**BUSINESS/IT**

**REQUIREMENTS DOCUMENT**

**Project Management Tool**

**Version 1.0**

|  |  |
| --- | --- |
| **Project Sponsor:** | *<The name of the sponsor advocating the change>* |
| **Business Project Manager:** | *<The name of the business project manager who is responsible for the requirements>* |
| **IT Project Manager:** | *\*\*\*author\*\*\** |
| **Business Analyst:** | *\*\*\*author\*\*\** |

|  |  |
| --- | --- |
| **Document Author:** | *Daryl Joe Ballesteros* |
| **Version Number:** | *1.0* |
| **Last Updated:** | *January 6, 2025* |
| **Status:** | *Initial Draft* |

**DOCUMENT CONTROL**

<Blue italic text is included to provide guidance to the author and should be deleted before publishing>

**Contacts**

<Contacts that would be useful to provide for business information>

|  |  |
| --- | --- |
| **Name:** | <Contact name> |
| **Title:** | <Contact title> |
| **Location:** | <Where the contact can be located> |
| **Contact Number:** | <Contact internal/external number> |
| **Email:** | < The email correspondence for the contact> |

**Document Approval**

<Enter details of all stakeholders who will be subject to approval of this document>

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver** | **Title** | **Business Area** | **Approval Date** |
| DMB |  |  | 1/6/2025 |

**Document Distribution**

<Enter details of all stakeholders who will be subject to receipt of this document for reference purposes>

|  |  |  |
| --- | --- | --- |
| **Name** | **Title** | **Business Area** |
|  | Project Managers | Primary Stakeholders |
|  | Team Members |
|  | Executives and Sponsors |
|  | IT Support Teams | Secondary Stakeholders |
|  | Clients/Customers |

**Revision History**

<Initially a document will be numbered 0.1 to 0.9 until it becomes the first issue for approval at which point the document is numbered 1.0. For future updates the document will be numbered using decimals to 1 place until it adopts the next whole number for issue>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Author** | **Version** | **Summary Of Changes** | **Status** |
| 1/6/2025 | DMB | 1.0 | Initial draft of system requirements | Pending |

**Related Documents**

<List any significant documents that precede and relate to the project>

|  |  |  |  |
| --- | --- | --- | --- |
| **Document Name** | **Version** | **Author** | **Date** |
| None | None | None | None |

**<*Not all of the following sections may be applicable to the work being performed. If so, the preference would be to keep the section heading, but make a note such as “This section is not applicable for this process” and provide an explanation for the reasons why*>**

**Table of Contents**

[1 Introduction 3](#_Toc359583147)

[2 Problem/Impact/Successful Outcome 3](#_Toc359583148)

[3 Objectives 3](#_Toc359583149)

[4 Purpose Of Document 3](#_Toc359583150)

[5 Scope 3](#_Toc359583151)

[6 Definitions, Acronyms and Abbreviations 3](#_Toc359583152)

[7 Risks 3](#_Toc359583153)

[8 Assumptions 3](#_Toc359583154)

[9 Issues 3](#_Toc359583155)

[10 Dependencies 3](#_Toc359583156)

[11 As Is Process 3](#_Toc359583157)

[12 Context Diagram 3](#_Toc359583158)

[13 Process Overview Diagram 3](#_Toc359583159)

[14 High Level To Be Business Requirements 3](#_Toc359583160)

[15 Detailed Business/IT Requirements 3](#_Toc359583161)

[15.1 Functional Requirements 3](#_Toc359583162)

[15.2 Process Diagram 3](#_Toc359583163)

[15.3 Non Functional Requirements 3](#_Toc359583164)

[16 Costs 3](#_Toc359583165)

[17 Appendices 3](#_Toc359583166)

# Introduction

This document outlines the business requirements for the development of a robust Project Management Tool. The primary goal is to create an intuitive, feature-rich platform that enables organizations to efficiently plan, execute, monitor, and close projects. The tool aims to improve productivity, enhance team collaboration, and ensure timely delivery of project objectives.

# Problem/Impact/Successful Outcome

|  |  |  |
| --- | --- | --- |
| **The Problem** | **The Impact** | **The Successful Outcome** |
| *<Detail the problem/issue which requires a resolution>* | *<Detail the impact of the problem upon the business community, application or process>* | *<Detail, at high level, what successful outcome would provide a resolution to the problem>* |
|  |  | 80% user adoption rate within the first six months of launch. |
|  |  | 95% positive user feedback on usability and functionality. |
|  |  | Reduction in project delays by 30% within one year. |

# Objectives

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Business Objective** | **Business Owner** | **Business Importance** |
| O01 | Provide a centralize platform for managing all aspects of a project lifecycle. |  |  |
| O02 | Enable seamless collaboration among team members and stakeholders. |  |  |
| O03 | Offer real-time tracking and reporting of project progress. |  |  |
| O04 | Facilitate resource allocation and workload management. |  |  |
| O05 | Ensure scalability to accommodate projects of varying sizes and complexities. |  |  |

# Purpose Of Document

The Business Requirements Specification details the business requirements as elicited by the business analyst from the key stakeholders. The document presents the requirements in a structured way that facilitates review and sign off by the designated approvers.

Building on the high-level scope of the project as defined in the Project Definition Document, the business requirements clearly state in business language what any chosen solution must do.

This document captures the business requirements in a structured way, providing the basis for ensuring that the solution delivered meets the requirements.

It should: -

* Facilitate a shared understanding for all stakeholders of the business requirements
* Be the key input for the preparation of a functional requirements specification
* Facilitate the identification of possible solutions

# Scope

|  |  |
| --- | --- |
| **In Scope** | **Out Of Scope** |
| * User-friendly dashboard for project overviews. * Task creation, assignment, and prioritization features. * Gantt charts and Kanban boards for visual project planning. * Time tracking and resource allocation. * Team collaboration tools (e.g., chat, document sharing). * Integration with third-party tools (e.g., Slack, Jira, Google Workspace). * Role-based access control and user management. * Reporting and analytics for project performance. * Mobile and web accessibility. | * Development of hardware-specific solutions. * Integration with legacy or highly customized systems unless specified. * Long-term maintenance and support beyond the initial launch phase. |

# Definitions, Acronyms and Abbreviations

<This subsection provides the definitions of all terms, acronyms, and abbreviations required to properly interpret the BRS>

|  |  |
| --- | --- |
| **Abbreviation/Acronym** | **Description** |
| KPI | Key Performance Indicator |
| API | Application Programming Interface |
| GDPR, NPC, or other data privacy regulators | General Data Protection Regulation |
| NPC | National Privacy Commission |

# Risks

*<Insert details of any risks you forsee in being able to complete the requirements. The ID number will take the form of Rxx where xx = a consecutive number per entry >*

|  |  |  |
| --- | --- | --- |
| **Ref** | **Risk** | **Detailed BRS Reference** |
| R01 | Adoption Risk: Users may resist switching from existing tools. |  |
| R02 | Technical Risk: Unanticipated integration challenges with third-party tools. |  |
| R03 | Operational Risk: Limited initial support resources may delay issue resolution. |  |

# Assumptions

*<Insert details of any assumptions made during elicitation of the requirements. The ID number will take the form of Axx where xx = a consecutive number per entry>*

|  |  |  |
| --- | --- | --- |
| **Ref** | **Assumption** | **Detailed BRS Reference** |
| A01 | All users will have access to stables internet connections. |  |
| A02 | Organizations will provide the necessary resources for tool adoption and training |  |
| A03 | Necessary APIs for integration will be available. |  |

# Issues

*<Insert details of any issues which contribute to the requirements being incomplete. The ID number will take the form of Ixx where xx = a consecutive number per entry>*

|  |  |  |
| --- | --- | --- |
| **Ref** | **Issue** | **Detailed BRS Reference** |
| Ixx |  |  |

# Dependencies

*<Insert details of any dependencies for the requirements to be completed. The ID number will take the form of Dxx where xx = a consecutive number per entry>*

|  |  |  |
| --- | --- | --- |
| **Ref** | **Dependency** | **Detailed BRS Reference** |
| D01 | Budget constraints may limit the inclusion of advanced features. |  |
| D02 | Development timeline is set at six months. |  |
| D03 | Compatibility is restricted to modern browsers and devices. |  |

# As Is Process

*< Detail, at high level, the current As Is process. Include a process flow diagram if required.*

*The As Is process may already have been documented separately. Make reference to this within the Related Documents section >*

# Context Diagram

*<This is a diagram that details how and where the new process to be defined sits within the overall E2E business process and illustrates the relationship among actors, processes and information. Define clearly in which part of the process the changes will take place. If the requirements are a component of a larger system, detail this within the diagram. This may take the form of a mind map, process flow or any other notation which suits the business/author >*

# Process Overview Diagram

*<Add a high level process flow diagram of the E2E business process to which this requirements document relates>*

