

Reporting 101

1. All report requests should be in writing. This forces the requester to organize their thoughts and include all of the pertinent information on the request specification.
2. How often will the report be used? (routine vs. ad hoc)
3. Is the person requesting authorized to have this information? (security)
4. When is the report needed? What is the true “drop dead date”? (deadline/priority)
5. How will this information be used? Indicate how the information should be presented/formatted. (purpose)
6. What data should be on the report (rows/columns/calculations)? (specifications)
7. How is the data to be selected? (population criteria)
8. How should the data be sorted and grouped? (parameters/filters)
9. How should the final output be displayed? (formatted/data dump)

Source: SunGard Higher Education, Joanne Keys