents

None

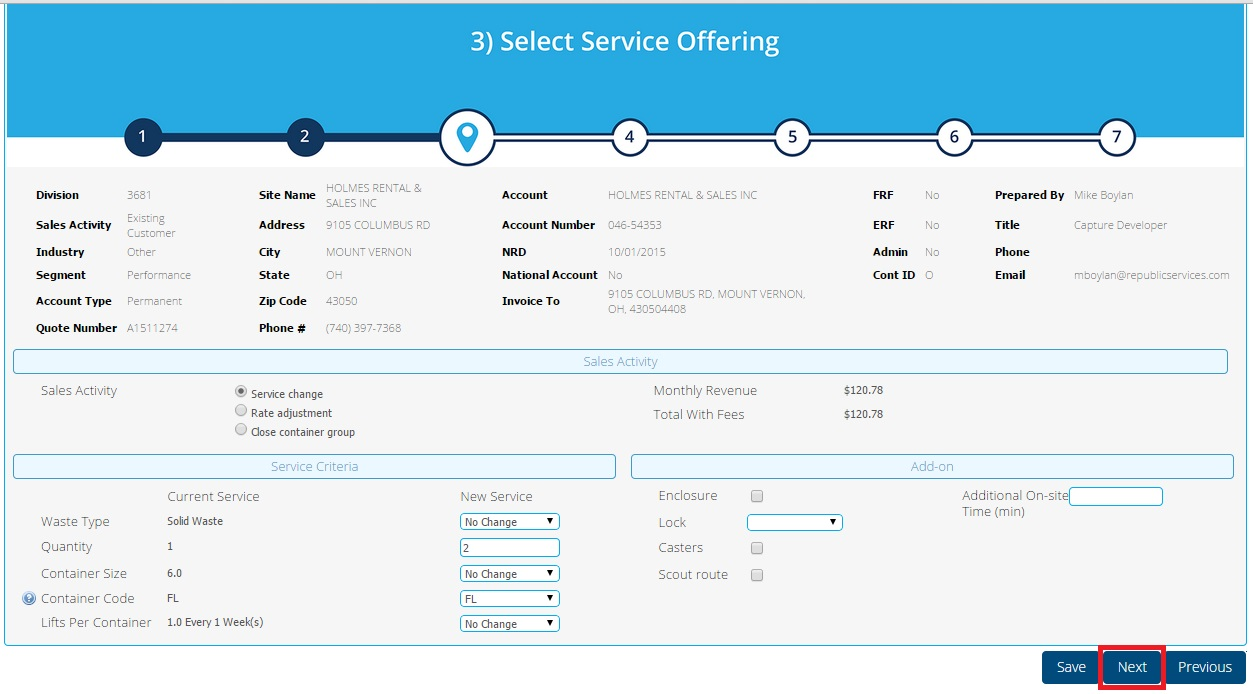
## Process Flow and Mock Ups

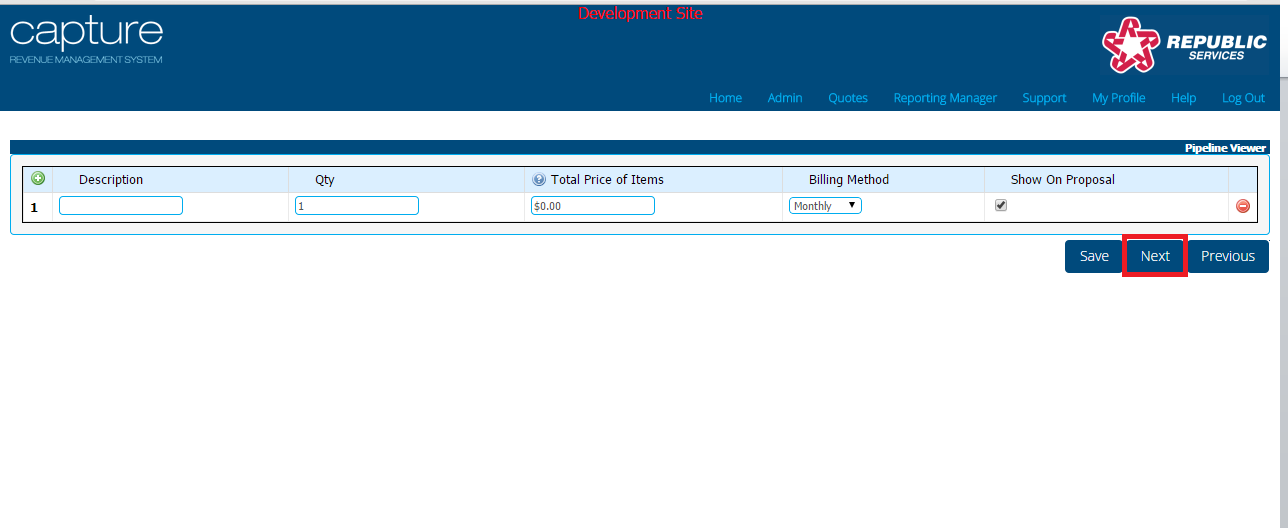
The following screen shots show where status is affected:

