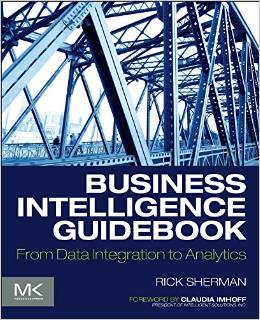
**Business Intelligence Guidebook**

**Templates**



**Chapter 13:**

**BI Application Content Specification Template**



[Company Name]

BI Application Content Specification Template

[Project Name]

Date: [Select Date]

Author(s):

Sponsor(s):

Table of Contents

[BI Applications 4](#_Toc404000378)

[BI Content Specification: [BI Application Name] 5](#_Toc404000379)

[BI APPLICATION - DESCRIPTION 5](#_Toc404000380)

[ BI Application Identifier 5](#_Toc404000381)

[ BI Application Name 5](#_Toc404000382)

[ BI Application Description 5](#_Toc404000383)

[ BI Application Category 5](#_Toc404000384)

[BI APPLICATION – BUSINESS CONTEXT 6](#_Toc404000385)

[ Business owner 6](#_Toc404000386)

[ Business Content Subject Matter Expert (SME) 6](#_Toc404000387)

[ Business constituency 6](#_Toc404000388)

[ Business processes 6](#_Toc404000389)

[ Business priority 6](#_Toc404000390)

[ Business concerns or issues 6](#_Toc404000391)

[BI APPLICATION – EXISTING REPORTS 7](#_Toc404000392)

[ Existing Reports of Data shadow Systems 7](#_Toc404000393)

[ Samples of Reports of Data shadow Systems 7](#_Toc404000394)

[BI APPLICATION – DATA CONTENT 8](#_Toc404000395)

[ Business requirements 8](#_Toc404000396)

[ Data Integration requirements 8](#_Toc404000397)

[ Systems of Records (SORs) 8](#_Toc404000398)

[ BI Application - Fields 8](#_Toc404000399)

[ Data Content Update Frequency 9](#_Toc404000400)

[ Data Content Update Type 9](#_Toc404000401)

[ Data Filters 9](#_Toc404000402)

[ Data Hierarchies – Drill Paths or Roll-ups 9](#_Toc404000403)

[BI Applications Cross-matrix 10](#_Toc404000404)

[Approvals 11](#_Toc404000405)

|  |  |
| --- | --- |
|  | Remember that the content of the template is more important than how is presented or formatted.  **Note: to delete any tip, such as this one, just click the tip text and then press the spacebar.** |

|  |  |
| --- | --- |
|  | See Chapter 13 “Business Intelligence Applications” of the *BI Guidebook* for a discussion of the use and content of a BI application content specification, and the information you will need to use this template.  This template provides the details of the data content presented in a BI application such as a report, visualization or dashboard. The user interface (UI) and design layout of these applications is not within the scope of this template. |

# BI Applications

|  |  |
| --- | --- |
|  | A reminder: these are preliminary requirements and not intended to be specifications. Fill in the details when creating data integration and BI application requirements and specifications. Avoid the common mistake of treating requirements at this stage at a too-high level and providing incomplete and ambiguous descriptions. Ambiguous requirements create a wide gap between what business people expect and what IT thinks it’s creating, leading to project failure. |

Table : List of Business Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| Identifier | Name | Description | Priority |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# BI Content Specification: [BI Application Name]

|  |  |
| --- | --- |
|  | Repeat this section for each BI Application. |

## BI APPLICATION - DESCRIPTION

|  |  |
| --- | --- |
|  | Descriptive attributes of the BI Application used to identify it within the project. |

### BI Application Identifier

|  |  |
| --- | --- |
|  | Provide a unique identifier. It is useful to create a naming convention for this identifier similar to what is being used for table and column naming. |

### BI Application Name

|  |  |
| --- | --- |
|  | Provide a brief, descriptive name. This may be used as the display name in portals, menus or in title fields. Stick to a naming convention. It is common for this field to be modified later in the project as you get business feedback. |

### BI Application Description

|  |  |
| --- | --- |
|  | Provide a brief description of its business purpose. This should be descriptive enough that a business person can decide if this application will be useful. |

### BI Application Category

|  |  |
| --- | --- |
|  | Provide a functional grouping of BI applications such as customer profitability, sales performance or expense tracking. |

## BI APPLICATION – BUSINESS CONTEXT

|  |  |
| --- | --- |
|  | Descriptive attributes of the BI application used to identify it within the project. |

