To serve not only as a starting point for the development of and estimation of the time required for each report, several items should be described for each report, including:

* What is the name and ID of the report?
* What is the purpose of the report?
* What questions is the report intended to answer?
* Who is/are the intended consumers for the report?
  + i.e., who is the audience?
* What is the source of data to be presented in the report?
* Is there an existing source for the data components of the report?
  + If yes, has this source been certified (if so, by whom?)?
  + If no or unknown, are (will there be) personnel available to validate the data, and how long will this take?
* What is the smallest quantity of data that can answer the question(s)?
  + identify ALL filters that can be used to minimize the number of source records
  + identify ALL aggregations that can be applied to minimize the number of reporting records
  + identify ALL columns that can be removed to minimize the amount of data to be processed
* What business rules must be implemented in this report? Are they inherent in the dataset? Are there any exceptions or special cases?
* What are the formulae for any calculations that are necessary in the report? Are there any exceptions or special cases?
* What visuals are desired on the report?
  + (provide a brief description of each)
* What filters (slicers) are required on the report (if any) for interactivity?
* What key performance indicators (or measures) are desired on the report?
* Is there a mock-up of the report and/or wireframe describing the report?
* Are there samples of existing reports that are currently used that present (some) of this information?
  + If yes, why are they being replaced, what are their shortcomings, and what are the desired enhancements?
* And, most importantly, when is this report needed to be in production?

| ***Item*** | ***Description*** |
| --- | --- |
| Report Name | <report name> |
| Report ID | <report identifier> |
| Purpose / Questions | What question(s) is the report designed to answer?  Q1:  Q2:  Q3:  Q4:  Q5:  What story is the report designed to tell?  ??  What decisions is this report designed to enable/support?  ?? |
| Audience | Who are the intended consumers of the report?  Who?  Will the report be shared exclusively to internal users in the organization?  Yes? No? (if yes, describe how (and to whom) the report will be shared)  Will the report be shared with external users outside of the organization?  Yes? No? (if yes, describe how (and to whom) the report will be shared)  Will the report be shared with other departments? If yes, how?  Yes? No?  Will the report be shared publicly? If yes, how?  Yes? No? |
| Data Source | What is/are the source(s) of data for this report?  ??  Is/are these data source(s) validated (endorsed and certified)? (If not, are client resources available and allocated within the report development timeframe?)  Yes? No? |
| Filters | What filters can be applied to minimize dataset size?  ?? |
| Aggregations | How can the source data be aggregated to match the level of detail (or grain) required from the report to minimize dataset size?  ?? |
| Columns | What columns are required and what columns can be removed to minimize dataset size?  ?? |
| Business Rules | What business rules are to be used in this report?  ?? (those not already inherent in the data; those that must be implemented in the report)  Are there any exemptions or special cases?  Yes? No? Describe… |
| Calculation Formulae | What are the formulae for calculations that are to be used in this report?  ??  Are there any exemptions or special cases?  Yes? No? Describe… |
| Visuals | What visuals do you want displayed on the report?  e.g.,   * Column chart – sales by year * Bar chart – sales by province * Matrix – sales by year by product category * … |
| Slicers | What interactive slicers should be used on the report?  e.g.,   * Date c/w slider * Customer Name (drop-down list) * Sales Region (tiles) * … |
| KPI’s / Measures | What KPI’s / measures should be displayed on the report?  ?? |
| Mock-up / Wireframe | Is there a mock-up and/or wireframe available for the report?  Yes, see attached |
| Existing Samples | Are there existing reports that are currently (or have been historically) to preset (some) of this information?  Yes, see attached |
| Visual Theme | Are there client-specific visual elements that must be used for the environment/reports?  Colours? Fonts? Logos? Other?  Are there any exemptions or special cases?  Yes? No? Describe… |
| Other | What other features/items should be displayed on the report?   * Report Last Refresh Date (upper-right corner) * Company logo (lower-left corner) * Dataset ID / Version / Version Date (lower-right corner) * Report ID / Version / Version Date (lower-right corner) |
| Timeframe | What is the timeframe for development, validation, deployment, and release of the report?   * Development (2 weeks) (first ½ of February 2025) * Validation (2 days) (3rd week of February 2025) * Deployment (4 weeks) (March 2025) * Release (June 1, 2025) |