


# Analytics Requirement Document - WIP




The following template will be used to discuss, capture, and align on development specifications for a BI Team request and is integral to ensure:

1. The BI team fully understands the business problem, resulting need, and specifically what data product(s) to deliver

2. The requestor(s) related to the request sign-off on the features and capabilities to be delivered by the BI team

## Business Context & Objectives [↗](#)



The intent of this section is to specify the business context of the project as well as high level objectives for what the project is trying to achieve - i.e., Sales is currently spending 4 days a month collating Sales Reports manually. The objective of this project is to automate a portion of this process to reduce the number of days this team spends on it.


### 1.1 Business Context [↗](#)

Explain the context and motivation for this analytics project.

### 1.2 Objectives [↗](#)

List the main goals and expected outcomes of the project.


## 2. Data Products [↗](#)



The intent of this section is to outline at a high level what data product(s) need to be built as a result of this project; i.e., dbt model(s), Power BI report(s), reverse ETL solutions, etc.

Data Product	Associated System/Tool (e.g., dbt, PBI, etc)	Notes

## 3. Data Requirements [↗](#)



The intent of this section is to identify specific data assets and logic need to produce the relevant data products, specifically:

1. Data Sources

2. Relevant fields by data source

3. Metric definitions & formula logic

4. Dimensions to filter/segment against

5. Timeframe & Grain considerations

### 3.1 Required Data Sources [↗](#)

Source System	Object / Table	Ingestion Method	Notes

### 3.2 Required Fields [🔗](#)

List the specific fields or metrics required from each data source.

Source System	Object / Table	Field Name

### 3.3 Key Metrics [🔗](#)

List the specific metrics, their business definition, and how they're calculated

Metric Name	Business Definition	Formula / Calculation

### 3.4 Dimensions [🔗](#)

Specify the dimensions by which the data should be analyzed, filtered, or segmented against.

### 3.5 Timeframe & Time Grain [🔗](#)

Define the time period for the analysis and any specific time-based requirements, i.e., this data should be captured at the monthly grain reflecting data for the last 2 fiscal years

## 4. Governance Requirements [🔗](#)

- i** The intent of this section is to identify any governance related requirements necessary to meet as part of the project. This includes, but isn't limited to,
1. Role based access control (RBAC)
  2. Dynamic Data Masking
  3. Row-level Security

Detail any specific technical needs or constraints pertaining to data governance or access restrictions

### 4.1 Role based access control (RBAC) [🔗](#)

### 4.2 Dynamic Data Masking [🔗](#)

### 4.3 Row-level Security [🔗](#)

## 5. Stakeholders and Roles [🔗](#)

**i** The intent of this section is to identify key stakeholders and their role(s) within the project.

Stakeholder	Team	Role

## 6. Timeline and Milestones [🔗](#)

**i** The intent of this section is to outline a high level project timeline and key milestones.

## 7. Assumptions and Constraints [🔗](#)

**i** The intent of this section is to list any assumptions made and known constraints.

## 8. Approval and Sign-off [🔗](#)

Stakeholder	Stakeholder Signature	Signature Date