To serve as a starting point for the development of a new Power BI environment (or the enhancement of an existing Power BI environment), several items should be described, including:

* Is there an established Power BI environment that will be modified/enhanced?
  + Regardless, what type of Power BI license will be implemented/used? Premium? Pro? Free (none)? Report Server (on-premises)?
* How many internal report consumers are anticipated at the start and the end of the project?
* Are there any external report consumers? If so, how many, how, and how often will they access the organizations’ reports?
* Are there multiple environments available/anticipated (e.g., DEV, TEST, PROD)?
  + If so, how is code moved between environments? Are deployment pipelines used?
* Are there validated corporate data sources available within the Power BI environment?
  + If yes, are dataflows used?
  + If not, has time been set aside for validation and resources available for validating the data sources?
  + Regardless, if there are on-premises data source(s) that will contribute to the reports, are there available dedicated workstations configured with Power BI gateways for the DEV, TEST, and PROD environments?
* How many reports will be developed, validated, and deployed by the end of the project?
* Is there a designated pilot group of internal resources who will validate the first stage of a phased deployment?
* Are there existing data sources that can be/have been validated along with connection details? (e.g., data warehouse? database? SharePoint? Other?)
  + If not, are there internal resources available within the project timeframe to validate the existing data sources?
* What is the smallest amount of data that can answer the questions inherent in the anticipated reports? Current fiscal year? Last fiscal year? Last 5 fiscal years?
* Can the source data be aggregated before extraction to minimize the Power BI processing time?
* Has time been allocated in the project timeframe to access/transform/validate the data sources?
* Do any (all?) reports have to de delivered simultaneously in multiple languages? English only? If multilingual, is a phased deployment acceptable (e.g., French and Spanish in version 2.0?)
* What are the report refresh requirements? Annual? Monthly? Daily? Real-time? Other?
* Are there internal resources assigned to do the Power BI administration during and after rollout?

| ***Item*** | ***Description*** |
| --- | --- |
| License | What type of Power BI license is available?  Premium? Pro? Free (none)? Report Server (on-premises) |
| Report Consumers/Authors | How many internal client resources will interact with the reports?  ??  How will the internal client resources interact with the reports?  Browser? Mobile? Power BI Desktop? PDF? Other?  Are there any external resources who will interact with the reports? (if so, how?)  ??  How many internal report authors currently exist/are anticipated?  ?? |
| Data Source(s) / Gateways | What is/are the data source(s) for the existing and future Power BI reports?  ??  Are these data source(s) validated (endorsed and certified)? (If not, are client resources available and allocated within the project timeframe?)  Yes? No?  If on-premises data source(s) will be used, have multiple gateways been established to connect the DEV, TEST, and PROD environments to the cloud?  Yes? No? Describe… |
| Data Volume | What are the filters that can be applied to the source/reporting data to minimize the number of records needed for the reports?  ??  What are the aggregations that can be applied to the source/reporting data to minimize the number of records used in the reports?  ?? |
| Data Refresh Cadence | How frequently does the data need to be refreshed?  Yearly? Monthly? Weekly? Daily? Hourly? Realtime? Other? Describe… |
| Environments | Are there separate environments available for Power BI (workspaces)?  (e.g., DEV, TEST, PROD)  ??  Are there separate environments available for data sources?  (e.g., DEV, TEST, PROD)  ??  If there are separate TEST and PROD environments, is the data in the TEST environment consistent with PROD such that validation is effective?  ?? |
| Deployment | How is code deployed? Are deployment pipelines used?  ?? |
| Language | Will the reports be delivered in English only?  Yes? No?  If multilingual reports are also required, can the additional languages be delivered later as a separate release/version/iteration?  Yes? No? |
| Administration | Are there internal resources assigned to do the Power BI administration during and after rollout?  ?? |
| Visual Theme | Are there client-specific visual elements that must be used for the environment/reports?  Colours? Fonts? Logos? Other?  Are there any exceptions or special cases?  Yes? No? Describe… |
| Security | How is security applied?  Active Directory? No? Describe… |