



Session 14: General Reporting Strategy
February 7, 2014
Workday

Name _____

Functionality	Comments
1. Describe the various reporting strategies associated with the proposed solution (e.g., baseline, custom, ad hoc). Additionally, for each strategy, describe the relevant tools. 2. If different entities are separate – please link the systems so all systems/updates/ledgers/reports are available/implemented consistently	
3. Demonstrate the creation of the following reports (it is GCCCD’s expectations that these reports would be built prior to the demonstration using the vendor’s proposed reporting tools. The vendor should then present the final solution and review the steps necessary to build the report using the reporting tools. See samples attached):	
a) YTD Budget to Actual	
b) GL Transaction Drill Down	
4. Demonstrate the generation of several state mandated reports (samples attached):	
a) Analysis of compliance with the 50 Percent Law	
b) 311 General Fund- Revenue, Expenditures and Fund Balance	
c) 311 Combined Balance Sheet	
d) 311 Detail General Fund Revenue - Supplemental data	
e) 311 Expend by Instructional Activity	
5. Demonstrate the use of standard data “views” that can be used for	



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custom reporting.	
6. Demonstrate how reports can select/sort information by various parts of the account code string with multiple levels of subtotals.	
7. Provide an overview of potential data warehousing solutions:	
a) Demonstrate end user access to data via a web browser.	
b) Demonstrate the use of a data warehouse using historical trend data.	
c) Demonstrate the ability of a data warehouse to make common reports centrally available.	
i. Can users share/publish ad hoc reports they create?	
ii. Describe any report retention management capabilities.	
d) Demonstrate the ability to modify existing data warehouse/views as needs change.	
e) Demonstrate the ability to develop dashboards and Key Performance Indicators.	
i. Examples of dashboards are: monthly or quarterly departmental budgets vs. actuals, and monthly staff leave balances (e.g., vacation, comp time, etc.)	
8. Other questions:	
a) Demonstrate the scheduling and distribution of reports.	
i. Can jobs/reports that are running be stopped by the user?	
b) Demonstrate performance monitoring of reports.	



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i. Can you determine which user is running a long running or resource intensive report?	
ii. Can you access reporting metrics? (e.g., how often reports have been run)	
c) How are security and access to data maintained?	



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Evaluation Form	
Name of Evaluator:	
Perceived Strengths:	
Perceived Weaknesses:	
Additional Comments:	
Acceptability of Vendor Solution:	<input type="checkbox"/> Yes <input type="checkbox"/> No