

## SAMPLE DOCUMENT

# Requirements Document

Project: Beverage Sales Reporting Process Improvement  
Organization: XYZ Inc.  
Author: Doug Chmela  
Date: *TBD*  
Version: 1

## Document Versions

Version Number	Date Published	Author	Summary of Changes
1	<b>TBD</b>	Doug Chmela	This document is a working draft. Not yet ready for publishing.

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## Stakeholders

Name	Functional Role	Requirements Role	Version & Date Approved
Doug Chmela	Business Analyst	Author	N/A
Solomon Alffson	Product Line Manager	Approver	
Martha Warren	Product Analyst	Approver	
Theo Barton	Product Manager	Reviewer	N/A
Delia Clemens	Product Manager	Reviewer	N/A
Vanessa Reyes	Product Manager	Reviewer	N/A
Darius Huber	Product Manager	Reviewer	N/A
Glen Mathieu	Controller	Reviewer	N/A
Tonya Kevinson	Legal	Reviewer	N/A

## Project Overview

The Product Management team at XYZ sees the beverage sales reporting process as being inefficient and reducing the effectiveness of the team.

During each month, each Product Manager gathers sales information from customer orders. Then at the beginning of the following month they send the information in the form of a Product Sales Report (PSR) to the Product Analyst. The Product Analyst then consolidates all the PSRs, along with ancillary data, into a Product Line Sales Report (PSLR) and sends the PSLR to the Product Line Manager to aid in managing the product line.

There are several issues with this process, summarized as follows:

- Compilation of the PSLR data takes too long, impacting the Product Line Manager's ability to effectively manage the team
- The entire process is manually intensive and focuses the Product Analyst and Product Managers on administrative work rather than more important responsibilities
- Creation of the PSRs is error-prone, resulting in considerable re-work on the reports and delays in PSLR availability
- PSRs are often sent late to Product Analyst, resulting in further delay of PSLR availability

These issues can all be overcome through automation of certain aspects of the process. This document describes the requirements for that automation.

## Assumptions and Unknowns

ID	Description	Assigned To	Status with Due Date
Unknown-1	Need to find out what the “table of data” contains in the PSLR (see UR-1).	Doug Chmela	<b>Resolved.</b> Contains: <ul style="list-style-type: none"> <li>• Product</li> <li>• Product Code</li> <li>• PM</li> <li>• PM Emp ID</li> <li>• Tran ID</li> <li>• Book Date</li> <li>• Ship Date</li> <li>• Customer</li> <li>• CRM ID</li> <li>• Quantity</li> <li>• Sub-Prod ID</li> <li>• Currency</li> <li>• Unit Price</li> <li>• Total Sale</li> </ul>
Unknown-2	Need to find out where we can source the Employee ID field for the PSLR (see UR-5).	Doug Chmela	<b>Resolved.</b> Will come from the Employee Database.

## Current State

### Process

1. Product Managers prepare PSRs
  - a. Customers call in with orders during the month
  - b. PM adds orders directly to PSR
  - c. <variation> Theo instead notes them down in a notebook, as each one comes in. At the end of the month, he transcribes them to the PSR
  - d. PM places the order with Fulfillment
  - e. Fulfillment sends the product to the Customer
  - f. PM checks with Fulfillment every day to see which orders have been shipped. PM adds the shipment dates to the PSR.
  - g. PM sends it to Product Analyst
2. Product Analyst compiles PSRs into PSLR
  - a. Product Analyst reviews PSR for completeness
    - i. If PSR is not complete, Product Analyst asks Product manager to fix PSR (go back to Step 2)
  - b. If PSR is complete, Product Analyst adds PSR data to Product Line Sales Report
  - c. Product Analyst adds additional details from cheat-sheet
3. Product Analyst sends completed PSLR to Product Line Manager
4. Product Line Manager reviews PSLR

