

Date:

Project Name:	SME1/Contact:
Department:	SME2/Contact:
Mgr/Contact:	Dev/Contact:
Lead/Contact:	Review Date:

*** Required fields**

1. Needs:

Report summary and why this project is needed*

2. Existing Report (Optional):

Name of existing report(s)	
Other potential reports to merge	
Key report creators/ users	
Main purpose of current report	
Delivery method and frequency	
Downloaded, printed, or routed?	
How will Power BI add value?	

3. Who Benefits:	
Who is the target audience*	
How many in audience group*	
Audience Experience with BI (1-5)	
Who presents the data-story?*	
Presenter Experience with BI (1-5)	

4. Desired Outcomes:	
Purpose of new report*	
Objectives for report viewers	
Objectives for report analysts	
Objectives for the overall business	

5. Engagement:	
What insight should stand out first?	
Other key insights that should stand out	
1st priority visual - Core information	
2nd priority visual (i.e. a support table)	
3rd priority visual (i.e. line or bar chart)	
Other visuals required	
Must-have fields to include	
Conditional color fields (i.e. stoplight)	

6. Design:	
Order of drill-down row labels (User selected?)	
Tables: List columns left to right	
Comparative measures, ratios, or KPI's	
Group by / Rank by / Segment by	
Optional - Visual tool-tip	
Optional - Additional tabs/pages	
Optional - Color theme / Branding	

7. Filters & Granularity:	
Slicers by (i.e. Division, Region, Territory)*	
Search / Filter by (i.e. GL Acct, Order#)*	
Slicer position - Top, Left, Right, Bottom, Hidden panel?*	
Calendar - Fiscal or Calendar Year*	
Calendar groups (i.e. Year, Qtr, Mo)	
Dates and values visually sorted?*	
Security levels / Report sensitivity*	

8. Data Sources:	
Known data source systems / paths*	
Other non-ERP data sources?*	
Key fields to include from ERP (i.e. Timestamps?)	
New calculated fields to create in tables	
Historic transactions - # of Years, Months*	
Snapshots of tables by Mo/Qty/Yr?	
Refresh schedule (i.e. Daily, Weekly)*	

9. Draft & Other Information:
Attach a drawing with notes illustrating the layout and placement of tables, graphs, slicers, and other visuals.
Use the text box below to include any other comments and information helpful in drafting this report.

Submitted By:

Contact:

Date: