# xpedx.com Next generation

# *Sales Rep Access to Web Channel Design Document*

**Authors: Sterling Commerce**

**Date Created:** 10/26/2010

**Last Updated:** 11/24/2010 12:47 PM

**File Name:** C:\Documents and Settings\bfurman\My Documents\Temp\Methodology v1.1\Project Management\TEMPLATE - DOCUMENT - Use Case Definition.docxpedx Sales Rep in SWC Detail Design Doc V1.4.docx

Approval Signatures (Mandatory)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Title** | **Name** | **Signature** | **Date** | **Comments / Issues / Concerns** |
| **xpedx Owner(s)** | Steve Bugher |  |  |  |
| Cheryl Tullis |  |  |  |
| **Sterling Commerce Owner(s)** | Guy Read |  |  |  |
|  |  |  |  |

**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)** |
| --- | --- | --- | --- |
| 0.1 | 10/26/2010 | Initial Draft | Sterling |
| 1.0 | 11/01/2010 | Ready to deliver | Sterling |
| 1.1 | 11/08/2010 | Updated based on meeting/notes 11/02 | Sterling |
| 1.2 | 11/09/2010 | Updated based on feedback from Steve 11/09 | Sterling |
| 1.3 | 11/24/2010 | Updated based on user profile mapping doc sent by George T. 11/10 and subsequent emails chain + updated screenshots from Chris K 11/23 | Sterling |
| 1.4 | 11/24/2010 | Updated mapping xlsx based on George T. clatification 11/24 | Sterling |

Related or Reference Documents

| Document Name | Description | Owner | Location |
| --- | --- | --- | --- |
| SCI\_Xpedx Solution Definition Document v1.5 | Solution Definition document | Sterling Commerce |  |
| xcom NG Connectivity Finalized Transactions.vsd | Connectivity diagram of all interfaces with Sterling | Sterling/xpedx |  |
| Screenshots-SalesRepLogin v1.2.pdf | Sketches of Sales Rep login experience | Sterling/xpedx |  |
| UserProfile-Salesrep v1.2.xlsx | User profile field handling | Sterling/xpedx |  |

TABLE OF CONTENTS

1. Introduction 5

1.1 Document Purpose 5

1.2 Document Audience 5

2 Sales Rep Access to Web Channel 6

2.1 Functions & Solution 6

2.1.1 Sales Rep Functionality enablement 6

2.1.1.1 Pre-use Setup Steps 6

2.1.1.2 Sales Rep Flow 6

2.1.2 Other functionality changes 7

2.1.2.1 Dummy user authentication mechanism 7

2.1.2.2 UI customizations 7

2.1.2.3 Access to Invoices in RR Donnelley 7

2.2 Master System 8

2.3 Implementation Details 8

2.3.1 Entity objects. 8

2.3.2 Actions involved and Functions 8

2.4 Process Flow 8

2.5 Field Mapping 9

2.6 Schema 9

2.7 Screen Shot 10

2.8 Open Questions 11

2.9 Assumptions 11

3 Connectivity Diagram 12

3.1 Connectivity Diagram 12

3.2 Connectivity Process 12

4 Glossary of Terms 13

# Introduction

## Document Purpose

This document is the governing functional design document for the Sales Rep access to Web channel functionality. 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.

# Sales Rep Access to Web Channel

## Functions & Solution

This document describes the mechanism/customizationa that allows xpedx Sales Reps to login to the Web channel to order on behalf of their customers using a view that is the same as what the end customer user sees.

## Sales Rep Functionality enablement

## Pre-use Setup Steps

1. Sales rep has been created in Sterling (manual or migration process)
2. Sales rep has been assigned to a set of customers in Sterling through teams ( automatic during the Customer batch feed using employee Id).
3. One dummy user per sales rep per customer has been created at the master customer level (automatic during the Customer batch feed) –
   1. With Customer Admin + customer buyer roles.
   2. Given access to all the bill-tos that the Sales Rep has access to.
   3. In addition there will be a new field on the dummy user record to indicate that it’s a dummy user and that the salesrepid that it is associated with. This field will also be used to control UI customizations (similar to punchout users to turn on/off certain links such as invoice on order details, logout, etc.) and for reporting purposes in Data Warehouse.
   4. Each dummy user will also be given the View Cost role.
4. When a customer load comes in that no longer has a sales rep associated with a particular bill-to delete the corresponding assignment from the dummy user-bill to assignment list.

## Sales Rep Flow

1. Sales rep navigates to a new custom page for login on the web channel (e.g. <http://www.xpedx.com/orders/salesrep/login.jsp>).
2. This is a non-branded webpage that allows sales reps to enter their username (network id) and password (active directory password) and request a login. This login page will reside within Sterling.
3. Once they request a login, behind the scenes they are authenticated against the Active Directory server and if successful presented with a landing page. If the authentication fails, they are returned to the login screen.
4. The landing page displays a list of customers that the sales rep has been assigned to. Here the sales rep makes a selection of which customer he would like to order on behalf of. The list of customers is at the Parent SAP level and not at the Bill-to level. The landing page will reside within Sterling.
5. Once the sales rep selects a customer, behind the scenes the corresponding dummy user associated with that customer and sales rep is retrieved and logged in.
6. After the dummy user logs in, the experience is almost the same as that of a customer admin logging into web channel.
7. The user is able to browse catalog, manage carts/my items lists/orders, etc.
8. Once the sales rep is done with a particular customer, they need to logout so that all related sessions can be closed out. To select a new customer, the sales rep will need to log in again using his active directory credentials.

