



Use Case ID:	UC7200		
Use Case Name:	Create Premier Site		
Created by:	Bo Lora	Last Updated by:	Bo Lora
Date Created:	05/23/2007	Date Last Updated:	05/23/2007

Actors:	<p>USER – Includes all roles below:</p> <ul style="list-style-type: none">• PROFILE_TEAM which consists of:<ul style="list-style-type: none">○ SR_PROFILE_USER – Senior Analyst in Profile Team○ PROFILE_USER – Analyst in Profile Team○ JR_PROFILE_USER – Junior Analyst in Profile Team <p>SYSTEM – Nano Tool</p> <p>ACTORS NOT TO BE ALLOWED IN THIS USE CASE:</p> <ul style="list-style-type: none">• ADMIN – Nano Administrator user• DATA_USER – Senior Analyst in Data Team• RSM – Regional Sales Manage
Description:	This functionality is used when USER initiates the task of creating a Premier Site
Trigger:	UC7100 – Find Premier Site – USER clicks on the “Create Site” button
Preconditions:	None
Post Conditions:	This use case ends when a new Account Group and orgRoleRelationship is created
Normal Flow:	<ol style="list-style-type: none">1. SYSTEM will display fields for creating new account group (See Pages Specs for details):<ol style="list-style-type: none">1.1. Site Name1.2. Liability1.3. Contract Type1.4. Role1.5. Contact1.6. Billing Address1.7. Shipping Address1.8. Tax ID1.9. Tax Exempt1.10. Regions1.11. Compass ID1.12. FAN No



