Instruction

This document is used to outline details related to reporting requirements of the project. Specifically, this document captures the technical specifications that are required for the successful design and development of business reports.

Report Technical Specifications

This section is used to describe the detailed specification related to how NUIT will develop a solution that meets the user requirements (which should have been outlined in the Business Requirements Analysis). If appropriate, you may want to insert graphic displays or screen shots (e.g., data sources and lists) into this document.

Intended Audience

Who will generate the reports?

Who will use the reports?

Related Documents

List any relevant documents, such as the Business Requirements Analysis or Project Charter, which should include that which is in scope (and outside of scope) as it relates to reporting needs.

Business rules

Describe the criteria for extracting data from the data source(s), including extraction logic, transformation logic, and how the data will be calculated before it is displayed.

Data Model

Provide a list of the tables that will be used for the report, plus any keys, and attributes that link tables in a relationship/grouping.

Data Attributes and Data Display

Provide a list of the fields needed for the reports and their attributes, like length, type, how they are sorted and totals required. In addition, provide details related to column labels and their source mapping. The user may provide a visual example of how they want the report to look, which can be attached to this document.

Data Facts

Provide facts related to the data being displayed; specifically, related to metrics and how they are grouped and displayed.

Drill-down Attributes

Provide a list of any drill down attributes, including their names and descriptions.

Report Naming Conventions

Define the naming convention standards for naming records, fields, and reports as appropriate. For example; NW\_XX\_

Report Header

Define how the header information should be displayed (first page, all pages, etc.)Also, define what information is included in the header (one the first page and subsequent pages, if different). At a minimum, the header generally consists of Report Title, Report Date; and a report identifier or number. Headers should also include a Northwestern logo.

Report Footer

Define what information should appear in the footer (first page and subsequent pages, if different). Typical footer information includes page number, number of pages in the document, the date created or printed, and whether the report is confidential.

Security

Provide details on who is able to access the report set-up and use functions. Other security considerations should be documented here as well.

Distribution

Provide details related to report distribution, including how they will be distributed, to whom they will be distributed, the timing and method of distribution, etc. Also include the data refresh frequency if the data source for the report is external.

Training

Provide details about training needs and content of the training, for the new or modified report. If training is required, detail the training schedule, location, and participants. If the training on reports is going to be combined with other project training, indicate so here.

Deployment

If deployment of reports is included in the overall project deployment, please use the Transition Plan to document the details of report deployment. Otherwise, use this section to provide specifics related to test, QA, development methodology, and the environment that the report will reside in during its life cycle. This section should also include the migration plan and sign off procedures.

Presentation

Provide details on how the report will be presented; for example, graphic form, spreadsheet, or some other method.

Document Tracking

The following chart is used to log of all changes made to this document.

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