PRJ 00000 PM2 Proposal Statement of Requirements (SOR)

**Statement of Requirements (SOR)**

**<Project Name>**

**General Information**

|  |  |
| --- | --- |
| Clarity Project #: | *<Clarity Project Number PRJ-xxxxx>* |
| Project Name: | ***<Project Name>*** |
| Project Sponsor: | *<Sponsor Name>* |
| Project Manager: | *<Project Manager Name>* |
| Attachments: | *<Attachments: Attach or link As-Is, To-Be and Gap Analysis Documents, if applicable>* |
| Business Analyst/Author: |  |
| Location: | *<File Location: SharePoint or Documentum>* |

**Revision / Change History**

|  |  |  |  |
| --- | --- | --- | --- |
| Revision Level | Revision Date | Revision Author | Description of Changes |
| 0.1 | <date> |  | Initial Version |
|  |  |  |  |

*This template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the particular project. The instructions should be deleted before distributing the document.*

* *Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*
* *Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.*
* ***Text and tables in black*** *are provided as boilerplate examples of wording and formats that may be used or modified as appropriate*.

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# Document Purpose

The purpose of this document is to define and document the high level requirements of the project – the scope and what the project the project needs to deliver to meet the objectives of the project. It focuses on the stakeholder needs and the capabilities that the project solution should provide to meet those needs. Details of “how” the project solution will meet the needs will be documented in the Solution Requirements captured in Requirements Traceability Matrix (RTM) document.

The intended audience for the document is the business process owners, user representatives, the project team, and other technical or IT functions who will be involved in the project. The SOR, once approved, should serve as a reference for subsequent activities of the project, including the solution proposal creation and subsequent solution development.

*[In the new IIBA terminology, this document contains, the scope, Business Requirements and Stakeholder Requirements. This information is combined into one document for the convenience of the above referenced intended audience for review and approval, or for vendors for developing proposals. This information should be transferred into the RTM document or HPQC, during the execution of the project, and used for managing the requirements and their traceability.]*

# Project Description

*[Provide a summary description and overview of the project for completeness of information. This section can be created from the Project Charter or linked to the Charter. If there has been any change to the overall scope since the Charter was approved, it should be reflected here and in the rest of the document.]*

# Scope and Objectives

*[Define the scope and objectives of the project. Scope defines the boundaries of the project. Objectives define what the organization intends to achieve by executing the project. A context diagram or use case diagram may be beneficial to delineate the scope clearly. In Scope and Out of Scope items may also be listed clearly below.]*

|  |  |  |
| --- | --- | --- |
| **ID** | **Scope Area** | **Description** |
| S.1 |  |  |
| S.2 |  |  |
| S.3 |  |  |

## In Scope



## Out of Scope



# Stakeholder Profiles

*[Stakeholder Requirements need to be defined from the perspective of the stakeholders of the project solution and what they plan to accomplish using the solution. Stakeholders include all the potential user roles (“personas”) as well as non-users. It may also include any downstream processes, and/or applications that will interact with the solution.]*

|  |  |  |
| --- | --- | --- |
| **Stakeholder Role** | **Description** | **Responsibilities/Needs** |
|  |  |  |
|  |  |  |

# Assumptions, Constraints, and Dependencies

*[Identify conditions or factors considered for developing the requirements. ]*

## Assumptions

*[Assumptions are factors taken to be true without proof that may affect the implementation of the requirements. If an assumption does not turn out to be true later, it would become a risk to the requirements. Assumptions are not requirements, but they help alert the audience to additional factors that need to be considered. ]*



## Constraints

*[Constraints are restrictions or boundaries that may affect the implementation of these requirements. These may include factors such as required technologies, required timing, decisions, etc.]*



## Dependencies

*[Dependencies are the events of conditions that must be in place in order to implement these requirements.]*



# Business Requirements

*[This section describes the key project objectives that were identified during the demand and Initiation phases. Business Requirements are higher-level statements of the goals, objectives and needs of the organization. They describe the reasons why a project has been initiated, the objectives the project will achieve, and the metrics that will be used to measure its success. Business requirements describe the needs of the organization as a whole, and not groups or stakeholders within it.*

*Business Requirements generally consists of:*

*• SMART business objectives*

*• Resource, cost, and time constraints*

*• A concise problem statement,*

*• A clear vision of how things should be in the future, and*

*• Scope statements that clearly specify is in or out of scope.*

*The following format represents a good way of stating business requirements:*

*The purpose of the project <project name>,is to …. (describe the project objectives), so that … (describe the measurable benefits of the solution).Alternate formats like the table, in example below, are also acceptable. On approval of the document, the business requirement numbering (ID) should be associated with that particular requirement for all subsequent references during the life of the project. ]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ID** | **Scope Area** | **Business Requirement** | **Benefits/Drivers** | **Source** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |

# Stakeholder Requirements

*[Stakeholder requirements are statements of the needs of a particular stakeholder or class of stakeholders. They describe the needs that a given stakeholder has and how that stakeholder will interact with a solution. Stakeholder requirements serve as a bridge between business requirements and the various categories of solution requirements. In other words, it should describe what the project solution or technology must do to support or respond to stakeholder needs from a feature/function point of view. It should include requirements from business process/business functions needed, user interface requirements, reporting needs, system or data integration, requirements, etc.*

*Please note that this section may contain both functional and non-functional requirements as referred to in traditional SDLC approaches.]*

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Stakeholder Requirement** | **Pri** | **Owner** |
| 1.1 |  |  |  |
| 1.2 |  |  |  |
| 1.3 |  |  |  |

**Notes:**

#1)

#2)

# Plan Acknowledgement

## Approvals

*[Capture the document approvals in this section. If approvals are via Email, then date of approval should be recorded here and the Email saved for audit or review purposes in the Project repository. Primary approver of SOR is Business Process Owner. However, additional approvals may be required based on project-specific decisions and requirements responsibilities.]*

The undersigned acknowledge that they have reviewed and approved this Statement of Requirements for the *<Project Name>*. Changes to this document will be coordinated with and approved by the undersigned or their designated representatives.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Date | Comments |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Approver Comments

*[Document any detailed approver comments or conditions of approval here.]*

# Appendix: Attachments or Links

*[Attach any supporting information available.]*