

COMMONWEALTH OF PENNSYLVANIA DEPARTMENT OF HUMAN SERVICES

INFORMATION TECHNOLOGY GUIDELINE

Name Of Guideline: Reporting Requirements Guideline	Number: GDL-EKMS002
Domain: Knowledge Management	Category: Business Intelligence
Date Issued: 12/01/2008	Issued By: DHS Bureau of Information Systems
Date Revised: 02/19/2016	

General:

This guideline provides suggested interview questions to be asked during the requirements phase of a systems development project to best obtain and define useful reporting requirements from which to construct the computer system.

Guideline:

All business reporting requirements should be collected and analyzed at the requirements phase of a project without regard to type of reporting or development tools. Sample questions to be used to encapsulate business reporting requirements follow:

For each business area that is or will be utilizing the computer system:

1. What are the key business objectives?
2. For each objective, what are the measures for success (to learn more about key metrics and business dimensions)?
3. What roles do data and analysis play in achieving goals?
4. How would better access to data and data analysis benefit them?
5. What are the current challenges in the daily operations of your program?
6. What are the current challenges in analyzing the effectiveness of your program?
7. What reports, analysis, or queries would best assist in determining that you're doing a great job?
8. What effect would not having access to the data entered into the system have on the effective running of your program?

For each report, analysis, or query provided:

1. By what name should this particular report be known?
2. What does the report accomplish from the business perspective? Define how this is currently accomplished (or if not how would it be done in a manual process.)
3. Is this report required for compliance, legislative, or federal reporting?
4. How often is this report, analysis, or query required? (i.e., daily, weekly, monthly, etc...)
5. What time frame of data is needed? (i.e., yesterday's, one month, 15 months, etc.)
6. Who needs access to this report, analysis, or query (Individual/Groups by agency, business partners, citizens, etc)?
7. Who should or should not have access to this report? Does the program fall under privacy or confidentiality provisions?
8. Should all report viewers see all of the data? (i.e., all counties, all recipients, etc...)
9. When does the report, and its associated data, need to be available to allow enough time for proper analysis by end-users?
10. Are report user parameters/prompts needed to control report scope, range, and/or resulting data fields?
11. How should the report data be summarized, grouped or sorted?
12. In what format(s) does this report need to be available?
13. What is the potential source(s) of the data?
14. How will the source data and resulting information be validated?
15. Who is the point of contact for the questions, clarification, and/or verification of report functionality?
16. Determine the useful life of this report. Are there any report storage and retrieval requirements for future audits and/or litigation purposes (physical and/or electronic formats)?

Refresh Schedule:

All guidelines and referenced documentation identified in this standard will be subject to review and possible revision annually or upon request by the DHS Information Technology Standards Team.

Guideline Revision Log:

Change Date	Version	Change Description	Author and Organization
12/01/2008	1.0	Initial Creation	Larry Leitzel, EKMS
02/23/2010	1.0	Reviewed Content	Larry Leitzel, EKMS
11/20/2013	2.0	Modified wording	EKMS
02/19/2016	2.1	Replaced DPW and Public Welfare with DHS and Human Services.	Joe Sweigard, EKMS