

***FSA Integration Program***  
United States Department of Education  
Federal Student Aid



**116.8.1 eZ-Audit Reports Requirements Definition and  
Design**

***Task Order #116***

***Deliverable #116.8.1***

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## Revision History

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8/13/2004	Draft	Draft Version.	Ben Lopez
8/13/2004	1.0	Initial version created for delivery to FSA.	Ben Lopez

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## Overview

The eZ-Audit Reports Release Design Document contains a detailed design for new and modified operational reports included in the scope of the release.

The following provides a high-level summary of the functionality of each of the new reports, listed under the section “New Reports”.

Also in this release, several existing reports will be modified to include either new columns or prompts that will allow FSA to access needed information vital to operational reporting. These reports and their new functionality are listed under “Existing Reports.”

A list of Reports Requirements in scope for this release is included in Appendix A eZ-Audit Reports Requirements Matrix. Mock-Ups of each report are provided in Appendix B eZ-Audit Reports Release Mock-Ups. The Mock-Ups are intended to provide a sample view of each report and do not guarantee the format of the reports developed. A Test Plan for the Reports Release is provided in Appendix C eZ-Audit Reports Release Test Plan.

## Reports Design

### Detailed QC Reports

#### Requirement

The Detailed Submissions Pending QC Report will return any records residing in the Pending QC queue.

The Detailed Submissions Pending QC Approval Report will return any records residing in the Submissions Pending QC Approval queue.

#### Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	Yes
Submission Reason	N/A	Submission	Type	Yes
Submission Date	N/A	Submission	Submission_Date	Yes
Resubmission?	N/A	Submission	Resubmission_Flag	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	Yes
Submission Type	fs.Submission_Id = sub.Submission_Id	Financial_Statement (fs)	fs.Submission_Id sub.Submission_Id	

	fa.Submission_Id = sub.Submission_Id	Submission (sub)  Financial Audit (fa) Submission (sub)	fa.Submission_Id sub.Submission_Id	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.resolution_date fa.resolution_date	
eZ-Audit Composite Score	N/A	Financial statement	Composite_score	
ED Composite Score	N/A	Forprofit_ws_668_171 (fp) Nonprofit_ws_668_171 (np)	Fp.cs Np.cs	
System Flag	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.case_flag fa.case_flag	
Reason Flagged	N/A	Financial_Statement (fs) Financial_Audit (fa)	Fs.reason_flagged Fa.reason_flagged	Yes
Deficiency Indicator	N/A	Financial_Audit	Deficiency_indicator	Yes
Referral to Case	N/A	QC	Decision_referral	Yes
Completeness Status	N/A	QC	Decision_status	Yes
Submission Pending QC Review?	N/A	QC	review_flag	Yes
Submission Pending QC Approval?	N/A	QC	review_flag	Yes
Reviewer Id	N/A	QC_Activity_Log	User_id	Yes
Notes	N/A	QC	Decision_note	
Last Mod Date	N/A	QC_Activity_Log	Last_mod_time	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated on an “as-needed” basis (potentially daily).

**Prompts/Filters**

The Report will have the following prompts: OPEID, Institution Name, Case Team, Institution Type, Submission Date, FYE, Submission Reason, Reason Flagged, Resubmission Indicator, Reviewer ID, Referral to Case, Deficiency Indicator, Completeness Status, Submission Pending QC Review, and Submissions Pending QC Approval

**Sorts**

The Report will be sorted by Case Team, then by Submission Date (from oldest submission to newest submission), and finally, System Flag (flagged and non-flagged).

## Resubmissions Due by School

### Requirement

The Resubmissions Due by School Report will return any submissions that have been marked incomplete and are still pending resubmission. Results will display both Financial Statement and Compliance Audit records for each submission, where applicable.

### Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	
City	N/A	Institution	City	Yes
State	N/A	Institution	State	Yes
Postal Code	N/A	Institution	Postal_Code	Yes
Province	N/A	Institution	Province	Yes
Country	N/A	Institution	Country	Yes
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	
Submission Reason	N/A	Submission	Type	
Submission Date	N/A	Submission	Submission_Date	
Fiscal Year End	N/A	Submission	Fiscal_Yr	Yes
Submission Marked Incomplete Date	N/A	Submission	Incomplete_Date	
Resubmission Due Date	(Date marked incomplete + 15 days)	Submission	Incomplete_date+15	
1 <sup>st</sup> E-Mail Notification Sent Date	N/A	Submission	Incomplete_Date	Yes
2 <sup>nd</sup> E-Mail Notification Sent Date	(Date marked incomplete + 15 days)	Submission	Incomplete_date+15	Yes
Final E-Mail Notification Sent Date	(Date marked incomplete + 30 days)	Submission	Incomplete_date+30	Yes

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report is needed on a weekly basis

**Prompts/Filters**

The Report will contain the following prompts: OPEID, Institution Name, City, State, Province, Country, Case Team, Fiscal Year End, First E-mail Notification Sent Date, Second E-Mail Notification Sent Date, Final E-Mail Notification Sent Date

**Sorts**

The Report will be sorted first by the most overdue resubmission pending to the most recent resubmission requested. It will also group Financial Statements and Compliance Audits together for each submission.

