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**Business Analysis for RPA**

**V4.0**

Requirements Template

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# **Overview**

The Business Analysis for Robotic Process Automation (RPA) vX.0 Requirements Template is intended to provide business analysts working on RPA initiatives with the structure and guidance to capture needs, scope, and detail focused requirements, specifications, and models necessary to complete the Process Definition Document (PDD), and to act as a critical input to the Solution Design Document (SDD). The Requirements Specification will serve as a repository for all Business Analysis artifacts produced.

# **Using the Requirements Template**

The Requirements Template provides readers with a comprehensive understanding of the needs, scope and specifications leading to a solution. When using the Requirements Template:

* Uniquely identify each artifact documented
* Complete the Requirements Trace Matrix to ensure comprehensive requirements coverage
* Follow the best practice recommendations defined within the supporting Business Analysis for RPA course materials

# **Requirements Template Author(s)/Reviewer(s)**

The Business Analyst(s), or alternative role(s) authoring or reviewing the Requirements Template. Reviewers are the individuals who evaluate the content for quality, completeness and accuracy. List the names, roles performed on the project, when they were engaged and the date they sent in their final acknowledgement of completed review

|  |  |  |
| --- | --- | --- |
| Name | Role (Author/Reviewer) | Start/Review Date |
|  |  |  |
|  |  |  |
|  |  |  |

# **Requirements Template Distribution List**

Those who will receive a copy of the completed, signed off Requirements Template. Provide the full name, role and contact information.

|  |  |  |
| --- | --- | --- |
| Name | Role | E-Mail |
|  |  |  |
|  |  |  |
|  |  |  |

# **Requirements Template Approver(s) List**

Those Business and/or Technology leads who will receive a copy of the completed Requirements Template, and who must accept what has been documented in the Requirements Template.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Title | Date | Signature |
|  |  |  |  |
|  |  |  |  |

# **Requirements Template Reference Artifacts(s)**

This information in this section provides context for the project, based on the input information used to support the vision and needs of this initiative.

|  |  |
| --- | --- |
| File/Artifact Name | Source/Location |
|  |  |
|  |  |
|  |  |

# Introduction

This section of the Requirements Template provides readers of this document with the Business Requirements of the Initiative. This will include; Goals, Objectives, Problem/Opportunities, and Current State Process Maps. For each table, add rows as required.

## Goal(s)

Qualifiable statements defining what the organization is seeking to establish and/or maintain.

|  |  |
| --- | --- |
| Unique ID | Goal Statement |
| GO001 |  |
| GO002 |  |

## Objective(s)

Statements of the quantitative measures of success to be realized.

|  |  |  |
| --- | --- | --- |
| Unique ID | Objective Statement | Traced to: |
| OB001 |  |  |
| OB002 |  |  |

## Problem/Opportunity Statement(s)

The Problem/Opportunity Statements (POs) provide factual, quantifiable, and concise descriptions of a problem or opportunity. The statement(s) do not recommend or provide a solution. Identify who the impacted actor/organization is, what the issue is, and where and when the issue is occurring.

|  |  |  |
| --- | --- | --- |
| Unique ID | Problem/Opportunity Statement | Traced to: |
| PO001 |  |  |
| PO002 |  |  |

## As-Is/Current State Process Map(s)

Capture the current state processes following the process taxonomy defined (L2/L3). For each process mapped, provide a summary description. Replicate these tables as needed for each map.

### As-Is/Current State Process Map(s) – Level 2

|  |  |  |  |
| --- | --- | --- | --- |
| Process Name: |  | | |
| Unique ID: | CSPM-001 | Level: | L2 |
|  | | | |
| Description: |  | | |
| Process Metrics: |  | | |
| DOWNTIME Analysis: |  | | |

### As-Is/Current State Process Map(s) – Level 3

|  |  |  |  |
| --- | --- | --- | --- |
| Process Name: |  | | |
| Unique ID: | CSPM-001.S1 | Level: | L3 |
|  | | | |
| Description: |  | | |
| Process Step Details: |  | | |
| DOWNTIME Analysis: |  | | |

# Requirements Scope

Scope/Stakeholder Requirements address the business need(s). These statements and models form the boundary of the ‘Requirements Scope’, which is a subset of the overall project scope. This section will include: High-Level Requirements Statements, Out-of-Scope, and scope models (e.g. Business Context Diagram). For each table, add rows as required.

