Administrative Services Orientation Seminar #6295-04

MANAGEMENT REPORTING SYSTEMS AND TECHNIQUES (Principles and Techniques of
Management Reporting Systems)

## OUTLINE

I.  OBJECTIVES OF MANAGEMENT REPORTS

A.  Management reports can be described as the product of a business
information factory.  A key objective of administrative operations
is to produce the best and most useful products at the lowest cost
consistent with management requirements.

II.  INFORMATION CLASSIFICATIONS

A.  Operating Information

B.  Control Information - for Performance Evaluation

C.  Decision-Making Information - to Permit Analysis and Selection of
Potential Courses of Action

D.  Reference and Documentation Information - for Training, Stimulation,
Historical Purposes, Etc.

III.  KEY CONSIDERATIONS IN REPORTING SYSTEMS DESIGN

A.  Parameters of Particular Job to Be Done

B.  Information Requirement Needed to Do the Job

C.  Data and Conversion Techniques for Supplying This Information

D.  Varying Detail - Information Requirements for Management Levels

E.  Reporting Frequency for Stable vs. Variable Operations

IV.  INFORMATION COLLECTION AND DATA FLOW

V.  FEEDBACK CONTROL, REDUNDANCY AND EXCEPTION REPORTING

A.  Feedback Control Systems

B.  The Nature of Exception Reporting

C.  Determination of Control Limits for Exception Reporting - Statistical
Data Analysis

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VI.  TOOLS AND TECHNIQUES

    A.  Presentation Methods

    B.  Simplified Writing and Communication Techniques

    C.  Statistics and Numerical Data Presentations

    D.  Oral Presentations

    E.  Charts and Graphics


VII.  REPORTS CONTROL, CODING AND NUMBERING

    A.  For Identification and Control

    B.  Centralized vs. Decentralized Control

    C.  Elimination and Consolidation of Reports

    D.  Reports Distribution and Controls

    E.  Reducing Reporting Costs


VIII.  TRAINING MANAGEMENT AND SUPERVISION IN INFORMATION HANDLING


IX.  DISCUSSION OF REGISTRANTS' EXPERIENCES, PROBLEMS AND PLANS


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PRINCIPLES AND TECHNIQUES OF MANAGEMENT REPORTING SYSTEMS

INFORMATION CLASSIFICATIONS

*Analysis System*

I. Introduction

    A. Types of classifications
    B. The unity of all information

II. Classifications Based on Time

    A. Historical information *What & Why, too much, JIC, classify—*
    B. Current operational information *Speed - access*
    C. Future projections— *inaccurate but most important, not only what but how get there*

III. Classifications Based on Use

    A. Planning information *to effect desired future (how) - espionage - forecast plus*
    B. Control information— *Why*
    *1. Qualitative - how good   2. Quantitative - how much   3. Profit—*

IV. Classifications Based on Origin

    A. Internal and external information—
    B. Functional information *traditional - interdiscipline*
    C. Geographical information —
    D. Production and product line information —
    E. Customer information —