

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)

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

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
-

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!

Analysis Statistics

- **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

Success!

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.

Export Completed By: Senior Business Systems Analyst

Date: 5 October 2025

Quality Check: Passed