Business Rules

There will need to be a customer’s table with information about that customer.

Each customer can have many projects, many proposed projects, many assessments, many recommendations, multiple site locations.

Each customer has a name, Primary Locations, an Alignment Engineer, a vCIO, and potential site locations.

There are three types of users Alignment Engineer, vCIO, and Project Manager

Each user needs a name, email address, and Security group.

Each customer is assigned only one Alignment Engineer and only one vCIO.

An Alignment Engineer performs assessments, creates recommendations, creates proposed projects. They can perform many of each.

Recommendations are linked to none or many Proposed projects, and assessments.

Recommendations have a customer, a status (Completed, In Progress, Approved, Declined, On hold, Proposed), name, completion date, description, linked assessments, linked Proposed projects, priority (1-10 and 10 being the highest.)

Projects can be made freely but normally proposed projects convert into projects. They need a status, project manager, cost, description, one customer, name, completion date.

Proposed projects are linked to recommendations. They have one customer, name, completion date, description.

Assessments uses an assessment template. They are performed by an Alignment Engineer for one customer. They need a date, score (based on the assessment itself 0-100), percent complete, comments, and a status (Completed, In Progress, On hold, Scheduled), site location.

Assessment templates are made up of one or many Assessment questions, an assessment name, an assessment type (Baseline, Health Check), and a description of it.

Assessment questions is a list of all available assessment questions. Any questions can be linked to many assessment templates. The questions need a questions field, answer field, support field.

After an assessment is completed. An Alignment Engineer creates recommendations from the assessment. They then create proposed projects to accomplish the recommendations.

After the recommendations are made a vCIO coordinates with a customer then can modify proposed projects or Recommendations. They then convert proposed projects into Projects.

Projects are worked on by project managers.

Each Customer has a technology inventory. This data is imported from other systems. It can be added manually.

The technology inventory needs to track device name, site locations, type (Server, workstation, firewall, switch, ups, other, unknown), make, model, Serial number, Operating system, data purchased, date warranty expired, age in years, date data was last updated.