

1.1 Custom User Defined Fields Consulting

Service Description

While eTapestry does contain many built-in fields, we know the real power for our customers lies in the ability to customize the product based on your specific organization needs. For this service, we help you create the User Defined Fields and framework of queries and reports needed to work with those fields.

Remote Preparation

Your organization’s prep work includes:

- Sign up to request consulting: <https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>
- Finish training listed in Pre-Consulting Worksheet: <https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting%20Worksheet%20Custom%20User%20Defined%20Fields.doc>
- Return completed Pre-Consulting Worksheet back to consulting@etapestry.com
- You will receive a scheduling link to sign up for time with a consultant

Delivery Process

You will work with a consultant through the following steps. Once these steps are complete we will consider the services delivered and close your project. If you determine you need additional assistance in this or any other area, you can request additional consulting services using the request form below:

<https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>

1.2 Project Approach

The following describes the implementation approach for **Custom User Defined Fields**

Project Approach		
Phase	Purpose	Overview of Tasks
Prepare	To coordinate with the consultant to schedule dates and times for each session. To provide consultant with necessary information regarding the queries and reports you want created.	<ul style="list-style-type: none"> • Complete preconsulting survey and identify the custom user defined fields you need build for your specific needs. • Schedule initial consultant call, consultant configuration work and secondary consulting session.
First Session	To review queries and reports needed.	<ul style="list-style-type: none"> • Discuss details User Defined Fields and framework of queries and reports needed to work with those fields. • Review database structure and discuss revisions to database if necessary.
Configure	To configure queries and reports	Configure the following Functional Areas:

Project Approach

	based on preconsulting survey and initial consulting session.	<ul style="list-style-type: none">• Consultant will create and configure required user defined fields and framework for queries and reports.• Consultant will test queries and reports created.
Second Session	To walk through queries and reports created	<ul style="list-style-type: none">• Walkthrough setup of user defined fields, queries and reports created by consultant• Customer will conduct a data entry walk through using their data• Customer and consultant will run queries and reports created and adjust if necessary
Wrap Up	To complete the activities required to formally end the implementation project.	<ul style="list-style-type: none">• Create an engagement summary document that outlines the following:<ul style="list-style-type: none">• List of fields, queries and reports created• Any special instructions regarding customization