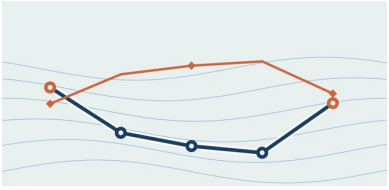
Reporting refresh workflow



We document and test a repeatable refresh for one report and two source files.

Who it helps

SME managers and reporting teams

The problem to solve

A recurring report can become hard to run when its refresh steps exist only in someone’s notes.

Working through the brief

1. **Inspect the report and two source files**

   Gather the agreed inputs. Existing reports or planning inputs, assumptions and the report owner.

2. **Document the refresh**

   Track “Source file” and “Refresh step” together so the reviewer can connect the source information to the result.

3. **Test the steps with approved data**

   Use the tested workflow to make source updates repeatable and easier to cover during an absence.

4. **Check the scope at handover**

   Licences, hosting and extra data sources require separate agreement.

Worked example

A source file arrives late. Define whether the refresh pauses or retains the last accepted data and how the owner is informed.

Read the service scope / DAT-027

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