# xpedx.com Next generation

# *My Items List in COM Design Document*

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**Note**: The sign off indicates approval of all sections of the document.

Document Revision History

This chart tracks the changes introduced by the revisions to the document as the project progresses through the stages of the System Development Life Cycle (SDLC).

| Version | **Date** | **Description (Changes Made)** | **Author(s)** |
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| 1.0 | 10/22/2010 | Initial Draft | Sterling |
| 1.1 | 10/25/2010 | Ready to deliver | Sterling |
| 1.2 | 10/28/2010 | Made changes for Security of My Items for CSR | Sterling |

Related or Reference Documents

| Document Name | Description | Owner | Location |
| --- | --- | --- | --- |
| SCI\_Xpedx Solution Definition Document v1.5 | Solution Definition document | Sterling Commerce |  |
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# Introduction

## Document Purpose

This document is the governing functional design document for My Items List functionality in COM. It presents significant decisions and constructs used in developing the functionality. Testing, builds, configuration management are not covered in this document.

The document will also serve the purpose of keeping a list of assumptions that were made during design discussions.

## Document Audience

This document is intended for management and technical staff working on this project, xpedx IT and Business, webMethods, Legacy(MAX and ACCESS), HP, IW, xpedx/IP Network Team. Sterling will use the document during design and configuration for design consideration.

# My Items List

## Functions & Solution

My Items List is a wish list of items that the customer orders frequently. My items lists are stored against a user or a list of customer in the Sterling database. CSR’s have the following capability through COM for My Items List. CSR’s can create new lists and assign it to the customers. CSRs will have read permission to all the lists.

* Import items using CSV template
* Export My Items List
* Replacement Tool
* Create New My Items List
* Delete List

CSRs will create the List and then choose a customer to assign it. Any CSR will be able to edit a My Item List; there won’t be any security of My Items list for CSRs, since CSRs are internal users. For tracking purpose, when the CSR modifies a LIST his name will appear on the last modified by column. The last modified by value will be overwritten by the person’s name who last modifies it.

CSRs would be able to edit including deleting an existing My Items List and there won’t be any security or rule to restrict any or all.

CSRs will be able to Import a CSV file (in the format specified below) to either create a new List or add it to an existing List. They should be able to export a List as well.

Items can be added to the List either by finding the items through item finder or by importing items through the import My Items List functionality.

**Replacement Tool in COM** – This is a page in COM where the items can be replaced globally for a Customer or Division in the My Items Lists. This is a custom page that needs to be built with the following logic.

The drop down will only show the divisions that the logged in CSR has access to. He will not be able to do a global replacement of items in my item list for the divisions he is not assigned to as per his team configuration.

Steps to replace items:

* xpedx Internal user come to this page and enters the Legacy product code that needs to be replaced and also the replaced Legacy product code.
* Then the user selects one option from the drop down:
* Select customer (SAP level ex: Kohls) – The list of customers would contain all the customers in the hierarchy.
* Select division - This should allow multiple divisions to be selected. From the drop down the user can select a division at a time but those divisions can be added to a text area as they select those divisions and when they click on generate all the divisions will be passed from the text area.
* User selects the customer (master customer level) - There could be drop down with all the customers at that level or we can ask to enter the SAP number.
* After the customer is selected click the generate list button. This will generate a list of all My Items authorized to this customer with Customer name | Division name | My Items List name.
* The list view will have a checkbox. By default all the My Items will be checked. If the user doesn't want to change that My Items list the user should uncheck the checkbox for that My Items list.
* After reviewing the user will commit the changes and the My Items list will be updated.
* No other output or report will be generated.
* User selects multiple divisions from the list of divisions provided.
* User clicks on generate list button.
* This will generate a list of all My Items authorized at those divisions with Customer name | Division name | My Items List name.
* The list view will have a checkbox. By default all the My Items will be checked. If the user doesn't want to change that My Items list the user should uncheck the checkbox for that My Items list.
* After reviewing the user will commit the changes and the My Items list will be updated.
* No other output or report will be generated.

