Requirements Gathering for Organisational Reports

Business Intelligence is more than just data reporting. When fully leveraged, it brings insights into data reporting that allow for making strategic decisions for organisations. Search "Business Intelligence" news on any web browser and you will find many studies and reports indicating the Business Intelligence market will grow quickly over the next few years. However, even if your organisation has purchased a Business Intelligence platform, such as Microsoft's Power BI, and employs individuals skilled in getting the most out of it, your organisation is likely experiencing a backlog of requests to have new reports and dashboards developed.

Often what causes report and dashboard backlogs is a lack of intelligent requirements. Frequent mistakes organisations make when writing requirements include:

- Hand over a legacy system report as-is with no markup
- Simply list the fields desired with no reasons behind why they are chosen
- List report requirements without any subject matter expertise or business analysis (what is "valid"? what is "accurate"? what should never happen? What should always happen? What are the distinct ways data flows through the division? What are the known exceptions?)

There is a better way to prepare requirements so that development in Power BI is quicker and arrives at the desired business result sooner.

1. Limit visible information to exactly what is needed

If the data model is designed correctly, no singular report should need to be a 'one-stop-shop' to answer all the questions for an organisation or even a division within an organisation. With Power BI's dashboards you can mix and match visuals from more than one report to make a bespoke dashboard and even then, it should only be a significant stop along your data journey, not the only destination. Keep reports and dashboards focused and succinct. Ask the following questions to isolate only what is needed in each report and each dashboard:

- What decision are you trying to make?
- What problem are you investigating?
- What question(s) do you have about the data?
- What fields MUST be visible?
- What is the definition of pass/fail or abnormal/normal?
- Is there a target to be met? And how is that target defined?
- Is there a comparison to be made? With what and why?

2. Depth of report

Once the questions above have been answered, bring in only the data necessary to answer those questions and then think of how deep you need to dive to be able to make the report or dashboard useful. The answers to the questions below determine whether drill-down reports are necessary or whether a drill-through or a linked report is necessary.

- What are the layers of the data? The Hierarchy.
- What granularity are you after?
- Is there a cause-and-effect relationship?

3. Breadth of report

With the subject of the report determined and how deep the information needs to flow to sufficiently satisfy the report or dashboard's purpose, consider whether other information may help to paint a fuller picture of the data. The answers to these questions would potentially be linked reports or drill-through reports. The questions to ask here are:

- What measures influence the answer to the questions?
- What is looked at when a problem occurs?

4. Delivery

The final need when writing report requirements is making sure the report is available to anyone in the organisation when they need it. The best questions to determine this aspect of reporting are:

- Who needs to interact with this report?
- Who needs to see the output?
- Does the report need to be exportable? To what application?
- Would you like alerts when pass/fail or abnormal/normal?

To make reports that have the best impact for your organisation, limit the data only to what is needed for its purpose. Extra information is just going to build a forest around the tree. When the report developer knows exactly what is needed: the depth, breadth and delivery of the report; the finished product and the value for effort increases exponentially.

If your business needs help with reporting requirements setting up Power BI dashboards which drive value to the business, please contact a Fujitsu Data & AI specialist now.