PROCEDURE OVERVIEW

The main purpose of MIS report generation is to provide SDLC business departments with user and web traffic information. This information is to be used for Sales, Finance, Advertising, and Product Development.

The **MIS REPORTING** procedure establishes the criteria for accepting, approving, tracking, and developing MIS report requests. This procedure should be used for all requests for information from the MIS databases. These requests could be one-time requests for MIS data or requests that need to be automated and delivered on a daily, weekly, or monthly schedule.

Procedure Owner: MIS Manager, Engineering

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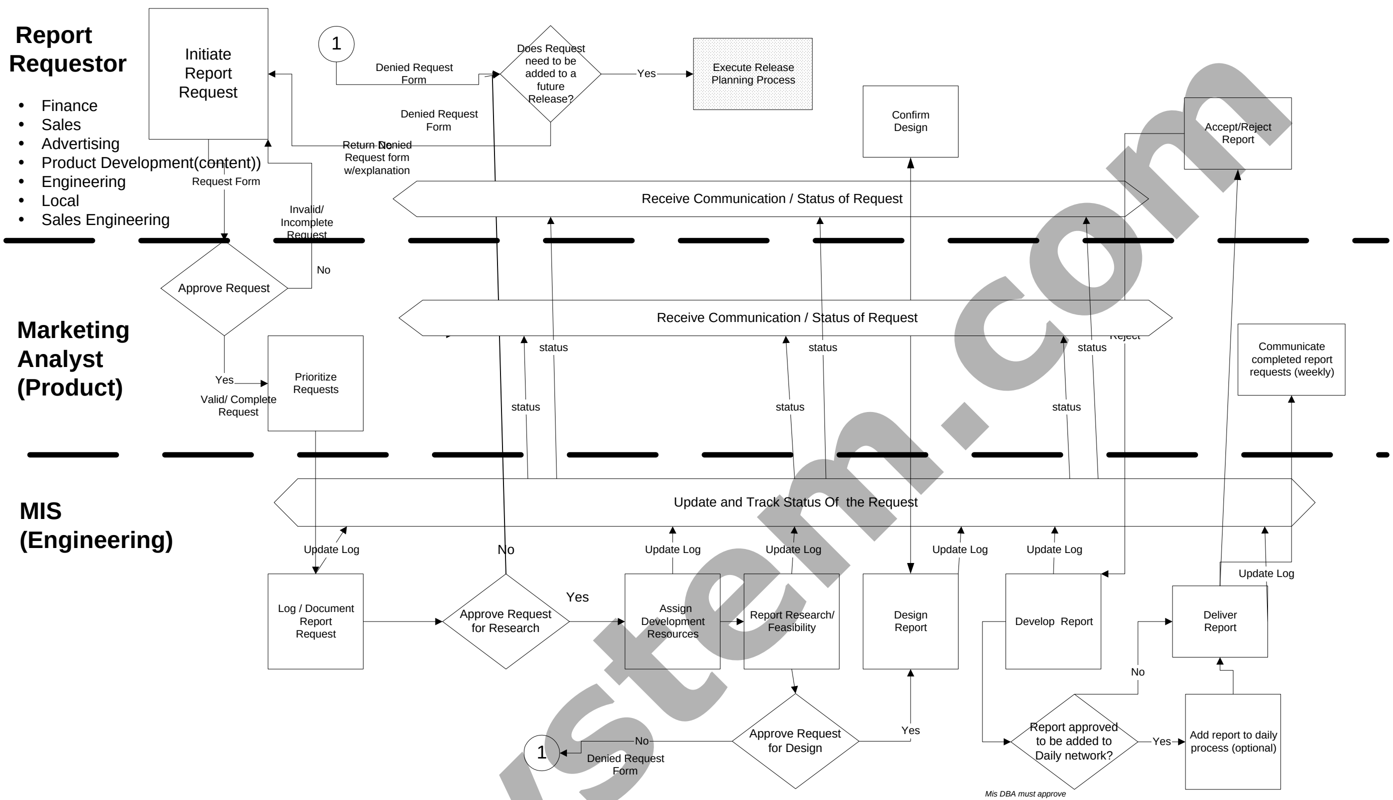
REVISION HISTORY

