

ANALYTICS &REPORTING REQUIREMENTS TEMPLATE

Bala V

Note:- This is a template that helps BA/DA while gathering the requirements,

1 Purpose

This document template defines an outline structure for the clear and unambiguous definition of analytic, reporting or informational outputs (including standard reports, ad hoc queries, Business Intelligence outputs, analytical models etc).

It provides a self-service survey template that can be used by business users to outline and the reporting outputs that are currently responsible for, and to document the process by which reporting is produced.

This template forms part of an example data specification & information requirements framework. The framework offers a set of outline principles, standards and guidelines to describe and clarify the semantic meaning of data terms in support of an Information Requirements Management process.

2 Reporting Requirements Survey Template

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| ORIGINATING REPORTING REQUIREMENT | <p>The statement of need for the business user to produce reporting output</p> <ul style="list-style-type: none">➤ <i>the total amount spent and the country for the Pending delivery status for each country.</i>➤ <i>the total number of transactions, total quantity sold, and total amount spent for each customer, along with the product details.</i>➤ <i>the maximum product purchased for each country.</i>➤ <i>the most purchased product based on the age category less than 30 and above 30.</i>➤ <i>the country that had minimum transactions and sales amount.</i> <p>This may be a reference to an originating document, memo or specification.</p> |
| REPORTING PURPOSE | <p>Outcome or purpose is to</p> <p>>>find the Amount spent for the pending delivery status for each county</p> <p>>>Count of Transaction, Quantity Sold, Total Amount spent for each customer along the product details</p> |
| REPORTING REQUIREMENT AUDIENCE | Stakeholders, Sales Managers, Area Managers, RM |
| UNSW REPORTING OWNER | Data Analyst |
| DATA STEWARD(s): | DA, DE |
| SOURCE DATA INPUTS | Customer, Order and Shipping data files |
| REPORTING DELIVERY METHODS & DATA | <p>Scheduling the report/Dashboard as an email</p> <p>Refreshing periodically</p> |

Analytics & Reporting Requirements Template

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| UPDATE PROCESSES | |
| EXCEPTIONS, CONSTRAINTS & EXCLUSIONS | <p>Are there any exceptions or constraints that limit the scope of report delivery?</p> <p>Is there any data that explicitly won't be included?</p> |
| DETAILED DATA DEFINITIONS & BUSINESS RULES | <p>Define any specific terms, calculations or business logic that are used within the report.</p> |
| REPORTING DOCUMENTATION | <p>What documentation exists for this reporting process?</p> <p>E.g. minutes, design documents, updates to metadata repository etc.</p> |
| OTHER RELEVANT REFERENCE MATERIALS | <p>What other principles, guidelines and reference materials relate to this requirement? (e.g. legislation, regulation, policies and standards)</p> |
| IDENTIFIED DEPENDENCIES | <p>Pre-requisites etc. that need to be satisfied before the report can be prepared.</p> |
| RELATED UNSW BUSINESS PROCESSES | <p>Identify other existing UNSW processes impacted by the delivery of the report.</p> |
| OTHER INFORMATION & NOTES | <p>Please include any further information that you consider of relevance.</p> |