**Detailed Weekly QC Assessment Report**

**Requirement**

The Detailed Weekly QC Assessment Report will return a list of all submissions that were submitted from QC during a defined period of time.

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	Yes
Submission Reason	N/A	Submission	Type	Yes
Submission Date	N/A	Submission	Submission_Date	Yes
Resubmission?	N/A	Submission	Resubmission_Flag	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	Yes
Submission Type	fs.Submission_Id = sub.Submission_Id  fa.Submission_Id = sub.Submission_Id	Financial_Statement (fs) Submission (sub)  Financial Audit (fa) Submission (sub)	fs.Submission_Id sub.Submission_Id  fa.Submission_Id sub.Submission_Id	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.resolution_date fa.resolution_date	
eZ-Audit Composite Score	N/A	Financial statement	Composite_score	
ED Composite Score	N/A	Forprofit_ws_668_171 (fp)	Fp.cs Np.cs	

		Nonprofit_ws_668_171 (np)		
System Flag	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.case_flag fa.case_flag	
Reason Flagged	N/A	Financial_Statement (fs) Financial_Audit (fa)	Fs.reason_flagged Fa.reason_flagged	Yes
Deficiency Indicator	N/A	Financial_Audit	Deficiency_indicator	Yes
Referral to Case	N/A	QC	Decision_referral	Yes
Completeness Status	N/A	QC	Decision_status	Yes
Submission Pending QC Review?	N/A	QC	review_flag	Yes
Submission Pending QC Approval?	N/A	QC	review_flag	Yes
Reviewer Id	N/A	QC_Activity_Log	User_id	Yes
Notes	N/A	QC	Decision_note	
Last Mod Date	N/A	QC_Activity_Log	Last_mod_time	
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated on a weekly basis.

**Prompts/Filters**

The Report will have the following prompts: OPEID, Institution Name, Case Team, Institution Type, Submission Date, FYE, Submission Reason, Reason Flagged, Resubmission Indicator, Reviewer ID, Referral to Case, Deficiency Indicator, Completeness Status, Submissions Pending QC Review, Submissions Pending QC Approval

**Sorts**

The Report will be sorted by Case Team.

**Summary Weekly QC Assessment Report**

**Requirement**

The Summary Weekly QC Assessment Report will display a count of the records returned in the Detailed Weekly QC Assessment.

**Column/Calculations/Table Name/Column Name/Prompt**

<b>Report Rows</b>	<b>Calculated Field</b>	<b>SQL</b>
Beginning workload	Number of submissions remaining in the queue from the previous week	TBD
Total Weekly Add on Submissions	Total number of submissions and resubmissions received during selected week	TBD
Weekly Add-On Submissions	Number of first time submissions received during the selected week	TBD
Weekly Add-On Resubmissions	Number of submissions received during the selected week	TBD
QC workload	Beginning workload + Total Weekly Add-ons	TBD
<b>Submissions Sent Back to Schools</b>		
Incomplete CA	Number of submissions that were QC'd (FS was complete)	<pre> select (ct1+ct2) as "INC-CA ONLY", ct1 as "Non Annuals", ct2 as "Annuals" from (select count(distinct f.submission_id) as ct1 from wf_history w, financial_audit f where f.submission_id=w.submission_id and w.object_id=f.audit_id and not exists (select * from financial_statement where f.submission_id=submission_id and w.wf_id=2 and w.state_id_next=31 and f.incomplete_flag='Y' and w.last_mod_time&gt;to_date(Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and w.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fa.submission_id) as ct2 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and fa.submission_id=fs.submission_id and (ws.state_id_next=31 OR wa.state_id_next=31) and fa.incomplete_flag='Y' and nvl(fs.incomplete_flag,'N')='N' and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date </pre>

