

# Contextia Feature Specification

## ***Product Development***

The following information is specific to product planners.

Feature name	User Management
Scheduled release version	Version 1.0
Priority (critical, high, medium, low)	Critical
Corresponding EI concept	None.
List any existing documents that provide details for this feature	CIWUserTypes.ppt
Customer(s) who requested the feature	None.
This spec has been reviewed by	Huy Bui
This spec has been approved by	

## ***Development Staff***

The following information is specific to development staff.

Impacts backward compatibility (data, usability, ...)?	No.
If impacts backward compatibility, is there a mitigation plan?	
Required resources	Server and UI developers
Level of schedule risk (high, medium, low)	

Level of technical risk (high, medium, low)	
Time estimate for implementation	
Time estimate for quality assurance/testing	
Features that depend on this feature, or on which this feature depends	The ability to assign stewardship for an environment requires the completion of this feature.
Interim deliverables	The following aspects of this feature can be delivered separately: <ul style="list-style-type: none"> <li>• Log in</li> <li>• Change password</li> <li>• Create person/organization</li> <li>• Assign roles</li> </ul>
Installation routine impact	The installation routine will need to create a default system administrator account.

## ***Details***

### **EI model/methodology changes:**

None.

### **Feature description:**

This feature will add the following screens to the application:

- the initial log-in screen
- a change password screen
- an add/edit person and add/edit organization screen
- an assign roles screen

For a person to gain access to the system, they will need to first be added to the system by a current user of the application. The person who adds the new person can be a user with the system administrator or information analyst role.

The person record created initially has a status of *null-user*, which means that they do not yet have any user roles or enterprise roles assigned to them. A *null-user* can be assigned as the steward of one or more environments, but does not represent a user who can log into the system. The assignment as a steward of an environment provides them an enterprise role within the application. There are two enterprise roles: steward and custodian. The custodian role will not be implemented for this version.

Next, a system administrator must assign one or more roles to the *null-user* record. Once a system or enterprise role has been assigned to a *null-user*, the person record is no longer a *null-user*, gaining the status of the role(s) assigned. For this release of the product, there are three roles that can be assigned: system administrator, informatics analyst, and viewer.

*System administrator*: A user with system administrator rights can:

- add, update, and delete user accounts
- assign and unassign roles
- set usernames and passwords
- create, update, delete, and back up repositories
- create, update, and delete environments
- delete *null-user* records

*Informatics analyst*: A user with informatics analyst rights can:

- create, update, and delete all data within any repository
- create, update, and delete any environment
- create *null-user* records
- delete *null-user* records

*Viewer*: A user with viewer rights can:

- view all data within any repository

When a user with informatics analyst role opens the screen to delete a user, only *null-users* are presented from which to choose.

When two users with informatics analyst role log into the same environment, the first one to log in logs in as an informatics analyst, but the second one to log in is degraded within that specific environment for the duration of the session to the rights assigned to the viewer role. If the first one logs out and the second one logs out and back in, he will have the informatics analyst role again. The title bar of the application will have the text (*Read-only*) appended to the main title when an informatics analyst logs into an environment that already has an informatics analyst in it, and a message box will appear that informs the user of the downgraded status.

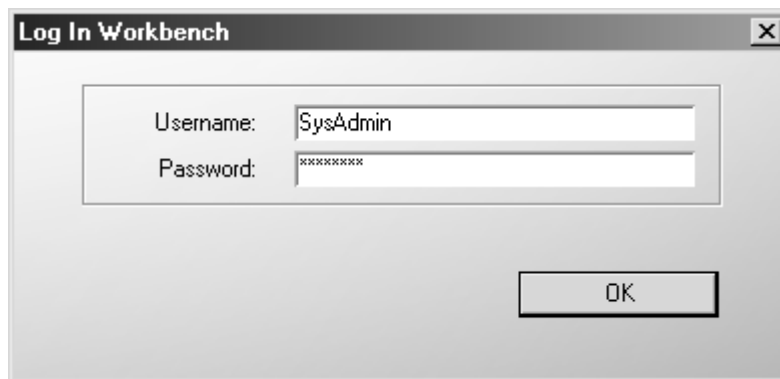
Information about user roles is contained at the repository level, but is not stored within a repository. The term *physical domain* refers to the collection of all repositories that exist within a single database, plus user role information.

