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Preparing reports



Technique sheet

Problem-based learning resources

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Introduction

Some engineering projects can involve thousands of workers and take years to complete. Others involve one person and are over in a few hours. Small, simple projects do not usually need much project management and reporting but the larger ones need both. What do you need to report on a project that is not yet finished? And who do you report to? Who needs to know that the solar panels have arrived?

When do you need to report?

Engineers working in workshops or teams often have very informal reporting systems – they just let their supervisor or colleagues know when a job has been completed. Larger projects usually have a regular reporting system with reports due at regular time intervals (e.g. every Friday or the first Monday of every month). These are useful reminders, but you may also need to report when specific events occur (e.g. first build of software completed, installation of the heat pump) or when a problem occurs (e.g. the supplier has failed to deliver the solar panels).

- Make sure you are aware of any reporting schedules and the format of the reports

required. Make time available to prepare these reports so that you can meet the deadlines.

What do you need to report?

Reports can be intimidating, and it can feel as if someone is checking up on you. However, most reports are made so that the people managing the project know what is going on and can make any changes to their plans to stop minor issues becoming major problems. Payment is often dependent on reporting as well. So, when you report that the solar panels have been delivered the solar panel supplier gets paid! Many reports have a standard structure which might include any tasks due to be completed, progress on those tasks, changes to schedule or other issues (e.g. problems with deliveries). A report can also include details of what you plan to do to solve any problems that come up. If the solar panels have not arrived on schedule, you might be able to shift to some of the other work from later in the project and then come back when the panels are on site. A simple explanation of what you plan to do is reassuring.

- Make sure you prepare your report carefully – if you need specific data or forms make sure this is done in advance of the report's due date. Reports must be honest and identify problems but can include your strategy for solving them.

Who should you report to?

You will probably report to a supervisor. They might have to check your work (e.g. compliance with gas safety laws) and issue a certificate or be responsible for managing a larger team of engineers. When you take on any job you should know who you report to and how often they expect a report. They will almost certainly be reporting to someone else so if your report is late and it delays them, they will not be pleased!

- Make sure you know who you have to report to and always get your reports to them on time and in the correct format – they will need to use these to create their own reports.

What if people report to you?

You may have responsibility for a project and people will report to you. You can expect them to deliver their reports in the correct format and on time but do not use this as an excuse to demand constant updates on the work. While they are writing their reports, they are not actually doing the work they are reporting on! Always respond to reports received even if it is only to acknowledge that they have arrived safely. In some instances, you might want to clarify some issues – do this as soon as possible after you receive the report. A simple question that occurs every time you read the report (e.g. 'what is the current stock level on site of a critical components?') might mean you could include a question on that in the report itself.

- Read the reports you receive and take any action required. If necessary, this might involve some redesign of the report itself too, to make things run more smoothly.

What if the news is all bad?

Engineering projects can be large and complex. Things can go wrong in one area (e.g. the controller for the solar system turned out to be the wrong one when the box was opened) that can have significant effects in another part of the project (e.g. the engineers due to install the battery cannot do their work on schedule and they are fully booked elsewhere for the next month). The golden rule with reporting problems is 'Do not put it off and hope it just goes away!' Problems do not go away if they are ignored and can get much bigger if no-one knows about them! Engineers are creative problem solvers and can often find ways around problems. There are some small inconveniences that you will cope with yourself without having to report them to supervisors. Experience will help you to distinguish between the niggles that are your responsibility and the problems that need to be flagged up immediately.

- Do not allow problems to grow before you report them and do not try to cover them up – others may be impacted by the issues and maybe some help is available. Tell the truth in your reports – even if the news is bad.



Check yourself

You should be able to answer these questions easily after reading this sheet.

1. Why are regular, accurate reports needed for larger projects?
2. Why is it important to keep to time with your contribution to a project – even if it is quite a small part?
3. What are two things you should do when you receive a report?



Taking it further

These activities will deepen your understanding of this topic.

1. Think about the reports you currently have to submit – it could be signing in on an attendance register, a record of work completed or an update on a major project. What information is required for each report? How easy is it to find this information? Could you develop some record keeping of your own to make it easier to fill in your reports e.g. noting down deliveries in your diary/phone when they happen for transfer to the official report later? Think of ways to make creating your reports easier.
2. A company is planning to install a large electric vehicle charging station at a motorway services station on the M1 near Leicester. The station will have 20 charging points and will take 9 months to build from start to finish. This will involve clearing of the site, installation of power supplies, erection and commissioning of charging points and final accreditation. Over 12 people will work on the project in total over the period although some will be present only for a few days or weeks for specialist work. Create some simple report forms for the site manager to fill in and send to the company headquarters in Cardiff. What should be included and why? How often should the reports be submitted?