WALLOT PLAN TEMPLATE

CONTENTS

EXHIBITS

Revision History

DATE	Version	Description	Author

1. OVERVIEW

Wallot is a financial management software that has as target public people that want manage their finances in a more organize and easy access way. Wallot will organize your expenses in a short and long term, showing to where go and comes the user money. It will create forms, stats and will follow any finance planning define by the user, that can follow, edit and create others simultaneous planning. The amazing differential of the app is that many of the user expenses will be imported with the cost, category and time, without the need manual insert this informations.

1.1. PURPOSE

For decades, Brazilians suffers with the unstable economy and short investment of the govern in finance education. The result of this is more than 63 millions people buried in debts. Is more than the population of Italy. Besides the low rankings in research about knowledge in financial concepts.
Knowing this scenario in that, currently, not all people have time, knowledge or disposition to organize their finances, Wallot primordial purpose is help the user achieve their finance health. In the same scenario that the expenses are frequent and diverse, Wallot aims to inform this expenses and aware the user in a way that he knows where are going his money. Another purpose is an adapt financial planning system, that can attend the planning for the month, year, travels, property and many others, in order that the user could know what he will need to achieve his financial goals.

1.2. SCOPE

- Register and login by email.
- Reading bank statement by the reading of the credit card data.
- Organize your balance, revenue, expenses by category.
- Show grafts that be easy reading and still with a lot information.
- Design focused in the user experience.
- Planning assistant in short and long term.
- Create a notification system to remember futures expenses and revenue.

1.3. APPLICABILITY

Wallot has as target public people that need manage their finances, but don’t have time or knowledge to able to keep the organization. The app will help showing notifications about how much they still the need pay, how much they saved and show how much an expense will burst they limit.

1.4. DOCUMENT ORGANIZATION

The content of the document approaches the importance points to the client about the app, the app goals, what is it for and who is your target public.

1.5. 2025 STORY

Based in several articles of several highly regarded financial, technology and inovation area's websites and magazines, like InfoMoney, Foxbit, PluralSight, Exame, TechCrunch, Forbes and others, we think that in 2025, our project will be supporting several differences ways of data input, like several credit card flags and provide services to cryptocurrency. Besides that, we have an ambition of provide support in the finance investment area to the users and been based and operating in San Francisco, CA and provide a worldwide services.

1.6. APPLICABLE DOCUMENTS

Identify documents controlling RM plan contents.

1.7. CHANGES AND REVISIONS

Tell what organization is responsible for controlling changes to the RM plan and related information.

1.8. ISSUES

Describe issues that affect implementation of the requirements management plan (training, tool selection, geographic distribution of the team, etc.)

2. ROLES AND RESPONSIBILLITIES

2.1. ORGANIZATION OVERVIEW

Provide an overview of the organization from a requirements perspective. Use graphics and/or a table showing project organization for easy reference. Contact information may also be included.

ROLE	NAME	ORGANIZATION
Project Manager	Joe S.	Project Management Office
Project Sponsor	Jane T.	Client Upper Mgmt Office
SME	Jack Z.	Client Office A

A. Roles and Organization

2.1.1. ROLE A

Provide the responsibilities and duties of each party or group during the lifecycle.

3. REQUIREMENTS PROCESSES

This section describes the approach to identifying, developing, maintaining, and managing requirements. Discuss inputs, processes, outputs, timing, entrance and exit criteria, events, and other information. Describe how participants will interface with each other.

3.1. OVERVIEW

Provide an overview of the processes relative to the lifecycle; structure the processes or activities and phases by the model you are following (CMMI, PMP, etc.)

3.1.1. PHASE ONE

Describe the phase.

1. PROCESS OR ACTIVITY A

Provide the details or workflow of the process, activity, or procedure; depict it graphically.

4. TOOLS

Describe the tools that will be used for requirements. Tools may include commercial software packages for the requirements repository, CASE tools, test tools, project planning tools, issue management tools, estimating tools, as well as non-automated tools such as diagrams and storyboards. If a tool has not been selected, provide the requirements for selecting it.

Tool	Version	Use

B. List of Tools

5. REQUIREMENTS DOCUMENTATION AND ORGANIZATION

5.1. REQUIREMENTS DOCUMENTATION

Discuss the requirements documents that will be produced.

5.1.1. BREAKDOWN STRUCTURES

Provide a diagram showing the requirements levels. Provide the standard for how requirements will be organized and decomposed; describe the relationship of the levels to the development phases and the requirements documentation.