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	<ul style="list-style-type: none">1.12.1. Generation1.12.2. Billing Description2. IF USER indicates this account group is Tax Exempt then continue to AF1 Handle Tax Exempt Information3. SYSTEM will require user to enter a FAN and click an "Add" button.<ul style="list-style-type: none">3.1. When USER clicks on the "Add" button the SYSTEM will check the ACC repository.3.2. IF FAN is not found THEN:<ul style="list-style-type: none">3.2.1. SYSTEM will require USER to select Generation of FAN3.2.2. SYSTEM will require USER to enter a Billing Description3.3. ELSE matching FAN, Generation and Billing Description will be displayed.4. USER will enter all required information and hit continue button.5. SYSTEM will validate form and save info to session:<ul style="list-style-type: none">5.1. Checks all front end validation5.2. Checks Site Name for unique constraint5.3. Save all data to session.5.4. If any error SYSTEM will redisplay page with appropriate error messages (See Pages Specs for details).6. SYSTEM displays Default Profile page.<ul style="list-style-type: none">6.1. SYSTEM will display choices according to chosen Liability Type.6.2. SYSTEM will pre-select the option that is designated as default.7. USER chooses default profile and clicks on "continue" button.8. SYSTEM display verification page.<ul style="list-style-type: none">8.1. Verification page will allow USER to review all entered data.8.2. SYSTEM will provide USER an opportunity to navigate back to either one of the previous entry pages.8.3. SYSTEM will provide USER with a "Confirm" button9. USER confirms site creation data by clicking on the "Confirm" button.10. SYSTEM creates Premier Site<ul style="list-style-type: none">10.1. SYSTEM creates Account Group:<ul style="list-style-type: none">10.1.1. If FAN(s) do not exist in the repository THEN SYSTEM will create new item and associate it to the new account group.
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	<p>10.1.2. SYSTEM will use USER entered data, default values and derived data to save account group related information:</p> <ul style="list-style-type: none">10.1.2.1. SYSTEM creates new Enterprise<ul style="list-style-type: none">10.1.2.1.1. Enterprise Name (PROBLEM: in the RUM we only collect the "Site Name". We need to collect an "Organization" perhaps allow the user to search for an existing one.)10.1.2.1.2. Enterprise Description: set to same as Enterprise Name10.1.2.1.3. Type: set to Enterprise10.1.2.1.4. Approval Required: set to False10.1.2.2. SYSTEM creates new Company<ul style="list-style-type: none">10.1.2.2.1. Company Name: set to same as Enterprise Name10.1.2.2.2. Company Description: set to same as Enterprise Name10.1.2.2.3. Type: set to Company10.1.2.2.4. Approval Required: set to False10.1.2.2.5. Federal Tax ID: user entered data10.1.2.3. SYSTEM creates new Account Group<ul style="list-style-type: none">10.1.2.3.1. Item Type: set to Account Group10.1.2.3.2. Account Group Name: set to user entered data10.1.2.3.3. Account Group Description: set to same as Account Group Name10.1.2.3.4. Contract name: Concatenate: Enterprise Name + " Contract"10.1.2.3.5. Contract Type: user selected value10.1.2.3.6. Contact Info: user entered data<ul style="list-style-type: none">10.1.2.3.6.1. Name10.1.2.3.6.2. Phone10.1.2.3.6.3. Email10.1.2.3.7. Default Billing Address: user entered data<ul style="list-style-type: none">10.1.2.3.7.1. Address 110.1.2.3.7.2. Address 2
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	<ul style="list-style-type: none">10.1.2.3.7.3. City10.1.2.3.7.4. State10.1.2.3.7.5. Zip10.1.2.3.8. Default Shipping Address: IF sameAsBilling is true then set Shipping Address to same as Billing Address ELSE set to user entered data<ul style="list-style-type: none">10.1.2.3.8.1. Address 110.1.2.3.8.2. Address 210.1.2.3.8.3. City10.1.2.3.8.4. State10.1.2.3.8.5. Zip10.1.2.3.9. Approval required: set to false10.1.2.3.10. For each FAN the SYSTEM will save:<ul style="list-style-type: none">10.1.2.3.10.1. Account Name: set to same as Enterprise Name10.1.2.3.10.2. Number: user entered data10.1.2.3.10.3. Bill Description:10.1.2.3.10.4. Commission Rep Code: set "enbog"10.1.2.3.10.5. CSR Required Indicator: set to false10.1.2.3.10.6. Generations: user selected value10.1.2.3.11. Federal Tax Identifier: user entered data10.1.2.3.12. Liability Type: user selected value10.1.2.3.13. Regions: user selected value10.1.2.3.14. Segments:<ul style="list-style-type: none">10.1.2.3.14.1. IF Liability Type is Corporate (CRU): set to "National Contracted" (Growth & National Contracted)10.1.2.3.14.2. ELSE set to Global (Global & Business Foundation)10.1.2.3.15. State: set to "COMPLETE"10.1.2.3.16. Tax Exempt Indicator: user selected value10.1.2.3.17. Tax Exempt States: IF Tax Exempt Indicator is true THEN set to user selected data.
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	<p>10.1.2.4. SYSTEM creates default account group login</p> <p>10.1.2.4.1. Login: SYSTEM concatenates account group name (extracts all spaces) and changes all to lower case (Example: Acme Corp CRU changes to acmecorpcru)</p> <p>10.1.2.4.2. Password: SYSTEM generates random 8 character alphanumeric password.</p> <p>10.1.2.4.2.1. SYSTEM saves password to session (for display in confirmation page)</p> <p>10.1.2.4.2.2. SYSTEM encrypts password to save in repository</p> <p>10.1.2.4.3. Role: if Liability type is corporate THEN set to "CRU" ELSE set to "IRU"</p> <p>10.1.2.4.4. Last Name: set to same as Login</p> <p>10.1.2.4.5. Login Map:</p> <p>10.1.2.4.5.1. Associated Info: set to 127.0.0.1</p> <p>10.1.2.4.5.2. Login: set same as Account Group Login</p> <p>10.1.2.4.5.3. Removal Date: set to today + 30 years</p> <p>10.1.2.4.5.4. New ID (Token Link): set to random hexadecimal code (45 Characters?)</p> <p>10.2. SYSTEM creates orgRoleRelationship(s):</p> <p>10.2.1. If USER selected Role of One Combined Site (CRU/TCM) THEN SYSTEM will create one Account Group with One OrgRoleRelationship for CRU and TCM.</p> <p>10.2.2. ELSE (Role of Two Separate Sites) THEN SYSTEM will create one Account Group with two separate orgRoleRelationships, one with CRU role and the other with TCM.role.</p> <p>10.2.3. SYSTEM creates Access Control List by copying ACLs from user selected default profile. MAY NEED MORE DETAIL</p> <p>10.2.4. SYSTEM creates Preferences by copying Preferences from user selected default profile. MAY NEED MORE DETAIL</p> <p>10.2.4.1. Description: set to Enterprise Name + " Prefs"</p> <p>11. USE CASE ENDS</p>
Alternative Flows:	AF1 Handle Tax Exempt Information



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	<p>AF1.1 SYSTEM will require USER to build a list of states in which the account group is tax exempt.</p> <p>AF1.2 SYSTEM will display list of states and allow USER to select one state then press an "Add" button.</p> <p>AF1.3 When USER clicks on "Add" button the SYSTEM will save the state and display it with a checkbox which will be pre-selected.</p> <p>AF1.4 USER may add multiple states to the list through the add button function</p> <p>AF1.5 SYSTEM will provide the USER a way to add all states at once.</p> <p>AF1.6 IF USER deselects any state once it has been added the addition of the state will be ignored when page is validated.</p> <p>AF1.7 USE CASE continues to step 4</p>
Includes:	None
Priority:	High
Frequency of Use:	Daily by 30 users
Business Rules:	None
Special Requirements:	None
Assumptions:	User is using a supported browser.
User Interface:	Link to Recommended User Model
Notes and Issues:	PROBLEM: in the RUM we only collect the "Site Name". We need to collect an "Organization" perhaps allow the user to search for an existing one.