Version	Date	Author	Description

<u>Distribution List:</u>
MIS Manager, Engineering
Product
Product
Market Analyst, Product
Product Management

PROCEDURE DIAGRAM



ROLES AND RESPONSIBILITIES

Report Requestor

The organization or individual that contracts with the MIS department to develop reports. For the purpose of this document, the ***requestor*** is defined as any internal SDLC department or personnel. The ***requestor*** is responsible for clearly defining the report request by completely filling out the **Report Request Form**. All requests for reports from external sources must be funneled through a ***requestor***. The MIS Department will not accept requests directly from external sources such as clients, ISPs, and other CMGI departments.

Designated Group Representative

The Sales, Finance, Advertising, Product (content), Engineering, Local, and Sales Engineering groups will each establish a ***designated group representative*** that acts as the initial funnel for all MIS report requests. These ***designated group representatives*** will screen all requests and then forward them on to the ***Marketing Analyst.***

Marketing Analyst (Product)

The ***Marketing Analyst*** acts as the second funnel for all report requests. The ***Marketing Analyst*** collects all the requests from the various internal SDLC.com departments, checks for completeness, analyzes business justification, and prioritizes all report requests prior to distributing them to the ***MIS team***. The ***Marketing Analyst*** will only accept requests from the ***designated group representative*** of each of the internal SDLC departments.

MIS Team

The ***MIS Team*** will be responsible for logging and tracking report requests, as well as designing, coding, testing, and delivering the final report. The ***MIS manager*** will assign a ***designated team member*** to log the initial report requests into the **Report Request Tracking Tool**. The ***MIS Manager*** will also assign a ***MIS developer*** to each request.

The ***MIS Team*** is responsible for the accuracy of the report and the data in the MIS databases/tables.

METRICS

The following data should be captured throughout this procedure to help estimate MIS report requests and to help measure the effectiveness of this procedure:

- Priority (Critical, High, Medium, Low)
- Actual Start Date
- Actual Completion Date
- Actual Report Run Time
- Actual Report Development Time

PROCEDURE ACTIVITIES

Initiate Report Request

All report requests must be generated by one the following “internal” SDLC Departments:

- Sales
- Finance
- Advertising
- Product (content)
- Engineering
- Local
- Sales Engineering

If an external source wishes to request a report, the request must first be directed to one of the internal departments mentioned above.

In order to request a report, the ***requestor*** must fill out a **Report Request Form** (MS Word document) and forward it via e-mail to their ***designated group representative***.

The **Report Request Form** will contain the following information:

- Report Name
- Description of the Report
- Business Need / Justification
- Requestor Name
- Requested Due Date
- Indication that the request needs to be added to MIS automated schedule (daily, weekly, monthly)
- User Defined Priority (Critical, High, Medium, Low)
- Requirements/Specifications
  - Data/Measures needed (page views, minutes, unique users, impressions, hits, etc.)
  - Timeframe, Frequency (Daily, Weekly, Monthly, One Time)
  - Report layout (Sort Order, Grouping, Totals)
  - Delivery format (Excel file format, other)
  - Delivery mechanism (e-mail, file server/LAN, hard copy)
- Distribution List for the report

Regardless of the ***requestor's*** job title, a **Report Request Form** must be filled out before any work begins. It is imperative that all SDLC staff, including upper management, follows this procedure and uses all required forms.
Each internal group defined above is responsible for naming a ***designated group representative*** to collect all requests within their respective group. This ***designated group representative*** reviews the **Report Request Form** for completeness, before forwarding it (via email) to the ***Marketing Analyst (from Product)****.*

Approve and Prioritize Requests

The ***Marketing Analyst*** acts as the as the central collection point or funnel for all report requests. The ***Marketing Analyst*** collects all the requests from the various internal SDLC departments, checks for completeness, analyzes business justification, and prioritizes all report requests prior to distributing them to the ***MIS team***. The ***Marketing Analyst*** is empowered to reject requests if the **Report Request Form** is incomplete or there does not appear to be sufficient business justification for the request. The ***Marketing Analyst*** has up to two business days to approve or reject a **Report Request Form**.

