

## 1.1 Queries and Reports Consulting

### Service Description

This service allows you to spend time with our expert product consultants to better understand and build queries/reports that allow you to extract the data you need. The consultant will build the queries and reports you need and teach you how to use them. This service is a maximum of 4 hours of consultant work both offline and online with the customer.

### 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 Worksheet Queries Reports.doc](https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting%20Worksheet%20Queries%20Reports.doc)
- Return completed Pre-Consulting Worksheet back to [consulting@etapestry.com](mailto: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 service 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 **Queries and Reports**

Project Approach		
Phase	Purpose	Overview of Tasks
<b>Prepare</b>	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"> <li>• Complete preconsulting survey and identify the queries and reports you need built.</li> <li>• Consultant will determine if the number and complexity of the queries/reports will fit into the allotted consulting time.</li> <li>• Schedule initial consultant call, consultant configuration work and secondary consulting session.</li> </ul>
<b>First Session</b>	To review queries and reports needed.	<ul style="list-style-type: none"> <li>• Discuss details of queries and reports needed.</li> <li>• Review database structure and discuss revisions to database if necessary.</li> </ul>
<b>Configure</b>	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"><li>• Consultant will create and configure required queries and reports offline.</li><li>• Customer will add/revise Funds and G/L codes to eTapestry based on first session.</li><li>• Consultant will test queries and reports created.</li></ul>
<b>Second Session</b>	To walk through queries and reports created	<ul style="list-style-type: none"><li>• Walkthrough setup of queries and reports created by consultant</li><li>• Run queries and reports created and adjust if necessary</li></ul>
<b>Wrap Up</b>	To complete the activities required to formally end the implementation project.	<ul style="list-style-type: none"><li>• Create an engagement summary document that outlines the following:<ul style="list-style-type: none"><li>• List of queries reports created</li><li>• Any special instructions regarding customization</li></ul></li></ul>