***Sample Power BI Report***

***Design Document Fragment***

***General and Scope***

|  |  |
| --- | --- |
| *Date:* | *2025-02-10* |
| *Version:* | *0.1* |
| *Author:* | *Greg Philps* |

***Version History***

*Each iteration of the design document should have an incrementing version number and version date. Version numbering allows enhanced communication by ensuring all participants are using the correct reference. The version number should also be referenced in every feature or testing note to enable an appropriate comparison.*

|  |  |  |  |
| --- | --- | --- | --- |
| ***Date*** | ***Version*** | ***Author*** | ***Notes*** |
| *2025-02-10* | *0.1* | *Greg Philps* | *Initial create* |
|  |  |  |  |

***Acronyms, Abbreviations, and Definitions***

*Include all corporate and technical descriptions so that all levels of stakeholders have the same understanding of the acronyms, abbreviations, and definitions that will be used during all stages of this project (e.g., requirement gathering, development, acceptance testing, rollout, etc.).*

|  |  |
| --- | --- |
| ***Item*** | ***Description*** |
| *DW* | *Data Warehouse* |
| *EDW* | *Enterprise Data Warehouse* |
| *ETL* | *Extract, Transform, and Load* |
| *KPI* | *Key Performance Indicator* |
| *PBI* | *Microsoft Power BI* |
| *PBIT* | *Power BI template file extension* |
| *PBIX* | *Power BI report/model file extension* |
| *PL-SQL* | *PL-SQL, the structured query language variant use by Oracle* |
| *Power BI Desktop* | *The report authoring program provided free by Microsoft for creating Power BI datasets and reports* |
| *Power BI Service* | *The online website that provides a central infrastructure for sharing Power BI datasets, reports, dashboards, and mobile reports* |
| *Service Account* | *An administrative account with the required privileges to interact with a system (or systems). A service account is not assigned to a specific individual and is maintained by the IT Department or the Admin Department.* |
| *SQL* | *Structured Query Language, or Microsoft SQL Server (depending on context)* |
| *T-SQL* | *Transact-SQL, the structured query language variant used by Microsoft SQL Server* |
| *UAT* | *User Acceptance Testing* |
|  |  |

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# Introduction

*Description of the current state*

*Description of the problem to be solved*

*Description of the project*

*Description of the data source and extract procedure and frequency*

*Description of the major features of the solution*

*Description of the data that will be loaded (filters that will be applied)*

*Description of the audience(s) who will use the report(s)*

*Description of the security that will be applied to the data and/or visuals in the report(s)*

# Scope of Work

*Description of the report(s) that compose this project along with high-level audience and security for each.*

*Description of the scope of work for this project. Include not only what specific items will be included in the scope for this project, but also scope items that will be specifically excluded from the project scope and scope items will be deferred until in future versions.*

*Be exhaustive.*

## Reports

*Assign an ID and (short) name to each report in the project along with high-level description, audience, and security notes for each.*

| ***ID*** | ***Name*** | ***Description*** | ***Audience/Security*** |
| --- | --- | --- | --- |
| *AR01* | *All Invoices* | *A listing of all invoices (historical, current, upcoming)* | * *A=Executives, Department Managers* * *S=Es can see all invoices* * *S=DMs can see only their own invoices* |
| *AR02* | *Historical Invoices* | *A listing of all historical (paid) invoices* | * *A=DMs* * *S=DMs can see only their own invoices* |
| *AR03* | *Current Invoices* | *A listing of all current (issued & unpaid) invoices including aging* | * *A=DMs* * *S=DMs can see only their own invoices* |
| *AR04* | *Upcoming Invoices* | *A listing of all upcoming (in progress, scheduled) invoices* | * *A=DMs* * *S=DMs can see only their own invoices* |
|  |  |  |  |

## Included

*Assign an ID and provide a high-level description and reason for each specific item that will be included in the project scope.*

| ***ID*** | ***Included Scope Item*** | ***Description*** |
| --- | --- | --- |
| *SI-1* | *Language – English Only* | *Due to a tight time-frame to develop the reports, the initial release will be hard-coded with English labels and data only* |
| *SI-2* |  |  |

## Excluded

*Assign an ID and provide a high-level description and reason for each item that will be specifically excluded from the project scope.*

| ***ID*** | ***Excluded Scope Item*** | ***Description*** |
| --- | --- | --- |
| *SE-1* | *Language – Add French* | *A future release of the reports will contain translated labels and data and all hard-coded English labels and data will be updated with calculations to present the selected language* |
| *SE-2* |  |  |

## Deferred

*Assign an ID and provide a high-level description and reason for each item in the project scope that will be deferred until a future release (iteration, version).*

| ***ID*** | ***Deferred Scope Item*** | ***Description/Reason/Version*** |
| --- | --- | --- |
| *SD-1* | *Language – Add multiple languages* | *D=A future release of the reports will contain translated labels and data for multiple languages. In addition to the already-provided English and French data, translations for Spanish, German, Italian, and Portuguese will be added, and all label and data calculations will be adjusted accordingly.*  *R=Corporate translation policies are currently under review and the level of effort cannot be properly scoped and planned at this time.*  *V=2.x* |
| *SD-2* |  |  |

*-- end of fragment*