Business Rules Plan

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# Objective

The Client Center Proposals and Contracts Business Plan is a guidebook outlining the administration, maintenance, and support of Day & Zimmermann’s Client Center Proposals and Contracts tool. It identifies lines of ownership for both business and technical teams, defining who is responsible for what areas of the system. Furthermore it establishes rules for appropriate usage of the Marketing Profile Tracker system.

The primary goals of this plan are to:

* Define the requirements for the Client Center Proposals and Contracts
* Document initial governing policies and procedures of the SharePoint environments
* Define the roles and responsibilities for the system to be successful
* Document the process of the system.

The business ultimately owns the portal, creating strategic synergies amongst themselves and capturing business opportunities. The IT group facilitates the use of the portal through the maintenance and administration of this tool.

# Requirements

***[This section will be completed by SME after gathering requirements and business needs from requestor]***

The requirements of the Client Center Proposals and Contracts solution are defined in this business rules plan as followed:

1. Ability for client to view a rollup of Contracts and Proposals
2. The system allows more resources to be utilized
3. Ability to provide automated association to content types
4. Ability to display consistent ‘Group by Views’
5. Ability to utilize a functional template that meets business needs
6. A simple process to create a Client Site that includes appropriate template
7. An ability to apply permissions automatically
8. A system that is simple to utilize by individuals with different levels of technical skill

# Defined Process

***[This section will be completed by SME to provide any current processes to developer as well as the defined process to meet business needs]***

Describe the steps of what this current solution do. Expose reasons for why we will need a new solution.

The defined process of the Client Center Proposals and Contracts tracking system is outlined in this business rules plan as followed:

1. The current solution uses the CCP workflow which performs the below steps:
   * 1. **Create** item level permissions for both Contacts and Proposals document libraries at client sites.
     2. **Remove** item level permissions for both Contracts and Proposals document libraries at client sites.
     3. **Copy** permissions from Client Center Permissions list to both Contract and Proposals document libraries at client sites. Client Center Permissions list is located at top level site.
2. The CCP workflow functionality is inconsistent. Sometimes it work on its own and sometimes it

doesn’t.

1. The current solution involves four SharePoint Designer workflows which update fields for items created in both Contracts and Proposals document libraries. These items are copied to master lists within the site collection. All four workflows have redundant steps.
2. Contracts and Proposal data are located in separate locations within the site collection.

5. Both Contracts and Proposals document libraries have inconsistent ‘Group by Views’ where some views are rendered and some are not.

6. The current solution currently uses a PowerShell script for creating client sites and permissions.

7. Saving the client template and creating a new site from the template causes an error.

8. The site collection has a higher ratio of Active Directory groups to SharePoint groups.

# Solution Background

***[This section will be completed by developers with detailed solution to requirements]***

This solution will be developed as a SharePoint farm solution. Refer to Client Center Proposals and Contracts Design Document for details of current and proposed solution architecture in section 6(Quick References) of this document.

**Requirement 1:** Ability for client to view a rollup of Contracts and Proposals

A single view can be created using a REST API to query both Contracts and Proposals document libraries across sites. Native client-side rendering can be used to create the required ‘Group-By’ view. The source files will be implemented within the solution to maintain a consistent view.

**Requirement 2:** The system allows more resources to be utilized

Four workflow solution files were exported using SharePoint Designer and imported to the solutions gallery to become reusable throughout the site collection. This is a manual process that allow the workflows to become available to each client site. Deactivating and removing the wsp files from the solution gallery and all workflow instances throughout client sites.

**Requirement 3:** Ability to provide automated association to content types

Using an event receiver instead of a workflow would increase performance due to high-volume requests. <https://msdn.microsoft.com/en-us/library/ff648492.aspx>

An event receiver can achieve the same functionality as the CCP reusable workflow and associating to respective content types.

**Requirement 4:** Ability to display consistent ‘Group by Views’

The ‘Group By Views’ for both Contracts and Proposals document libraries are created via JavaScript and XSLT (Extensible Stylesheet Language) files located at ‘docsethomepage.aspx’ file within each Contracts and Proposal document library. The solution can include removing the XSLT within ‘docsethomepage.aspx’ and creating a s ingle external XSLT file to be sourced or create native client-side rendering JavaScript. The former provides less time to implement but not as reusable. The latter provides more time to implement but increases reusability.

**Requirement 5:** Ability to utilize a functional template that meets business needs

Creating a client site from the existing client template produces an error which prevents the client site from being created. The error is related to two site columns from the Client site template. The error and fix will be documented.

**Requirement 6:** A simple process to create a Client Site that includes appropriate template

Automation of site creation can be created using normal ‘out of box’ means to create a site. A new client site can be created as you would normally, either in the SharePoint 2010 or 2013 experience. However, a custom form will render user input for fields representing the [Plants] list. When the client site is created, values from those fields will update the [Plants] list. Every new site can reference a database table holding the Active Directory user and group permissions values. Currently, the Active Directory permission groups’ information are stored text files.

**Requirement 7:** An ability to apply permission automatically

ECMCC site collection predominately uses Active Directory security groups to manage SharePoint user access. This causes a complex effort to manage permissions. A fix to this would be to create new permission scheme where new SharePoint groups derive from the current Active Directory groups.

**Requirement 8:** A system that is simple to utilize by individuals with different levels of technical skill

The solution will provide automated processes as a whole. For site creation, users should create a custom site using ‘out of box’ means. Administrators should avoid uploading workflow solution files to the site solution’s gallery for reusability.

# Roles & Responsibilities

***[This section will be completed by IT developers with appropriate permissions and roles defined]***

For the system to run smoothly and accurately the following roles and responsibilities must be declared and followed.

* 1. Members
     1. Shaun Lewis
     2. Kelly Reed
     3. Earl Paul
     4. Sanford Guerrero
  2. SharePoint Developer
     1. Create a single view from all Client sites Contacts and Proposals lists.
     2. Remove the four existing workflows
     3. Replace current CCP workflow with event receiver and reuse CCP workflow logic.
     4. Fix ‘Group By Views.’
     5. Fix client site template
     6. Improve site creation process.
     7. Create new permission scheme for ECMM
     8. Automate processes
  3. Development Team
     1. Ensure all requirements are met and implementations traced back to requirements once deployed to production.

# 6. Quick Reference

***[This section will be completed by IT developers with images and step by step guidance]***

1. Refer to below presentation for screenshots and implementations.