12 BEST PRACTICES IN BI REPORT GOVERNANCE

Report governance involves establishing policies, procedures, and controls to ensure the accuracy, reliability, and security of reports generated within an organization. Here are some best practices for effective report governance:

1. **Define Report Ownership:** Clearly define ownership for each report, specifying roles and responsibilities for report creation, maintenance, and distribution. Assign accountability to individuals or teams to ensure that reports are accurate, up-to-date, and aligned with organizational objectives.

2. **Standardize Report Templates:** Develop standardized report templates with consistent formatting, layouts, and branding elements. Standardization ensures uniformity across reports and facilitates easier comprehension and analysis by users.

3. **Establish Data Quality Standards:** Define data quality standards and guidelines for report data sources. Ensure that data is accurate, complete, timely, and relevant to the intended audience. Implement data validation and cleansing processes to maintain data integrity.

4. **Document Report Metadata:** Maintain comprehensive documentation for each report, including metadata such as report name, description, purpose, data sources, refresh schedule, and access permissions. Documenting metadata helps users understand the context and relevance of reports.

5. **Implement Version Control:** Establish version control mechanisms to track changes to report templates, data sources, and definitions over time. Maintain a version history to facilitate auditing, compliance, and troubleshooting activities.

6. **Enforce Access Controls:** Implement access controls to restrict access to reports based on user roles, permissions, and data sensitivity. Ensure that only authorized users can view, modify, or distribute reports to prevent unauthorized access and data breaches.

7. **Enable Audit Trails:** Enable audit trails and logging mechanisms to track user interactions with reports, including viewing, downloading, and sharing activities. Monitor and review audit logs regularly to detect anomalies, unauthorized access, or misuse of reports.

8. **Provide User Training:** Offer training and support to users on report creation, interpretation, and usage best practices. Educate users on how to navigate reports, interpret data visualizations, and leverage report insights to inform decision-making.

9. **Promote Data Governance Principles:** Align report governance with broader data governance principles and initiatives within the organization. Ensure consistency with data management policies, data classification standards, and data privacy regulations.

Contact ODGA's Data Protection and Governance Team for assistance.

10. **Regular Review and Validation:** Conduct periodic reviews and validations of reports to ensure accuracy, relevance, and compliance with business requirements. Engage stakeholders in the review process to gather feedback and make necessary adjustments.

11. **Monitor Performance and Usage**: Monitor report performance metrics such as execution time, data freshness, and user engagement. Identify performance bottlenecks and usage patterns to optimize report delivery and user satisfaction.

12. **Continuous Improvement:** Continuously assess and refine report governance practices based on feedback, lessons learned, and changing business needs. Foster a culture of continuous improvement to adapt to evolving reporting requirements and technological advancements.

By implementing these best practices, organizations can establish robust report governance frameworks that promote data integrity, accessibility, and usability while mitigating risks associated with inaccurate or unauthorized reporting.

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