

1. PRE-PLANNING

Exec stakeholder profile _____ Complete
 Lead user profile _____ Complete
 Lead developer _____ Select
 User cohort profile _____ Complete
 Develop source repository _____ OneDrive/Github
 _____ /folder/other
 Develop location _____ Local/remote access
 Develop account _____ Create
 Develop account access _____ Check
 Report mandate/description _____ Write
 Business questions the report will answer _____ List
 Actions taken as a result of the report _____ List
 Desired outcomes from this project _____ List
 Sample report _____ Obtain
 Data reconciliation method _____ Report/script
 _____ /user/other
 Report test plan _____ Write
 Entities identified/data model
 sketch _____ Complete
 Total reports/pages/
 visuals needed _____ Estimate

2. DATA ENTRY

Data entry screenshots _____ Capture
 Data entry process _____ Document
 Data validated on entry? _____ Yes/No
 Data quality check method _____ Note

3. EXTRACT

Confirm source systems _____ List
FOR EACH SOURCE SYSTEM
 Data storage tech _____ SQL/NoSQL/file/Excel/
 SharePoint/other
 Connectivity, how is the system
 accessed? _____ Document
 Query method – query tech
 and script method _____ Document
 List all datasets required _____ List
 Gateway required? _____ Yes/No

FOR EACH DATASET

Security check _____ Table/dataset
 sensitivity check (organization/public/private)
 Security check, any PII? _____ Yes/No
 Security check, any
 Intellectual property? _____ Yes/No
 Ethics check, is it right to use this
 data? _____ Yes/No
 Refresh schedule _____ Confirm
 Number of extract scripts needed _____ Count
 Time to develop extract stage _____ Estimate

4. STORAGE

Landing used? _____ Yes/No
 Landing area storage tech _____ SQL/dataflow/
 OneDrive/lake/other
 Encrypted at rest? _____ Yes / No
 Storage access method _____ Access OK

5. STAGING

Staging area used? _____ Yes/No
 Staging area tech _____ SQL/Power BI
 model/dataflow/lake/NoSQL/other
 Transform script tech _____ Stored proc/
 PowerShell/view/Python/R/dataflow/other
 Clean/transform scripts _____ Count
 Staging development time _____ Estimate
 Data exploration session _____ Complete
 Row-level security needed? _____ Yes / No
 Row-level security roles _____ Identify
 RLS users _____ Identify
 Visualization samples _____ Sketch

6. MODELING

FOR EACH TILE/VISUAL

Dim layer tech _____ SQL/Power BI
 model/dataflow/lake/NoSQL/other
 Dim layer scripts required _____ Count
 Relationships _____ Sketch
 Dim layer development time _____ Estimate

DAX/CALCULATIONS

Measures _____ List

FOR EACH CALC

Measure complexity _____ Easy/medium/hard
 Measure development time _____ Estimate
 Pivot table/matrix for
 Data reconciliation _____ Complete
 User data reconciliation _____ Complete
 Measure inline code comments _____ Complete

7. VISUALIZATION

Visualization _____ Create
 Row-level security _____ Create
 Row-level security view as role _____ Check
 Business question answered? _____ Yes/No
 Visualization look/feel UX
 check _____ Complete
 Test all page/visual interactions _____ Check
 Drill through _____ Complete

8. SHARING

Report version control
 PBIX/PBIT _____ Save
 Report information page _____ Complete
 Report publish _____ Complete
 App publish _____ Complete
 User access _____ Confirm
 Dataset refresh _____ Complete
 Report documentation: DAX
 export/data _____ Complete
 Data dictionary _____ Update

9. SCHEDULE

Gateway installed _____ Complete
 Dataset configured _____ Complete
 Refresh schedule _____ Configure
 Refresh test _____ Complete