### Issues with Process

- Per Solomon
  - Compilation of data takes too long (biggest problem, per Solomon)
  - Compilation of data takes too much of Product Analyst's time (about 1 week, per Solomon) (biggest problem, per Martha)
  - Product Manager has complained about the process of creating spreadsheets
  - Another Product Manager is sometimes late with sending her spreadsheet to the Product Analyst
- Per Martha
  - Some people are a day or two late sending their reports to Martha
  - Martha has to chase some people regularly for their reports
  - Product Manager errors:
    - Forgetting to enter the Transaction Currencies
    - Forgetting to enter the Ship Dates
    - Entering wrong information (e.g. "Quantity" field)
- Per Vanessa
  - She gets a lot of reports back from Martha due to issues
  - Currency issue
    - PMs have to enter currency for every order
    - Currencies can vary

- She has to remember what currency is used by each customer... fine now (20 customers), but will be problem later (50-100 customers)
  - Automatic assignment of default currency to a customer would help
  - Customers always pay in the same currency
  - Too much administrative work
- Per Carley
  - System isn't automated. Past employer had system where...
    - Clients entered orders online
    - She got notification, reviewed order and then approved it.
    - She didn't have to get involved at all
    - Downsides
      - More admin work in correcting/canceling customer orders
      - Some PMs like to speak with customer while taking order
      - Some customers aren't familiar with products and need advice

## Observations

- Martha received three out of five reports on first day of month. Only one was error-free.
- "Date Prepared" is actually date sent to Solomon



## Business Requirements

Req ID	Requirement	Rationale	Source
BR-1	Solution will ensure that the Product Line Sales Report is available to the Product Line Manager at beginning of first day of each month.	Key project driver. Important to have at beginning of month to accelerate decision-making.	Solomon Alffson, Product Line Manager
BR-2	Solution will significantly reduce level of manual work performed by Product Analyst.	Free up analyst's time to handle other work.	Solomon Alffson, Product Line Manager
BR-3	Solution will provide an on-demand report capability for product performance.	Important to deliver to accomplish BR-2.	Martha Warren, Product Analyst
BR-4	Solution will provide an on-demand report listing all transactions for a Product Manager.	Important to deliver to accomplish BR-2.	Martha Warren, Product Analyst
BR-5	Solution will provide an on-demand report listing all transactions for a single customer for a given time range.	Important to deliver to accomplish BR-2.	Martha Warren, Product Analyst

## User Requirements

Req ID	Requirement	Rationale	Source	Parent
UR-1	The Product Line Sales Report will contain a <b>[Table of Data]</b> , sourced from the Product Sales Report.	Product Line Manager needs information to run organization.	Martha Warren, Product Analyst	BR-1
UR-2	The Product Line Sales Report will contain a Product field, sourced from the Product Sales Report.	Product Line Manager needs information to run organization.	Martha Warren, Product Analyst	BR-1
UR-3	The Product Line Sales Report will contain a Product Code field, sourced from the Product Sales Report.	Product Line Manager needs information to run organization.	Martha Warren, Product Analyst	BR-1
UR-4	The Product Line Sales Report will contain a Product Manager Name field, sourced from the Product Sales Report.	Product Line Manager needs information to run organization.	Martha Warren, Product Analyst	BR-1
UR-5	The Product Line Sales Report will contain a Product Manager Employee ID field, sourced from the Employee Database.	Product Line Manager needs information to run organization.	Martha Warren, Product Analyst	BR-1
UR-6	The table of data in the Product Line Sales Report will contain a <b>Product</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-7	The table of data in the Product Line Sales Report will contain a <b>Product Code</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-8	The table of data in the Product Line Sales Report will contain a <b>Product Manager</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-9	The table of data in the Product Line Sales Report will contain a <b>Product Manager Employee ID</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-10	The table of data in the Product Line Sales Report will contain a <b>Transaction ID</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1