### Business owner

|  |  |
| --- | --- |
|  | List business owners of this BI application. Include their names, titles, organizational groups and project roles. |

### Business Content Subject Matter Expert (SME)

|  |  |
| --- | --- |
|  | List the business person who is the SME for discussions on the content and functioning of this application if the business owner is delegating this responsibility. Include their names, titles, organizational groups and project roles. |

### Business constituency

|  |  |
| --- | --- |
|  | List the business groups and people who will use this application. Include their names, titles and organizational groups. |

### Business processes

|  |  |
| --- | --- |
|  | Identify and briefly describe in business terminology the key business processes that will be involved in or impacted by this BI application. |

### Business priority

|  |  |
| --- | --- |
|  | List the business priority or value assigned to this BI application relative to the other BI applications on the BI program or project lists. |

### Business concerns or issues

|  |  |
| --- | --- |
|  | List any concerns or issues raised by business stakeholders. |

## BI APPLICATION – EXISTING REPORTS

|  |  |
| --- | --- |
|  | This section should provide any pertinent information on any current reports or data shadow systems (spreadmarts) that are supplying comparable data to the business stakeholders. (Chapter 16 of the BI Guidebook explains data shadow systems.) |

### Existing reports of data shadow systems

|  |  |
| --- | --- |
|  | List the names, descriptions and SMEs for any existing reports or data shadow systems. |

|  |  |  |  |
| --- | --- | --- | --- |
| Identifier | Name | Description | SME |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Samples of reports of data shadow systems

|  |  |
| --- | --- |
|  | Provide report or spreadsheet samples or links to samples. |

## BI APPLICATION – DATA CONTENT

|  |  |
| --- | --- |
|  | This section provide the details on the field level data content. |

### Business requirements

|  |  |
| --- | --- |
|  | List and potentially link to the business requirements used to define this BI application. |

### Data integration requirements

|  |  |
| --- | --- |
|  | List and potentially link to the data integration requirements used to define this BI application. |

### Systems of Record (SORs)

|  |  |
| --- | --- |
|  | List the SORs for this BI application that were specified in business requirements and data integration specifications referenced above. This is not intended to replicate those deliverables’ documentation, but provide a business context. |

### BI application - fields

|  |  |
| --- | --- |
|  | List and describe all the data fields used in the BI application. These fields may be displayed in tabular reports or data visualization.  NOTE: The data sources in this list are the databases that the BI application directly connects with such as the DW, data mart or BI cubes rather than the underlying SORs. |

Table : List of data content fields

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Field ID | Field Name | Data Source | Table | Column | Data Type | Derivation or Transformation | Description |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

BI APPLICATION – DATA TRANSFORMATIONS

|  |  |
| --- | --- |
|  | This section provides details on the data transformations that occur within the BI application. Data sourcing, integration and cleansing are presented is separate BI project deliverables, |

### Data content update frequency

|  |  |
| --- | --- |
|  | Provide the data currency requirements such as monthly, weekly, daily, real-time or near real-time. |

### Data content update yype

|  |  |
| --- | --- |
|  | List whether the data updates in the BI application will be a push from data integration processes or a pull initiated by the BI application user. |

### Data filters

|  |  |
| --- | --- |
|  | List and describe any data filters that will be available to BI application users. |

### Data hierarchies – drill paths or roll-ups

|  |  |
| --- | --- |
|  | List and describe any data hierarchies that will be available to BI application users to either drill down into more detail from aggregated data or to aggregate when the data granularity is detailed. |

# BI Applications Cross-matrix

|  |  |
| --- | --- |
|  | Consolidate and coordinate the varied requirements into a cohesive set of BI project requirements to determine which ones truly drive value. The consolidation process identifies overlapping, redundant, outdated and conflicting requirements. It also identifies gaps and missing elements based on dependencies that might not have been apparent before the consolidation.  Consolidate and cross-reference (or tag) the requirements along such dimensions as:   * Business purpose * Business processes * Business group * Data sources * Analytical functionality |

|  |  |
| --- | --- |
|  | Classify and list the requirements according to agreed-upon categories. |

# Approvals

|  |  |
| --- | --- |
|  | It is a best practice to obtain sign-off approval of each project milestone. An organization’s policies and culture will dictate who the approvers are, but typically the sponsors and key stakeholders are included. |

|  |  |  |
| --- | --- | --- |
| Title | Name | Approval  Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |