

# Export Summary

**Export Date:** 5 October 2025

**Export Location:** /home/ubuntu/sfg-nexus-mockup/business-analysis-export/

## Files Successfully Exported

File Name	Size	Format	Description
sfg-business-rules-complete.json	62 KB	JSON	Complete structured data export
sfg-actionable-summary.md	47 KB	Markdown	Executive summary & implementation guide
sfg-actionable-summary.pdf	Auto-generated	PDF	PDF version of actionable summary
sfg-planner-mapping.md	55 KB	Markdown	Planner workflow mappings
sfg-planner-mapping.pdf	Auto-generated	PDF	PDF version of planner mapping
sfg-gaps-and-questions.md	42 KB	Markdown	Clarification questions for stakeholders
sfg-gaps-and-questions.pdf	Auto-generated	PDF	PDF version of gaps document
README.md	12 KB	Markdown	Package overview and usage guide

**Total Files:** 8 (4 Markdown + 3 PDFs + 1 JSON)

## Analysis Coverage

### Entities Analyzed

- Quote
- Job
- Supplier Order
- Drawing Approval

Materials Analysis  
 Customer  
 Employee  
 Fabrication Workflow  
 Installation Schedule  
 Quality Check

## Workflows Documented

Enquiry Response (SLA: 2 hours initial)  
 Quote Approval (Value-based routing)  
 Quote to Job Conversion (14-day PO wait)  
 Drawing Approval (7 stages, 16 days total)  
 Materials Analysis (2 days SLA)  
 Purchase Order Approval (3-tier based on value)  
 Fabrication Execution (14 stages)  
 Installation Scheduling (Resource allocation)

## Business Rules Extracted

Purchase Order Approval Thresholds (< £100, £100-£500, > £500)  
 Survey Costing Calculation (£1/mile, £50 min, Manchester exception)  
 RBAC - 3-tier access control  
 SLA Definitions (Enquiry, Quote, Drawing, PO)  
 Distance Calculation (Manchester M12 5PG base)  
 VAT Calculation (20% default)  
 Quote Markup (rules identified, percentages need clarification)

## Integrations Identified

MS Teams Notifications  
 Email Automation (Supplier orders, Customer quotes)  
 Distance Calculation API  
 SharePoint List Sync (Power Automate)

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## ⚠ Critical Gaps Identified

### CRITICAL (Must Resolve Before Go-Live)

1. **Quote Markup Calculation Rules** - Target margins per quote type undefined
2. **Quality Check Criteria** - Pass/fail standards not documented

### HIGH (Resolve Within First Month)

1. **CEO Approval Threshold** - Value not specified (£50k suggested)
2. **Installation Staffing Rules** - Safety-critical formulas need validation

### MEDIUM (Optimize Over Time)

1. Regional survey pricing variations
2. Late payment interest calculations
3. Drawing revision limits
4. Supplier performance ratings

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5. Fabrication helper assignment rules
  6. Warranty risk assessment
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## Next Steps

### Immediate Actions

- 1. Schedule Stakeholder Workshop**
  - Invite: CEO, Finance Mgr, Operations Mgr, Production Mgr, Sales Mgr, Installation Mgr
  - Duration: 3-4 hours
  - Goal: Resolve CRITICAL and HIGH priority gaps
- 2. Review Export Package**
  - Business stakeholders: Read PDFs (actionable summary, planner mapping, gaps)
  - Technical team: Use JSON file for SharePoint configuration
  - Project manager: Track implementation roadmap
- 3. Clarify Missing Rules**
  - Use clarification form in sfg-gaps-and-questions.md
  - Collect answers from relevant department heads
  - Document decisions in policy manual

### Implementation Sequence

#### Phase 1 (Week 1):

- RBAC setup (Tier1/Tier2/Tier3)
- Purchase Order approval workflows
- Enquiry Response SLA tracking

#### Phase 2 (Weeks 2-3):

- Drawing Approval 7-stage workflow
- Quote to Job conversion automation
- Planner board setup

#### Phase 3 (Weeks 4-6):

- Survey costing calculation
- MS Teams integration
- KPI dashboards

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## How to Download Files

All files are located in:

```
/home/ubuntu/sfg-nexus-mockup/business-analysis-export/
```

### For Local Download

Click the “**Files**” button at the top-right of the platform interface to access and download these files.

## File Structure

```
business-analysis-export/
├── sfg-business-rules-complete.json      # Complete JSON export
├── sfg-actionable-summary.md             # Implementation guide (Markdown)
├── sfg-actionable-summary.pdf            # Implementation guide (PDF)
├── sfg-planner-mapping.md               # Planner workflows (Markdown)
├── sfg-planner-mapping.pdf              # Planner workflows (PDF)
├── sfg-gaps-and-questions.md            # Clarifications needed (Markdown)
├── sfg-gaps-and-questions.pdf           # Clarifications needed (PDF)
├── README.md                            # Package overview
└── EXPORT_SUMMARY.md                   # This file
```

## Recommended Reading Order

### For Business Stakeholders (Executives, Managers)

1. **Start:** README.md (5 min read)
2. **Then:** sfg-actionable-summary.pdf (30 min read)
3. **Finally:** sfg-gaps-and-questions.pdf (20 min read)
4. **Optional:** sfg-planner-mapping.pdf (validation only)

### For Technical Team (Developers, Business Analysts)

1. **Start:** README.md (5 min read)
2. **Then:** sfg-business-rules-complete.json (review structure)
3. **Then:** sfg-actionable-summary.md (implementation details)
4. **Finally:** sfg-planner-mapping.md (automation patterns)

### For Project Managers

1. **Start:** README.md (implementation roadmap)
2. **Then:** EXPORT\_SUMMARY.md (this file - status overview)
3. **Then:** sfg-gaps-and-questions.md (stakeholder action items)
4. **Track:** Implementation phases and success metrics

## Export Checklist

- [x] Complete JSON export generated
- [x] Actionable summary document created
- [x] Planner mapping document created
- [x] Gaps and questions document created
- [x] PDF versions auto-generated
- [x] README with usage guide created
- [x] Export summary created
- [x] Files organized in dedicated folder
- [ ] **Stakeholder workshop scheduled** ← NEXT ACTION
- [ ] Critical gaps resolved

- [ ] SharePoint lists configured
  - [ ] Power Automate flows built
  - [ ] Planner board deployed
  - [ ] User training completed
  - [ ] Go-live!
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## Analysis Statistics

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- **Total Entities Analyzed:** 20+
  - **Workflows Documented:** 8 major + 10+ supporting
  - **Business Rules Extracted:** 50+
  - **SLA Definitions:** 15+
  - **RBAC Tiers Defined:** 3
  - **Approval Thresholds Identified:** 5
  - **Integration Points:** 4
  - **Critical Gaps:** 2
  - **High Priority Gaps:** 2
  - **Medium Priority Gaps:** 6
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## Success!

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Business rules analysis successfully completed and exported. All files ready for stakeholder review and implementation planning.

**Status:** EXPORT COMPLETE

**Next Action:** Schedule stakeholder workshop to resolve critical gaps.

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**Export Completed By:** Senior Business Systems Analyst

**Date:** 5 October 2025

**Quality Check:** Passed