<p>Incomplete FS</p>	<p>Number of submissions that were QC'd as incomplete due to the FS (CA was complete)</p>	<p>23:59:59', 'MM/DD/YYYY hh24:mi:ss'))                  select (ct1+ct2) as "INC-FS ONLY", ct1 as "Non Annuals", ct2 as "Annuals" from                  (select count(distinct f.submission_id) as ct1 from wf_history w, financial_statement f where f.submission_id=w.submission_id and w.object_id=f.fs_id and not exists (select * from financial_audit where f.submission_id=submission_id) and w.wf_id=1 and w.state_id_next=31 and f.incomplete_flag='Y' and w.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and w.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')),                  (select count(distinct fs.submission_id) as ct2 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and fa.submission_id=fs.submission_id and (ws.state_id_next=31 OR wa.state_id_next=31) and fs.incomplete_flag='Y' and nvl(fa.incomplete_flag,'N')='N' and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))</p>
<p>Incomplete Both</p>	<p>Number of submissions that were QC'd as incomplete because both CA and FS were marked incomplete</p>	<p>select (ct1) as "INC-CA/FS" from                  (select count(distinct fa.submission_id) as ct1 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and fa.submission_id=fs.submission_id and (ws.state_id_next=31 OR wa.state_id_next=31) and fa.incomplete_flag='Y' and fs.incomplete_flag='Y' and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))</p>
<p><b>Submissions Sent</b></p>		

<p><b>to Co-Team Leaders</b></p>		
<p>Complete - Deficient CA</p>	<p>Number Submissions marked complete where only the CA was forwarded to a Co-Team leader</p>	<pre>select (ct1+ct2+ct3+ct4) as "Comp-CA to Case, FS Archived", ct1 as "Annuals - CA Def", ct2 as "Annuals - CA Non-Def", ct3 as "Non Annuals - CA Def", ct4 as "Non Annuals - CA Non-Def" from (select count(distinct fa.submission_id) as ct1 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and wa.state_id=31 and wa.state_id_next=2 and ws.state_id=31 and ws.state_id_next=21 and fa.case_flag='Y' and fa.deficiency_indicator=1 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fa.submission_id) as ct2 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and wa.state_id=31 and wa.state_id_next=2 and ws.state_id=31 and ws.state_id_next=21 and fa.case_flag='Y' and nvl(fa.deficiency_indicator, 1)&lt;&gt;1 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fa.submission_id) as ct3 from wf_history wa, financial_audit fa where fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and not exists (select * from financial_statement where submission_id=fa.submission_id) and wa.state_id=31 and wa.state_id_next=2 and fa.case_flag='Y' and fa.deficiency_indicator=1 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date</pre>

		23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fa.submission_id) as ct4 from wf_history wa, financial_audit fa where fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and not exists (select * from financial_statement where submission_id=fa.submission_id) and wa.state_id=31 and wa.state_id_next=2 and fa.case_flag='Y' and nvl(fa.deficiency_indicator, 1)<>1 and wa.last_mod_time>to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time<to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))
Complete - Flagged FS	Number of submissions marked complete where only the FS was forwarded to a Co- Team leader	select (ct1+ct2) as "Comp-FS to Case, CA Archived", ct1 as "Annuals", ct2 as "Non Annuals" from (select count(distinct fa.submission_id) as ct1 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and ws.state_id=31 and ws.state_id_next=2 and wa.state_id=31 and wa.state_id_next=21 and fs.case_flag='Y' and wa.last_mod_time>to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time<to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time>to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time<to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fs.submission_id) as ct2 from wf_history ws, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and not exists (select * from financial_audit where submission_id=fs.submission_id) and ws.state_id=31 and ws.state_id_next=2 and fs.case_flag='Y' and ws.last_mod_time>to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time<to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))
Complete - Both Deficient CA and Flagged FS	Number Submissions marked complete where both the FS and CA were forwarded to a Co-Team leader	select (ct1+ct2) as "Comp-CA/FS to Case", ct1 as "CA Def", ct2 as "CA Non-Def" from (select count(distinct fa.submission_id) as ct1 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and

		<p>wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and wa.state_id=31 and wa.state_id_next=2 and ws.state_id=31 and ws.state_id_next=2 and fa.case_flag='Y' and fa.deficiency_indicator=1 and fs.case_flag='Y' and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fa.submission_id) as ct2 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and wa.state_id=31 and wa.state_id_next=2 and ws.state_id=31 and ws.state_id_next=2 and fa.case_flag='Y' and nvl(fa.deficiency_indicator, 1)&lt;&gt;1 and fs.case_flag='Y' and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))</p>
<p>Number of Submissions Sent to Archive</p>	<p>Number of submission marked complete where both the FS and CA were forwarded to a Co-Team leader</p>	<p>select (ct1+ct2+ct3) as "Comp-Archived", ct1 as "Annuals", ct2 as "FS Non Annuals", ct3 as "CA Non Annuals" from (select count(distinct fa.submission_id) as ct1 from wf_history wa, wf_history ws, financial_audit fa, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and fa.submission_id=fs.submission_id and wa.state_id=31 and wa.state_id_next=21 and ws.state_id=31 and ws.state_id_next=21 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))</p>

