The intention of this document is to outline guidelines for the publication of reports in the production Project Management folder in the Power BI environment maintained by Information Technology.

**GENERAL REPORT GUIDELINES**

1. Review test and production environments to ensure reports are not duplicated.
2. Avoid creating duplicate or similar reports by incorporating parameter prompts that can produce various related reports. Examples include a student report that can be generated for a selected college or all colleges, or a finance report that can be produced for a specific account or for all accounts.
3. When naming a report use a descriptive short title that is consistent with similar reports in the library, and do not use the word *“Report”* in the name.
4. Ensure that reports are written efficiently. Consult with IT personnel if necessary.
5. Be consistent with font types and font sizes. Suggested font sizes include 16pt for headings, 12pt for column headings, and 10pt for details.
6. Suggested font type for reports is the current default ***Segoe UI***.
7. Maintain page margins to no less than 0.25”.
8. Use Portrait (letter) orientation when possible to minimize the number of report pages, otherwise use landscape (16:9) orientation.
9. Display the report title in the upper left section of the report with the text left justified.
10. Include a division logo in the upper right section of the report or the author’s department/division when appropriate.
11. Use black and white and gray shading for most data reports. Color is appropriate for charts and graphs.
12. Use alternate line shading for rows when applicable.
13. Use descriptive headings and column names using mix title case.
14. Ensure that all fields and text are not truncated.
15. Use consistent naming conventions for all column labels. For example, don’t use the label “Organization” in one report and “Department” in another to mean the same thing.
16. Minimize the number of pages contained within a report.
17. Develop reports that are printable with most columns fitting on a page when applicable.
18. Avoid using abbreviations and acronyms in headings unless the abbreviations or acronyms are better understood than the full word or phrase. Using abbreviations or acronyms are acceptable when the full word of phrase will not fit in the assigned heading space.
19. Right justify most numerical fields.

**Reports with Pagination Capabilities (includes reports developed using Report Builder)**

1. Display report headings on all pages (as opposed to only displaying the report headings on the first page) when the number of total report pages is limited.
2. Repeat column headings and page footers on report pages.
3. Include run date in lower left section of the page footer.
4. Include current page and total number of pages in the lower right section of the page footer.
5. Store datasets separately in a Datasets folder. Often these are usable queries for look-up tables that can be shared across reports.
6. Use the data sources in the **Data Sources – IT** to connect to a database server.

See below sample report template.

Page <current page> of <total pages>

Report produced on MM/DD/YYYY

**<Report Title with Parameters>
<Optional Sub-title>**

**REPORT ACCESS**

1. All DTAS personnel will automatically be granted read-access to all DTAS related folders in production including **Information Technology** and **Project Management** folders.
2. For non-DTAS employee access, access will be granted via the existing ***Web Report Library Viewer Access Form*** found at the link below. Additional folders may be required to be added to the form for Power BI specific folders.

<http://www.utoledo.edu/it/EA/Forms/Web_Report_Viewer_Form.doc>

**REPORT MOVE PROCEDURES**

1. For report moves to the production Power BI server folders, all moves would be authorized through the current ***Web Report Library Move Form*** found at the link below.

<http://www.utoledo.edu/it/EA/Forms/Web_Report_Move_Form.doc>

1. Report move request to a production Project Management folder would be authorized by the Project Management Office (PMO).
2. As other folders are added to the Power BI report environment, production moves would be processed via the Web Report Library Move Form and authorized by the data custodian noted on the form.
3. Access to test Power BI folders would be limited to developers developing reports for a specific folder.

**REPORT METADATA**

Provide report metadata in the Description within the Properties of the report in the Power BI Server environment. Information should include a Report Description, Filters, Parameters, Data Source(s), and Version information. Version information includes Version Number, Date, Author, and Description.

See the below example.

Description

The report provides the number of projects for Strategic projects by Executive Level and Status in a matrix format.

Filters: Strategic Projects and Status is Active or Completed.

Parameters: DTAS Team

Data Source: MS Project Online SQL tables from extract

Version 1.0, 8/1/18, Sherry Blosser, Original report creation.

Version 2.0, 8/17/18, Dom D'Emilio. Modified to fit on one page and include page headers and footers.