



Checklist CRR - Custom Report Requirements Gathering

(Please complete for *each* report requested)

Required Attachments

(One form is required for *each* report requested)

- This form filled out (Required)
- Sample of the report from prior provider or mocked up by customer (optional)

Custom Report Request Information Gathering Checklist

Company Name/# _____

Report Contact _____

Contact e-mail: _____

Contact telephone: _____

Contact preference: e-mail ___ tel. ___

Report Title _____

Report Description

Report Purpose (Please describe who will use the report and for what business purpose)

Report Similar To Standard (If report is similar to a standard report, id the report and the differences)

Report Data

If any data or calculations require data that is not normally loaded into Web Pay by the conversion department, please show the customer where to enter the data.

If any custom fields need to be filled to store the data, please label the field during conversion and indicate the label and field type (Text, number, date, checkbox, lookup) below.

Col #	Column Name	Web Pay Screen/Function	Custom Field Label/Type	Calculation	Total

Select Records

by _____

Aside from the filters below, what set of records may appear on the report? E.g.: all hourly emps

Sort(s)

1. _____
2. _____
3. _____
4. _____
5. _____

Group by

1. _____
2. _____
3. _____
4. _____
5. _____

Filters _____

Indicate any non-standard filters that the customer needs on the report. e.g.: select specific unions

Company Set _____

Should the interface be run from the company set? If so, what is the company set name?