If the **Report Request Form** is rejected, the ***Marketing Analyst*** will send the form back to the ***designated group representative*** with an explanation of why the request was rejected.

If the **Report Request Form** is approved, it is e-mailed to the **MIS Team**.

Log and Document Report Requests

Upon receipt of the **Report Request Form** from the ***Marketing Analyst***, a ***designated MIS Team Member*** logs the requests into the **Report Request Tracking Tool**.

The following information needs to be captured in the tool:

- Report name
- Description
- Business Need / Justification
- Requestor name
- Requested Due date
- User Defined Priority (Critical, High, Medium, Low)
- Request Status (Received, Rejected, Request Approved, Feasibility Approved, Design Complete, Code/Test Complete, Report delivered, Report Accepted)
- Rejection Reason

Initially, the request status is logged as "received" by the ***designated MIS Team Member.***

If the **Report Request Form** is incomplete, the form will be e-mailed back to the ***Marketing Analyst*** with a reason for the rejection. The request status will be set to "rejected" and the rejection reason should be entered into the **Report Request Tracking Tool**.

Approve or Reject Requests for Research

All "received "**Report Request Forms** need to be evaluated within two business days by the ***MIS Manager*** upon receipt**.** If the ***MIS Manager*** knows that the report can not be satisfied because the data requested is unavailable, the ***MIS Manager*** rejects the report request.

If the request is rejected:

- The assigned ***MIS Team Member*** or ***MIS Manager*** updates the **Report Request Tracking Tool** by changing the request status to "rejected" and entering the rejection reason (i.e. – Data not available).
- The ***MIS Manager*** notifies the ***Marketing Analyst*** and ***requestor*** immediately of the request status. The reason the request was rejected needs to be clearly stated in the communication back to the ***Marketing Analyst*** and ***requestor.***
- The ***requestor*** may follow up by requesting the data be added as part of a future system release, so it is available for future reporting. A **Service Request Form** should be completed and forwarded to the appropriate group as defined in the **RELEASE PLANNING PROCEDURE.**

If the request is approved, the ***MIS Team Member*** updates the **Report Request Tracking Tool** by changing the request status to "request approved". It should be noted here that the report request might still be rejected later in this procedure based on the outcome of further detailed analysis.

On a weekly basis, the ***MIS Manager*** should produce a list of all the "approved" requests ranked by priority and distribute it to the ***Marketing Analyst*****.** It is the shared responsibility of the ***MIS Manager*** and ***Marketing Analyst*** to review all approved requests in the queue and re-evaluate priorities.

Assign Development Resources

The ***MIS Manager*** is responsible for assigning work to a ***MIS Developer***. All work is assigned based on the agreed upon priorities.

Report Research/Feasibility

The assigned ***MIS Developer*** analyzes the report request. In some cases, this analysis may take a couple of days to determine whether or not the request can be satisfied. The ***MIS Developer*** reviews the request to determine whether or not the data requested is in the MIS database and is available to satisfy the report request.

If the report needs to be added to the automated report process, the ***MIS Manager*** reviews the request with the ***MIS DBA***. The ***MIS Manager*** must approve all changes to the automated reporting process.

