WORKSHEET D.1

Business question and decision

Bound a question that can be analysed.

One question per sheet. Explore three interpretations, then agree one definition.

Exact question

Who needs the answer for which decision?

Period and population

Calendar, organisational unit, status and comparison.

Usable answer

Number, unit, evidence and required qualification.

Excluded scope

Which question remains outside this session?

REVIEW CRITERION

The agreed sample can test the answer.

WORKSHEET D.2

Data inventory and access review

Understand the source and its boundaries.

One sheet per source. A system name alone does not demonstrate access.

Source and owner

File, table, extract, version and business ownership.

Keys and field meanings

Distinguish order_id, order_date, status, net_eur, region and updated_at. Which key or master record would you need to map regions to sites?

Quality and freshness

Duplicates, missing fields, update cycle and known gaps.

Permitted access

Role, tenant, organisational boundary, approval evidence and open question.

REVIEW CRITERION

Source, key, freshness and access are evidenced or explicitly open with owner and deadline.

WORKSHEET D.3

Metric definition and reference calculation

Enable others to reproduce the result.

Use the unchanged exercise CSV. The reporting cutoff is 2 April 2027 at 23:59:59 (exercise clock). Discard versions later than the cutoff. Keep the latest remaining version per order_id. Then select March by order_date and status delivered. Sum signed amounts by region and compute the overall mean per eligible order.

Metric and formula

What is summed or counted? Unit and rounding.

Filters and versions

order_date in March 2027; status delivered; latest updated_at.

Expected value and working

Raw rows, unique keys, eligible order IDs and amounts, West/East, total, denominator and mean.

Independent check

Who calculates independently and where is the evidence?

REVIEW CRITERION

Both independent calculations yield the same values and exclusions.

WORKSHEET D.4

Acceptance cases and honest answers

Prevent misleading results.

Run the checks separately. Start each change from a fresh copy of the original CSV. Copy A: append the row below. Calculate March results twice, as of the end of 2 April and 3 April 2027. Copy B: blank only A104.net_eur in the original sample. State the eligible population, known subtotal and measures you can report.

Question and data version

Append in copy A (original column order): A103,2027-03-12,cancelled,West,210,2027-04-03T09:00:00. Which version is visible at each cutoff?

Expected response and evidence

Copy A: compare IDs and totals. Copy B as of 2 April: are the order count, total, mean and each regional sum fully known?

Answer boundary

Original as of 2 April: what is known for April? A fictional role may read West only. How would you answer its request for all regions? Do the data establish causes of differences?

Result and improvement

For each test record expected and observed results, evidence (copy, ID, cutoff), pass/open and owner. A value that is missing or outside the permitted scope cannot be assumed to be zero.

REVIEW CRITERION

Both cutoffs, the independent missing-value case and the permitted response scope are evidenced. Label a known subtotal as a subtotal.

WORKSHEET D.5

Follow-on scope and data contract

Prepare a bounded implementation.

Select one read-only question family. Treat new sources or actions as separate decisions.

Permitted scope

Questions, sources, roles, period and freshness.

Technical evidence

Confirmed access path, sandbox, data owner and open licensing issues.

Control and fallback

Reference check, missing access, stale data and responsible expert.

Measurement

Usable answers, corrections and total review effort.

REVIEW CRITERION

Another reader can identify scope, approvals and explicit exclusions.

WORKSHEET D.6

Decision and next steps

Close the session with clear ownership.

Explain Go, Hold or Stop using evidence. No automatic product or integration commitment.

Decision and rationale

Which next step makes sense under which conditions?

Open issues

What is missing, who resolves it and by when?

Accountability

Sponsor, data owner, subject-matter reviewer and deputy.

Handover

Version, storage location, recipients and next review.

REVIEW CRITERION

Every open prerequisite has an owner, deadline and next decision point.