

Crystal Holos

Terms of Reference

Overview

This document details the scope of a time-boxed RAD development phase within *{company/project details}*. This document applies to the Holos product.

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Introduction

Purpose

The purpose of these terms of reference is to provide a working document, which supports the Holos Rapid Application Development (RAD) methodology for the *{project name}* applications.

Every revision of this document will be signed off by *{customer project manager}* as confirmation of agreement of scope at that point in time.

Scope

This document spans *{project scope}*.

The first version of this document follows on from an initial requirements gathering from the business area (see below) Subsequent versions have been produced following on from each user workshop and/or notification of a change in requirements.

{

- It may be that parts of the Functional Definition section are suitable for porting to a Physical Design Document
- Reference any relevant standards for the project, eg. adherence to Project Management and reporting standards

}

Related Documents

Document Name	Reference	Issue Date
<i>{Filename}</i>	<i>{Title of document}</i>	

{Reference project plans, coding and screen standards, relevant meeting notes}

Project Scope

Objectives

{Project specific, but more general ones could be:

- To demonstrate the ability of Holos as a suitable reporting tool for the project/company

- To trial the RAD methodology within the company}

Business Benefits

-
-
-

Impact Analysis

-
-
-

Functional Definition

The following functionality is anticipated to be deliverable at the end of the timebox period.

Environment

Hardware/Software

{Reference the version of Holos, the platform, operating system and version, database and version, client environment and version}

Standards

All code will be developed according to the guidelines specified in the Holos Coding Standards, referenced above.

{It may be necessary to reference any adherence to GUI standards that the customer may have, else reference our GUI standards in the above document}

Desktops

{Desktops available to all types of user, any navigation between them, any access restrictions etc.}

Use of Tools

{Holos tools available to super users eg.

- Access to Worksheet
- Access to Report Designer}

Data

Source Data

{Detail all sources of data. If relevant, provide details of database table layouts or spreadsheet columns. If flat files are being used then it would be helpful to specify the format of the file. Provide details of mapping columns to dimensions if the relationship is not obvious}

Dimensions

{List all dimensions in the application. Include dimension name, fieldnames and approximate number of fields in each dimension. Use the > symbol to indicate a hierarchy eg.

timem_dim: Jan, Feb, Mar....Dec > Year Total (13 fields)}

{Note any alternate hierarchies and indicate whether the dimensions are static or whether it is necessary to rebuild any of them.}

Structures

{Supply the structure name and the component dimensions eg.

toys_str dimensions are:

product, profloss, measure, timem}

Rules & Calculations

{Provide rule table names and rule calculations which are used in the model, or on their own. Do not reference any calculated fields here, it is more relevant to provide those calculations in the report details below}

Models

{Detail the model name and the component structures and rule tables}

Data Export

Dynamic Access

Reports

{Report 1}

{Insert a screen print of the report. This may be a Holos report or a Word table or graphic}

Dimensions

{List dimensions referenced in the report}

Structures

{List structures referenced in the report. Mention the number of dimensions and the type of structure}

Rules and Calculations

{Provide details of calculated fields only}

Table

Rows: *{list dimensions}*

Columns: *{list dimensions}*

Sections: *{list dimensions}*

Graph

{Detail type of graph}

Plot: *{list dimensions}*

Reference: *{list dimensions}*

Sections: *{list dimensions}*

Functionality

{Provide a list of functionality available from within the report. This may be from the button bar, menu or double-clicking eg

- *Drill across on sections*
- *Access to HoloS worksheet}*

Notes

- *.....*

Dialogs

{Dialog 1}

{Insert a screen print of the dialog}

Dimensions

{List dimensions referenced in the dialog - if relevant}

Structures

{List structures referenced in the dialog - if relevant}

Dialog

{Include description of how the dialog will function}

Contingency Scope

The following functionality may be added to the base system described above should there be any outstanding time available within the timebox.

{List further development which has been discussed in workshops, but which you do not think you can feasibly achieved in the time. It may be that in further revisions of this document that some reports and functionality move in and out of scope as time and user priority dictates. This could be as detailed as providing a report description as above, or just an outline of functionality}

Constraints

The following functionality arising from user discussions, will **not** be included for the purposes of this development:

{This is an opportunity to clarify any uncertainties of scope, which may have arisen in the course of development. eg security issues}

Training

.....

Project Plan

Roles & Responsibilities

Role Of Seagate Software

-
-
-

Role Of Customer

-
-

Milestones

-
-
-

Timescales

The timescales detailed below are subject to change:

{Try to establish some dates at the beginning of the development, even if they do change. Aim for a user workshop once a week. See below for example activities}

Date	Activity	Resource
Jan 13	Terms of Ref	LC
Jan 14	Prototype Build	DC /LC /GC
Jan 20 10am	User Workshop	CH /JH /RP/ LC
Feb 13	Final Demonstration	CH /RP /LC
Feb 14/18	Testing	LC
Feb 18/19	User Acceptance	CH
	Testing and Signoff	

KEY

Initials - Name Surname

Success Criteria

{Project specific - bear in mind that this might relate back to objectives. This section is especially important if this is a pre-sales prototype}

Deliverables

Documentation

.....

Application Software

.....

Issues / Risks

{Outline any threats to the success of the project, or of the long term use of Holos eg

- *availability of users for workshops*
- *user/developer training}*

Issue or Risk Item	Owner	Due	Complete
.....	Initials	Date	Date
.....	Initials	Date	Date
.....	Initials	Date	Date
.....	Initials	Date	Date
.....	Initials	Date	Date

Future Developments

{Provide some suggestions for the way in which they might use Holos in the future, if relevant}

Contacting Crystal Decisions for Technical Support

We recommend that you refer to the product documentation and that you visit our Technical Support web site for more resources.

Self-serve Support:

<http://support.crystaldecisions.com/>

Email Support:

<http://support.crystaldecisions.com/support/answers.asp>

Telephone Support:

<http://www.crystaldecisions.com/contact/support.asp>