

## New Report Check List

This document covers the different aspects to be considered when a new report is being produced in Excel. It looks at what is required and who should be asked to provide it, what information (guidance and documents as well as data) and when they should be asked to provide it.

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## Background

When a new report is ordered in Excel there are a number of different aspects to consider and questions which should be asked. The report should be considered from the following viewpoints.

- 1) Who ordered the report to be produced.
- 2) Who will be responsible for the report being published.
- 3) Who will build the report.
- 4) Who will be responsible for maintaining and developing the report.
- 5) Who will complete the report.
- 6) Who will provide the data for the report.
- 7) Who will receive the report.

Though some of the people above may have duplicate roles each section will be treated separately.

## The Report

One or more sections may be responsible for the questions being answered, more questions may be needed and not all of the questions given may be relevant.

### Who Ordered the Report

- 1) Who ordered the report.
- 2) When do they want it first produced.
- 3) How often do they want it produced (e.g. Daily, Weekly, Monthly, On Request etc).
- 4) Who is to receive the report.
- 5) How are they to receive it (email, in folder etc).
- 6) Is there currently a similar report. If so provide a copy.
- 7) If there is not a similar report where is the report specification.
- 8) Where is the raw data coming from. Could a sample be provided
- 9) If more than one source of raw data is it all in the same format.
- 10) Are there any formatting aspects that need addressing.
- 11) Do the people providing the data know they are going to have to provide it.
- 12) What form of output will the report take (Hard Copy, Excel, PowerPoint, SharePoint to name a few are all distinct possibilities.

### Who is Publishing the Report

- 1) Which member of their staff will be responsible for the report.
- 2) Will anyone be responsible for checking the report.
- 3) Who will produce the report if the designated staff member is absent.
- 4) Do they have all the answers required from whoever ordered the report.
- 5) Do they have any other questions to ask whoever ordered the report.
- 6) Do they have any questions for whoever will build the report (such as can they technically produce what is required).

### Who will Build the Report

- 1) Is the specification and details provided sufficient to build the report.
- 2) Are there any technical problems to overcome.

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- 3) How complicated is the report.
- 4) How difficult will maintaining the report be.
- 5) Do they have time to build the report.
- 6) Where will the technical and user documentation be kept.

### **Who will Maintain and Develop the Report**

- 1) Are the technical aspects of the report such that it can be maintained and developed by them.
- 2) Do they have time to maintain and develop the report.

### **Who will Complete the Report when it is Due**

- 1) Are they aware that completion of the report is being added to their work schedule.
- 2) Can they fit this in to their work schedule at the time the report is due.
- 3) Can they ensure that the technical aspects of the report are not compromised.
- 4) Where will the user documentation be kept.
- 5) Is whoever will produce the report in their absence capable of doing so.

### **Who will Provide the Data for the Report**

- 1) Are they aware they have to provide the data.
- 2) Will providing the data fit in to their work schedule at the time it is due.
- 3) What is the earliest they can provide the data.
- 4) What format can they provide it in.
- 5) Are there any formatting aspects that need addressing.
- 6) Can they use a centralised template.

### **Who will Receive the Report**

- 1) Do they know they are going to receive it.
- 2) Is when they will receive it the best time for their work schedule.
- 3) Do they know how they are to process it.
- 4) What format can they receive it in (there is the possibility that companies have different version of MS Office throughout the world).
- 5) Should anyone in addition to them be on the distribution list.