**Created**

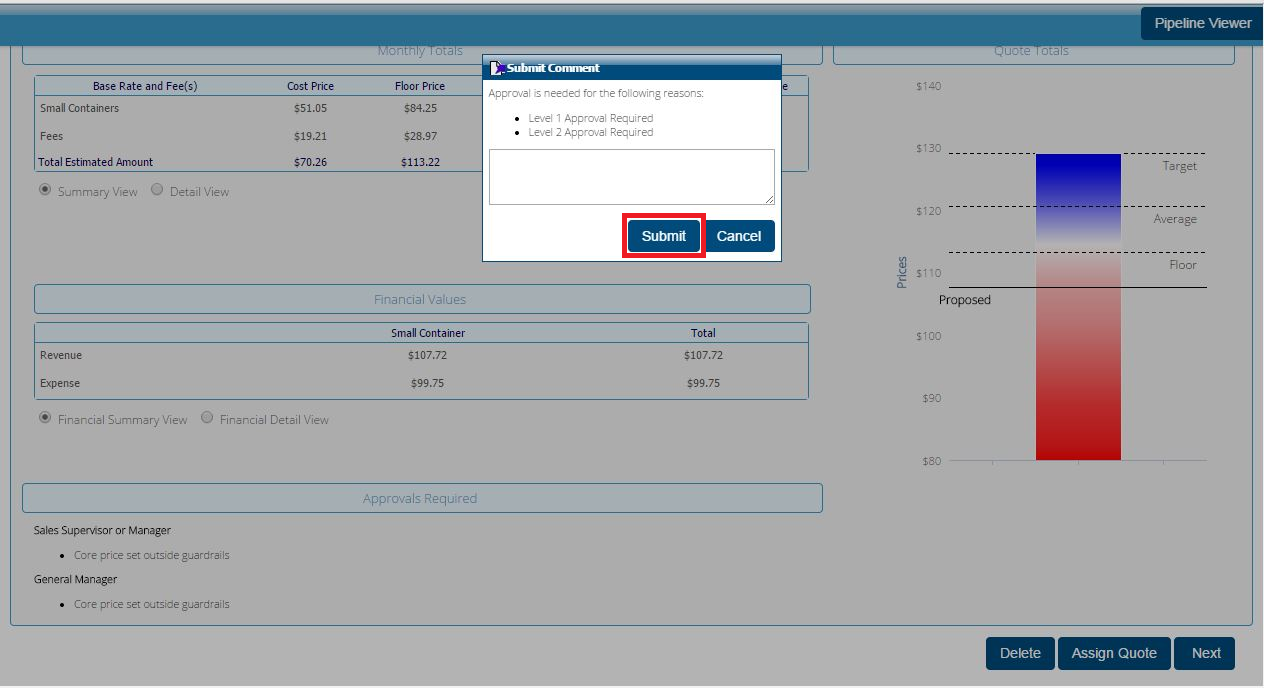
****

**Configured**

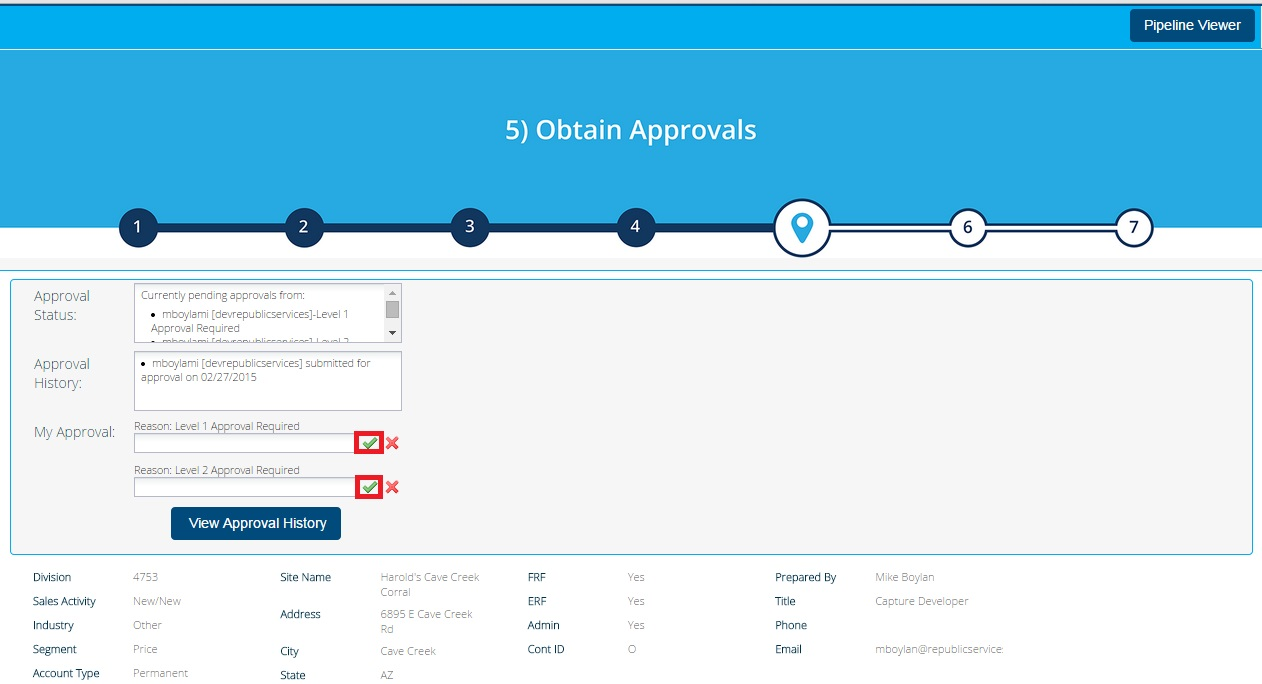
