Company Name Here [Department Name Here (if applicable)

Functional Design Document (FDD)

**Project Name: Enter the Project Name Here**

|  |  |
| --- | --- |
| **Business Area** |  |
| **Project Name:** |  |
| **Version:** |  |
| **Issue Date:** |  |
| **Approval State:** |  |
| **Approved by:** |  |
| **Prepared by:** |  |
| **File Name:** |  |
| **Confidentiality Category:** |  |

# REVISION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Name** | **Description** |
|  |  |  | IT Business Analyst |
|  |  |  |  |
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# Introduction

### Overview

## Purpose

Example:

The purpose of the Functional Design Document is to describe in detail the enhancements to the [application name here] functionality associated with [business/functional area here]. The requirements for Release 1 were gathered from initial requirements sessions via requirements workshops conducted with key stakeholders. Requirements in-scope for Release 1 focuses on [improving the user experience associated with viewing and scheduling events on the web and increasing performance associated to [application name here]].

## Problem Statement

[What is the problem being solved with this project?]

***Key Challenges***

***[***Example of a challenge:

* Secure Log in experience is not optimal - Guest Registration experience is especially poor]

***Key Pain Points***

*[Example of a pain point:*

1. All customers have to log into the secure web (using Participant ID or Guest ID) to view available Consultations and Seminars].

[In summary, the challenge that users experienced with registering for Consultations and Seminars has resulted in increased phone volumes for the Customer Service Group. The increased phone volume has created a resource constraint on the CSG team and have minimized, and in some cases eliminated, any proactive efforts from the team.]

## Project Background

[Example background: This release focuses on enhancements to the client experience on the individual web, including greater visibility into available events, an improved user flow, and enhanced meeting confirmations.

The requirements for the project are based on detailed feedback we have received from clients – participants and institutional administrators in particular – as well as feedback from [Company name here] business leadership and end user focus groups conducted by [name of company or department that conducted the sessions]].

## [Project Name Here] Overview

The [system name here] System was developed to provide [Company name here] Clients with an enhanced ability to schedule appointments as well as register for events online. The [system name here] System all allow [Company Name here] with the ability to screen and segment potential clients prior to face-to-face meetings, allowing [Company name] to constantly and automatically direct Clients to the most appropriate service channel based on organizational and Client preferences. In effect, this will improve the current end user experience, expand current scheduling options, and provide reliable metrics associated with Individual and Institutional Client Relationship activity via [application name here]. In addition to the above, the [initiative name here] initiative also seeks to improve existing systems integration, infrastructure, and compliance.

## Initiative Scope

### In Scope

The following items are considered in-scope for the [Project name] project:

### Out of Scope

The following items are considered out-of-scope for the [Project name] project:

## Glossary (Terms, Acronyms, and Definitions)

|  |  |
| --- | --- |
| Term/Acronym | Definition |
| BRD | Business Requirements Document |
|  |  |
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# 

# References

## References/Related Documents

* ***[Project name here] Off Presentation***

*[Insert link here]*

* ***[Project name here] Requirements Traceability Matrix***

*[Insert link here]*

* ***Technical Design Document***

*[Insert link here]*

* ***Prototype Links***

*[Insert link here]*

# Detailed Functional Requirements

## [Business Process Name Here]

### Requirements Mapping

* [List requirements for this business process]

### Use Case: [Name of Use Case Here]

#### Scenario

*[This use case will define \*\*\*.]*

#### Actors

* + - [List actors for this use case here]

#### Trigger(s)

* + - [What is the trigger for this use case? What will “kick off this process”?]

#### Pre-Conditions

* + - [What pre-conditions must be met before this use case can be started? Examples:
    - User must be logged in
    - User must be in the ABC screen]

#### Normal Course

*Document normal processing steps in this section - steps to complete the process (i.e., mandatory optional attributes, business rules, etc.) are described here. Each step may include a table for attribute level description.*

##### [Name of normal course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
| --- | --- | --- | --- | --- |
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#### Alternative Course

##### [Name of alternative course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| 2. |  |  |  |  |

##### [Name of alternative course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| 2. |  |  |  |  |

#### Exception processing

[How errors are handled]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Alt Course #** | **Use Case Step** | **Error/Warning** | **Exception Condition** | **Exception Message** | **Exception Processing** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

#### Post-Conditions

*What is the state of the system after the use case has completed?*

#### Use Case Diagram

[Add your use case Visio process flow here]

#### User Interface Definition

*If there are associated screen shots to visually depict elements of the use case, insert those here. Number each one to allow for easy reference within the Use Case Diagram. For example, the Sample Use Case Diagram above would have the associated screen shots defined. (Note: An alternative approach would be to maintain the UI designs in a separate deliverable for the project. In including the designs within this deliverable, any material changes may require that the FDD be reapproved. Keeping the designs within a separate deliverable may be helpful if there is a high risk that the designs may change as the design phase continues forward.)*

#### SS1 - <Screen Shot Name >

*Screen shot 1 would be inserted here.*

#### SS2 - <Screen Shot Name>

*Screen shot 2 would be inserted here.*

#### SS3 - <Screen Shot Name>

*Screen shot 3 would be inserted here.*

#### Output Definition

*If this use case produces a report or other physical output, insert a mock up of what that output should look like, or insert a link to a mock up.*

#### O-1 - <Output name here (such as report name)>

*Output 1 would be inserted here, or a link to it would be provided.*

#### Dependencies

*State any other use cases or conditions upon which this function relies.*

## [Next Business Process Name Here]

### Requirements Mapping

* [List requirements for this business process]

### Use Case: [Name of Use Case Here]

#### Scenario

*[This use case will define \*\*\*.]*

#### Actors

* + - [List actors for this use case here]

#### Trigger(s)

* + - [What is the trigger for this use case? What will “kick off this process”?]

