User Defined Export (UDE) Process

Reference Guide

Document Details

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Overview

This guide outlines the process to submit a custom User Defined Export (UDE) request. UDEs are used to export a custom set of data out of Crunchtime that is typically used for integration purposes. This data can be accessible via flat file by leveraging the Crunchtime Data Pump, or via API using our Scheduled Export API Service.

Download the latest version of this document here:
https://links.crunchtime.com/RG-UserDefinedExportProcess

… or scan the QR code to the left.

Related Documentation

- Data Export Options Guide: https://links.crunchtime.com/SVC-DataExportOptions
- UDE Requirements Template: https://links.crunchtime.com/UDEtemplate

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REFERENCE GUIDE

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Process Outline

The User Defined Export Process begins after a customer has reviewed the native data export options (https://links.crunchtime.com/SVC-DataExportOptions) and determined that it is likely that a custom developed export is needed. Custom development requires a Statement of Work that is billable at a rate of $250 per hour.

The process is as follows:

1. Signed SOW: A SOW will be provided once both the customer and Crunchtime believe a UDE is needed beyond a reasonable doubt. A SOW will consist of three parts
    a. **Design** - Estimated at 6 hours
    b. **Build** - Estimate TBD based on scope and design
    c. **Validation** - Estimate TBD based on scope and design

2. Design: The customer is responsible for providing their custom requirements. Customers can get a head-start by filling out the UDE Requirements Template on their own (see tip below), or they can work directly with Crunchtime Technical Services to design the export and complete the template together. The template consists of the following information:
    a. **High level details** such as a description of the request and the destination system
    b. **Formatting details** such as file extensions, delimiters, and export frequency
    c. **Sample export** using data that exists in Crunchtime

Tip: Each UDE Statement of Work consists of a 6-hour time and materials scoping estimate. Overall cost can be reduced by filling out the template to completion prior to engaging with Crunchtime Technical Services. Providing as much detail as possible, using real data from your Crunchtime environment reduces billable hours and speeds time to delivery.

Note: A Change Order will be required in addition to the Statement of SOW for customers to sign off on the finalized technical UDE requirements.

3. Build: The Technical Team will complete the development as defined by the requirements outlined in the SOW and Change Order. During the Build phase, if there are any changes in scope that will cause the actual hours to exceed the estimate, the client will be notified in the ticket and will be provided a Change Order outlining the revised estimate and updated scope for additional sign off. Examples include:
    a. Changes in scope that require Crunchtime to access data from additional data tables
    b. Changes in scope the require multiple exports
    c. Changes in scope that drastically change the format
    d. Continuous changes in scope that inhibit the ability to close the project

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4. Validation: After Crunchtime has completed Development and Testing in our internal QA environment, the UDE will be deployed into the customer's environment and the customer will be notified to begin testing. If needed, a follow up call can be scheduled to ensure that testing is on track to meet the Production date. Issues identified during acceptance testing or change requests will be communicated through the ticket. The Build and Validation phases will repeat until the desired result is achieved.



Note: A Change Order will be required in addition to the Statement of SOW for customers to sign off on the finalized technical UDE requirements.

5. Launch: Once Validation testing is completed, the UDE will be deployed to Production where customers will need to complete a final acceptance.



Note: A Change Order will be required in addition to the Statement of SOW for customers to sign off on the finalized technical UDE requirements.

FAQs

Q: *Can I get an estimate without signing a SOW?*

A: Crunchtime's Technical Services Team can work with your team for up to 2 hours to arrive at a rough estimate range without a signed SOW. This estimate is subject to change once the UDE template and requirements have been finalized.

Q: *Will I be charged to refresh a Test Environment as part of a SOW?*

A: The Test environment can be refreshed up to 4 times per year at no cost.

Q: *What if I don't have a Test site?*

A: If the UDE being developed does not perform any data updates in Crunchtime then it will be provisioned directly into your Production environment. If the UDE does perform data updates (ex. marking records as exported) a temporary free Test site will be created using a copy of Production data for you to perform validation. Once the development and SOW is completed, the Test site will be removed.

Q: *What portion of the SOW is billable?*

A: All time accrued after agreeing to move forward with a SOW is considered billable including the gathering and documenting of requirements, coding, testing, and delivering the completed work. If you opted in for Design Consultation, an additional 6 hours will be added to the estimate.

Q: *Why would I want Technical Services Consultants during the design phase?*

A: By engaging with Crunchtime Technical Services early, customers can feel confident that their custom user-defined export requirements meet their goals and any questions that could lead to delay or increases in the original estimate have been addressed up front. This add-on service will likely speed up time to Launch and improve accuracy of the export requirements as well.

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FAQs (Continued)

Q: *How can the cost of the SOW be reduced?*

A: The biggest factor in reducing cost is providing clear requirements for the work to be completed. Filling out the template, providing sample data from your Crunchtime URL for all requirements/conditions, and ensuring ahead of time that it will process successfully into the destination system makes a major difference. You can also opt-in to license the design consultation which has proven to decrease the overall time/cost.

To download a copy of the template, click this link: https://links.crunchtime.com/UDEtemplate

Q: *Can the Technical Services Team create sample data?*

A: Crunchtime Technical Consultants can work with your team to create sample data but it will be included in the billable hours and can be one of the most expensive pieces of the project especially if the request is complex. If the customer is in Implementation, the Implementation team will work with the customer directly to populate the template prior to engaging with Technical Services.

Q: *What is the typical turn-around time for UDE Development?*

A: Since each request is custom, and each is scheduled in the order received, the time to complete a request will vary. To assist with planning the initial steps would be as follows:

1. A requirements review meeting will be scheduled within five business days of the UDE Request.
2. Upon acceptance of the export requirements by both the customer and Crunchtime, a SOW will be sent to the customer within five business days (time between requirements review and acceptance may vary depending on the quality of the requirements template).
3. A formal delivery estimate will be listed within the SOW, but our baseline is 30 days. This baseline may change pending the volume of requests in the queue or the complexity of the export.
4. The delivery estimate in the SOW begins once the SOW Docusign has been completed.

Q: *Can a UDE Request in the requirements gathering phase be put on hold?*

A: We understand that business priorities can shift. If a UDE Request needs to be put on hold we will close the existing request, keeping all the requirements gathered so far, and it can be referenced when the project is ready to be worked on again.

Q: *Can a UDE Request in the Build or Validation phase be put on hold?*

A: Our team will work with your organization to determine whether to close the existing UDE request and SOW or keep it open. In most cases if the hold is more than 2 weeks, the existing SOW will need to be closed and can be reopened when needed. The hours accrued will be billed, the existing SOW closed, and a new SOW created when the ticket is reopened.

Q: *Can changes be made after the Validation phase is complete?*

A: After the SOW is accepted and closed, any additional changes will require a new SOW.

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