****

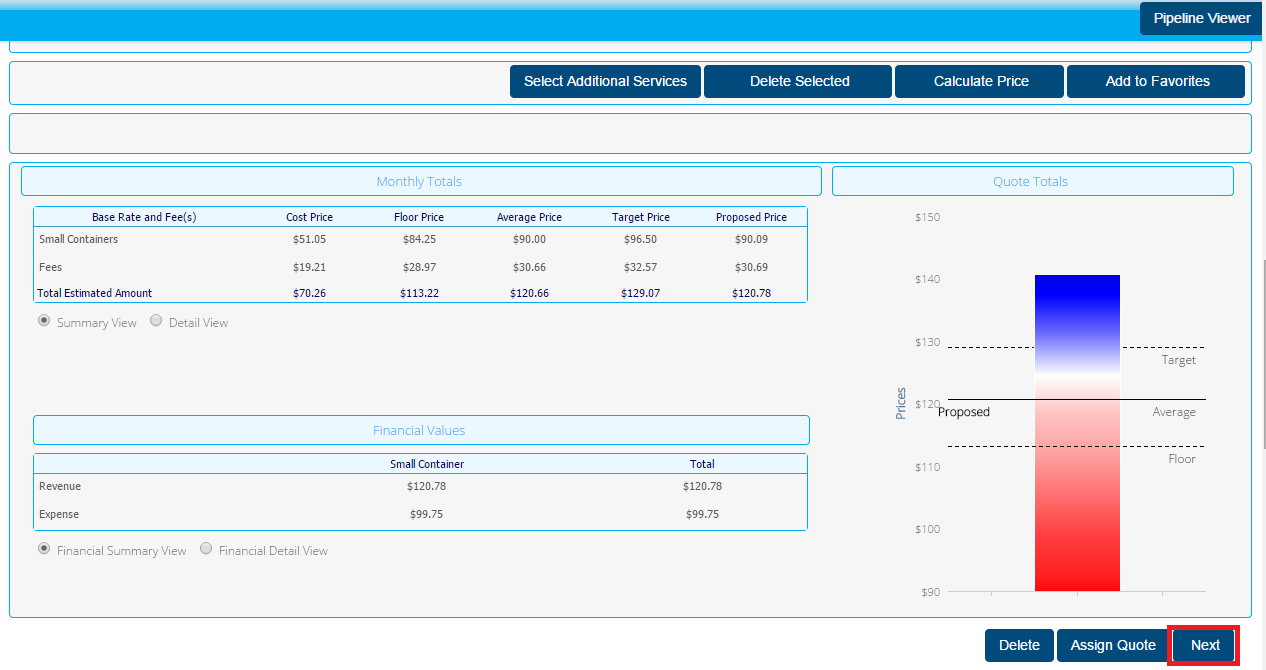
****

**Submitted**

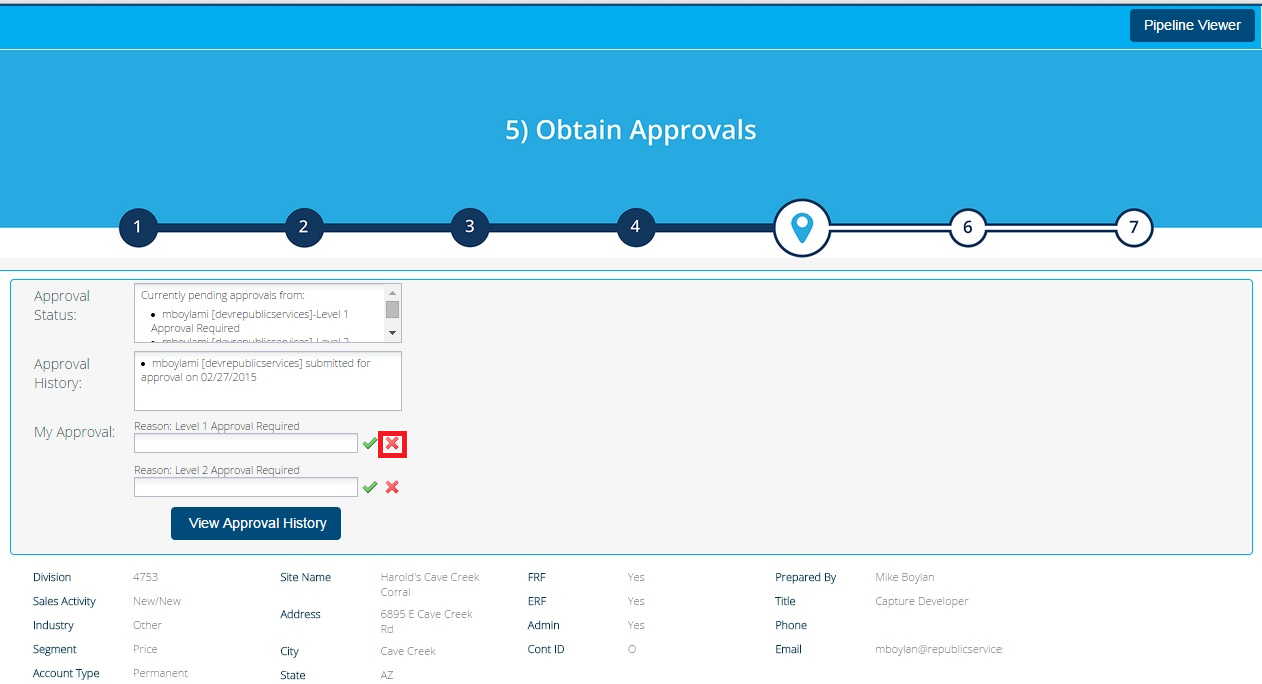