### Mock-up/Use case:

#### *Use case #1*

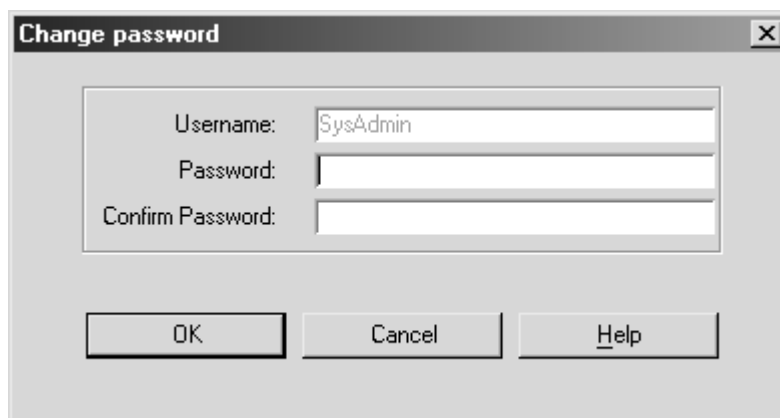
Immediately after the product is installed, an administrator is tasked with creating user accounts so that builders can start using the product.

1. She starts the product. A log-in screen appears:



The screenshot shows a dialog box titled "Log In Workbench" with a close button (X) in the top right corner. Inside the dialog, there are two input fields: "Username:" with the text "SysAdmin" and "Password:" with a masked password "xxxxxxx". Below the input fields is an "OK" button.

2. She enters the username and password provided by the installation documentation for the default system administrator account.
3. She is prompted to change the password for the default account:



The screenshot shows a dialog box titled "Change password" with a close button (X) in the top right corner. Inside the dialog, there are three input fields: "Username:" with the text "SysAdmin", "Password:", and "Confirm Password:". Below the input fields are three buttons: "OK", "Cancel", and "Help".

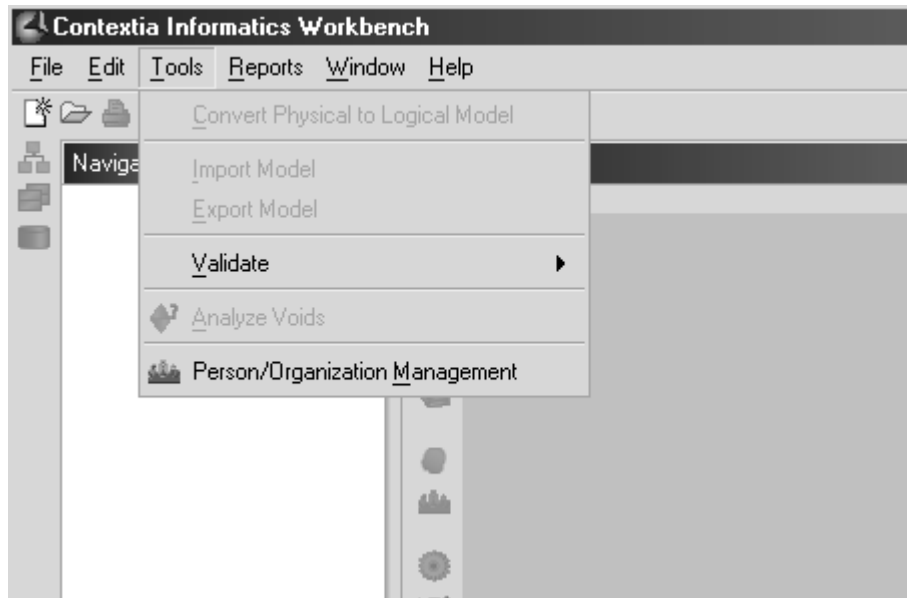
4. She sets a new password for the default system administrator account, and the product opens. She is then prompted to create or select an environment. This is the standard screen that appears when any user logs in:



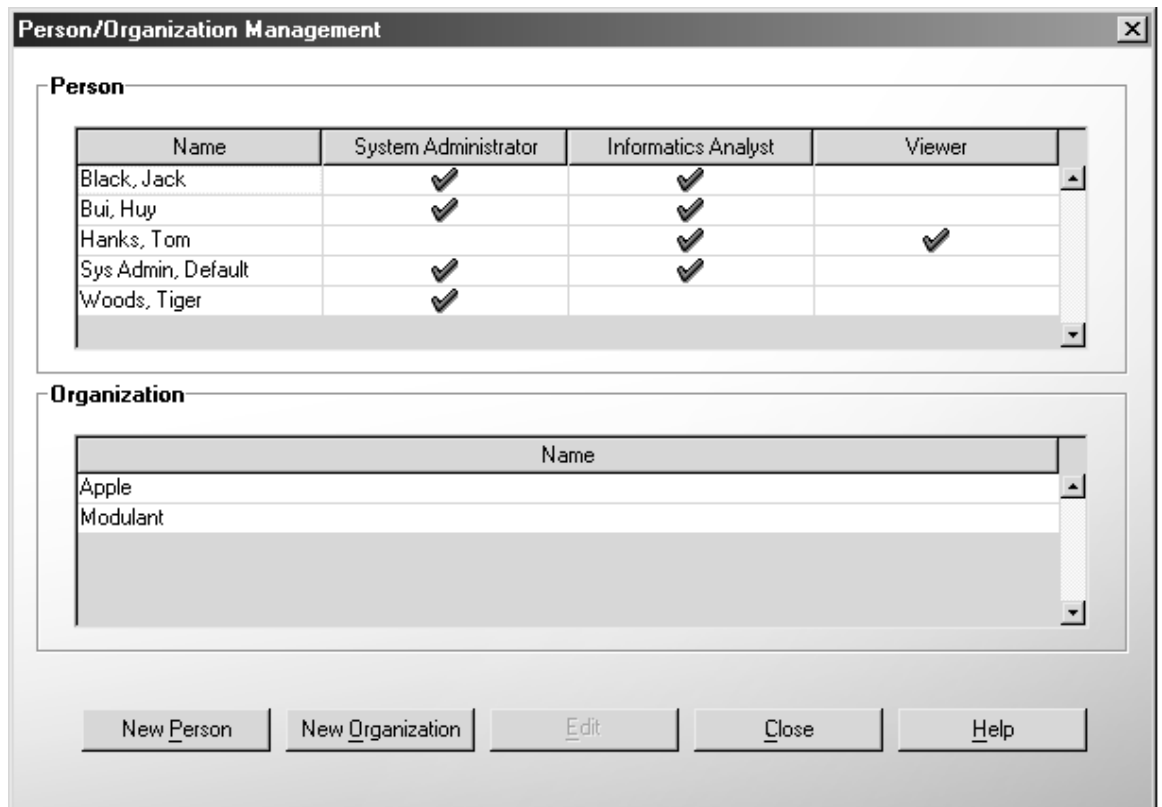
5. She closes this screen without creating or selecting an environment.

At this point, she wants to add some users to the system.

