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## Change History

| **Date** | **By** | **Description** | **Change Approval Required** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
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## Overview of Business Needs

|  |  |
| --- | --- |
| **Purpose of Report** |  |
| **Features In Scope** |  |
| **Features Out of Scope** |  |
| **Due Date for Finished Report** |  |
| **Intended Audience** |  |
| **Anticipated Action(s) Taken Based on this Report** |  |
| **Report Owner** |  |
| **Subject Matter Expert** |  |
| **Intended Delivery Mechanism (if automated delivery, specify timing & who it is distributed to)**  **On-Demand / E-Mail / Other** |  |
| **Folder or Document Library Where Report Should be Stored** |  |
| **Historical Data Requirements** |  |
| **Includes Sensitive or Personally Identifiable Data** |  |
| **Related or Cross-Referenced to an Existing Report** |  |

## Sample Report / Mockup / Prototype

*Please include a screen shot or mockup of the desired report output.*

## Data Sources

*Please identify the source of the data – for example, the Data Warehouse, CRM System, Accounting System, etc. If queries are available, please include.*

|  |  |
| --- | --- |
| **Data Source 1** |  |
| **Data Source 2** |  |

## Report Filters

*This section includes filters only which the user does not interact with or see (parameters are included in the next section). Items appropriate for this section include situations like “Transaction Code B1 is always excluded from these report results.”*

|  |  |  |
| --- | --- | --- |
| **Filter 1** | **Data Element to be Filtered on** |  |
| **Condition(s)** |  |
| **Filter 2** | **Data Element to be Filtered on** |  |
| **Condition(s)** |  |
| **Filter 3** | **Data Element to be Filtered on** |  |
| **Condition(s)** |  |

## Parameters

|  |  |  |
| --- | --- | --- |
| **Parameter 1** | **Parameter Label Displayed to User** |  |
| **Required Selection?**  **Required / Optional** |  |
| **Default Pre-Selected for User** |  |
| **Multiple Values Allowed?**  **Multi-Select / Single-Select** |  |
| **Related to Another Parameter? If Yes, Specify Behavior.**  **Yes / No** |  |
| **Parameter 2** | **Parameter Label Displayed to User** |  |
| **Required Selection?**  **Required / Optional** |  |
| **Default Pre-Selected for User** |  |
| **Multiple Values Allowed?**  **Multi-Select / Single-Select** |  |
| **Related to Another Parameter? If Yes, Specify Behavior.**  **Yes / No** |  |

## Report Body

*If there are multiple sections of the report, please group the data elements into the appropriate sections. If you know the data is to be derived in the report, please provide the calculation.*

| **Column Name** | **Data Element / Field Name** | **Data Type / Formatting Rules / Conditional Formatting** | **Comments, Description, or Specific Requirements** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Grouping

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Data Element / Field Name** | **Subtotal for Group?**  **Yes / No** | **Group Value is Displayed?**  **In Column / In Row** | **Page Break After?**  **Yes / No** |
| **Group By First** |  |  |  |  |
| **Group By Second** |  |  |  |  |
| **Group By Third** |  |  |  |  |

## Sorting

|  |  |  |
| --- | --- | --- |
|  | **Data Element / Field Name** | **Scope of Sort (Report, Within Group)** |
| **Sort By First** |  |  |
| **Sort By Second** |  |  |
| **Sort By Third** |  |  |

## Interactive Features

|  |  |
| --- | --- |
| **Sortable Column Headings?**  **Yes / No** |  |
| **Drill Down Hyperlinks to More Detail (Same Report with +/-)**  **Yes / No** |  |
| **Drill Through Hyperlinks to More Detail (Different Report)**  **Yes / No** |  |
| **Conditional Visibility Rules** |  |

## Formatting & Display

*Most formatting is dictated by the standardized Report Style Guide. This section is for noting exceptions and specific needs.*

| **Item** | **Formatting** |
| --- | --- |
| **Logo** |  |
| **Report Title & Subtitle** |  |
| **Page Header** |  |
| **Page Footer** |  |
| **Pagination** |  |
| **Other** |  |

## Exceptions to Typical Report-Based Security

*This section denotes any specific requirements around access to the report, or security of the data.*

|  |
| --- |
|  |

## Exceptions, Notes or Special Situations

|  |
| --- |
|  |