****

**Approved**

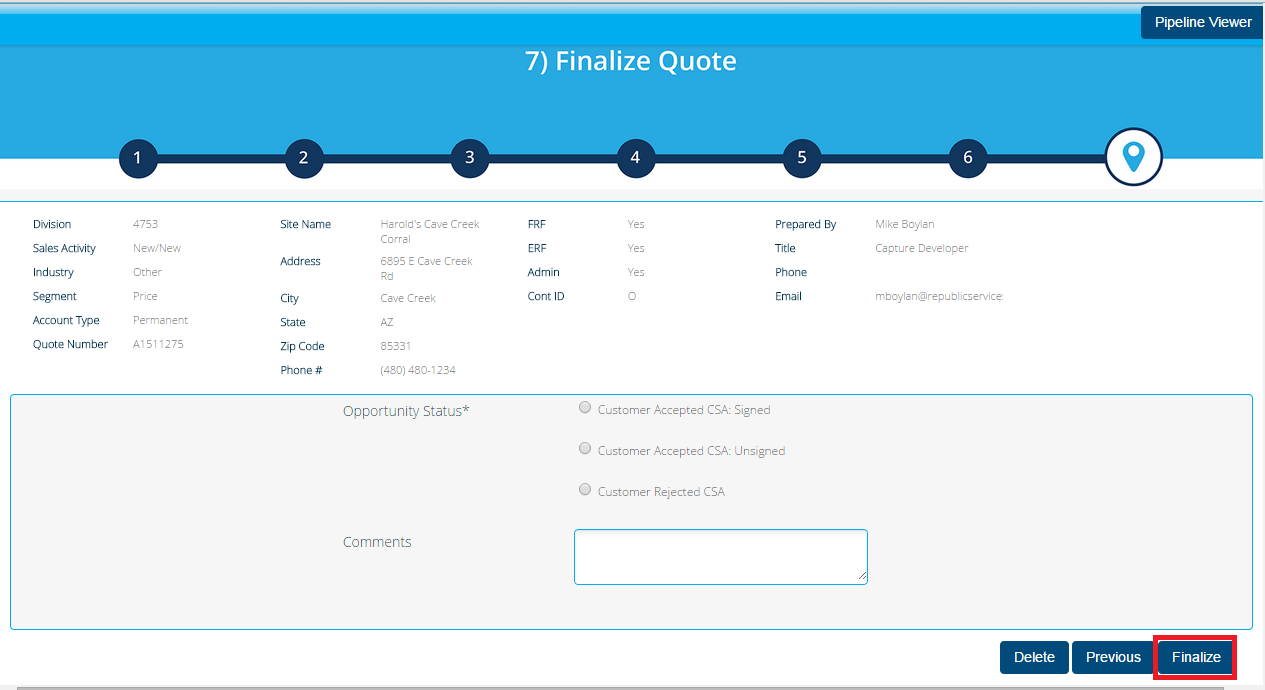
****

****

**Rejected**

****

**Finalized**

****

## Functional Logic

Listed are the forward actions where the Quote XML will be sent to TIBCO:

