# Sample Workbook Design Template

Use the simple workbook planning template below to plan the creation of your workbooks.

Examine Existing Workbooks, Searches, and Reports

What existing workbooks, saved searches, and/or reports can be leveraged?

### Workbooks

|  |  |  |
| --- | --- | --- |
| **Name** | **Base Record** | **Description** |
|  |  |  |
|  |  |  |
|  |  |  |

### Saved Searches

|  |  |  |
| --- | --- | --- |
| **Name** | **Search Type** | **Description** |
|  |  |  |
|  |  |  |
|  |  |  |

### Reports

|  |  |  |
| --- | --- | --- |
| **Name** | **Metric** | **Description** |
|  |  |  |
|  |  |  |
|  |  |  |

## Datasets

What other types of data do you want to see in the workbook? Be sure to include any additional fields you may want to view in table views, pivot tables, and charts.

### Record Joins

|  |  |  |  |
| --- | --- | --- | --- |
| Record Name |  |  |  |

### Fields

|  |  |  |  |
| --- | --- | --- | --- |
| Joined Record |  |  |  |
| Fields |  |  |  |

### Filter Criteria

|  |  |  |  |
| --- | --- | --- | --- |
| Joined Record |  |  |  |
| Fields |  |  |  |

### Advanced Sorting

|  |  |  |
| --- | --- | --- |
| Column | **Ascending/Descending** | **Options** |
|  |  |  |
|  |  |  |
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### Formula Fields

What calculations or other field manipulation do you need to perform?

| **Formula Name** | **Output Type** | **Formula/SQL Function** |
| --- | --- | --- |
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## Workbook Data Visualizations

### Table Views

How do you want to summarize the source data?

|  |  |  |
| --- | --- | --- |
| **Column Field** | **Filtering** | **Sorting** |
|  |  |  |
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### Pivot Tables

How do you want to aggregate the source data?

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Rows** | **Columns** | **Measures** |
|  |  |  |  |
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### Charts

How do you want to visualize the source data?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Chart Type** | **X / Y-axis** | **Series** | **Measures** |
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## Dataset/Workbook Sharing

Who needs access to datasets and workbooks? Do they require exported data?

### Dataset Sharing

|  |  |  |
| --- | --- | --- |
| **User Role** | **Permission** | **Exported Data** |
|  |  |  |
|  |  |  |
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|  |  |  |
|  |  |  |

### Workbook Sharing

|  |  |  |
| --- | --- | --- |
| **User Role** | **Permission** | **Exported Data Visualization** |
|  |  |  |
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