

CalSAWS Ad-Hoc Report Request Form

When complete please attach form to ServiceNow Ticket

#	REQUIRED REPORT REQUEST INFORMATION: PLEASE COMPLETE ALL FIELDS BEFORE SENDING	Ticket #:	SN
1	Date Submitted Mm/dd/yyyy	Date Required mm/dd/yyyy	
2	County Name		
3	Title of Request		
4	Short Description of Request		
5	Purpose	e.g. Legal, business process etc....	
6	Requestor's Name First & Last Names	First	Last
7	Requestor's Phone Most Accessible Contact #	Office	Other Email
8	Requestor's Title & Department	Title	Dept.
9	Manager Name Approval to Submit Request		
10	RM Name Regional Manager Name		

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11	<p>Request Please provide details.</p> <p>Request Type:</p> <ul style="list-style-type: none"> - New Report – e.g. New Report, Extract, Content, Functionality - Modify Existing report - e.g. New data element or change data element. - New Report Using existing report – e.g. using existing report add new data elements to create new report. <p>Format: CSV file or xlsx format report.</p> <p>Priority:</p> <ul style="list-style-type: none"> - Critical - Impacts enterprise, entire site, entire business function or a high visibility system and has NO WORKAROUND. - High – Current state causing a major slowdown in work or partial failure of technology supporting a business unit. WORKAROUND is AVAILABLE but is not efficient. - Medium - Impacts 5 or more people. - Low – Everything else. 	<p>Request Type and Format</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%; padding: 5px;"> Select one from each column. </td> <td style="width: 30%; padding: 5px;"> <input type="checkbox"/> New Report <input type="checkbox"/> Modify Existing Report... <input type="checkbox"/> New report using existing report </td> <td style="width: 30%; padding: 5px;"> <input type="checkbox"/> Data Extract (CSV) <input type="checkbox"/> xlsx Report </td> </tr> </table> <p>Any Current Business Process to see/get Data (Detailed Description, if any)</p> <p>Priority Requested <input type="checkbox"/> Low (4) <input type="checkbox"/> Medium (3) <input type="checkbox"/> High (2) <input type="checkbox"/> Critical (1)</p> <p>What is your reason for this priority? <i>(Please justify the priority you selected.)</i></p> <p>Functional Business Area (Case, Person, Fiscal, EDBC, Self Service Portal etc....)</p> <p>Tool(s) Used for Current Processes (if any, e.g. APEX, other)</p>	Select one from each column.	<input type="checkbox"/> New Report <input type="checkbox"/> Modify Existing Report... <input type="checkbox"/> New report using existing report	<input type="checkbox"/> Data Extract (CSV) <input type="checkbox"/> xlsx Report
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12	<p>Report Description and Justification</p> <p>Description: Bullet points of what the report will be designed to produce and any additional details.</p> <p>Justification: What reason does the business have for requesting the report?</p>	<p>Report Description:</p> <p>Justification:</p>			

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13	Data Requirements Data elements, Report Input, Report Output.	<p><u>Report Input:</u></p> <ul style="list-style-type: none"> - Report Parameters [User entered values to generate the report/extract] List - Filters [Fixed/Hard Coded parameters like Aid Code, Program, etc..] List - Sorting and Grouping [sort order or grouping of data..] List <p><u>Report Output:</u></p> <ul style="list-style-type: none"> - General Format [explain how the report should look, Providing a mockup is recommended] Attach the Mock report. - Header Level data [List of all data elements, report columns, data page mapping in CalSAWS application etc..] List/page name - Line level Data [if any, specify fields to be under column names and any additional fields to be displayed] List - Calculations [Expected calculations: e.g. how the business defines "eligible"] List - Totals [Summary or Grand total information to displayed] List <p><i>Please refer counties security and privacy policy if any.</i></p>												
14	Additional comments or instructions Any information not covered previously that would assist in defining the solution	Comments												
15	User Acceptance Testing List names of persons who will be assigned to help define and test user acceptance (Testing and Validation of Data is Counties responsibility)	Tester Names and Contact Information												
16	Supporting Documentation Are you sending any supporting information or attachments?	<p>Please list file names of supporting documents you are submitting</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: left;">File Name</th><th style="width: 50%; text-align: left;">Description</th></tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	File Name	Description										
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CalSAWS Ad-Hoc team USE ONLY			
Received Request by		Received Date	
Contacted Requestor	Acknowledged Info. Requested Interviewed	Requestor's Response	
Notes			