5.1.2. ASSOCIATED INFORMATION

Describe the information that will be associated with each requirement and who is responsible for collecting the information.

Associated Information	Use	Captured By
Change history	Change control and audit	RM Tool
Priority	Implementation planning	Analyst
Unique ID	Traceability matrix	RM Tool

C. Associated Information

5.2. ORGANIZATION

5.2.1. NUMBERING CONVENTION

Describe the requirements numbering convention that will be used. Do not use the outline organization numbering of the requirements document as the unique ID.

5.2.2. Traceability Strategy

Describe the traceability strategy. Depict the traceability strategy graphically.

5.2.3. Repository Structure

Describe how the requirements will be structured in the requirements management tool or repository and the relationship, interface, or dependency on data in other tools. The repository structure is based on the traceability strategy.

6. MEASURES

Describe the measures that will be used for managing requirements. Put details of the measures in the appendix.

7. REPORTS

Describe the reports that will be generated and their purpose. Put examples of the reports in the appendix.

8. APPENDICES

Appendices contain details not included in the plan.

A. DEFINITIONS, ACRONYMS, ABBREVIATIONS

Associated information	Information associated with a requirement, including traceability information. If a requirements management tool is used, the requirements database or repository usually has more associated information than hardcopy documents such as the SRS.
Child	Child requirements are decomposed from parent requirements. For example, A is the child of the requirement ABC.
Compliance matrix	RTM
Constraint	Boundary conditions on how the system must be constructed and implemented, for example, how a COTS package might be selected.
Derived	New requirements identified during the development process that trace back to a driving requirement.
Goal	States the desired result, not the way to reach it. For example, they system shall reduce operating costs by 10% of 2001 costs. All changes in requirements and design should be passed through stated goals. If they are outside the goals, they should be rejected.
Information	Any communication or representation of knowledge such as facts, data, or opinions in any media or form.
Non-functional requirement	Relate to characteristics of a system such as performance, reliability, security, accuracy, and so forth.
Non-technical requirements	Agreements, conditions, or contractual terms that affect and determine the management activities of a project.
Parent	Child requirements are decomposed from parent requirements. See child requirement.
PMO	Project management office
Requirement	A condition or capability that is wanted or needed.
Requirement repository	COTS providing a database or spreadsheet in which the requirements and associate information are stored.
RM	Requirements management
RTM	Requirements traceability matrix
SME	Subject matter expert in one or more areas of the client's business.
SRS	System requirements specification.
System functional requirements	Include functional and non-functional requirements on the system.

B. FORMS

Include forms that will be used.

C. REQUIREMENTS EVALUATION CHECKLISTS

Enter the unique ID of the problem requirement(s). Explain in Remarks the reason if “No” is checked. Attach additional sheets if needed.

Evaluation Criteria	Yes	No	ID	Remarks
A test case is associated with the requirement.				
The requirement can be understood by affected parties (e.g., SME, developers, testers).				
Unacceptable words and phrases are absent (e.g., adverbs, adjectives, as appropriate, at a minimum).				
Adheres to defined terms in the requirements glossary.				
Requirement conforms to standard format.				
Requirement is at the appropriate level of detail for its position in the hierarchy.				
Requirement has the associated information required by the RM plan.				
Requirement is within scope.				
Requirement is terse.				
Requirement avoids specifying design.				
Requirement is feasible.				
Requirement is written in the imperative (shall).				
Cross-references are specific so the information can be easily located; the reference is located in the project document library if it is external to the requirement.				
Requirement can be traced to its parent or driver.				
Requirement is unrestrictive; it can be implemented by more than one solution or design.				
Requirement contains no TBD.				

D. Checklist for Individual Requirements

Evaluation Criteria - All Requirements	Yes	No	IDs	Remarks
Requirements are consistent with each other.				
Requirements are complete: every case or scenario is addressed.				
Requirements address user interfaces.				
Non-functional requirements are addressed.				
Assumptions and dependencies for requirements are stated.				
Requirements address system and user error conditions.				
All requirements are traced to their parent or driver (no dropped traceability).				
Interfaces are specified (internal/ external).				
Inputs and outputs are specified.				

E. Checklist for All Requirements

D. REQUIREMENT REPORT EXAMPLES

Some requirement reports are listed below. Examples should be generated from the tool when possible.

- Traceability Matrix
- Unallocated Requirements
- Requirements by Risk
- Requirements by Priority
- Requirements by Qualification Method
- Requirements Status
- Cumulative Changes
- Other Requirement Metrics Reports

E. QUALITY STANDARDS

Describe the characteristics of requirements of good quality.