

**Report Design Document**

|  |  |
| --- | --- |
| ****Title:**** | [Abstract] |
| ****Case:**** | Click or tap here to enter text. |
| ****Quote:**** | Click or tap here to enter text. |
| ****Customer:**** | [Company] |
| ****Revision:**** | [Status] |
| ****Author:**** | [Author] |

# The Six S Development Process

*This process has five steps. You only need to perform one of them now. (You’ll also need to sign off on this document later.)*

### **Request**

Please fill out the **Request** section yourself or in collaboration with a Six S consultant. This is where you will explain your needs along with answering a few supporting questions.

### **Response**

The Six S Strategic Services department (i.e., the development group) will fill out this section. They will summarize your request as they understand it and explain the solution that is being proposed. This document will then be returned to you with an accompanying quote.

**Thoroughly review this section to ensure the development group has accurately understood your issue and that the suggested approach will meet your needs**. This review process is critical to ensuring your development project is successful.

If you have any questions or concerns after your review or any explanations are unclear, please contact Six S BEFORE you approve the design so they can be addressed.

### **Signoff – Design Authorization**

The **Design Authorization** section should be signed upon your approval of the suggested design. This acknowledges that you agree that Six S has understood your request correctly and the design outlined in step 2 (red section) is acceptable. There are also “initial” boxes in this section. Please initial these boxes indicating you agree to said sections before signing off on the yellow section.

### **Development**

When you return the signed document, your request will be placed on the development schedule. A developer will then complete the request and contact you to arrange testing.

### **Signoff – Customer Acceptance**

The **Customer Acceptance** section must be signed upon completion of your report(s). This acknowledges that Six S has completed the work, you have tested it, and you are satisfied with the results. Reports are not moved to live/production environments until this is signed.

# Request

*Please fill this section out yourself, or in collaboration with a Six S consultant.*

## Which database would you like this developed in?

*Six S normally performs new development in the “Test” database. If you prefer another database, please specify. Please ensure your chosen database has sufficient data for testing the relevant reports.*

Click or tap here to enter text.

Please refresh this database with a copy of my live database.

## What is your need?

*Please list the reports you would like modified. Please include mockups (separate documents are fine) for each report.*

*For complex requests, custom calculations, and new reports, please provide written detail of your need. For design changes and primarily aesthetic requests, mockups alone will be sufficient.*

Click or tap here to enter text.

## Do you need routings or have other requirements?

*This section is Optional.   
If you would like routings configured, please describe them here. List the document to be transmitted and the intended recipient(s).  
  
If you would like a particular approach utilized (or not) please let us know. Likewise, please list any special considerations or additional functionality you need.*

***Examples:*** *“Our part images are stored outside Epicor.”  
“Please configure our PO to automatically email to the selected purchase point and CC payables@ourcompany.com.”*

Click or tap here to enter text.

# Response

*This section will be completed by the Six S development group.* ***Please review thoroughly to ensure your request has been accurately understood******and the proposed solution will meet your needs****.*

## Reports to be modified

Initial: ahAH\_\_AH\_\_\_

*These are the reports Six S will be modifying and/or creating.*

|  |  |
| --- | --- |
| Report | Style |
|  |  |
|  |  |
|  |  |

## Changes to be made

Initial: \_\_\_\_\_

*This is an overview of the changes that will be made to each report.*

Click or tap here to enter text.

## Additional Components

*In some cases, additional items may be needed to accommodate your request. If that is the case, those items will be listed here.*

|  |  |  |
| --- | --- | --- |
| Name | Type | Purpose |
|  |  |  |
|  |  |  |

# Terms

**Design and Engineering Approach**

Epicor’s standard development tools and recommendations along with software development best practices have been utilized wherever possible. This is done to minimize changes to the base software and make upgrades as easy as possible. Anywhere an external or non-standard approach has been suggested, will be clearly noted in the design above.

Every effort has been made to ensure that this solution will exhibit performance in line with base software.

**Upgrade Considerations**

Work required to migrate items from one version to another will incur additional costs not covered unless a Customization Maintenance contract has been engaged.

Six S designs solutions with upgradeability in mind. Whenever possible, solutions will be designed to upgrade without the need for manual intervention by a developer. However, Six S can not make guarantees regarding compatibility with future software versions.

**Limitations**

If there is more than a 10% increase to the volumes of data or a change to the typical use of the custom solution as shown by this design, it may render the architecture of the solution inappropriate and/or affect performance.

If you require assistance from Six S Partners in this scenario, any optimization or changes to the custom solution may be chargeable and are not covered by either the original cost of development or Customization Maintenance.

**Testing and Quality Assurance**

Whenever possible, testing is carried out within your own environment. (e.g., Your Test or Pilot database.) When this is not possible, the solution will be tested on the same release version.

Six S Partners ensures that the solution will pass all listed Unit Tests prior to delivery.

**Warranty**

Six S warrants that the product furnished pursuant to the approved Development Design Specification for a period of ninety (90) days from the date of delivery to the customer. The warranties specified in this Section will not apply to defects attributable to: (i) modification of Product without Six S prior written approval, (ii) change of scope or process agreed upon in the documentation to which the product no longer functions, (iii) upgrades, or (iv) due to internal infrastructure viruses and changes. After ninety (90) days the custom maintenance period will be in affect if selected.

# Design Authorization

Any of the functional sections within this design document which are subject to interpretation and may subsequently cause a problem in the software by not satisfying [Company]requirement, need to be fully documented within this design before approval, otherwise Six S Partners’ development group reserves the right to follow their interpretation.

I have read and initialed (where indicated in yellow) that I agree to the Six S interpretation of our requirements and the Six S proposed solution(s). I have reviewed the entirety of this design document and I agree that it is a fair representation of [Company]requirements and a solution to them.

|  |  |
| --- | --- |
| **On behalf of** [Company]**:** | |
| **Signature** |  |
| **Date** |  |
| **Print Name** |  |
| **Job Title** |  |

# Customer Acceptance

I have reviewed, tested, and approved the design and function of the solution with changes, additions, deletions, or corrections as agreed upon.

I declare the solution complete and authorize it to be moved to our live environment. (Six S will not deploy any solutions to the live environment prior to explicit scheduling with customer.)

|  |  |
| --- | --- |
| **On behalf of** [Company]**:** | |
| **Signature** |  |
| **Date** |  |
| **Print Name** |  |
| **Job Title** |  |