# High Level To Be Business Requirements

< Detail, at high level, the To Be business requirements>

* 1. Project Planning and Scheduling
  2. Task Management
  3. Resource Management
  4. Budget and Cost Management
  5. Reporting and Analytics
  6. Project Risk Management
  7. Timeline Monitoring

# Detailed Business/IT Requirements

## Functional Requirements

*<List the functional requirements which will deliver the business/IT requirements>*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ID** | **Title** | **Requirements Description** | **Type (\*)** | **MVP Priority** | **Originator** | **Status (\*\*)** | **Delivered By** | **Test ID** |
| FR001 | Project Planning and Scheduling | * Create, edit, and manage project timelines. * Gantt charts for visualizing project schedules. * Task dependencies and critical path visualization. * Milestone tracking.   Use Case  Gantt Chart: Visual representation of project timelines, task schedules, and dependencies.  Calendar View: A calendar-based overview to view tasks, milestones, and deadlines.  Milestone Management: Set and track project milestones to measure progress.  Time Estimation and Deadlines: Set time estimates for tasks, and track if deadlines are met. | Business | 1 or 2 |  | Accepted |  |  |
| FR002 | Task Management | * Assign tasks to team members. * Set priorities, deadlines, and reminders. * Task progress tracking (e.g. percentage completion) * Kanban boards or list for task organization   Use Case  Task Creation and Assignment: Ability to create tasks, assign them to team members, set priorities, deadlines, and dependencies.  Task Dependencies: Set task dependencies to manage workflows and ensure tasks are completed in sequence.  Task Progress Tracking: Update task status (e.g., Not Started, In Progress, Completed) and track progress through visual indicators.  Time Tracking: Ability for users to log hours worked on tasks and estimate time for completion. | Business | 1 or 2 |  | Accepted |  |  |
| FR003 | Resource Management | * Allocate resources (personnel, equipment, budget) to tasks. * Track resource utilization and availability. * Manage workload distribution across the team.   Use Case  Resource Allocation: Allocate and track resources (personnel, equipment, budgets) across multiple projects.  Capacity Management: Monitor team member workloads to avoid overloading and manage available capacity.  Budget Tracking: Manage project budgets, track expenses, and ensure that projects remain within financial constraints. | Business | 2 |  | Accepted |  |  |
| FR004 | Budget and Cost Management | * Track project budgets and expenses * Cost estimation and forecasting * Financial reporting (e.g. variance analysis) | Business | 1 |  | Proposed |  |  |
| FR005 | Collaboration and Communication | * Real-time chat and team communication * File sharing and document collaboration. * Centralized project and notifications * Commenting on tasks or deliverables   Use Case  Integrated Messaging: Built-in chat or messaging functionality to allow communication between team members directly within the tool.  File Sharing: Upload and share files and documents related to tasks or projects.  Comments/Notes: Ability to leave comments or notes on tasks or documents for better communication and clarification.  Notifications: Automatic notifications about updates, approaching deadlines, or task completions. | Information | 3 |  | Proposed |  |  |
| FR006 | Project Risk Management | * Identity, assess, and track project risks. * Risk mitigation plans and alerts * Issue logging and resolution tracking | Business | 2 |  | Proposed |  |  |
| FR007 | Notifications and Alerts | * Email and in-app notifications for task updates, deadlines, and project changes. | Application | 2 |  | Accepted |  |  |
| FR008 | Integration and APIs | * API endpoints for integration with third-party tools. * Prebuilt integrations for popular platforms.   Use Case  Document Management Systems: Integration with tools like Google Drive, Dropbox, or SharePoint.  Communication Platforms: Integration with email systems, Slack, or Microsoft Teams for enhanced communication.  Time Tracking Tools: Integration with time tracking tools such as Toggl or Harvest.  CRM and ERP Systems: Integration with Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems to sync customer data, financials, and project status. | Integration | 3 |  | Proposed |  |  |
| FR009 | Reporting and Analytics | * View dashboards per role.   Use Case  Real-time Dashboards: Visual dashboards showing project health, task progress, team performance, and potential bottlenecks.  Customizable Reports: Generate reports based on project status, resource utilization, or financial data.  Risk Management: Ability to identify, track, and mitigate risks throughout the project lifecycle.  KPIs and Metrics: Track and visualize key performance indicators such as task completion rate, project burn rate, and resource utilization. | Technical | 4 |  |  |  |  |