## High-Level Requirement(s)/In Scope

Statements of the needs of a particular stakeholder or class of stakeholders that enable the Business Requirements. The initiative must meet these needs. For each Requirement Statement, ensure to define the Priority (High, Medium, Low) as well as trace to P/O statements.

|  |  |  |  |
| --- | --- | --- | --- |
| Unique ID: | High-Level Requirement Statement(s) | Priority | Traced to: |
| HLR001 |  |  |  |
| HLR002 |  |  |  |
| HLR003 |  |  |  |

## Out-of-Scope

This Section is meant to document results of the discussions and decisions that were made to exclude requirement(s) from the scope of the initiative. Be sure to define the rational for exclusion.

|  |  |  |
| --- | --- | --- |
| Unique ID: | Out-of-Scope Statement(s) | Rational |
| OS001 |  |  |
| OS002 |  |  |
| OS003 |  |  |

## Scope Model(s)

Technique(s) that provides a view of the business needs, external of the solution. Describe each of the entities and information flows depicted in the diagram to avoid ambiguity.

|  |  |  |  |
| --- | --- | --- | --- |
| Scope Model: |  | | |
| Unique ID: | BCD001 | Traced to: |  |
|  | | | |
| Entity Descriptions: |  | | |
| Information Descriptions: |  | | |

# Solution Requirements

This section describes the capabilities and qualities of a solution that meets the stakeholder requirements. They provide appropriate level of detail to allow for development and implementation of the solution. This section will include: Future State/To-be Process Maps (L2/L3), Process Specifications (Use Cases), Business Rules & Calculations, Data Requirements, UI/Screen Specifications & Notifications, Reporting Requirements, and Non-Functional Requirements.

## To-be/Future State Process Map(s)

Document the future state processes following the process taxonomy defined (L2/L3). For each process mapped, provide a summary description. For L2 Future State Maps, be sure to summarize each key activity/function defined. Replicate these tables as needed for each map.

### To-be/Future State Process Map(s) – Level 2

|  |  |  |  |
| --- | --- | --- | --- |
| Process Name: |  | | |
| Unique ID: | FSPM-001 | Level: | L2 |
|  | | | |
| Description: |  | | |
|  | | Traced to: |  |

### To-be/Future State Process Map(s) – Level 3

|  |  |  |  |
| --- | --- | --- | --- |
| Process Name: |  | | |
| Unique ID: | CSPM-001.S1 | Level: | L3 |
|  | | | |
| Description: |  | | |
|  | | Traced to: |  |

## Use Case(s)

The Use Case Specification provides elaborated details of a L3 Business Process Map. Within the context of a Process Map, it demonstrates the expected interaction with the system(s). In the context of an RPA initiative, the Robot will be identified as an actor, so that interaction, scenario flows, logic, and information used by the Robot are clearly defined.

### Actor Summary

Define the actors (people, systems) in scope of the use case specifications provided. A Use Case Diagram can be used to visually represent actors.

|  |  |  |  |
| --- | --- | --- | --- |
| Unique ID: | Actor Description | Role (Primary/ Secondary) | Traced to L3: |
| ACT001 |  |  |  |
| ACT002 |  |  |  |
| ACT003 |  |  |  |
| ACT004 |  |  |  |
| ACT005 |  |  |  |

### Use Case Specification(s)

The Use Case Specification provides details on steps, data, rules, interface, and reporting for each Use Case identified in the Use Case Diagram.

|  |  |  |  |
| --- | --- | --- | --- |
| Unique ID: | Use Case Specification Name & Description | UC Specification File (attachment) | Traced to L3: |
| UC001 |  |  |  |
| UC002 |  |  |  |
| UC003 |  |  |  |
| UC004 |  |  |  |
| UC005 |  |  |  |

## Report(s)

Reporting requirements document the business knowledge to be presented in the process of enabling a goal.

|  |  |  |  |
| --- | --- | --- | --- |
| Unique ID: | Report Specification Name & Description | Report Specification File (attachment) | Traced to: |
| REP001 |  |  |  |
| REP002 |  |  |  |
| REP003 |  |  |  |

# Non-Functional Requirements

Non-Functional Requirements describe a system operation, or quality. These qualities may include describing a systems performance, capacity, security, availability, redundancy and recovery, and continuity. Listed below are a primary subset of key NFRs for RPA consideration. Complete this only as needed, as NFR conditions may have already been included as part of the HLR statements.

|  |  |  |  |
| --- | --- | --- | --- |
| Unique ID: | NFR Category | NFR Requirement | Traced to: |
| NFR001 | Hours of Usage |  |  |
| NFR002 | Days of Usage |  |  |
| NFR003 | Usage Time Exceptions |  |  |
| NFR004 | Response Time |  |  |
| NFR005 | # of concurrent events |  |  |
| NFR006 | # of system users |  |  |
| NFR007 | # of peak events |  |  |

# Additional Details & Notes

Please provide any additional details to support this Requirements Specification.

# Requirements Trace Matrix

Use this table to summarize the traceability between the requirements artifacts captured throughout this document.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goals | Objectives | Problems/ Opportunities | HLRs | BCD | FSPM L2 | FSPM L3 | Actors | Use Case(s) | Reports | Other |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
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