1. **Created**

Send XML in step – New Customer and Site

Admin

Next

Next: New Customer Site -> Select Services

Exec Manager

Next

Next: New Customer Site -> Select Services

Manager

Next

Next: New Customer Site -> Select Services

Sales Rep

Next

Next: New Customer Site -> Select Services

Send XML in step – Existing Customer: Select Account/Site

Admin

Next

Next: New Customer Site -> Select Services

Exec Manager

Next

Next: New Customer Site -> Select Services

Manager

Next

Next: New Customer Site -> Select Services

Sales Rep

Next

Next: New Customer Site -> Select Services

Send XML in step – Existing Customer: View Account/Site

Admin

Next

Next: Existing Customer Site -> Add or Change Services

Exec Manager

Next

Next: Existing Customer Site -> Add or Change Services

Manager

Next

Next: Existing Customer Site -> Add or Change Services

Sales Rep

Next

Next: Existing Customer Site -> Add or Change Services

Send XML in step – Existing Customer with New Site

Admin

Next

Next: New Customer Site -> Select Services

Exec Manager

Next

Next: New Customer Site -> Select Services

Manager

Next

Next: New Customer Site -> Select Services

Sales Rep

Next

Next: New Customer Site -> Select Services

Send XML in step – Existing Customer with New Site

Admin

Next

Next: Existing Customer with New Site -> Select Services

Exec Manager

Next

Next: Existing Customer with New Site -> Select Services

Manager

Next

Next: Existing Customer with New Site -> Select Services

Sales Rep

Next

Next: Existing Customer with New Site -> Select Services

Send XML in step – Change of Ownership

Admin

Next

Next: Existing Customer with New Site -> Select Services

Exec Manager

Next

Next: Existing Customer with New Site -> Select Services

Manager

Next

Next: Existing Customer with New Site -> Select Services

Sales Rep

Next

Next: Existing Customer with New Site -> Select Services

2. **Configured**

Send XML in step – Select Services

Admin

Hidden Action

Hidden Action: Select Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Exec Manager

Hidden Action

Hidden Action: Select Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Manager

Hidden Action

Hidden Action: Select Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Sales Rep

Hidden Action

Hidden Action: Select Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Send XML in step – Add or Change Services

Admin

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Exec Manager

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Manager

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Add or Change Services -> Adjust Pricing

Sales Rep

Hidden Action

Hidden Action Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Send XML in step – Add Additional Services - New

Admin

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Select Services-> Adjust Pricing

Exec Manager

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Manager

Hidden Action

Hidden Action: Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

Sales Rep

Hidden Action

Hidden Action Add or Change Services -> Adjust Pricing

Next

Next: Select Services -> Adjust Pricing

3. **Submitted**

Send XML in step – Adjust Pricing

Admin

Request Approval

Request Approval: Apply Pricing -> Submitted for Approval

Exec Manager

Request Approval

Request Approval: Apply Pricing -> Submitted for Approval

Manager

Request Approval

Request Approval: Apply Pricing -> Submitted for Approval

Sales Rep

Request Approval

Request Approval: Apply Pricing -> Submitted for Approval

4. **Approved**

Send XML in step – Adjust Pricing

Admin

Next

Submit: Apply Pricing -> Generate Documents

Exec Manager

Next

Submit: Apply Pricing -> Generate Documents

Manager

Next

Submit: Apply Pricing -> Generate Documents

Sales Rep

Next

Submit: Apply Pricing -> Generate Documents

Send XML in step – Submitted for Approval

Admin

Next

Submit: Submitted for Approval -> Generate Documents

Exec Manager

Next

Submit: Submitted for Approval -> Generate Documents

Manager

Next

Submit: Submitted for Approval -> Generate Documents

Sales Rep

Next

Submit: Submitted for Approval -> Generate Documents

5. **Rejected**

Send XML in step – Submitted for Approval

Admin

Reject

Reject: Obtain Approval -> Adjust Pricing

6. **Finalized**

The functionality to send XML already exists.

