



## What is the report planning process you should go through?

### Most Common Mistakes:

- **NO Planning:** Too many people immediately dive into the report development process without much planning.
  - This can work at times, but more often than not it will lead to a much longer process to get to the desired result.
  - If you are a user doing this development for yourself, at the least this will result in a longer time to complete.
  - If you are bringing in an **outside consultant** for this development, this lack of planning will likely **COST** you.
- **Bad Design:** Another less-than-desirable outcome of lack of planning is an **incorrect** design.
  - You have given the specs for a report, had the report designed to those specs, and then upon delivery and review you give a lot of ***“Ok, that’s great but now can you....”***.
  - **Minor** follow-up changes are normal and to be expected.
  - **Major** post-development changes result in more complex modifications and the costs go UP, UP UP ....
  - And if it happens multiple times, you can get to the point where the developer says *“well if you would have told me that is what you wanted from the beginning, I would have designed this a whole different way...”* .
  - These 11<sup>th</sup> hour re-designs **add time and \$\$\$** to your report

## So what should you think about when you plan a report?

**6 easy steps** – some may seem obvious but you would be surprised how often they aren’t followed!

1. Think backwards. Picture the output first and then work towards what you need to arrive at that. Mocking-up a report in Excel is a good way to do that. Come up with a general format and the design you desire.
2. Identify what data you need in the detail of the report. In some cases the most detail level is simply some form of summary.
3. Determine what grouping and totaling you need.
4. Determine what sorting and ordering you need. This means for the overall report and within groups within the report.
5. Determine how the user will run the report. What filters of the data will need to be applied? Are these filters something that will change each time they run the report (e.g date range, run for a specific customer, etc)? If so, these will likely be parameters designed and applied to the report.
6. Determine **where the data is** that you need. This can be one of the most difficult yet most critical aspects. Dynamics GP provides a tool within their application to help you locate the correct table and fields.

Conclusion: spending some time thinking before you dive into a new report will save you time and maybe \$\$\$, and give you the results you need and want.

- Basis for this document taken from ana article by Rick Feterick, Feterick & Associates, Inc at [www.erpsoftwareblog.com](http://www.erpsoftwareblog.com)