

Business Rules

SelCtl Land Trust Database Development Project

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Purpose

This document lists rules of business operation that are relevant to the use of the product developed during the project.

Business Rules

The following tables lists rules of business operation relevant to database design.

ID	Rule Definition	Type of Rule*	Static/ Dynamic**	Source
Con.sub-01	Each contact subject code may be used only once with each contact	Action Restricting	Dynamic	
Con-01	Each contact may be associated with several contact subject codes	Structural fact	Static	
Don-01	A “proxy donation” record is not required to indicate the “original donor” associated with it.	Structural fact	Static	
Don-02	A donation record may be associated with no more than one pledge record	Structural fact	Static	
Don-03	To represent a pledged future donation, a donation record is entered with donation date set to the date of the expected future donation, amount set to zero, pledge amount set to the amount of the expected donation	Structural fact	Static	
Don-03	A non-fund donation (for example, hours volunteered, materials provided...) is represented by a donation record with amount set to zero, donation type set to the appropriate “non-fund” category, and with the “value” set to the estimated value of the donation.	Structural fact	Static	
Email-01	Only one email address associated with an party may be designated as the primary email address for that party	Action Restricting	Dynamic	

ID	Rule Definition	Type of Rule*	Static/ Dynamic**	Source
Group.mbr-01	No group membership period record may overlap a time period entered for the same group on another group membership record.	Action Restricting	Dynamic	
Group-01	Each group may be represented by no more than one group record	Action Restricting	Dynamic	
Loctn-01	Only one location associated with an party may be designated as the primary location for that party	Action Restricting	Dynamic	
Loctn-02	Several phones may be associated with each location	Structural fact	Static	
Par-01	When an individual first contacts the organization their address information is added to the database and they are granted a one-year complimentary subscription to the newsletter.	Structural fact	Static	
Par-02	If an individual has not made a donation after receiving the newsletter for one year, the next issue of the newsletter sent to them includes an insert requesting a donation (the “legacy insert”).	Action Triggering	Dynamic	
Par-03	If an individual has not made a donation by the time the 2d newsletter following their one-year complimentary subscription is sent, that newsletter includes an insert indicating that the individual will be removed from the database if they do not make a donation	Action Triggering	Dynamic	
Par-04	If an individual has not made a donation by the time the 3d newsletter following their complimentary one year subscription is sent, they are removed from the database.	Action Triggering	Dynamic	
Par-05	An party may be associated with several party category	Structural fact	Static	
Par-06	Several locations may be associated with each party	Structural fact	Static	
Par-07	Several phones may be associated with each party	Structural fact	Static	
Par-08	Each party may be associated with several groups	Structural fact	Static	
Par-09	Each party may be associated with several party class codes	Structural fact	Static	
Par-10	Each party class code may be associated only once with each party	Action Restricting	Dynamic	

ID	Rule Definition	Type of Rule*	Static/ Dynamic**	Source
Par-11	Each party may be associated with several email addresses	Structural fact	Static	
Par-12	Each party must have an assigned staff member	Structural fact	Static	
Par-13	When a new party is created, the assigned staff member associated with that party must be a current employee	Structural fact	Static	
Phone-01	Only one phone record associated with an party may be designated as the primary phone number for that party	Action Restricting	Dynamic	
Phone-02	A phone may be associated with a location or a party, but not with both.	Structural fact	Static	
Pledge-01	A pledge record may be associated with multiple donation records	Structural fact	Static	
Proj-01	Each easement project may have multiple staff members assigned to it.	Structural fact	Static	
Proj-02	Each easement project may be associated with multiple parties	Structural fact	Static	
Loctn-03	Each location record must be associated with one and only one party	Structural fact	Static	

*Values used for “Type of Rule” include:

“Structural Fact” – facts or conditions that must be true.

“Action Restricting” – prohibits one or more actions based on a condition.

“Action Triggering” – instigates an action when one or more conditions become true.

“Inference” – draws a conclusion when one or more conditions become true

“Calculation” – calculates a value given a set of other values.

**Values used for “Static/Dynamic” include:

“Static” – unchanging in normal operation, not dependent upon calculations or inferences derived from attributes entered into the system as data characterizing data subjects such as “donation”, “mailing list member” etc. However, these rules may be subject to change if business rules are altered.

“Dynamic” – application of rule depends on calculations or inferences derived from attributes tracked within the system as data characterizing data subjects such as “donation”, “mailing list member” etc.