\* MVP – Most Viable Product

\* Type Key:-

* Business
* Application
* Information
* Integration
* Technical

\*\* Status Key:-

* Proposed
* Accepted

MVP Rating:-

* **(1) Must Have**: Describes a requirement that must be satisfied in the final solution for the solution to be considered a success
* **(2) Should Have**: Represents a high-priority item that should be included in the solution if it is possible. This is often a critical requirement but onewhich can be satisfied in other ways if strictly necessary.
* **(3) Could Have**: Describes a requirement which is considered desirable but not necessary. This will be included if time and resources permit.
* **(4) Would Have**: Represents a requirement that stakeholders have agreed will not be implemented in each release, but may be considered

## Process Diagram

*<Include a process flow diagram which links to the functional requirements above if necessary>*

***PENDING***

## Non Functional Requirements

*<List the non-functional requirements which will deliver the business/IT requirements>*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ID** | **Title** | **Requirements Description** | **Type (\*)** | **MVP Priority** | **Originator** | **Status (\*\*)** | **Delivered By** | **Test ID** |
| NFR001 | Access Control and Security | * Role-based access control (RBAC) for users * Secure data storage and encryption * Audit trails for project activities * End-to-end encryption for sensitive data. * Compliance with standards like GDPR, NPC, or other data privacy regulators.   Use Case  Admin/Project Manager: Ability to create and manage projects, assign tasks, set deadlines, and track progress.  Team Members: Can view assigned tasks, update task statuses, and communicate with other team members.  Stakeholders: View-only access to project progress and key metrics.  Custom Roles: Specific user types (e.g., contractors, external collaborators) with tailored permissions.  Use Case for Security and Data Protection  Role-based Access Control (RBAC): Restrict access to sensitive data based on user roles.  Data Encryption: Ensure data is securely encrypted both in transit and at rest.  Audit Trail: Track user actions and changes made to the project for accountability.  Data Backup and Recovery: Ensure the system is backed up regularly and that recovery options are available in case of data loss. | Technical/  Security | 1 |  | Accepted |  |  |
| NFR002 | Scalability and Flexibility | * Support for multiple projects simultaneously * Configurable workflows to match business processes * Scalability for small teams or enterprise-level projects.   Use Case  Custom Fields: Ability to define custom fields for tasks, projects, or resources to tailor the tool to your business processes.  Templates: Use predefined project templates to standardize processes for similar types of projects.  User Interface Customization: Ability to customize the look and feel of the tool to match branding or user preferences.  Multi-project Support: The tool should support managing multiple projects simultaneously with the ability to zoom in on individual projects or track overall project portfolios.  Scalability: Ensure the tool can scale as the company grows in terms of the number of users, projects, and tasks. | Performance | 1 |  | Accepted |  |  |
| NFR003 | Performance and Availability | * Response time under 2 seconds for 95% of operations. * 99.9% uptime guarantee. | Performance/  Capacity/  Availability/  Reliability | 1/2 |  | Accepted |  |  |
| NFR004 | User-friendly Interface | * Intuitive design for easy onboarding * Mobile and desktop accessibility * Customizable views (e.g. calendar, list, board) * Intuitive user interface with minimal learning curve.   Use Case  Ease of Use: The interface should be user-friendly to ensure smooth adoption across teams.  Training and Onboarding: Availability of onboarding resources, guides, and training programs.  Customer Support: Access to timely and effective customer support for troubleshooting or issues. | Integration/  Performance/  Usability | 1 |  | Accepted |  |  |
| NFR005 | Time Tracking | * Log work hours for task and projects * Timesheets for resource billing and payroll * Automated time tracking with reminders | Audit/Usability | 1 |  | Accepted |  |  |
| NFR006 | Mobile Accessibility | Use Case  Mobile Application: Ensure that the tool is accessible on mobile devices for team members who need access on-the-go.  Responsive Web Interface: A mobile-friendly web interface for those who do not want to use the dedicated app. | Compatibility | 4 |  | Proposed |  |  |

\* Type Key:-

* Technical
* Integration
* Security
* Audit
* Performance
* Capacity
* Availability
* Reliability
* Recovery
* Compatibility
* Maintainability
* Usability

