NorthArk Investment Bank - Project Forecast
Agile Business Requirements Document

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1. Document Purpose

This requirements document is designed to be an input to the Agile software development process as opposed to the more linear process of the waterfall methodology (Step by step, one task at a time until project completion) NorthArk Investment Bank is making the switch from Waterfall to Agile to increase development efficiency, stay up to date with industry advancements, and to allow for changing requirements during development.

Documents and decks are all available here and the crossover is obvious but in the real world, a spreadsheet known as a 'Traceability Matrix' is often used to understand the relationship between documents

It describes the business need and context to a sufficient extent that the Agile team can estimate, prioritize, and backlog the features described. With the understanding that requirements for an Agile project must be documented 'early and often,' we acknowledge that this document represents incomplete knowledge of the subject area, and that additional engagement between the Agile team and the business will be required to prioritize and detail these requirements before and during software development.

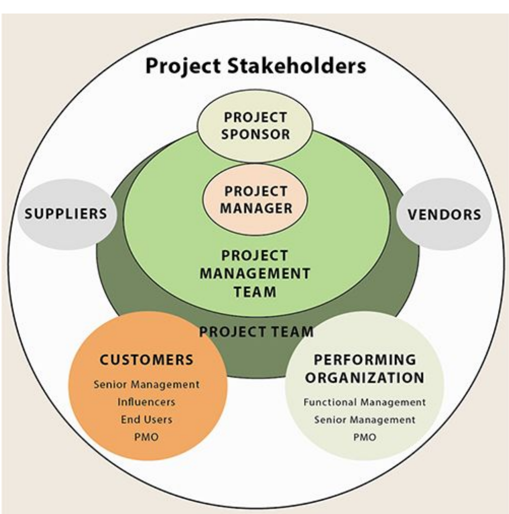
2. Statement of Business Need

NorthArk Investment Bank's front office team(Client Facing roles that generate revenue) has the need of a web facing tool where their clients can view/analyze their bank account transactions and create reports in real time. Bank account transactions come from a single user account. The clients will need to be able to see current spend and income and a 12 month history. The newly built portal will be rolled out to over 12 million users and needs to be completed in a 6 week timeframe.

Statement of Business Need is where someone looking at the project for the first time can immediately see what the goal is and what the project aims to do

3. Stakeholders / Project Sponsor

Name	Department(Business Unit)	Role
John Smith	CFO	Sponsor / Stakeholder
Jane Doe	Director of IT Security	Stakeholder
Sam Jones	Director of IT	Stakeholder
Joe Brown	Front Office	Internal Client
Individual Users	End Users	Need to be able to view and analyze their bank account history



Project Stakeholders can range from the CEO of a company to individual developers to an outside client as well

4. Project Schedule Overview

This project will pertain to the development, Release, and Wrap up stages.
*Northark Project Note - Take efforts to become familiar with the entire Project Life Cycle.

4.1 Schedule

	Duration	Description
Project Initiation	3 days	Initiated in 4Q 2019 with the identification of the business need and creation of Business Case
Funding Obtained	2 days	Funding was obtained in 4Q 2019 for the 2020 budget
Project Kickoff	1 day	T-0
Obtain Resources	2 weeks	T+ 2 weeks
Development	5 weeks	T+ 5 weeks
Release	1 day	T+ 5 weeks
Project Wrap up	1 week	T+ 6 weeks Support SME, Archive artifacts

4.2 Schedule Constraints

- The entire project must be completed in 6 Weeks
- A sprint at NorthArk Investment Bank is no longer than 1 week

5. Identified Personas

A "Persona" is a fictional character with defined needs and expectations. Identifying Personas answer the question, 'Who?', as in "Who the project is being made for?" Who will benefit from it?"

Persona	Description
Front office	Front office is the internal client within the bank that is using the platform to pitch to prospective customers or 'end users' of the system
Average End User (Bank Customer)	The average end user has been banking traditionally for years and is relatively technology savvy. They have access to a laptop as well as a smartphone and require the ability to view their personal banking history in an organized format

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6. Feature Sets / Epics

Epics define an overarching need of the project.

ID	Description
E01	As a NorthArk Investment Bank customer, I need to view my income and expenses.

7. User Stories

User Stories are used to break down each of the Feature Sets / Epics above into manageable work efforts. .To identify a **User Story, think about each individual need and process that an end user needs to be able to perfomr in order to accomplish the Feature Set/Epic. Identifying User Stories is key in planning, development, and testing phases**

7.1 E01 Epic Description Reiterated

As a NorthArk Investment Bank Customer, I need to report on my revenue and expenses.

7.2 User Stories & Acceptance Criteria

ID	Priority	As a . . .	Context	I want . . .	So that . . .	Acceptance Criteria
US01	1	NorthArk Customer	Who is responsible for their income and expenses	Login to the system	I can access the data	- User can enter ID and Password - Password is masked - Error displayed if invalid credentials are entered - "Forgot password" option provides a message stating "For assistance with your password please contact the help desk." - When login is successful, landing page is displayed containing company name, user name, Transaction Log, Expense Report button, Revenue Report button, and Projection Report button
US02	2	NorthArk Customer	Who is reviewing their personal Balance sheet	Upon Login I need to be able to view all transactions for the past 12 months and view my	I can be aware of my available funds	- All transactions for the past 12 months are displayed - Data is presented with columns for date, description, balance, income, expense. - Data can be refreshed on command.

				current balance		
US03	3	NorthArk Customer	Who is reviewing expenses	To be able to generate an expense report	I can review paid expenses	- Report generated by user selecting “Expense Report” button - Report provides pop-up for time period - User selects time period of current week, current month, current quarter, year to date, last week, last month, last quarter, last year, and custom. Default value is “last month”. - Option to change default is provided - Report is generated on webpage. - Report includes a header of “Expense Report for <dates covered> as of <generation date>” - Report includes columns for Date, Description, and Amount - Ability to save to PDF is provided - PDF Report includes page number on bottom - Ability to close report is provided
US04	3	NorthArk Customer	Who is reviewing their income statement	To be able to generate an income report	I can review received income	- Report generated by user selecting “Income Report” button - Report provides pop-up for time period - User selects time period of current week, current month, current quarter, year to date, last week, last month, last quarter, last year, and custom. - Default value is Default value is “last month”.

						- Option to change default is provided - Report is generated on webpage. - Report includes a header of “Income Report for <dates covered> as of <generation date>” - Report includes columns for Date, Description, and Amount - Ability to save to PDF is provided - PDF Report includes page number on bottom - Ability to close report is provided
US05	4	NorthArk Customer	Who is planning ahead	To be able to forecast income for the next 3-6 months	I can anticipate my cash flow	- Report generated by user selecting “Projection Report” button - User selects time period of “3 month forecast” or “6 month forecast” - Forecast chart is generated on webpage. - Report includes a header of “Projection Report for <dates covered> as of <generation date>” o The current month will always be part of the months forecasted. - Report includes a line chart where the X axis contains MMYY and Y axis contains amounts. - Display will show 1 line for cash flow, 1 for income, and 1 for expenses - Report displays prior 6 month data in solid line and forecasted data in a dotted line. - The current month will always be part of the months forecasted.

						- Save to PDF option - Report can be closed on command.
US06	3	NorthArk Customer	Who is navigating the system	Needs to move between reports	I can view different data	- When any report is opened it replaces any report currently displayed on the screen - From any screen, the user can go to any of the reports or transaction log
US07	1	NorthArk Customer	Who is completed with the session	Needs to log off	I can keep the information secure	- Log out by selecting log off option - Upon logoff, all data is cleared and Login page is provided