		<pre>(select count(distinct fa.submission_id) as ct2 from wf_history wa, financial_audit fa where fa.submission_id=wa.submission_id and wa.object_id=fa.audit_id and wa.wf_id=2 and not exists (select * from financial_statement where submission_id=fa.submission_id) and wa.state_id=31 and wa.state_id_next=21 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss')), (select count(distinct fs.submission_id) as ct3 from wf_history ws, financial_statement fs where fs.submission_id=ws.submission_id and ws.object_id=fs.fs_id and ws.wf_id=1 and not exists (select * from financial_audit where submission_id=fs.submission_id) and ws.state_id=31 and ws.state_id_next=21 and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss'))</pre>
<p>Total Weekly # QC</p>	<p>QC workload – Submissions Sent back to Schools – Submissions Sent to Co-Team leaders – Submissions Sent to archive</p>	<pre>elect (ct1+ct2+ct3+ct4) as "Total Weekly Subs Qcd", ct1 as "Subs QCd Comp", ct2 as "Annual Subs QCd Inc", ct3 as "Non-Annual FS QCd Inc", ct4 as "Non- Annual Ca QCd Inc" from (select count(distinct submission_id) as ct1 from (select submission_id from wf_history where state_id=31 and state_id_next in (21,2) and last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') )), (select count(distinct submission_id) as ct2 from (select a.submission_id from wf_history wa, financial_audit a, financial_statement s, wf_history ws where wa.submission_id=a.submission_id and wa.object_id=a.audit_id and ws.submission_id=s.submission_id and ws.object_id=s.fs_id and a.submission_id=s.submission_id and (s.incomplete_flag='Y' OR a.incomplete_flag='Y') and wa.state_id_next=31 and ws.state_id_next=31 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss')</pre>

		<pre> and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') )) qAnnInc, (select count(distinct submission_id) as ct3 from (select sb.submission_id from submission sb, financial_statement s, wf_history ws where ws.submission_id=s.submission_id and sb.submission_id=ws.submission_id and sb.type in (2,4,7,9,11) and s.incomplete_flag='Y' and ws.state_id_next=31 and ws.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and ws.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') )) qFsInc, (select count(distinct submission_id) as ct4 from (select sb.submission_id from submission sb, financial_audit a, wf_history wa where wa.submission_id=a.submission_id and sb.submission_id=wa.submission_id and sb.type in (5,6) and a.incomplete_flag='Y' and wa.state_id_next=31 and wa.last_mod_time&gt;to_date('Begin_Date 00:00:00', 'MM/DD/YYYY hh24:mi:ss') and wa.last_mod_time&lt;to_date('End_Date 23:59:59', 'MM/DD/YYYY hh24:mi:ss') )) qCaInc                     </pre>
Complete YTD	Previous week value from Completed YTD + Total Weekly QC	TBD
Total Pending eZ-Audit	QC Workload - Total Weekly QC#	TBD

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated on a weekly basis.

**Prompts/Filters**

The Report will have the following prompts: Case Team

**Sorts**

The Report will be sorted by Case Team.

**Change in Auditor**

**Requirement**

The Change in Auditor Report will return any submissions that have been deemed complete and have a change in auditor flag present for either the Financial Statement, Compliance Audit, or both. Results will display both Financial Statement and Compliance Audit records for each submission, where applicable.

**Column/Calculations/Table Name/Column Name/Prompt**

<b>Report Column</b>	<b>Calculated Field</b>	<b>Table Name</b>	<b>Column Name</b>	<b>Prompt</b>
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	
City	N/A	Institution	City	Yes
State	N/A	Institution	State	Yes
Postal Code	N/A	Institution	Postal_Code	
Province	N/A	Institution	Province	Yes
Country	N/A	Institution	Country	Yes
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	Yes
Submission Reason	N/A	Submission	Type	Yes
Submission Date	N/A	Submission	Submission_Date	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	Yes
Submission Type	fs.Submission_Id = sub.Submission_Id  fa.Submission_Id = sub.Submission_Id	Financial_Statement (fs) Submission (sub)  Financial Audit (fa) Submission (sub)	fs.Submission_Id sub.Submission_Id  fa.Submission_Id sub.Submission_Id	
Approved Date	N/A	Financial_Statement (fs) Financial_Audit (ca)	fa.approval_submission_date, fs.approval_submission_date	
Change in Auditor Two Consecutive Years?	total # consec yrs	Institution	consecutive_yrs_auditor_change	Yes
Flagged for Case Review		Financial_Statement (fs) Financial_Audit (fa)	Fs.case_flag Fa.case_flag	

