PRINTABLE WORKSHEET

# Check how a number in your report is calculated

Use the worked example and six fields to document the data, rules, results, and unresolved questions.

## Record one number

Illustrative sample data: two reports read the same four service requests and both return 2. The requirement is to count requests currently marked Open. The new report reads the previous-status field instead, so it counts the wrong requests.

## Source rows for this example

| Request ID | Current status | Previous status |
|---|---|---|
| REQ-1042 | Open | Open |
| REQ-1043 | Open | Closed |
| REQ-1044 | Closed | Closed |
| REQ-1045 | NULL | Open |

NULL means no current status is recorded. The SQL setup loads the CSV's empty current-status field as NULL.

**Completed example: two reports, one comparison**

**Number, purpose, and scope**

Count service requests currently marked Open. Both reports start with the same four saved records, with one row per unique request. Both return 2. No dates, joins, or permission filters are modeled.

**Rule in plain language**

Count a request when its current status is Open. The new report counts a request when its earlier recorded status was Open, which is a different test.

**Where the rule lives**

current-report.sql and replacement-report.sql, lines 1–3 in each. Both query sample_requests, populated by sample-fixture.sql. These are illustrative files; only the status field differs between the queries.

**Expected and actual result**

Expected: 2, including REQ-1042 and REQ-1043 once each. The existing query matches. The new report also returns 2, but includes REQ-1042 and REQ-1045. It leaves out REQ-1043 and counts REQ-1045 instead. The total matches, but the included requests do not.

**What is still unknown**

REQ-1045 has no current status recorded. Its true current status and the reason for the missing value remain unknown. Its previous Open value does not resolve either question. Whether to add a missing-status indicator is a separate pending decision.

**Decision and acceptance**

The candidate fails the stated requirement. Use current status and rerun: count 2, with REQ-1042 and REQ-1043 once each. Separately, a source-data owner must investigate REQ-1045; a report owner must decide whether to add a missing-status indicator. In a real review, document who approved the decision and when.

**Example sources:** the **sample CSV** and **SQL setup**. Run the setup once in a scratch SQLite session, then run both queries against those same records. The setup explicitly loads the empty current-status field as NULL. **Sample file notes and metadata** explain the fields and expected results.

**Existing report:** **`current-report.sql`**, lines 1–3.

```
SELECT COUNT(*) AS open_requests
FROM sample_requests
WHERE current_status = 'Open';
```

**New report, wrong field:** **`replacement-report.sql`**, lines 1–3.

```
SELECT COUNT(*) AS open_requests
FROM sample_requests
WHERE previous_status = 'Open';
```

Both results are 2. The existing report includes REQ-1042 and REQ-1043; the new report includes REQ-1042 and REQ-1045. This checks one illustrative mapping error. It does not validate a full report or establish REQ-1045's true current status.

## Try it on your report

Print this page or save it as a PDF from your browser. You can also copy these blank fields into the notes you already use. No signup.

### Your report: one number, six fields

**Number, purpose, and scope**

Name the number and the decision it supports. Record population, unit, date or cutoff, time zone, and relevant filters.

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**Rule in plain language**

Explain which records count and which do not. Include any calculation.

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**Where the rule lives**

Record artifact, location, version, parameters, and data snapshot. Note dependencies and whether inspection is complete or partial.

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**Expected and actual result**

Record inputs, what one count represents, the expected total, included IDs, and how often each ID should appear. Record actual results, differences, and untested conditions.

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**What is still unknown**

Separate missing data, uninspected behavior, and undecided requirements. Identify who can resolve each question.

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**Decision and acceptance**

Record preserve/change/remove, reason, owner, effective date, and acceptance checks. If pending, name the unresolved question.

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Start both reports from the same saved data and match the relevant settings. If a requirement changes, keep the old calculation as a baseline and document the expected difference.

This worksheet starts the inspection of one number. The article also covers included records, repeated rows, exception cases, and time boundaries.

Source: Same total. Wrong records.

JodyInk · Updated 20 October 2026
jodyink.com/resources/check-a-report-number/