6. From the **Tools** menu, she chooses **Person/Organization Management**:

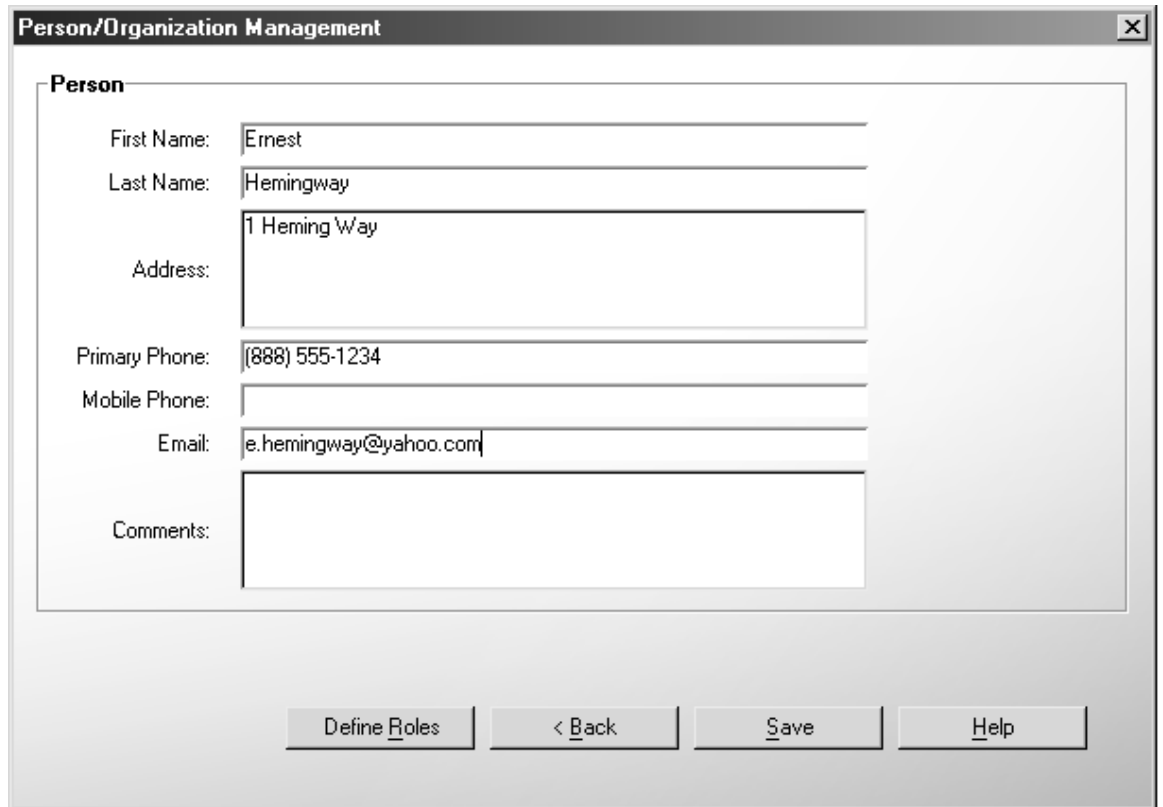


7. The Person/Organization Management dialog box appears.



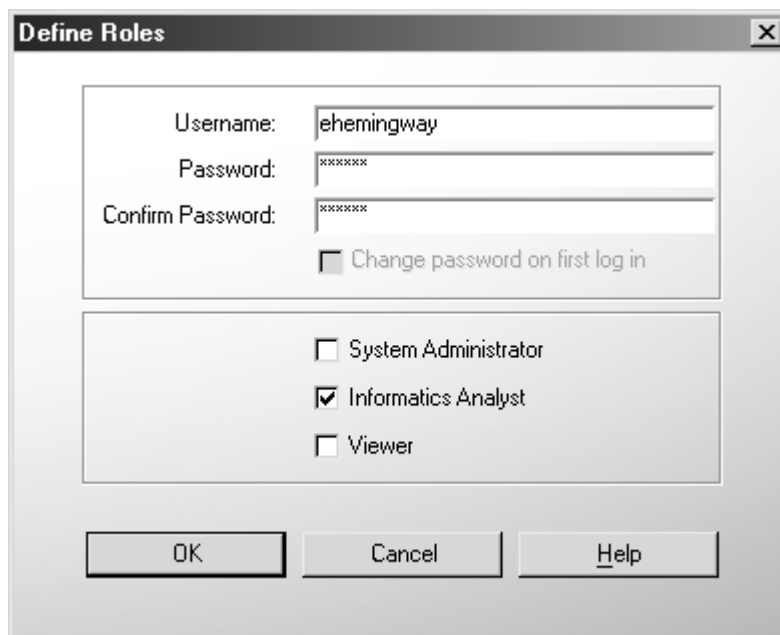
8. She clicks **New Person**.

9. The Person/Organization Maintenance – Add Person dialog box appears. She enters values for a user:



The dialog box is titled "Person/Organization Management" and contains a section labeled "Person". It features several input fields: "First Name" with the value "Ernest", "Last Name" with "Hemingway", "Address" with "1 Heming Way", "Primary Phone" with "(888) 555-1234", "Mobile Phone" (empty), "Email" with "e.hemingway@yahoo.com", and "Comments" (empty). At the bottom, there are four buttons: "Define Roles", "< Back", "Save", and "Help".