Current Auditor Firm Name	N/A	Audit_Firm	Name	Yes
Current Auditor Tin	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.tin fa.tin	
Previous Auditor Firm Name	N/A	Audit_Firm	Name	Yes
Previous Auditor Tin	Select tin from financial_audit fa, submission sub where fa.submission_id=sub.submission_id and ope_id=" " and sub.submission_date is not null and nvl(fa.tin,'0')<>'0' " and sub.status=1 and sub.peps_flag is null order by end_date desc  select tin from financial_statement fs, submission sub where fs.submission_id=sub.submission_id and ope_id=" " and sub.submission_date is not null and nvl(fs.tin,'0')<>'0' and sub.status=1 and sub.peps_flag is null order by period_end_date desc	Financial_Statement (fs) Financial_Audit (ca)	fs.tin fa.tin	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report is needed on a weekly basis.

**Prompts/Filters**

OPEID, Institution Name, City, State, Province, Country, Case Team, Institution Type, Submission Reason, FYE, Submission Date, Current Auditor Firm Name, Previous Auditor Firm Name, Two Consecutive Year Indicator

**Sorts**

The Report will be sorted by Case Team, and then by Received Date, from oldest record received to the most recent record received.

## Detailed Report of Schools on Administrative Stay

### Requirement

The Detailed Report of Schools on Administrative Stay will return a list of all submissions that are or have been on administrative stay (except for records that have had their administrative stay cancelled).

### Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	Yes
School Group Name	N/A	School_Group	Name	
City	N/A	Institution	City	Yes
State	N/A	Institution	State	Yes
Postal Code	N/A	Institution	Postal_Code	
Province	N/A	Institution	Province	Yes
Country	N/A	Institution	Country	Yes
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	Yes
Submission Reason	N/A	Submission	Type	Yes
Submission Date	N/A	Submission	Submission_Date	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	Yes
Admin Stay Start Date	N/A	Admin_Stay	Admin_Stay_Date	
Reason for Admin Stay Start	N/A	Admin_Stay	Reason	
Notes to Admin Stay Start	N/A	Notes	Text	
User Started Admin Stay	N/A	Admin_Stay	User_Id	
Admin Stay Stop Date	N/A	Admin_Stay	Admin_Stay_Date	
Reason for Admin Stay Stop	N/A	Admin_Stay	Reason	
Notes to Admin Stay Stop	N/A	Notes	Text	
User Stopped Admin Stay	N/A	Admin_Stay	User_Id	
Analyst	first_name + last_name	ezaudit_user_profile	first_name + last_name	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.Resolution_Date fa.Resolution_Date	
Days on Admin	(Start Admin Stay	Admin_Stay	Admin_Stay_Date	Yes

Stay	Date minus Stop Admin Stay Date)			
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**Type**

The Report will be generated in Microstrategy format.

**Frequency**

This Report is needed on a bi-weekly basis.

**Prompts/Filters**

OPEID, Institution Name, City, State, Province, Country, Case Team, Institution Type, Submission Reason, FYE, Submission Date, Days on Admin Stay

**Sorts**

The Report will be sorted by Case Team, and then by the length of time each record has been on Admin Stay, from oldest to newest.

**Open Submissions by School**

**Requirement**

The Open Submissions by School Report will return all submissions that have been opened but not submitted. This will not include “waiver, letter of public status, merger/change in ownership” submissions.

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	Yes
Institution Name	N/A	Institution	Name	
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	Yes
Submission Reason	N/A	Submission	Type	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	
Next Due Date	SELECT nst.ope_id OPE_ID_QUERY, fys.year YR_QUERY FROM FISCAL_YEARS fys,	Institution ,YR_Query	DUEDATE_FUNC (to_date(to_char(P RCSS_FYE_FUNC (inst.FISCAL_YR_ END), 'MM/DD/')    to_char(YR_QUE R_Y, '9999'),	

