**1.** **Dashboard Overview/Executive Summary:**

* **Purpose:** A high-level summary of the dashboard's purpose, what it aims to achieve, and the key business questions it will answer.
* **Description:** A brief narrative describing the dashboard, its name, and its overall goal.
* **Success Metrics:** How will success be measured? (e.g., "The dashboard will reduce the time spent on manual reporting by 50%," "It will increase user adoption by 20% within the first six months.")

**2.** **Audience & Stakeholders:**

* **Target Audience:** Who are the primary users of the dashboard? (e.g., Sales Managers, Marketing Analysts, Executive Leadership, Customer Service Representatives).
* **User Personas:** Briefly describe the different types of users and their specific needs.
* **Stakeholder List:** Identify key stakeholders who will approve the design, provide data, or use the dashboard to make decisions.

**3.** **Data Sources & Connections:**

* **Source Systems:** List all the data sources that will be used (e.g., SQL Server, Excel files, SharePoint lists, Salesforce, Google Analytics, APIs).
* **Connection Method:** Specify how Power BI will connect to each source (e.g., DirectQuery, Import, Live Connection).
* **Data Refresh Frequency:** Define how often the data needs to be refreshed (e.g., daily, hourly, real-time).
* **Data Sensitivity:** Note any data privacy or security constraints related to the data being used.

**4.** **Key Metrics & KPIs (Key Performance Indicators):**

* **List of Metrics:** Provide a detailed list of every metric and KPI that will be displayed on the dashboard.
* **Definitions:** For each metric, provide a clear, unambiguous definition and the calculation logic (e.g., "Sales Revenue" = Sum of 'OrderAmount' from 'Sales' table; "Customer Churn Rate" = (Lost Customers / Starting Customers) \* 100).
* **Visualizations:** Specify what type of visualization will be used for each metric (e.g., Card, Bar Chart, Line Chart, Gauge).

**5.** **Dashboard Layout & Design:**

* **Mockups/Wireframes:** Include visual representations of the dashboard's layout. This can be a simple drawing, a PowerPoint slide, or a low-fidelity mockup created in a design tool.
* **Number of Pages/Tabs:** Specify how many pages the dashboard will have and the purpose of each page.
* **Branding Guidelines:** Note any corporate branding requirements (e.g., color palettes, font styles, logo placement).
* **Navigation:** Describe how users will navigate between pages and interact with filters.

**6.** **Filters & Interactivity:**

* **Slicers:** List all the filters that will be available to the user (e.g., Date Range, Region, Product Category, Salesperson).
* **Drill-Through Functionality:** Specify which visuals will have drill-through capabilities and what details will be revealed.
* **Tooltips:** Describe the information that should be displayed when a user hovers over a visual element.

**7.** **Constraints & Assumptions:**

* **Technical Constraints:** Note any limitations of the Power BI service or the data sources (e.g., limitations on file size, DirectQuery performance issues).
* **Resource Constraints:** Mention any limitations on budget, time, or personnel.
* **Assumptions:** List any assumptions made during the planning phase (e.g., "It is assumed that the data in the SQL database is clean and accurate," "It is assumed that the users have the necessary Power BI Pro licenses").

**8.** **Project Timeline & Deliverables:**

* **Phases:** Break down the project into logical phases (e.g., Discovery & Planning, Data Modeling, Dashboard Development, Testing & QA, Deployment).
* **Key Milestones:** List specific dates or target periods for key milestones.
* **Deliverables:** Clearly state what will be delivered at the end of each phase (e.g., "A completed data model," "The final Power BI dashboard (.pbix file)," "User training documentation").

**9. Security and Access**

* **User Roles:** Define the different levels of access required for the dashboard (e.g., Viewer, Contributor, Admin). Specify what each role can do (viewing data, interacting with filters, editing the dashboard).
* **Row-Level Security (RLS):** Describe how data will be filtered to ensure users only see the data they are authorized to view (e.g., a regional manager only sees data for their region).
* **Authentication:** Specify the authentication methods to be used (e.g., Azure Active Directory, specific user accounts).
* **Workspace Management:** Detail which Power BI workspace the dashboard will reside in and who will have access to it.

**10. Testing and Quality Assurance (QA)**

* **Test Cases:** Outline the key scenarios to be tested. This includes data validation (e.g., "Are the sales numbers in the dashboard matching the source system?"), filter functionality, and drill-down accuracy.
* **User Acceptance Testing (UAT):** Define the process for UAT, including who will participate, the timeline, and the sign-off criteria.
* **Bug Tracking:** Specify the method for tracking and resolving any bugs or issues found during testing.

**11. Maintenance and Support**

* **Data Refresh Schedule:** Confirm the final, agreed-upon data refresh schedule for the dataset.
* **Ownership:** Clearly state who will be the owner of the dashboard once it's deployed. This includes responsibility for data quality and future updates.
* **Support Plan:** Describe the plan for handling user questions, issues, or change requests after the dashboard is live.

**12. Technical Requirements**

* **Power BI Version:** Specify the required Power BI Desktop version and service settings.
* **Performance Benchmarks:** Define performance expectations, such as a maximum load time for pages or visuals.
* **Licensing:** List the required Power BI licenses for all users and stakeholders (e.g., Power BI Pro, Power BI Premium).
* **Gateway Setup:** Note any requirements for a Power BI Gateway to connect to on-premise data sources.

**13. Future Enhancements/Roadmap**

* **Phase 2 Features:** List features that are out of scope for the current version but are planned for a future release (e.g., "Add forecasting visuals," "Integrate external data from a new source," "Implement mobile-friendly views").
* **User Feedback Loop:** Describe the process for collecting and prioritizing user feedback for future iterations.