7. **Deleted**

Send XML in step – New Customer and Site

Admin

Delete

New Customer Site -> Trashed

Exec Manager

Delete

New Customer Site -> Trashed

Manager

Delete

New Customer Site -> Trashed

Sales Rep

Delete

New Customer Site -> Trashed

Send XML in step – Existing Customer: Select Account/Site

Admin

Delete

Existing Customer: Select Account/Site -> Trashed

Exec Manager

Delete

Existing Customer: Select Account/Site -> Trashed

Manager

Delete

Existing Customer: Select Account/Site -> Trashed

Sales Rep

Delete

Existing Customer: Select Account/Site -> Trashed

Send XML in step – Existing Customer: View Account/Site

Admin

Delete

Existing Customer: View Account/Site -> Trashed

Exec Manager

Delete

Existing Customer: View Account/Site -> Trashed

Manager

Delete

Existing Customer: View Account/Site -> Trashed

Sales Rep

Delete

Existing Customer: View Account/Site -> Trashed

Send XML in step – Existing Customer with New Site

Admin

Delete

Existing Customer with New Site -> Trashed

Exec Manager

Delete

Existing Customer with New Site -> Trashed

Manager

Delete

Existing Customer with New Site -> Trashed

Sales Rep

Delete

Existing Customer with New Site -> Trashed

Send XML in step – Change of Ownership

Admin

Delete

Existing Customer with New Site -> Trashed

Exec Manager

Delete

Existing Customer with New Site -> Trashed

Manager

Delete

Existing Customer with New Site -> Trashed

Sales Rep

Delete

Existing Customer with New Site -> Trashed

Send XML in step – Select Services

Admin

Delete

Select Services -> Trashed

Exec Manager

Delete

Select Services -> Trashed

Manager

Delete

Select Services -> Trashed

Sales Rep

Delete

Select Services -> Trashed

Send XML in step – Add or Change Services

Admin

Delete

Add or Change Services -> Trashed

Exec Manager

Delete

Add or Change Services -> Trashed

Manager

Delete

Add or Change Services -> Trashed

Sales Rep

Delete

Add or Change Services -> Trashed

Send XML in step – Add or Change Additional Services

Admin

Delete

Add or Change Additional Services -> Trashed

Exec Manager

Delete

Add or Change Additional Services -> Trashed

Manager

Delete

Add or Change Additional Services -> Trashed

Sales Rep

Delete

Add or Change Additional Services -> Trashed

Send XML in step – Adjust Pricing

Admin

Delete

Adjust Pricing -> Trashed

Exec Manager

Delete

Adjust Pricing -> Trashed

Manager

Delete

Adjust Pricing -> Trashed

Sales Rep

Delete

Adjust Pricing -> Trashed

Send XML in step – Add Additional Services - New

Admin

Delete

Add Additional Services - New -> Trashed

Exec Manager

Delete

Add Additional Services - New -> Trashed

Manager

Delete

Add Additional Services - New -> Trashed

Sales Rep

Delete

Add Additional Services - New -> Trashed

Send XML in step – Submitted for Approval

Admin

Delete

Submitted for Approval -> Trashed

Exec Manager

Delete

Submitted for Approval -> Trashed

Manager

Delete

Submitted for Approval -> Trashed

Sales Rep

Delete

Submitted for Approval -> Trashed

Send XML in step – Generate Documents

Admin

Delete

Generate Documents -> Trashed

Exec Manager

Delete

Generate Documents -> Trashed

Manager

Delete

Generate Documents -> Trashed

Sales Rep

Delete

Generate Documents -> Trashed

Send XML in step – CSA with Customer

Admin

Delete

Order Submitted -> Trashed

Exec Manager

Delete

Adjust Pricing -> Trashed

Manager

Delete

Adjust Pricing -> Trashed

Sales Rep

Delete

Adjust Pricing -> Trashed

Send XML in step – Approved

Admin

Delete

Approved -> Trashed

Exec Manager

Delete

Approved -> Trashed

Manager

Delete

Approved -> Trashed

Sales Rep

Delete

Approved -> Trashed

Send XML in step – Pending

Admin

Delete

Pending -> Trashed

Exec Manager

Delete

Pending -> Trashed

Manager

Delete

Pending -> Trashed

Sales Rep

Delete

Pending -> Trashed

## 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