	<pre> INSTITUTION inst WHERE fys.year &gt;= greatest(2002 , to_number(to_ char(inst.ti tle_iv_eli_d ate, 'YYYY'), '9999')) MINUS  (SELECT inst.ope_id OPE_ID_QUE RY, to_number(to_ char(sub.fi scal_yr, 'YYYY'), '9999') YR_QUERY  FROM INSTITUTION inst, SUBMISSION sub, SUBMISSION INSTITUTION si  WHERE sub.SUBMISSION_ID = si.SUBMISSION_ID and si.OPE_ID = inst.ope_id and sub.type in (1, 9) and sub.status = 1 and sub.submission_date IS NOT NULL UNION  SELECT iew.ope_id OPE_ID_QUE RY, iew.fye YR_QUERY  FROM         </pre>		<pre> 'MM/DD/YYYY'), inst.TYPE, YR_QUERY)         </pre>	
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	<pre> INSTITUTIO N inst, INSTITUTIO N_EXEMPT _WAIVER iew  WHERE inst.OPE_ID = iew.OPE_ID and inst.type = 3 and  iew.valid = 'Y'     UNION  SELECT inst.ope_id OPE_ID_QU ERY, fys.year YR_QUERY  FROM INSTITUTIO N inst, FISCAL_YE ARS fys  WHERE DUEDATE_ FUNC(to_da te(to_char(P RCSS_FYE_F UNC(inst.FI SCAL_YR_E ND), 'MM/DD/')    to_char(fys.Y EAR, '9999'), 'MM/DD/Y YYY'), inst.TYPE, fys.YEAR) &gt; SYSDATE         )         ) </pre>			
Opened Date	WF_HISTORY action=create for audit/statement	wf_history	last_mod_time	
Resubmission?	N/A	Submission n	resubmission_flag	Yes
Financial	N/A	Financial_	error_check	

Statement Completed?		Statement		
Compliance Audit Completed?	N/A	Financial_audit	error_check	
Checklist Completed?	N/A	Completeness_check	error_check	
Upload Completed?	N/A	File_upload	error_check	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated weekly or on an “as-needed” basis.

**Prompts/Filters**

OPEID, Case Team, Institution Type, Submission Reason, Resubmission Indicator (Should be “y/n” value)

**Sorts**

The Report will be sorted by Case Team, then by the record with the oldest Date Opened.

**Non-Assigned Submissions in Co-Team Lead Queue**

**Requirement**

The Non-Assigned Submissions in Co-Team Lead Queue Report retrieves all submissions in Co-Team Lead pending assignment queue.

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	
Institution Name	N/A	Institution	Name	
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	
Submission Reason	N/A	Submission	Type	
Submission Type	fs.Submission_Id = sub.Submission_Id	Financial_Statement (fs)	fs.Submission_Id sub.Submission_Id	Yes

	fa.Submission_Id = sub.Submission_Id	Submission (sub)  Financial Audit (fa) Submission (sub)	fa.Submission_Id sub.Submission_Id	
Fiscal Year End	N/A	Submission	Fiscal_Yr	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.resolution_date fa.resolution_date	
Arrived In Queue Date	N/A	wf_history	last_mod_time	
Days in Queue	Current Date minus Arrival in Queue Date	wf_history	sysdate- last_mod_time	
Reason Flagged		Financial_Statement (fs) Financial_Audit (fa)	Fs.reason_flagged Fa.reason_flagged	
Co-Team Lead(s)	first_name + last_name	ezaudit_user_profile	first_name + last_name	
Co-Team Lead E- mail(s)		ezaudit_user_profile	email_address	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report is needed on a weekly basis.

**Prompts/Filters**

Case Team, Submission Type

**Sorts**

The Report will be sorted by Case Team, then by the record with the greatest number of days in the Co-Team Lead pending assignment queue.

**Assigned but Not Approved Schools**

**Requirement**

The Assigned but Not Approved Schools Report will return all submissions in the Co-Team Lead Pending Approval queue

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	
Institution	N/A	Institution	Name	

Name				
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	
Submission Reason	N/A	Submission	Type	
Submission Type	fs.Submission_Id = sub.Submission_Id  fa.Submission_Id = sub.Submission_Id	Financial_Statement (fs) Submission (sub)  Financial Audit (fa) Submission (sub)	fs.Submission_Id sub.Submission_Id  fa.Submission_Id sub.Submission_Id	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.resolution_date fa.resolution_date	
Arrived In Queue Date	N/A	wf_history	last_mod_time	
Days in Queue	Current Date minus Arrival in Queue Date	wf_history	sysdate-last_mod_time	
Reason Flagged		financial_statement (fs) financial_audit (fa)	fs.reason_flagged fa.reason_flagged	
Co-Team Lead(s)	first_name + last_name	ezaudit_user_profile	first_name + last_name	
Co-Team Lead E-mail(s)		ezaudit_user_profile	email_address	

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated weekly.