10. She clicks **Define Roles**. The Define Roles dialog box appears:



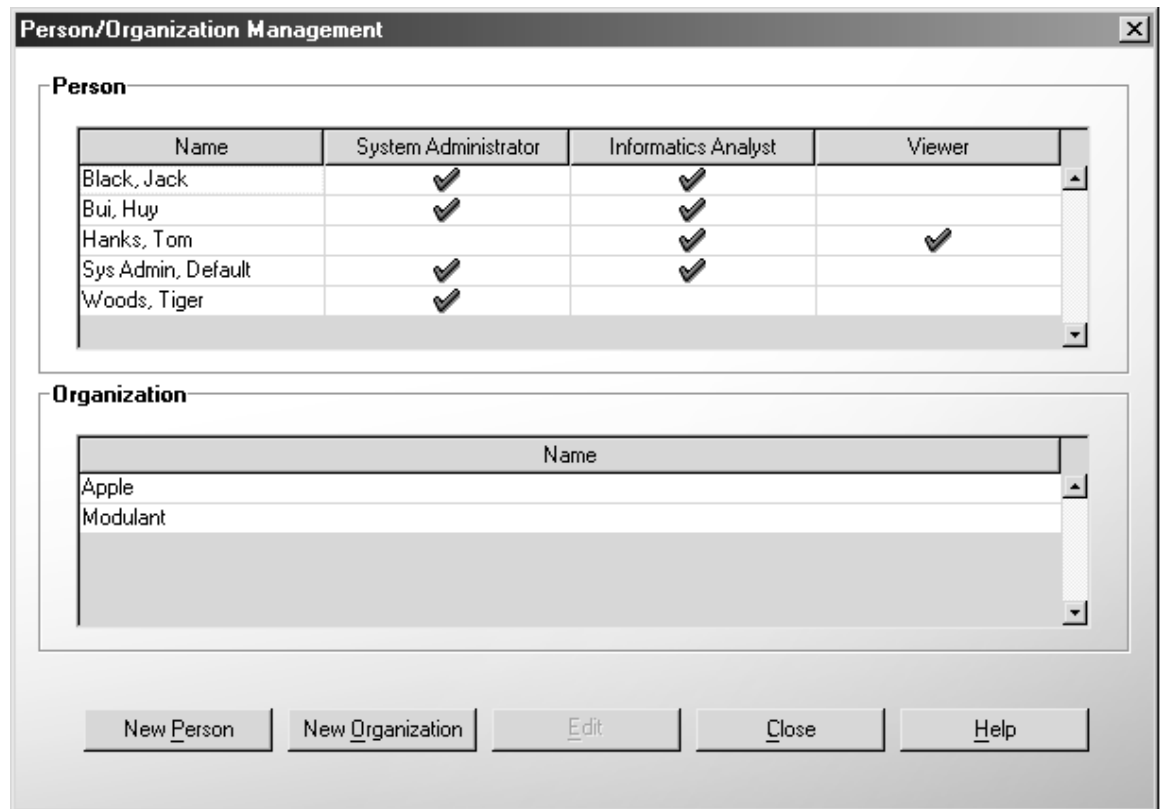
The dialog box is titled "Define Roles" and contains a form with the following elements: "Username" field with "ehemingway", "Password" field with "xxxxxxx", "Confirm Password" field with "xxxxxxx", and a checkbox labeled "Change password on first log in" which is unchecked. Below these fields is a list of roles with checkboxes: "System Administrator" (unchecked), "Informatics Analyst" (checked), and "Viewer" (unchecked). At the bottom, there are three buttons: "OK", "Cancel", and "Help".

11. She enters a username and a password for the user, marks **Change password on first log in**, marks **Informatics Analyst**, and clicks **OK**.
12. She sends an email to the email address provided earlier, providing the username and temporary password so the individual can log in.
13. The user receives the email, and he logs in using the provided username and password. As with the system administrator, he is prompted to create a new password upon logging in.

*Use case #2*

1. The new user from Use case #1 wants to get access to the product for a coworker. He logs into the application, and chooses **Tools > Person/Organization Management** from the menu bar.

The Person/Organization Maintenance dialog box appears.



