

Plan for the business data catalog and profiles

1. **Application:** List each line of business application.
2. **Entities:** List the entities for each application. For example, for a customer service application you might list Customer and Product, among others.
3. **Properties:** List the business data properties to include for the business data profile of each entity.
4. **Account:** List the account used to access the properties of each application. This will also typically be the access account used when crawling business data for search.
5. **SharePoint groups:** List the groups and membership for each group that can access business data that has been crawled.

Application	Entities	Properties	Account	Groups	Membership

Plan lists and Web Parts

1. **List or Web Part:** List each list or Web Part.
2. **Type:** Web Part or list? Business data list, KPI list, or other SharePoint list?
3. **Source:** List the data source used for the list or Web Part, whether it's another list, an Excel workbook, a data connection library, or an application in the business data catalog.
4. **Properties:** List any properties that are used by this list or Web Part or by filter Web Parts connected to this Web part.
5. **Filter Web Parts:** List any Filter Web Parts that connect to this Web Part in any of your sites.
6. **Sites:** List any planned sites that will use this Web Part.

List or Web Part	Type	Source	Properties	Filter Web Parts	Sites

Plan reports and key performance indicators (KPIs)

1. **Report or KPI:** List each report or KPI list page.
2. **Report Center:** If you have more than one report center page, list the URL of the report centers that use this report or KPI list page.
3. **Reports library content:** Include all lists and Web Parts used by each report or KPI page. For all reports, include supporting business data lists, files, and documents and the Web Parts used to display the report. For KPIs, list the KPI List and KPI Web Parts used, along with any supporting files and documents if the KPI is displayed as part of a report.
4. **Dashboards:** List all dashboard pages that use the report or KPI.

Report or KPI	Report Center	Reports library content	Dashboards

KPI lists

1. **KPI list:** List each KPI list in the previous table.
2. **KPIs:** List the KPIs for each KPI list.
3. **Values:** List the values for each level of performance.
4. **Source:** Type the source used for the KPI.
5. **Calculation method:** Type the data range and formula used to calculate each KPI.

KPI list	KPIs	Values	Source	Calculation method

Plan dashboards and filters

1. **Dashboard:** List each dashboard by name and location.
2. **Web Parts:** For each dashboard listed, list the Web Parts used, whether they are business data Web Parts, Excel Web Parts, Analysis Services Web Parts, KPI Web Parts, or Filter Web Parts.
3. **Filters:** For each Web Part, list the Filter Web Parts connected to that Web Part
4. **Source:** List the data source of each Web Part in each dashboard.
5. **User filter properties:** If this is a filter that viewers of the dashboard can select values for, list the properties, values, and source. Otherwise, type **No** in this column.

Dashboard	Web Parts	Filters	Source	User Filter Properties

Plan business data actions

1. **Action:** List the name of each action.
2. **URL:** List the URL for the page that resolves the action.
3. **Form:** For actions that refer to forms, include the relevant form and properties here.

Action	URL	Form

Plan business data search

1. **Content source:** List each content source that contains business data.
2. **Start addresses:** For each content source, list the relevant start addresses.
3. **Properties:** List the crawled properties, including entities, that you want to map to managed properties to use in search queries.
4. **Managed properties:** For each crawled property, list all managed properties it is mapped to. Then go to the search properties worksheet and add the same mapping information.

Content source	Start addresses	Properties	Managed properties