**Prompts/Filters**

Case Team, Submission Type

**Sorts**

The Report will be sorted by Case Team, then by the record with the greatest number of days in the Co-Team Lead Pending Approval queue.

**Incomplete Post-Approved Record**

**Requirement**

The Incomplete Post-Approved Record Report will return all records approved by a Co-Team Leader but not yet archived by an Analyst.

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
OPEID	N/A	Submission_Institution	Ope_Id	
Institution Name	N/A	Institution	Name	
School Group Name	N/A	School_Group	Name	
Case Team	N/A	Institution	Team_Id	Yes
Institution Type	N/A	Institution	Type	
Submission Reason	N/A	Submission	Type	
Submission Type	fs.Submission_Id = sub.Submission_Id  fa.Submission_Id = sub.Submission_Id	Financial_Statement (fs) Submission (sub)  Financial Audit (fa) Submission (sub)	fs.Submission_Id sub.Submission_Id  fa.Submission_Id sub.Submission_Id	Yes
Fiscal Year End	N/A	Submission	Fiscal_Yr	
Resolution Due Date	N/A	Financial_Statement (fs) Financial_Audit (fa)	fs.resolution_date fa.resolution_date	
Approval Date	N/A	wf_history	last_mod_time	
Days in Queue	Current Date minus Arrival in Queue Date	wf_history	sysdate- last_mod_time	
Reason Flagged	N/A	financial_statement (fs) financial_audit (fa)	Fs.reason_flagged Fa.reason_flagged	
Co-Team Lead(s)	first_name + last_name	ezaudit_user_profile	first_name + last_name	
Co-Team Lead E-mail(s)	N/A	ezaudit_user_profile	email_address	
Analyst	first_name + last_name	ezaudit_user_profile	first_name + last_name	
Analyst E-Mail	N/A	ezaudit_user_profile	email_address	

**Type**

The Report will be generated in Microstrategy format.

### Frequency

The Report will be generated weekly.

### Prompts/Filters

Case Team, Submission Type

### Sorts

The Report will be sorted by Case Team, then by the record with the greatest number of days in the Analyst Approval Queue.

## Password Reset Detail by School

### Requirement

The Password Reset Detail by School Report will return a list of all users that have had a password reset.

### Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
User ID	N/A	Ezaudit_User	User_Name	Yes
User First Name	N/A	Ezaudit_User_Profile	First_Name	
User Last Name	N/A	Ezaudit_User_Profile	Last_Name	
Password Reset Date	N/A	PWD_History	Last_Mod_Time	Yes
User Type	N/A	Ezaudit_User_Role	Role_Id	Yes
User E-Mail	N/A	Ezaudit_User_Profile	Email_Address	
User Phone Number	N/A	Ezaudit_User_Profile	Phone_Number	
OPEID	N/A	Ezaudit_User_Profile	Ope_Id	
Institution Name	N/A	Institution	Name	
Case Team	N/A	Ezaudit_User_Profile	Team_Id	
ED Admin ID	N/A	PWD_History	User_Id	Yes

### Type

The Report will be generated in Microstrategy format.

### Frequency

The Report will be generated on an "as-needed" basis.

### Prompts/Filters

User Type, Password Reset Date, User ID

### Sorts

The Report will be sorted by User Name with the most recent reset date to the User Name with the oldest reset date.

## Users Deleted Detail Report

**Requirement**

The Detail Report on Users Deleted will return a list of every user “deleted” from eZ-Audit.

**Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
User ID	N/A	Ezaudit_User	User_Name	Yes
User First Name	N/A	Ezaudit_User_Profile	First_Name	
User Last Name	N/A	Ezaudit_User_Profile	Last_Name	
Password Delete Date	N/A	PWD_History	Last_Mod_Time	Yes
User Type	N/A	Ezaudit_User_Role	Role_Id	Yes
User Email	N/A	Ezaudit_User_Profile	Email_Address	
User Phone Number	N/A	Ezaudit_User_Profile	Phone_Number	
OPEID	N/A	Ezaudit_User_Profile	Ope_Id	
Institution Name	N/A	Institution	Name	
Case Team	N/A	Ezaudit_User_Profile	Team_Id	
ED Admin ID	N/A	PWD_History	User_Id	Yes

**Type**

The Report will be generated in Microstrategy format.

**Frequency**

The Report will be generated on an “as-needed” basis.

