



Report Train - Are your reports really Smart?

DOSIER – 5

What are reports?

Reports are pre-defined formats used to represent and understand certain behaviour of business processes

Are all the reports of your organization Listed?

In any organization there could be many reports, these reports can be system driven or could be excel reports. In any case every report has a user and a consumption pattern. Every report throws some information to different user and that help them to understand or take certain decision. Based on the same it is very important that each report small or big, detailed or summarized must be listed with its users and purpose of the report for the user.

Report Id	Report Description	User	Purpose	Frequency

Have you thought about numbering your reports?

To take your organization towards efficiency it is very important how you design your reports and dashboards. It is also important that once you have listed your report you should number them smartly so that in any review meeting or reference, you base your discussion on a numbered report, which will be consistent and also system driven, thereby reducing the entire load of report compilation in the company and also applying your mind to understand a report each time.

In the example cited below you will see that a business process has been identified as **Procure to Pay** and it is been given a code **P2P**, assuming it is the starting point of the business process the report is given a **serial number 01**, based on **type i.e. the report** being a detailed report it has been given a **code D** and within detail report it has been given a **number 1**, with the assumption a 2nd detailed report with a different purpose can be added. The report should also be given a **version** in the form of month



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and year like **1119** meaning November of 2019. This helps to track the growth of a report and maturity of users on consuming a report. It also helps in understanding the performance of the IT support team or delivery team

Cycle	Report Category	Report Number	Report Name	Report Description	User	Purpose
Procere to Pay	P2P	P2Po1D11119	Gate Entry Detail report	The report lists the number of Gate Entries in a day/period based on Lines	Security	To keep check on vehicles that have come in and not gone out beyond a specific period and take necessary action
					Purchase officer	Based on commitment of PO to check how many material have been delivered or simply to check status of goods received
					Store Officer	To check the pending for GRN List
Procere to Pay	P2P	P2Po1S11219	Gate Entry Summary report	Summarizes the report based on vendor/material on number of vehicles coming in and out	Security Officer	To identify pattern of different kind of material or vendor I term of their TAT and identify a pattern if any
					Purchase officer	To understand over a period the commitment to deliver vendor wise or material wise
					Store Officer	The lag between Gate entry and goods receipt

Is your reports linked to reviews?

It is very important that for each report you fix a review meeting of the concerned catchment and also finalize a frequency and update format to the next higher level.

The moment you do that you would find that many areas where we are reactive we start becoming predictive, and therefore reduce surprises or failures and improve our efficiency.

Is your reports indicative?

Reports could be plain formats, meaning the report contains a detail or summary of any business process with all data. Indicative reports are the once in which you have identified parameters and based on the parameters the rows or column are highlighted. The moment we achieve that the consumption time per report goes down and needed areas are focussed, leading to a better quality of report and decision making.



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Do you have a report Hierarchy?

Like hierarchy in organization it is very important to have report hierarchies and review hierarchies. For every function a company have an organization structure with defined or undefined Job Description (JD). It is important to fix these reports and review of reports with each JD so that accountability can be fixed and errors or surprises can be reduced and efficiencies across board can be increased.

If you can find proper answers to all the question on report and deployment of report within the shortest duration of your any ERP implementation you will find that the results multiplying.

The above concept can be called the ***Report Train***. I recommend all of you to board this train today.