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| Description: Approved shield 25mm | BPM Community **Requirements analysis template** |
| **Author** |  | **Date** |  |
| **Company** |  | **SBU** |  |
| **Issued to** |  | **Version** |  |

## Introduction

This guideline outlines the typical content of a requirements analysis document for a BPM project and gives advice on how to construct it.

 A requirements analysis is typically produced as part of a BPM project to:

* Describe the business processes that the BPM project is addressing
* Outline the functional requirements to enable an informed choice of software, if a business intelligence application is being purchased
* Agree functional requirements to be delivered, if an in-house development is being proposed

This more detailed requirements analysis is normally produced after the business case approval. The business case justifies the investment in the BPM project by outlining the benefits (financial and non-financial) to be delivered. The requirements analysis sets out in more detail the scope of the BPM project and the functional and non-functional requirements it must satisfy to deliver those benefits.

Functional requirements cover topics such as the range of BPM applications included in scope and the way they are designed to operate. Non-functional requirements cover aspects of service delivery such as backup and recovery targets, response times and systems availability.

For BPM projects, it is important to be very specific about the scope of the project – for example, whether it includes budgeting and forecasting, business intelligence. It should specify its delivery mechanisms – online vs paper, use of mobile technologies etc.

With phased projects, the requirements document also lays out the sequence of developments, and dependencies between each phase.

Where an implementation consultant is being used to configure a business intelligence application, the requirements analysis is normally a key element of the contractual terms, and once agreed is subject to a change control process. Many organizations will have their own in-house standards and development methodologies; in these cases this template can be used as a checklist to ensure all key areas have been addressed.

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| **1.0 Purpose**  |
| **Use this space to summarise the purpose of this document to its intended recipients.****Example:** This document summarises the business processes and systems requirements of the [BPM upgrade] project. It should be read in conjunction with the business case.  |

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| **1.1 Intended Audience** |
| **Describe your intended audience here.** [Generally, the main intended audience for this document are the business owners of the proposed system. This content should be tailored to their needs. They must be able to verify that their business requirements have been documented here; completely, accurately and unambiguously.] |

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| **1.2 Project Background** |
| **Describe the background and history of the project here.** This sets the business requirements in context and may explain any scope limitations agreed at business case approval stage.  |

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| **1.3** **Business Goals/Objectives to be achieved** |
| **Describe the major goals/objectives to be achieved with the implementation of the business requirements.** This should link in with the organisation’s strategic objectives as laid out in the strategic plan and summarised in the business case. |

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| **1.4 *Benefits/Rationale*** |
| **Use this section to describe the desired benefits to be achieved and the justification for the project.**Most of this section can be lifted from the business case document suitably updated for any subsequent changes and is included to allow the business requirements document to be reviewed and approved as a standalone document  |

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| ***1.5 Stakeholders*** |
| **Adapt the table below to reflect your organisation and project.** [Stakeholders are the individuals or groups who have a vested interest in this project and whose interests need to be considered throughout. This section lists the Stakeholders of the Application / Project for which these Business requirements are documented.] |

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| Stakeholder Group | Role |
| Chief Executive | Champions need for step change Provides visible sponsorshipUses BPM as key tool. |
| Other executives | Champions need for step change Provides visible sponsorshipUses BPM as key tool. |
| IT groups | May be responsible for business intelligence but will also be concerned with data availability, definition, control and accessibility as well as concerned re software and hardware needs.  |
| Data providers | BPM projects need raw data and without support it may not be provided. |
| Performance commentators  | Data needs to be interpreted and often the commentators are a separate group from the data providers. |
| Divisional or business unit heads | Will want consistency between their own reporting and any consolidated reporting. |
| Head office departments | Often have interest in ensuring common data definitions, accounting methodologies and software choices. |

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| **1.6 *Dependencies on existing systems*** |
| **Describe the dependencies between the BPM project and existing applications/systems.** |

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| **1.7 Assumptions** |
| **Describe the major assumptions that were made prior to or during the business requirements gathering and documentation.**  |

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| **2.0 *Requirements scope*** |
| **Outline what business functionality is in scope and out of scope for implementation.Include an overall high-level Use case diagram indicating which use cases are out of scope for Implementation. Draw separate boundary boxes around “in scope” use cases and “out of scope” use cases. See the example below :**If Function Hierarchy Diagram (FHD) modeling is done using Oracle Designer for these Business Requirements instead of Use case modeling, then include an overall high-level Function Hierarchy diagram indicating which Functions are out of scope for Implementation. Please draw the “out of scope” Function boxes in **grey** **color** as shown in the example below :2.1 In Scope  **List the use cases/business functions that are in scope.** **Provide a brief description (2-3 lines) for each of these use case/business functions.**List the system/organizational interfaces that are **in scope**. Mention the name and a brief 2-3 lines short description for each interface that is in scope. Out of Scope**List here requirements that are out of scope – this is a key aspect, particularly when using outside parties to configure the software.**  |

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| **3.0 *Functional requirements*** |
| **Describe the functional requirements of the project here.** [Functional requirements define how the BPM system should function from the end-user's perspective. They describe the features and functions with which the end-user will interact directly.When interpreting and recording requirements it is important to clearly define and prioritise them, analyse the impact of change, resolve conflicting issues and analyse feasibility.] |

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| **4.0 *Non-functional requirements*** |
| **Define the operations that must be carried out in the background to keep the product or process functioning over a period of time and the required service standards**  |

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| **5.0 *Technical requirements*** |
| **Define the technical issues that must be considered to successfully implement the process or create the product. This should include data requirements.** |

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| **6.0 *Transitional requirements*** |
| **Describe the steps needed to implement the new product or process smoothly.**  |

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| ***7.0*  Interface Requirements** |
| Describe the User and System Interface requirements for the proposed system.7.1 User Interface RequirementsDescribe how the users will interact with the system, in particular any manual processes to be carried out outside of the system. Also describe the user interface requirements. Include or attach a screen prototype diagram here.7.2 System Interface RequirementsDescribe the other systems with which the BPM system will interact, both as inputs and outputs. Outline any automated control and reconciliation requirements as well.List and describe what other external systems/business functions are required to be interfaced with the proposed system from Business Requirements perspective. *Example: This system needs to interface with the CAS in order to receive some input data.* [Note: Avoid describing system design and technical issues.] |

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| ***8.0 Business Glossary*** |
| Include a complete glossary of business terms used in this document. |

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Revision Log

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| Date | Version | Change Reference | Reviewed by |
|  |  |  |  |
|  [date] |  |  |  |
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Appendices

**List any appendices here**

Normally these will be process flows, systems architecture charts and systems availability and access requirements.

Approval

**Describe the approval process followed as in the example below:**

This document has been approved as the official Business Requirements Document for the project.

Following approval of this document, changes will be governed by the project’s change management process, including impact analysis, appropriate reviews and approvals, under the general control of the Master Project Plan and according to Project Support Office policy.

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| Prepared by | Signature | Date |
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| Approved by | Signature | Date |
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