**Prompts/Filters**

User Type, Password Delete Date, User ID

**Sorts**

The Report will be sorted by the User Name with the most recent delete date to the User Name with the oldest delete date.

**Revisions to Existing Reports**

The following reports, included in the SOO as “new” reports, will be generated by modifying existing eZ-Audit reports.

**Financial Statement Summary (Detail Non-Flagged by Case Team)**

A prompt will be added to the existing Financial Statement Summary Report to allow users to filter results by “Reason Flagged.” A user may then use this filter to return all Non-Flagged submissions that have a FS Determination by Case Team. (FS Determination and Case Team are existing prompts on the report). In addition, the ED For-Profit Composite Scores and ED Non-Profit Composite Scores will be combined into one column “ED Composite Score.”

**New Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated	Table Name	Column Name	Prompt
---------------	------------	------------	-------------	--------

	Field			
Reason Flagged	N/A	financial_statement (fs) financial_audit (fa)	fs.reason_flagged fa.reason_flagged	Yes
ED Composite Score	N/A	Forprofit_ws_668_171 (fp) Nonprofit_ws_668_171 (np)	Fp.cs Np.cs	

*Note: The Reason Flagged prompt should list all possible reasons for flagging once and return all records that are flagged for that purpose. The record may contain other reasons for flagging as well. Example: Selecting the prompt “Material Weakness Identified,” will pull records that are flagged exclusively for Material Weakness, as well as records that are flagged for Material Weakness and other reasons.*

### Compliance Audit Summary (Non-Deficient by Case Team Detail)

Three prompts will be added to the existing Compliance Audit Summary Report to allow users to filter results by “Deficiency Indicator,” “Reason Flagged,” and “Findings.” A user may then use this filter to return all Non-Deficient submissions that have been flagged for review.

#### New Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
Deficiency Indicator	N/A	Financial_Audit	Deficiency_indicator	Yes
Reason Flagged	N/A	financial_audit (fa)	fa.reason_flagged	Yes
Findings	N/A	findings	code	Yes

*Note: The Reason Flagged prompt should list all possible reasons for flagging once and return all records that are flagged for that purpose. The record may contain other reasons for flagging as well. Example: Selecting the prompt “Material Weakness Identified,” will pull records that are flagged exclusively for Material Weakness, as well as records that are flagged for Material Weakness and other reasons.*

### Delinquency / Missing (Never Received Report (overdue 180+ days))

Four prompts will be added to the existing Delinquent /Missing report that will enable users to filter results by “Submission Date,” “Resubmission Indicator,” “Received Date,” and “Institution Type.” The user can then retrieve all submissions with received date and then sort the results by the existing field “Days Late” to identify all missing over 180 days.

#### New Column/Calculations/Table Name/Column Name/Prompt

Report Column	Calculated Field	Table Name	Column Name	Prompt
Submission Date	N/A	Submission	Submission_Date	Yes
Resubmission?	N/A	Submission	Resubmission_Flag	Yes
Received Date	N/A	submission	submission_date	Yes (Prompt will be displayed as “Y/N”)

				value)
Institution Type	N/A	Institution	Type	Yes

**New Sorts**

Days Late

**Delinquency / Missing (Received Late Report (past due, but received before 180 days))**

Four prompts will be added to the existing Delinquent /Missing report that will enable users to filter results by “Submission Date,” “Resubmission Indicator,” “Received Date,” and “Institution Type.” The user can then retrieve all submissions with a received date and then sort the results by the existing field “Days Late” to identify all those late submissions received up to 180 days after the due date.

**New Column/Calculations/Table Name/Column Name/Prompt**

Report Column	Calculated Field	Table Name	Column Name	Prompt
Submission Date	N/A	Submission	Submission_Date	Yes
Resubmission?	N/A	Submission	Resubmission_Flag	Yes
Received Date	N/A	submission	submission_date	Yes (Prompt will be displayed as “Y/N” value)
Institution Type	N/A	Institution	Type	Yes

**New Sorts**

Days Late

**General Design Notes**

Reports created in this release will display a value of “N/A” in place of blanks (if generated in MicroStrategy format), as requested by Ti Baker.

Reports created in this release will display a value of “Non-Deficient” in the “Deficiency Indicator” column if Compliance Audits are non-deficient.

**Appendix List**

- A. Appendix A eZ-Audit Reports Requirements Matrix 08132004.xls**
- B. Appendix B eZ-Audit Reports Release Mock\_Ups 08132004.zip**
- C. Appendix C eZ-Audit Reports Release Test Plan 08132004.doc**
- D. Appendix D eZ-Audit ERD and Data Dictionary.zip**