2. He selects clicks **New Person**.

The Person/Organization dialog box appears, with the **Define Roles** button disabled, because he does not have system administrator role:

Person/Organization Management

**Person**

First Name: Ernest

Last Name: Hemingway

Address: 1 Heming Way

Primary Phone: (888) 555-1234

Mobile Phone:

Email: e.hemingway@yahoo.com

Comments:

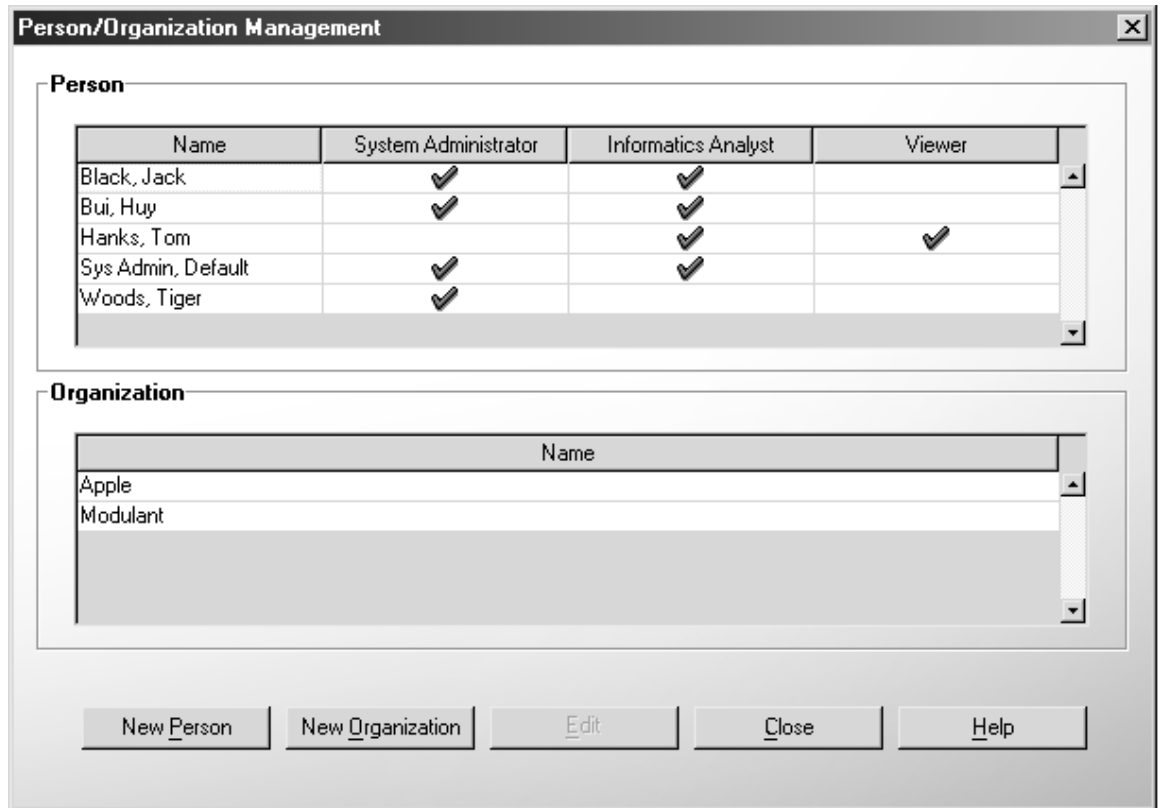
Define Roles < Back Save Help

3. He enters data for the coworker and clicks **Save**. He sends an email to the system administrator, asking that the *null-user* account have roles defined for it.

*Use case #3*

1. A user of the system wants to create an organization. He chooses **Tools > Person/Organization Management** from the menu bar.

The Person/Organization Maintenance dialog box appears.



2. He clicks **New Organization**.

The Person/Organization Management – Add Organization dialog box appears.

The screenshot shows a dialog box titled "Person/Organization Management" with a close button in the top right corner. The main area is titled "Organization" and contains the following fields:

- Name:** A text box containing "Modulant Solutions".
- Address:** A text box containing "146 Fairchild Street, Suite 200" and "Charleston, SC 29492".
- Contact:** A dropdown menu showing "Woods, Tiger".
- Comments:** An empty text box.

At the bottom of the dialog, there are three buttons: "< Back", "Save", and "Help".