My Items List Size – The size of the list will be restricted to 200 items. If the CSR wants to add more than 200, they will have to create another List and add the extra items in the new list. This will be restricted for both the scenario - whether it is being added from the item finder or they are being imported through import functionality.

## My Items List Page

This page displays list of My Items List based on search criteria. Customer Number and Division will be supported as search criteria.

There will be an option to create a New List from the Listing Page and Delete button to delete a list. Column headers on the page will not be sort-able. There will be 3 columns in the listing view.

* List Name & Description along with Number of items in the List. - This field is a hyperlink to the List detail page. User can click and open the List.
* Created By
* Last Modified Date
* Last Modified By

## My Items List Detail Page

This page displays the details of a particular List. There will be a single view of the page which is the editable view. There won’t be a non-editable view. It will be a simple page and will have the following fields.

* Product Name and SKU #
* Quantity – Editable field
* UOM

The following actions can be performed from the list detail page.

* Remove Items from List
* Export List
* Import Items
* Edit the name and description of the List.
* Save Changes button

## Quick Add to My Items List

* Not Supported through COM

## Import /Export My Items List

After a List is created, users should be able to import a list of items through a CSV file. The user adds information to the CSV template and saves the file as CSV. CSR should be able to import the file by clicking on the import button. The current CSV file has the following fields:

Import format fields:

* Customer Part # - customer specific sku
* Supplier part # aka xpedx Part #
* Quantity
* Unit Of Measure
* Customer defined fields [1 to 5] – Even though the fields will be present in the template they will have no effect on import through COM.
* Description – Product description, this will be used for special items or the items which we did not find in the catalog. For the ones we found in the catalog, the desc will be used from the catalog and will ignore this description.

Export format fields:

* Customer Part # - customer specific sku
* Supplier Part # - xpedx part#
* Quantity
* Unit Of Measure
* Customer defined fields [1 to 5] - Even though the fields will be present in the template they will have no effect on import through COM.
* Description

## Add to Cart from My Items List Detail Page

* Not Supported through COM

## Master System

Sterling is the master of system to maintain and create My Items Lists.

## Implementation Details

## Entity objects.

Create the following custom entity objects to store the List and Detail information for My Items List.

* XPEDX\_My\_Items\_Items.xml – This entity stores the List level information, such as List Key, CustomerID, createdBy, Date of Creation, Modification etc.
* XPEDX\_My\_Items\_List.xml – This entity stores line level information for the List, such as Part #, Job#, UOM, Quantity, Item Type etc.

## Actions classes involved

Create the following actions to view, edit and manage My Items List. Few more needs to be identified for My List authorization functionality.

* XPEDX MyItemsDetailsAction.java – Fetch and Display My Item’s Details page.
* XPEDX MyItemsDetailsAddFromCatalogAction.java – Add items from catalog to My List action.
* XPEDX MyItemsDetailsChangeAction.java – Modify action to change List Details and save the changes.
* XPEDXMyItemsDetailsCreateAction.java – Creates a new line item.
* XPEDX MyItemsDetailsDeleteAction.java – Deletes a line item.
* XPEDX MyItemsListAction.java – Show the List of all the My Items List.
* XPEDXMyItemsListChangeAction.java – Modify the List object.
* XPEDX MyItemsListCreateAction.java – Create a new List object.
* XPEDX MyItemsListDeleteAction.java – Delete a List object.

## Process Flow

Not Applicable

## Screen Shot

Not Applicable

## Open Questions

## Assumptions

1. Copy List functionality will not be supported through COM.

# Glossary of Terms

|  |  |  |
| --- | --- | --- |
| S. No. | Term | Definition |
| 1. | Entity Object | Database and Java entity objects to store the required data. |
| 2. | Action Class | Struts controllers which redirects the parameters and does some business logic before calling the business APIs. |
| 3. | My Item List | Wish List of Items |
| 4. | BR1 | Business Release 1 |
| 5. | IW | Industrial Wisdom – UI firm engaged on the project. |
| 6. | OOTB | Out Of the Box Sterling system |
|  |  |  |