\*\* Status Key:-

* Proposed
* Accepted

<Non Functional requirements checklist>

|  |  |
| --- | --- |
| **TYPE** | **REQUIREMENT TYPE DESCRIPTION** |
| **SECURITY** | |
| Login Requirements | Access levels, CRUD levels (Create/Retrieve/Update/Delete) |
| Password Requirements | Length, special characters, expiry, recycling policies |
| Inactivity Timeouts | Durations, actions |
| **AUDIT** | |
| Audited Elements | What business elements will be audited |
| Audited Fields | Which data fields will be audited |
| Audit File Characteristics | Before image, after image, user & time stamp |
| **PEFORMANCE** | |
| Response Times | Application loading, screen open & refresh times |
| Processing Times | Functions, calculations, imports, exports |
| Query & Reporting Times | Initial loads & subsequent loads |
| **CAPACITY** | |
| Throughput | How many transactions per hour does the system need to be able to handle? |
| Storage | How much data does the system need to be able to store? |
| Year on year growth requirements |  |
| **AVAILABILITY** | |
| Hours of Operation | When is it available? Consider weekends, holidays, maintenance times etc |
| Locations of Operation | Where should it be available from; what are the connection requirements? |
| **RELIABILITY** | |
| Meantime Between Failures | What is the acceptable threshold for down-time eg. one a year, 4,000 hours etc |
| Meantime To Recovery | If broken, how much time is available to get the system back up again? |
| **INTEGRITY** | |
| Fault Trapping | How to handle electronic interface failures |
| Bad Data Trapping | Data imports: flag-and-continue or stop the import policies etc |
| Data Integrity | Referential integrity in DB tables and interfaces |
| Image Compression & Decompression Standards |  |
| **RECOVERY** | |
| Recovery process | How do recoveries work; what is the process? |
| Recovery Timescales | How long should a recovery take to perform? |
| Backup Frequencies | How often is the transaction data, set-up data and system (code) backed up? |
| Backup Generations | What are the requirements for restoring to previous instance(s)? |
| **COMPATIBILITY** | |
| Compatibility With Shared Application | What other systems does it need to talk to? |
| Compatibility With 3rd Party Applications | What other systems does it have to live with amicably? |
| Compatibility On Different Operating Systems | What does it have to be able to run on? |
| Compatibility On Different Platforms? | What are the hardware platforms it needs to work on? |
| **MAINTAINABILITY** | |
| Conformance to Architecture Standards | What are the standards it needs to conform to or have exclusions from? |
| Conformance to Design Standards | What design standards must be adhered to or exclusions created? |
| Conformance to Coding Standards | What design standards must be adhered to or exclusions created? |
| **USABILITY** | |
| Look And Feel Standards | Screen element density, layout and flow, colours, UI, metaphors, keyboards and shortcuts |
| Internationalization/ Localization Requirements | Languages, spellings, keyboards, paper sizes etc |
|  |  |

# Business Impact Assessment

|  |  |
| --- | --- |
| **Lens** | **Key Impacts** |
| Process | * Impacts on business process and to what extent * Introduction of any automation to business processes and if so has the business/cost model been reviewed to reflect this * Have any new/amended policies been introduced |
| People | * New/revised organisation design impacts including resource impacts and if applicable recruitment needs * Training and development requirements * Additional cultural change requirements * Communication requirements |
| Customer | * Customer communication requirements before, during and after * Impacts on customer experience if everything goes according to plan * Impacts on customer experience if things do not go according to plan and mitigation requirements |
| Financial | * Operational cost impacts, e.g. licenses and ongoing support/maintenance * Benefits management processes in place |
| Data & MI | * Data cleanse requirements/approach * Data governance/policy requirements * Data migration requirements * Data access requirements * MI/reporting requirements |
| Product & Proposition | * Change to existing products because of this change * New product development * Product governance requirements, e.g. product implementation group * Customer needs understood/documented |
| Supplier | * Existing contract impacts, e.g. re-negotiation, rights to use * New contract impacts * Supplier communication requirements * Supplier interface/governance/data impacts |
| Management | * Business readiness management requirements * Business readiness plan requirements * Stakeholder engagement/communication requirements |
| Governance & Risk | * Operational risk impacts and where appropriate mitigation requirements * Risk and control framework impacts, e.g. changes to control owners * Regulatory compliance impacts and documentation/evidence of obligations met * New/revised governance |
|  |  |

# Costs

*<Include any costs associated with this change if applicable.*

*Note: This section has been specifically added at the request of the Food Business Analysts>*

* Pricing Model: Clear pricing based on factors such as the number of users, the level of features required, or usage volume.
* Trial Period: A trial version of the tool to assess its suitability before committing to a purchase.

# Appendices

*<Additional document/s to add as a reference to the requirements>*

Appendix A: References

* Market research reports
* Stakeholder interviews