If the request can not be satisfied:

- The ***MIS Developer*** contacts the ***MIS Manager*** with his/her findings. The ***MIS Manager*** is the only person on the ***MIS team*** with the authority to reject a request.
- The assigned ***MIS Team Member*** or ***MIS Manager*** updates the **Report Request Tracking Tool** by changing the request status to "rejected" and entering the rejection reason (i.e. – Data not available).
- The ***MIS Manager*** notifies the ***Marketing Analyst*** and the ***requestor*** immediately of the request status. The reason the request was rejected needs to be clearly stated in the communication back to the ***Marketing Analyst*** and the ***requestor.***
- The ***requestor*** may follow up by requesting the data be added as part of a future system release, so it is available for future reporting. A **Service Request Form** should be completed and forwarded to the appropriate group as defined in the **RELEASE PLANNING PROCEDURE.**

If the request is approved:

- The ***MIS Developer*** updates the **Report Request Tracking Tool** by changing the request status to “feasibility approved”.
- The ***MIS Developer*** updates the **Report Request Tracking Tool** by entering an estimated completion date for the report.
- The ***MIS Developer*** notifies the ***Marketing Analyst*** and the ***requestor*** of the estimated completion date. If applicable, the ***MIS Developer*** communicates to the ***requestor*** if the request will be added to the automated reporting process.

Design Report

The assigned ***MIS Developer*** is responsible for designing the report. Before coding is started, the ***MIS Developer*** must confirm the design with the ***requestor*.** This can be done formally by producing specifications or informally by a quick e-mail. The important thing is attaining sign-off from the ***requestor*** (by either signing the specifications or via e-mail) for the work to be performed and the criteria by which the ***requestor*** will accept the report.

Upon receiving confirmation of the design by the ***requestor:***

- The ***MIS Developer*** updates the **Report Request Tracking Tool** by changing the request status to “design complete”.

Develop and Test Report

The assigned ***MIS Developer*** codes the report as per the design. The ***MIS Developer*** tests the report by verifying the information on the report agrees with the data in the MIS database. The ***MIS Developer*** prior to distribution must test all reports. The ***MIS Team*** is responsible for the accuracy of the report and the data in the databases.

Upon completion of the testing:

- The ***MIS Developer*** updates the **Report Request Tracking Tool** by changing the request status to “code/test complete”.

Add Report to Automated Process (optional)

This step is optional and should only be performed for report requests that were approved to be added to the automated process by the ***MIS Manager.***

If the report needs to be added to the automated reporting process, the assigned ***MIS Developer*** is responsible for ensuring the report is added and that it is tested and accepted before moving the report to production.

Deliver Report

Upon completion of the testing:

- The ***MIS Developer*** delivers the report to the ***requestor.***
- The ***MIS Developer*** updates the **Report Request Tracking Tool** by changing the request status to "report delivered".
- The ***MIS Developer*** updates the **Report Request Tracking Tool** by entering the actual completion date for the report. The time the report took to run and to develop will also be captured. This information will be used to develop metrics for estimating the time it will take to complete similar requests.
- The SQL Plus query name and file server location should also be entered into the tracking tool so it can be easily located for similar future requests.

Accept Report

The ***requestor*** reviews the report and either approves or rejects it. The ***requestor*** verifies that the final report deliverable agrees with the "confirmed design". If the report does not match the design it is rejected and sent back to the assigned ***MIS Developer*** to fix any problems or inconsistencies. The ***requestor*** needs to accept or reject the report within two business days of receipt.

If the report is accepted:

- The **Report Request Tracking Tool** is updated by the ***MIS Developer*** to reflect that the request status is "report accepted".

Update and Track Status of Reports

It is the responsibility of the ***MIS Manager*** to ensure that all report requests are entered, updated, and tracked through each activity. It is also the ***MIS Manager's*** responsibility to communicate the status of each requested report to the ***Marketing Analyst*** and the ***requestor*** in a timely fashion.

Every Friday all delivered report requests for the week will be communicated to the internal SDLC groups by the ***Marketing Analyst***. An e-mail distribution list will be used to facilitate this communication.

FORMS

- Report Request Form

EXCEPTIONS

- None identified at this time.

AFFECTED/RELATED PROCEDURES

- Release Planning Procedure

TOOLS/SOFTWARE/TECHNOLOGY USED

- MS Excel
- E-mail
- MS Word
- MS Excel