Customer SQL Scope

|  |  |
| --- | --- |
|  |  |
| Customer |  |
| Customer On Premise / Online? |  |
| Primary Contact/Phone/Email |  |
| MC Representative |  |
| Deliver Code To (pick one) | IC / CC / SE / Customer |
| Date (and revision) |  |

# Overview

*If there are multiple requests, an overview can be provided. Otherwise, this section is not needed.*

* [Report – Custom Expression](#_Report_–_Custom)
* [DB Scheduler Event](#_DB_Scheduler_Event)
* [Rules Manager SQL](#_Rules_Manager_SQL)
* [Database Cleanup / Independent SQL Assistance](#_Database_Cleanup_/)

# Report – Custom Expression

|  |  |
| --- | --- |
| **Report Name (if hosted)** |  |
| **Column Header/Label** |  |
| **Description of Desired Result** |  |
| **Fields Used to Calculate** |  |
| **Special Criteria (inclusion/exclusion of data, time periods, etc.)** |  |

# DB Scheduler Event

|  |  |
| --- | --- |
| **Description of Desired Result/Effect** |  |
| **Name of DB Job** |  |
| **Frequency** | *Example: Every 2 days* |
| **Fields Used To Calculate** |  |
| **Special Criteria (inclusion/exclusion of data to update, etc.).** |  |

# Rules Manager SQL

|  |  |
| --- | --- |
| **Description of Desired Result/Effect** | *Specify action to take (create new work order, change work order status, etc.) and record to update (event record, parent, child, etc.).* |
| **Rule Name** |  |
| **Event (Trigger)** | *Example: New Work Order* |
| **Criteria** | *Describe any rule criteria that is used to determine the circumstances under which the rule should execute (e.g., only for work orders with procedure “x” or procedure “y”).* |
| **Special Criteria for Rule Script** | *Indicate any additional logic or special cases for the execution of the script.* |

# Database Cleanup / Independent SQL Assistance

|  |  |
| --- | --- |
| **Description of Desired Result/Effect** |  |
| **Special Criteria (inclusion/exclusion of data, time periods, etc.)** |  |