# Use Case MP4 – New MarkeTrak Admin Workflow

## Description:

### New Admin workflow will replace the current functionality within the Administrator tab and the Manage Data tab to add, delete and update users in MarkeTrak.

### GUI:

Add a new hierarchy to the Submit Tree with the following main category and sub categories:

MarkeTrak Admin

* Add User
* Delete User

API:

* N/A

Bulk Insert:

* N/A

## Add User request:

* ‘Add User’ link will be added to the Submit Tree under a ‘MarkeTrak Admin’ tab for Administrator use only. MarkeTrak users will automatically be set up with the default preferences associated with their User type.

### Transitions for Add User request

### Submit Transition

New Fields:

* **Text field (Required): Employee id.** 
  + Include Help box language (include section in user guide on where to find it)
* **Text field (Required):** First Name
* **Text field (Optional):** Middle Name/Initial
* **Text field (Required):** Last Name
* **Text field (Required):** email address
* **Text field (Required):** Phone Number

### Commit Transition

Final Commit – “Please review the user information below. Press OK to continue adding this user with the below information or Cancel.”

Buttons:

i. Commit

ii. Withdraw

### Validations on Submit:

1. Error - Format Check on email address. Just the ‘@’.

2. Error – Phone number needs at least 10 characters. Brings back updateable field. Press ‘OK’ to continue

3. Error – Employee id has special characters in it. Employee id needs to be alphanumeric. Administrator must update field before continuing.

4. Error – Employee id exists as an active user under your company’s DUNS number. Please use the Update User process. Admin must update the employee id or ‘Withdraw’ the issue.

## Delete User request

* ‘Delete User’ link will be added to the Submit Tree under a ‘MarkeTrak Admin’ tab for Administrator use only. Delete User through MarkeTrak capability will allow for a more efficient delete user process.

### Transitions for Delete User request

### Submit Transition

Add drop down lists.

* **Employee ID (from digital certificate)**
* Type: alpha-numeric
* Screen Location: Issue
* Read Only (Y/N): N
* Automatically populated: No
* Field Screen Title: Employee ID
* Transitions Enabled: “Submit”

### Active Issue/Rolodex Check Transition

* This transition will check all Active issues that the Deleted User is currently Active Owner of and will allow the Administrator to replace with another Active contact from their company or with NULL value for them to update at a later time. If the Deleted User is not associated with any Open Issues then it will skip this transition.

**Fields**:

Add Drop down lists

* **Replacement Contact for Active Issues(Required)**
  + Type: Drop Down List
  + Screen Location: Issue
  + Read Only (Y/N): N
  + Automatically populated: No
  + Values: Active Contacts associated with Company DUNS selected from Company Field on Submit Screen
  + Field Screen Title: Replacement Contact for All Active Issues
* List of Open Issues: We will provide a hyperlink to a report that will return all MarkeTrak issues that the deleted user is the Assigned owner of. The report will appear in a Pop up box and have the following information:
  + Columns to be displayed
    - Issue Number
    - Issue Title
  + Sort by
    - Issue Type
    - Issue Title
    - Checkboxes for option of Mass Update “Assign Owner”.
* The user can select one person from the Replacement Contact for all Active Issues on the issue screen, or do a mass update in the report returned to replace deleted user’s active issues with multiple users of the Administrators choice.
* List of Rolodex Contacts that the Deleted user is associated with: We will provide a hyperlink to a report that will return all MarkeTrak Rolodex Contacts that the deleted user is associated with. The report will appear in a pop up box and have the following information:
* Contact Type
* Contact Level
* Issue Escalation

**Button Options:**

* OK
* Error- Make sure that Replacement contact is NOT deleted contact.
* Cancel
  + Returns to Submit State

### Delete User Transition

* User is marked as deleted from the ERCOT database, marked as inactive in MP contact table, removed as secondary owner of previous issues.
* Rolodex updates are up to the MP Admin.

### Withdraw Transition

* MarkeTrak Administrator can withdraw the issue in between Submit and Delete User transitions.