

# BI/EDW Business Requirements Document

Tracking # (SF Ticket, etc.)	Date Submitted to BI Team	Requestor Name	Requestor Team Name

**\*\*\*Make a copy first, this is a template**

To deliver the most correct and complete analysis as quickly as possible it is important that the BI team understands the specifics of the request. Who? What? When? Where? Why? How?

The following template is meant to facilitate the collection of information needed to fulfill the request.

## Full Request Description

What needs to be accomplished? Why is it important? What is the expected outcome? When does it need to be delivered (recurring basis, as needed, one-time)? How should it be delivered? Why is it being requested now? Who is involved?

## Business Value

Describe and quantify the benefit this work will create and how we will know the value has been created. Are there specific goals to be achieved? How will we know if this analysis has been successful? Who is responsible for acting based on the analysis? What actions should be taken based on the analysis?

## Business Process (Processes)

Are there any existing business processes in place? What is the current process, if any. Is a change to the existing business process needed before the data required for this request can be generated? If applicable, provide diagrams of the current state of the process (as-is) and the future state.

## Report Requirements (Business Requirements)

Capture the data to be displayed, any calculations, and graphs/charts needed. What filters should be included?

#	Requirement Name	Detailed Description	Calculation/Condition	Sample Data

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## Data Inclusions/Exclusions

Generally, what is the scope of analysis? What data should be included? What should be excluded? How much history should be made available?

## Data Sources

Generally, where is the data required stored? Which database(s)?

## Dependencies, Assumptions, Constraints

What must happen before the data or analysis can be delivered? What are the upstream/downstream processes? Is there missing knowledge that required assumptions to be made? What limitations exist that prevent us from fulfilling the requirements completely?

## Other Requirements

What else needs to be delivered to fulfill the request? For example, are there any specific security requirements? If the data needs to be made available to extract, what data fields need to be included? Does this analysis only need to be delivered for a certain period, stop on a certain date?

## Mock-up(s)

If applicable, provide a rough design of the report or data visualization.

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### Approvals

Name	Title	RACI	Date Approved

### Document History

Date	Version #	What changed	Author