# BI Report Requirements Questionnaire

* 1. Where does this data currently exist
     1. Similarities to existing reports?
        1. Can we make an enhancement to an existing report
     2. Other tools ( ex: salesforce, internal app, dynamics, google analytics )
     3. Spreadsheets
     4. Databases
     5. APIs

* 1. Who else needs to be looped in?
     1. Biz users
     2. Report developers
     3. Eventual report audience
     4. Data source owners
     5. Data creators

* 1. How accurate is proposed data source?
     1. Gotchas
     2. Limitations
     3. How fluid is it?
     4. How current is it
     5. Percent accurate (100 - 80 , 80 - 50 , <50 )

* 1. What are existing biz rules?
     1. What needs to be excluded/included
     2. Will it match source?
        1. Will rules in BI be different than source?
     3. How much data is needed (5 years, 6 months, 1 month)

* 1. How frequently do you need the data
     1. Daily, weekly, monthly, quarterly
     2. One time export
     3. Are there any existing processes/meetings where this data gets used/shared

* 1. Who is audience
     1. CEO, VP, Manager, entire department?
     2. How many people ballpark
     3. User external to organization?
     4. Public?

* 1. Want any email subscriptions?
     1. If yes what is cadence?
     2. Any other alerts desired

* 1. Report Format
     1. Mobile
     2. Report
     3. Dashboard

* 1. What potential actions can be taken as a result of viewing this report?
     1. Changes to process
     2. More spending
     3. Reconfigure application
     4. Hire more people
     5. Increase communication
     6. Used in recurring meetings/communications
     7. Strategic changes

* 1. Do you have any mockups/preference on specific visuals?
     1. Screenshots of other reports
     2. Any direction on look
     3. preferred visuals
     4. Any existing reports that we can leverage for inspiration
     5. Pie chart/trend/column/kpi

* 1. What specific data is required?
     1. columns, categories, descriptors
     2. metrics, KPIs, calculations
        1. definitions/considerations for all
     3. Inclusions/exclusions ("What is included in this report?")
     4. SQL tables / Power BI datasets
     5. Provide a specific example of a calculation in a table

* 1. What cuts/categories would you like
     1. By product
     2. By person
     3. By date(s)

* 1. How to validate calculations before report ready for more widespread distribution?
     1. Account to source, strongly preferred, helpful to view in source for additional context
     2. Designated person(s) to confirm/ sign off
     3. More formal UAT process?
     4. Spot check records
     5. Will timing of refresh affect matching to source

* 1. Security
     1. Public
     2. Private
     3. Restricted
     4. Which departments/users need access
     5. Who controls who gets access (Report Manager)
     6. Row Level Security
     7. Internal use only?

* 1. Review Frequency
     1. When should we revisit design/check in on how it's going with usage metrics

* 1. Sign off
     1. From request originator