Report Requirements

Document Purpose

The Report Requirements document (RRD) is a record of requirements written from the user centric perspective. The document will describe to the user audience report request, objective and response needed to make business decisions.

The RRD will be used as the basis for the following activities:

- Defining and implementing the solution to the business problem
- Documenting stem-centric software requirements document (functional specifications)
- Creating report designs
- Determining project completion and success

Overview of Business Impact & Need

The objective of this section is to provide a brief background on how and why this problem came up, high level details of the problem situation.

Impact to Business Process

The key of this entire section to introduce the problem as to its affect on the corporate business, then in the next section we will drill down into the affect to each business process and finally down to the affect on the users performing process activities – i.e., where we need the solution to get implemented.

The process(es) mentioned in the next section, exist to contribute toward the mission of the business as a whole.

Quick example, if the problem/issue causes more member calls, this negatively affects the business as a whole as members have to wait longer to get through etc., which can ultimately affect sales and persistency.]

[Provide high level background on how the current business process operates to achieve its process objectives. Reference the process workflow or provide a link to its location as necessary.

Remember to describe the problem in the context of the process in which it exists. Also explain the impact of the issue on all other affected areas and processes.

<u>SAMPLE TEXT STRUCTURE</u>

The business process that requires a change is X. It is the Mission of X business process to do Y. It is the vision of management that the performance X is such that it is done with…(e.g. lower cost, lower cycle time, higher customer experience satisfaction, better quality, higher volume handling) .

Then explain specifics regarding the problem facing the process and the impact it is having or will have on the process performance.

The problem/situation/change that is currently (or will) negatively affecting X business process is Y. Y negatively affects X business process because it causes A, B, and C which ultimately leads to the negative performance (reference the attribute listed in the preceding paragraph). In addition, Y also has a significant negative affect on the performance of business process X as it causes…

Business Need

Then introduce the business need from the user perspective. Note – this does not mean explaining which fields need to be added to system X.

This section serves as the vision statement for the process. Each requirement listed in the User Requirements section should bring the project closer to the vision listed here.

It is the business vision to develop a solution for business process X that will result in achieving the desired increase/decrease the performance attributes of A, B and C.

IN THEORY ENTIRE SECTION SHOULD COME FROM THE ARGUMENT MADE IN THE STATEMENT OF NEED OR BUSINESS CASE. Provide reference or link to the document as necessary.]

Stakeholder Community

Name	Title	Business Unit

Database Requirements

	Description	Notes
1		
2		

Report Requirements

Name of the Report

Report Properties	Requirements
Report Audience	The potential readers & viewers of the report.
Business Owners	Person responsible for managing the objective and key performance indicators.
Business Purpose/Objective	A written declaration of the report, its idea and context to explain the measureable goals and objectives, the business need and problem to be addressed.
Data Source	The location of the data. (ie. DataMart)
Report Data Refresh Rate	The time the report is ready for viewing. (ie. Near real time, weekly, monthly, etc.)

Report Availability	When the report is ready for viewing (ie. On demand, Monday, 1st of the month)
Reporting Period	The timeframe the data is measured. (ie. Rolling 12 month, monthly, weekly, daily, etc.)

Report Details

Report Details	**Requirements**
Report Header	Usually the name of the report but some users may want the reporting period included as well.
Drill Down	Detail to the level/layer of data granularity the user wants to see. (ie. Policy level, insured level, benefit level, etc.)
Report Sorting	Default sort order the report must display.
Report Filter	Identify which fields the user wants to filter by to limit the data display.
Report Summary Fields	High level summary of data rolled up, usually data counts. List out fields needed to see (ie. How many tasks are in a department)
Report Detail Fields	Detail summary of data, list out fields needed in the report. Related to drill down.