#### Pre-Conditions

* + - [What pre-conditions must be met before this use case can be started? Examples:
    - User must be logged in
    - User must be in the ABC screen]

#### Normal Course

*Document normal processing steps in this section - steps to complete the process (i.e., mandatory optional attributes, business rules, etc.) are described here. Each step may include a table for attribute level description.*

##### [Name of normal course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
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#### Alternative Course

##### [Name of alternative course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
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##### [Name of alternative course here]

| **#** | **Actor** | **Business Process Step** | **Expected Result** | **Business Rules** |
| --- | --- | --- | --- | --- |
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#### Exception processing

[How errors are handled]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Alt Course #** | **Use Case Step** | **Error/Warning** | **Exception Condition** | **Exception Message** | **Exception Processing** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

#### Post-Conditions

*What is the state of the system after the use case has completed?*

#### Use Case Diagram

[Add your use case Visio process flow here]

#### User Interface Definition

*If there are associated screen shots to visually depict elements of the use case, insert those here. Number each one to allow for easy reference within the Use Case Diagram. For example, the Sample Use Case Diagram above would have the associated screen shots defined. (Note: An alternative approach would be to maintain the UI designs in a separate deliverable for the project. In including the designs within this deliverable, any material changes may require that the FDD be reapproved. Keeping the designs within a separate deliverable may be helpful if there is a high risk that the designs may change as the design phase continues forward.)*

#### SS1 - <Screen Shot Name >

*Screen shot 1 would be inserted here.*

#### SS2 - <Screen Shot Name>

*Screen shot 2 would be inserted here.*

#### SS3 - <Screen Shot Name>

*Screen shot 3 would be inserted here.*

#### Output Definition

*If this use case produces a report or other physical output, insert a mock up of what that output should look like, or insert a link to a mock up.*

#### O-1 - <Output name here (such as report name)>

*Output 1 would be inserted here, or a link to it would be provided.*

#### Dependencies

*State any other use cases or conditions upon which this function relies.*

# Additional Diagrams

### Business Process Flow Diagram

*Provide a diagram that depicts the overall flow of the system from a functional perspective.*

*This should be created by working closely with the Business and may be a further refinement of the current state and future state diagrams that were defined within the Requirements Definition Phase.*

### Data Flow Diagram

*Provide a diagram that depicts the overall flow of data from a functional perspective. This can be where you put a context level dataflow diagram.*

# Assumptions

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| **Assumptions** | **Confirmed By** | **Date** |
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# Constraints

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| **Constraint** | **Confirmed By** | **Date** |
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# Dependencies

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| **Dependencies** | **Confirmed By** | **Date** |
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# Appendices

## Appendix A - Requirements Traceability Matrix

[Insert link to trace matrix here]

## Appendix B - Acceptance

| **Functional Requirements Acceptance Approvals** |
| --- |
| By approving, each team member is stating that he/she has read and understands the Functional Design Document.  Business owners/stakeholders are confirming that the information provided either reflects his/her needs as the business stakeholder and that the document adequately addresses the project definition or scope.  Each IT owner/implementers are confirming that the documentation provides a satisfactory level of information to provide the services requested. |
| Acceptance pertains to Functional Design Document: <Enter FDD# and Version>  *(****NOTE: Each version MUST obtain approval as it is published in order to meet SDLC approval standards. For every version, attach an additional approvals list by version to Appendix B****.)* |

|  |  |  |
| --- | --- | --- |
| **Prepared by:** |  |  |
| **Name:** |  | **Date:** |
| **Project Role: IT Business Analyst** |  |  |

**Accepted by:**

|  |  |  |
| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: IT Project Manager** |  |  |

|  |  |  |
| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: : IT – Sales, Service, & Relationships – Functional Delivery Owner** |  |  |

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| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: End to End Sales Business Lead** |  |  |

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| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: Business Sponsor** |  |  |

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| --- | --- | --- |
| **Name:** |  | Date: |
| **Project Role: End to End Sales IT Lead** |  |  |

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| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: IT – Sales, Service, & Relationships – Development Owner** |  |  |

|  |  |  |
| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: IT – Sales, Service, & Relationships Owner** |  |  |

|  |  |  |
| --- | --- | --- |
| **Name:** |  | **Date:** |
| **Project Role: IT – Online Owner** |  |  |

## Appendix C –Requirement Change Requests

*Once the Functional Design has been accepted and approved, any changes must follow the Change Control process.* ***All changes requiring a new version of the FDD MUST be approved for that version. For each version, attach appropriate additional copies of Appendix B.***

*All changes should be entered into the following table:*

### Document Change Control (After Approval)

|  |  |  |  |
| --- | --- | --- | --- |
| **Change #** | **Date** | **Author(s)** | **Link to Change Request** |
|  |  |  |  |
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