

Report Discovery and Analysis Form

Client Area

Report Name: _____

Report Description:

Report Location:

Work Group Assignment	Tab	Menu Group	Menu Item	Embedded in Form Y/N

Report Screenshot or Sample:

Report Discovery and Analysis Form

Report Area Descriptions:

Display Name	Alignment	Field Format	Description

Field Logic:

Display Name	Business Logic

Report Launcher Form Screenshot or Sample:

Report Search Field Descriptions:

Display Name	Field Name	Field Type	Description

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Form

Developer Area

Report Data Model:

Report Meta Data Information:

Display Name	Table	Field	Data Type

Report SQL:

Report File Name:

ClientTrack Report ID/Name:

Additional information needed:

Report Discovery and Analysis Form

Quality and Assurance Area

Unit Testing:

Step	Action	Results	Success/Fail
#1			
#2:			
#3			
#4			
#5			
User Signature		Date:	

Functionality Testing:

Step	Action	Results	Success/Fail
#1			
#2:			
#3			
#4			
#5			
User Signature		Date:	

Integration Testing:

Step	Action	Results	Success/Fail
#1			
#2:			
#3			
#4			
#5			
User Signature		Date:	

System Testing:

Step	Action	Results	Success/Fail
#1			
#2:			
#3			
#4			
#5			
User Signature		Date:	

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Report Schedule

WBS	Task(s)	Start Date	End Date	Wrk Days	Owner	%
01.000 Planning Phase						
01.001	Environment Needed					
02.000 Design Phase						
02.001	Define Data to show on Report					
02.002	Design Data Model					
02.003	Review Data Model					
02.004	Review Business Rules					
02.005	Design Report Layout					
02.006	User Approval of Design					
03.000 Configuration Phase						
03.001	Connections Configured					
04.000 SQL Coding Phase						
04.001	Collect Meta Data Information					
04.002	Define Variables					
04.003	Create SQL to Configure Data					
04.004	Encapsulate SQL into Stored Procedure					
04.005	Unit Test					
05.000 Report Coding Phase						
05.001	Create Report User Interface					
05.002	Configure Report Objects to DB					
05.003	Link Fields to Report					
05.004	Setup Parameters in Report					
05.005	Custom Code for report					
05.006	Unit Test					
06.000 Testing Phase						
06.001	Deploy Database Changes to Test					
06.002	Deploy Report to Test					
06.003	Unit Testing					
06.004	Integration/System Testing					
06.005	Functionality Testing					
06.006	User Acceptance Testing					
07.000 Deployment Phase						
07.001	Deploy Database Changes to Prod					
07.002	Deploy Report to Production					
07.003	Unit Testing					

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07.004		Integration/System Testing					
07.005		Functionality Testing					
07.006		User Acceptance Testing					
08.000		Signoff Phase					
08.001		Client					
08.002		Project Manager					

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Sign Off Area

Functionality Testing:

QA Date

Client Date

Integration Testing:

QA Date

Client Date

System Testing:

QA Date

Client Date

User Acceptance:

QA Date

Client Date