

# Requirements Document

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## Define the different screens / web part pages

This is the user interface / experience

### Screen 1 – form1 user fills out

[screenshot or mock up]

After the setup form is filled out, the user clicks the Add button. After the Add button has been clicked, the user clicks the Next button.

#### Web Parts Involved:

- A
- B
- 

Web part connections: listed here

#### *Form1 fields*

Field Name	Field Type	Required	Field Description
Customer Name	Text	Yes	This field is used to enter the name of the corporate
Address Line 1	Text	Yes	This field is used to enter the first line of address of the corporate location
Address Line 2	Text		This field is used to enter the second line of address of the corporate location
Country	Text field – Combo box	Yes	User can select from a list of options or type in the name of the country if not on the list

### Screen 2 – form2 user fills out

Description of this screen and what it does.

**Web Parts Involved:**

- A
- B
- 

Web Part Connections: listed here

[screenshot or mockup of this page]

*Form2 user fills out*

Field Name	Field Type	Required	Field Description

**Screen 3 – form3 user fills out**

Description of this screen and what it does.

**Web Parts Involved**

- A
- B
- 

Web Part Connections:

Description of connections involved

[screenshot or mockup of this page]

**Form3 fields**

*Form Name here*

Field Name	Field Type	Required	Field Description

## Working With Forms

Description of the user interface and how to get to forms that are in progress.

### Draft Forms

Description of the user interface of forms in progress.

## Workflow Process

Define the steps of the process here...

1. User clicks a button to start the workflow.
- 2.

## Change History

This is a custom SharePoint list that captures information along the way for each customer's workflow. There are "create list item" actions throughout the workflow, which create items in this list for later reference, and/or to display on dashboard pages for the user to read only.

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### List Fields

Change History Field	Field Type
Title	text
Done By	person
Comments	Text
Form Lookup	Lookup

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## Dashboard 1 (for each customer)

List all of the web parts involved on this dashboard and how/if they interact with each other.

## Workflow Tasks

This is the list of tasks that get assigned, and who they are assigned to.

### List of Tasks

Task Name	Description	Assigned To	Due Date	Overdue Notify
Review Form	Review the submitted form(s)	Customer Service Manager	1 hour	Manager

Task Name	Description	Assigned To	Due Date	Overdue Notify
Review Service Ownership	Review the service team ownership section on Ship-To's	CSR Team	1 hour	Manager
Etc...				

## Task Fields

Task Field	Field Type
Title	text
Assigned To	person
Completed By	Person
Start Date	Date
Due Date	Date
Completed Date	Date
Status	Choice
Related Form	Lookup
Comments	Multiple lines text

## Workflow Emails – Verbiage

Name	TO	CC	Subject	Body
Review Form Task	Customer Service Manager		New Setup Form – <i>Customer Name</i>	This is to notify you that a new renter setup form has been submitted. Please ensure the form is accurate.
Review Service Ownership	CSR Team		Review Service Ownership– <i>Customer Name</i>	This is to notify you that a new renter setup form has been submitted. Please assign the relevant service owners.

## Home Page

This is all of the information about the navigation and the web parts on the home page.

## Left Navigation

- Reports

- A
- B
  
- Lists
  - Workflow Issues – a list created using the “issues” template which lets end users easily submit questions and issues to us, regarding this new site / process.
  - Etc.

## Web Parts

[screenshot or mock up here]

### Left side

Descriptions of web parts

### Right Side

Descriptions of web parts...

### My Active Tasks

This is the list of active tasks that are assigned to the currently logged in user.

## Metrics

Define reporting here. Overdue tasks, etc. Use reporting services or other.

## Migration

1. Create new site collection in test environment.
2. Test that new site / process.
3. Cleanly copy that site collection to production
4. Go live