The above flow supports multiple store fronts– In case the sales rep is assigned to customers that happen to be in different storefronts –

1. A separate url context has been setup for sales rep login screen
2. Non-brand specific sales rep login site based on url context path.
3. Then after login and customer selection, switch to correct storefront when login as dummy user.

## Other functionality changes

## Dummy user authentication mechanism

When the Sales Rep selects a customer the parameters specified in 2.5 are passed to the web channel.

## UI customizations

For dummy users, some portions of the web channel are not relevant and will be hidden based on a dummy user role.

The following list details all the functions that are to be hidden on web channel –

1. User status (active/inactive) and reset password are hidden from all screens for dummy users.
2. Dummy users dont show up for other customer users.
3. Set the "view invoice link" to No and don't show this field in profile screens.

## Access to Invoices in RR Donnelley

Sales Reps will not have access to RR Donnelley from the web channel. They use another system to look at customer invoices.

NOTE: This has implications for modifying RRD feed to not include any of the dummy users from the feed.

## Master System

N/A

## Implementation Details

## Entity objects.

## Actions involved and Functions

## Process Flow

## Field Mapping

The following mapping contains the fields that are sent as part of the request when a Sales Rep selects a customer to the customer landing page.

Sales Rep User Id

Customer Id

Customer dummy user Id

Customer dummy user password

Brand (storefront id)

Several user profile fields need to be maintained for the dummy users, so that the web channel functionality may continue to work as expected. The following mapping document captures the behavior of the user profile fields for the sales rep and dummy user on the Web Channel and The Call Center.



## Schema

Not Applicable.

## Screen Shot

***Sales Rep Login Page & Sales Rep Landing Page***



## Open Questions

1. When placing orders, there are several user profile settings that come into play that are manually maintained. How will this data get populated into the profile for these dummy users ? [11/2 - George/Steve to provide default values for all profile fields to be used when creating dummy users.]
2. How long is the sales rep session to be active ? [11/2 – George/Steve - same - for both sales rep and dummy user session. Set it to the same as what regular web channel users have]
3. Internal Q – Do we want to authenticate every request against the session map for security purposes or only the login ? [11/2 – Prashant - All agreed - no need to authenticate every request.]
4. There was initially talk about the data that needs to be sent on the invoice link to RRD for these users. Need clarification. [11/2 – Steve/George - Need to filter out in RRD batch all these dummy users + all users (internal + external) with "view invoice link" flag off.]
5. UI screenshots for the 2 screens – login and landing page. [11/1 -GT - Login - is there a reason we cannot use the actual login page? Landing - do you need a HTML or just a sketch?] [11/2 - Pawan to follow up to see if Chris has screens already for this.] [Chris K. – provided on 11/23]
6. George to confirm what fields to hide on the customer profile for dummy users. [GT – 11/10 – Sent mapping doc that is included in
7. Generic URL for signon page. [Steve – 11/10 - For the URL, let’s go with sales.ipaper.com – I’ve made a request to Internet Services to hold this USD 5719254]
8. Prashant G – 11/24 - Column B on the UserProfile-Salesrep v1.1.xlsx document is talking about updating the original Sales Rep profile fields via the web. This, I believe, is a new requirement that will affect the estimates for this CR. Need to clarify requirement. [GT – 11/24 - Column B is a mistake. Agree original Sales Rep ID cannot be maintained via web channel.] [PG – 11/24 – Deleted Column B in mapping doc]

## Assumptions

1. There is one dummy user per Sales Rep per SAP Parent Customer.
2. Each sales rep logs in to a particular customers on the web channel via the dummy user created specifically for them.
3. Sales reps will be authenticated against the Active Directory.
4. The system will support multiple Sales Reps per customer by creating a dummy user for each sales rep for that customer.
5. UI design of the login page and the landing page for sales reps will be provided by xpedx. [George – 11/2 - Login page to be similar to apple.xpedx.com. the landing page design to be provide by xpedx.]
6. The Sales rep will only be able to perform functions of a customer user/customer admin via web channel. They will not have access to Call Center.
7. Customer Service Reps and other internal roles are not included in access to Web Channel because of complexities such as assignment to divisions and not customers.
8. The hardware sizing that is currently in place does not include this particular customization.[George – 11/2 - George to work with Kurt/Ryan to do some data analysis.]

# Connectivity Diagram

## Connectivity Diagram

Not applicable

## Connectivity Process

Not applicable

# Glossary of Terms

|  |  |  |
| --- | --- | --- |
| S. No. | Term | Definition |
| 1. | WSDL | Web Services Definition Language |
| 2. | UE (User Exit) | Hooks to write custom code in Sterling |
| 3. | MQ | Message Queue |
| 4. | BR1 | Business Release 1 |
| 5. | IW | Industrial Wisdom – UI firm engaged on the project. |