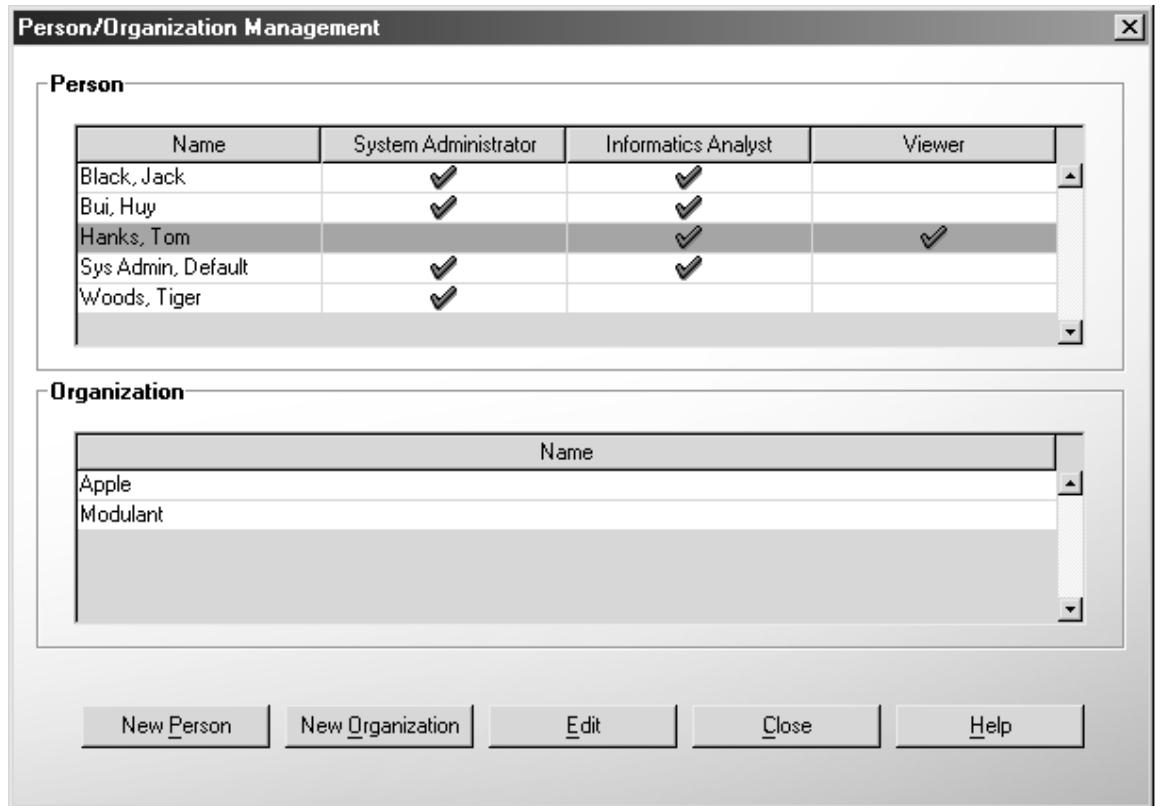
3. He enters data for the organization and clicks **Save**.

#### *Use Case #4*

A system administrator wants to delete a user from the system. The user has been assigned to at least one stewardship role.

1. She chooses **Tools > Person/Organization Management** from the toolbar.

The Person/Organization Maintenance dialog box appears.



2. She selects a person from the **Person** list, and clicks **Edit**.

The Person/Organization – Person dialog box appears.

The screenshot shows a dialog box titled "Person/Organization Management". Inside, there is a section labeled "Person" with the following fields:

- First Name: Tom
- Last Name: Hanks
- Address: (empty)
- Primary Phone: (empty)
- Mobile Phone: (empty)
- Email: (empty)
- Comments: (empty)

At the bottom of the dialog box, there is a toolbar with five buttons: "Define Roles", "< Back", "Save", "Delete", and "Help".

3. She clicks **Delete**.

Behind the scenes, all enterprise roles (stewardship) are deleted, and then the user is deleted.

