

Asset**WORKS**

QUICK GUIDE

13 Questions to Ask
Before Creating a Report

13 Questions to Ask Before Creating a Report

A Fleet Management system allows an organization to gather an enormous amount of information about what type of work is being done on the fleet: labor/parts/commercial charges being posted to equipment, downtime statistics, and so on. With so much information at your fingertips, what is needed to create a great report that can be used by your organization to help manage your fleet?

Your title may be report writer, fleet manager or something else, but, when it comes to getting all of the details for a report specification, you also need to be a great detective! Don't assume that your coworkers know exactly what they're looking for. Simply asking "What reports do you need to support your job?" and then walking away to create the report without taking the time to understand their needs will cause the report writer a lot of pain later on.

This quick guide will address the questions you should ask to get started.



Before you create a report

1. Have you identified the business process or workflow that this report will support?

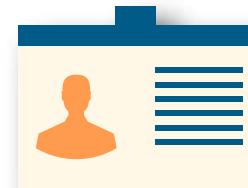
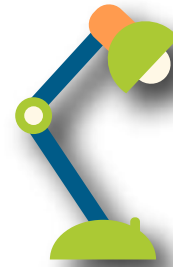
Understanding the business process that this supports will assist in gathering the right people for the specification process.

2. Who will use this report?

Once the business process is understood don't just involve the person who asked for the report. Think organization wide! There are many employees that can contribute their extensive knowledge in this effort...take advantage of them. If not, they will be stuck with another report whose intent may be unclear.

3. How will this assist them in their day-to-day job?

Find out from them what will be solved by creating this report. Maybe it's because they are constantly getting phone calls from customers in need of information. Their boss may want something that takes them hours/days to create. Or maybe the boss needs something that will assist in helping run the fleet.



Before you create a report

4. What is this report's priority level?

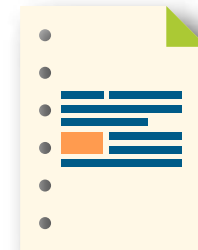
It's important to understand if the report is needed immediately or can wait a while. While monthly or yearly reports may be important, focus on reports that will help make an immediate impact.

5. Are the "right" people involved?

Don't limit the group to management or the person that requested the report. This is one case where the more people involved the better. There is nothing more frustrating to a report writer to finish a report and have someone who wasn't involved say "can you just add this one column because it will really help?"

6. Are you creating the same report that was used before?

If a report was created in the past don't just rewrite it! During the process make sure that the employees know this is a new report that they have a say in. Think outside the box.



Next steps

Once you assemble your group, gather them into a room with a whiteboard and brainstorm about these next questions:

7. What is the name of the report?

Seems simple, but a name helps users get a feeling about what the report is, without having to look at the details below.

8. What columns/fields will be in the report?

Again, make sure that all columns are identified the first time!

9. What data is included on the report?

Confirm that everyone understands what the underlying data means. Just adding data doesn't do anything unless it is known

10. How will the data be sorted and grouped?

11. Are there any page or report summaries?

12. How will the information be sorted and grouped?

13. Who will receive this report and does it need to be executed automatically?



AssetWorks Fleet Management Software Solutions



AssetWorks suite of fleet management software solutions are designed to make the data you need for reports and dashboards accessible quickly and easily. FleetFocus is part of a comprehensive suite of fleet management software applications making it the only product on the market with a real-time, single database integration for nearly all fleet management functions. The full product suite is comprised of FuelFocus fuel management system, KeyValet automated motor pool solution, GPS powered by Networkfleet and the Field Service Solution mobile workforce management system.

For more information on how our software can help you improve fleet performance, visit www.assetworks.com/fleet

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