UR-11	The table of data in the Product Line Sales Report will contain a <b>Book Date</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-12	The table of data in the Product Line Sales Report will contain a <b>Ship Date</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-13	The table of data in the Product Line Sales Report will contain a <b>Customer</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-14	The table of data in the Product Line Sales Report will contain a <b>CRM ID</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-15	The table of data in the Product Line Sales Report will contain a <b>Quantity</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-16	The table of data in the Product Line Sales Report will contain a <b>Sub-Product ID</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-17	The table of data in the Product Line Sales Report will contain a <b>Currency</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-18	The table of data in the Product Line Sales Report will contain a <b>Unit Price</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1
UR-19	The table of data in the Product Line Sales Report will contain a <b>Total Sale</b> field.	Key information for PLSR.	Martha Warren, Product Analyst	BR-1

## Functional Requirements

Req ID	Requirement	Rationale	Source	Parent
FR-1	The Date Submitted field in the PSLR will be calculated as the date that the report is generated by the system.	This is in line with current practice. Required to ensure continuity with reports created before implementation.	Martha Warren, Product Analyst	UR-1
	Etc.			
	Etc.			
	Etc.			

## Nonfunctional Requirements

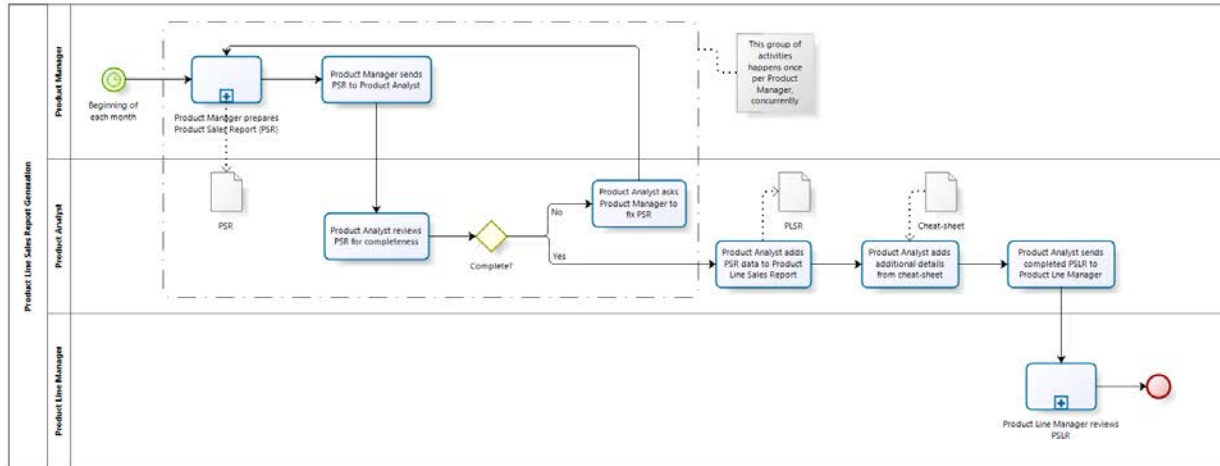
## Timeliness

Req ID	Requirement	Rationale	Source	Parent
NF-1	The Product Line Sales Report will be available for use by 8:00 AM Eastern Time on the first business day of each month.	Key project driver.	Solomon Alffson, Product Line Manager	BR-1

## Diagrams and Models

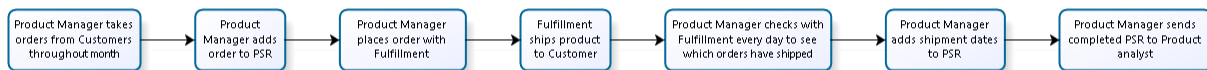
### Process Flows

*Illustration 1: Product Line Sales Report Generation*



*Illustration 2: Product Sales Report Generation Sub-Process*

This sub-process is an expansion of "Product Manager prepares Product Sales Report (PSR)" in Illustration 1.



## Special Considerations

### For Training

Training team will need to get up to speed on new reporting system in order to train Product Managers on use.

### For Development

N/A

### For Testing

N/A

### For Implementation

N/A