Functional Requirements Questionnaire (FRQ)

Introduction

The Functional Requirements Questionnaire (FRQ) is a critical element of the Define phase of the Blue Prism delivery methodology.

The FRQ captures important details critical to implementation, and upon which functional and technical decisions are based.

This guide looks at the following:

- What is a Functional Requirements Questionnaire (FRQ)?
- Where to gather information from for a FRQ?
- What makes a good FRQ
- Common mistakes and issues

What is a Functional Requirements Questionnaire (FRQ)?

The FRQ is a document that details production information about the process and environment which may be relevant during development.
It should capture all inputs, outputs, environmental factors, schedules, SLAs, alert structures, reporting targets, and any other requirements of the business process in sufficient detail to be able to ensure that all requirements at all levels are met.

The FRQ does not repeat any of the business process logic that is captured in the Process Definition Document (PDD), it supplements that PDD document with details of the business expectations of how the process needs to perform and be managed.

A FRQ is needed for the following reasons:

- To record all technical details on all aspects of the system, especially interaction points with other systems. It acts as a reference for all development. This makes it possible to integrate with other systems and processes at all interaction points.
- To enable developers to complete development with minimal effort. Without a properly defined FRQ before development starts, both development and testing can be extended greatly before the process performs accurately and meets all expectations.
- To base verification and UAT plans upon. Test plans must ensure each documented requirement is met as specified as part of the full testing process.
- To base operational planning and scheduling of the automated solution. Details from the FRQ document can be used to decide the number of resources required, how to plan for peak work times, and when to schedule the solution to run.

Where to gather information from for an FRQ?

Existing Documentation

Existing functional and technical documentation must be accounted for or included in data-gathering for an FRQ. Functional and technical requirements for the process may or may not change during the BP implementation process, but they must all be mapped either to a requirement in the FRQ or an explanation of why they are no longer relevant.

Potential issues with existing documentation:

- Outdated – the implementation of the original process may have changed or evolved over time, meaning the existing documentation is no longer 100% accurate.
- Discrepancies – Documentation may reflect an expectation different than the original implementation of the process, meaning it may not actually reflect how the process is done day-to-day.
- Level of Detail – Existing documentation may not have the full detail necessary to properly develop the Blue Prism implementation.
- Ease of Use – Documentation may be unclear, poorly written, or difficult to understand.

Because of these potential issues, it is always best practice to review all documentation with Subject Matter Experts to ensure discovered requirements are valid.

Subject Matter Experts (SMEs)

The best source of information about business processes is the staff working and maintaining the process.

- Document all assumptions, requirements, SLAs, and technical elements in as much detail as possible.
- Copy samples of input and output files, reports, log entries, and alert/error messages where possible to include in the FRQ.
- Question the process and explore/expand as much as possible, to ensure all information is correct and relevant to the context.
- Where possible, compare the details to the live/existing process before publishing the FRQ.

Blue Prism strongly recommends sitting with multiple SMEs when documenting a process. Different people may know different elements about a process, and working with more than one person minimizes the chance of missing critical information.

Business Decisions and Sign-off

Process and Requirements Documentation should be agreed and signed off by the business owners to ensure it has been completed correctly.

Why:

- Ensure the automated solution meets operational requirements
- Ensure all parties are aware of the requirements, scope, and expectations.

Who:

- Subject Matter Experts: Confirm that the results of their actions are reflected correctly in the requirements.
- Business Process Owners: The process owners need to be away of the expectations of the implementation.
- Technical Staff: The technical staff who implemented the original process and work with it day-to-day will have good insight into how the requirements match reality.
- Business Analysts: BAs frequently documented the original requirements for the process and will have good insight into the correctness and completeness of a FRQ.

What makes a good FRQ?

FRQ Contents and Structure

Blue Prism provides an FRQ template in the Methodology area of the Portal and a completed example as part of the Lifecycle Orientation training. New FRQ documents can be based upon these.

An FRQ should be clear and easy to understand. Even though the details mostly apply to technical implementation, they should be clear to anyone reading the document.

The document should not try to record process or solution details, these belong in other definition and design documents. Only the inputs, outputs, SLAs, schedules, alerts, reporting targets, and other technical details that are implemented by parts of the process should be documented in an FRQ.

Difficulties documenting the Functional Requirements

Sometimes it can be difficult to capture FRQ information. Reasons for this difficulty may include some of the following:

Problem:

Requirements differ between documentation and existing implementation, or different SMEs/staff believe requirements should hold different values.

Solution:

Document all cases where requirements conflict, and report these to the operational process owner. Make it clear that implementation cannot be completed and testing cannot be properly planned until all discrepancies are addressed and corrected.

Problem:

If the business process to be automated is a new business process, existing knowledge may not exist about how it should be performed and managed.

Solution:

A new business process should not be scheduled to be automated until all decisions about how it is to be performed have been finalised.

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