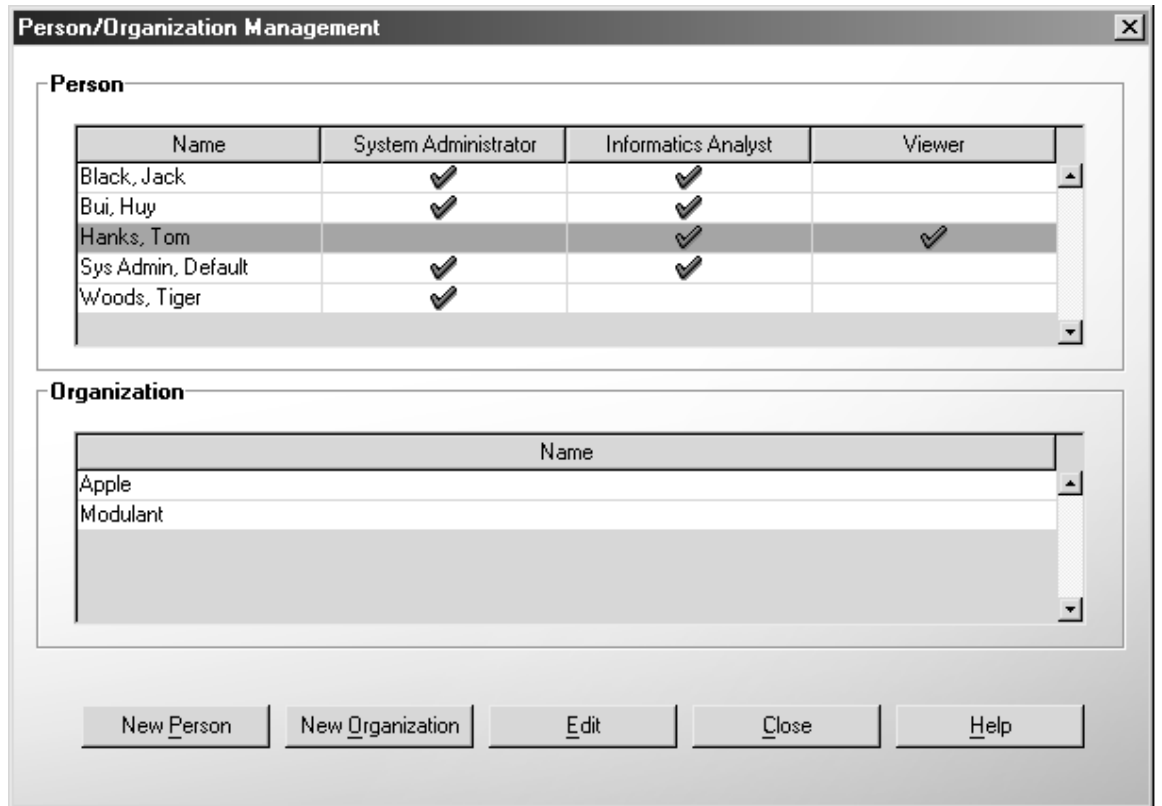
4. A message box is displayed, indicating that the user was successfully deleted.

#### *Use Case #5*

A user wants to update the contact information for another user.

1. He chooses **Tools > Person/Organization Management** from the toolbar.

The Person/Organization Maintenance dialog box appears.



2. He selects the person from the Person list and clicks **Edit**.

The Person/Organization dialog box appears:

**Person/Organization Management**

**Person**

First Name: Ernest

Last Name: Hemingway

Address: 1 Heming Way

Primary Phone: (888) 555-1234

Mobile Phone:

Email: e.hemingway@yahoo.com

Comments:

Define Roles < Back Save Help

3. He edits the values and clicks **Save**.

**Impact to installer:**

None known.

**Impact to administrator:**

Administrator will need to assign roles to users, unassign roles from users, set usernames, set passwords, and delete users.

**Impact to builder:**

The user will need to create an account and then wait for the administrator to assign roles to have access to the system.

**Impact to maintainer:**

See *Impact to builder*.

**Impact to browser:**

See *Impact to builder*.

**Schedule risks:****Mitigation plan for schedule risks:****Technical risks:****Mitigation plan for technical risks:****Impact on back-end data model:**

New tables created to support persistence of Person, Organization, User, etc.

**Impact on back-end code:**

The repository handler and controller will implement the contracts to support creating, updating, deleting, and retrieving user management domain objects and the Hibernate mapping files will be modified to update the persistent data store.

**Impact on user interface code:**

This feature will require the creation of the following dialog boxes:

- Login dialog box
- Change password dialog box
- Person/Organization screens
- Assign Roles dialog box

**New methodology, technology, or third-party product requirements:****Additional notes:**