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Integration scope

Define the workflow and its owners before selecting a connection. Fill in locally and save a copy. Never enter passwords or API tokens.

Request / flow ID

Business owner

Workflow objective

Source system / edition / version

Destination system / edition / version

Sample project

Direction: read only / write / both

Records in scope and explicitly excluded

Technical owner

Support owner

Implementation work, fees and boundaries to confirm

A completed worksheet does not establish compatibility. Leave unverified items explicit until the responsible teams confirm them.

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Map records and permissions

Describe one field or operation per copy, with a distinct flow ID. Record support as unverified, confirmed or unsupported; leave it unverified until checked.

Flow ID

Support status (verify separately)

Source record and field

Destination record and field

Stable record ID / matching key

Authoritative system for this field

Transformation, units and missing-value behavior

Supported operation: documentation URL / version / date

Required permissions and access limits

Reviewed by

Review date

Planning example only: an external report reads RFI-001 status from System A. The operation, fields and permission still need confirmation. This is not a supported-connector claim.

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Record acceptance tests

Test a controlled sample before rollout. Expected and actual results must be compared; a successful request alone is not acceptance.

Test 1: Read and reconcile sample records

Expected state / reconciliation method

Actual state / evidence reference

Result: not run / pass / fail

Not run

Issue owner / retest date

Test 2: Check access and missing records

Expected state / reconciliation method

Actual state / evidence reference

Result: not run / pass / fail

Not run

Issue owner / retest date

Test 3: Retry without creating duplicates

Expected state / reconciliation method

Actual state / evidence reference

Result: not run / pass / fail

Not run

Issue owner / retest date

Accepted by / date / remaining conditions

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Operate and maintain

Agree who owns updates, exceptions and future changes. Use project records and documented support scope to complete these decisions.

Update mechanism and cadence

Failure detection, alert recipient and escalation

Retry method and duplicate prevention

Conflicting edits, deleted records and reconciliation

Recovery / rollback steps and responsible owner

Maintenance review date

Operations owner

Use with your project and implementation teams

Review supported operations at jet.build/api-reference and planning requirements at jet.build/developers. Revisit this worksheet when system versions, permissions or workflow scope change.