

Collect Requirements

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Collect Requirements Process

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Description: PMBOK Collect Requirements Process

Collectrequirementsprocess

Project: ADPA - Advanced Document Processing & Automation Framework

Version: 3.2.0

Document Owner: ADPA Product & Business Analysis Team

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1. Purpose

The Collect Requirements process for the ADPA (Advanced Document Processing & Automation) Framework defines the systematic approach

for gathering, analyzing, and managing requirements from diverse stakeholders to ensure successful delivery of enterprise-grade, standards-compliant document automation solutions. This process ensures alignment with business analysis and project management best practices (BABOK v3, PMBOK 7, DMBOK 2), regulatory compliance, and enterprise integration needs.

2. Process Overview

The process leverages both AI-powered automation and structured stakeholder engagement to elicit, document, validate, and baseline functional and non-functional requirements. It is tailored for large-scale, regulated, and integration-heavy enterprise environments, supporting multiple input channels (CLI, REST API, Admin Web UI), and accommodating industry frameworks and regulatory standards.

3. Inputs

- **Business Case, Project Charter, and Initial Scope Documents**
 - **Stakeholder Register and Analysis**
 - **Existing Standards and Frameworks:** BABOK v3, PMBOK 7, DMBOK 2.0, regulatory requirements (GDPR, SOX, PCI DSS, etc.)
 - **Technical Constraints:** Platform, integration endpoints (Confluence, SharePoint, Adobe, etc.), security requirements
 - **Organizational Process Assets:** Templates, historical data, lessons learned
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4. Tools & Techniques

- **ADPA Document Generator:** Template-driven, standards-compliant document creation
- **AI Provider Integration:** Context-aware requirement elicitation using OpenAI, Google AI, Copilot, Ollama

- **REST API & CLI:** Multi-modal requirements submission and management
 - **Confluence/SharePoint Integration:** Direct publishing for collaborative review
 - **Workshops & Interviews:** Facilitated by business analysts, leveraging ADPA-generated guides
 - **Surveys & Questionnaires:** Automated distribution and analysis
 - **Prototyping & Mockups:** Generated via Adobe Document Services for visual requirement validation
 - **Approval & Traceability Workflows:** Built-in role-based access (Active Directory, SAML, OAuth2)
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5. Process Steps

5.1 Preparation

- **Identify Stakeholders:** Use the Stakeholder Analysis module, synchronize with Active Directory or manual input.
- **Select Standards/Frameworks:** Determine which (BABOK, PMBOK, DMBOK) are applicable; configure in ADPA.
- **Establish Document Types:** Define which documents are required (e.g., Requirements Specification, Risk Register, Data Governance Plan).

5.2 Requirement Elicitation

- **AI-Assisted Workshops:**
 - Use ADPA's guided templates and AI context management to structure sessions.
 - Capture requirements in real time via CLI, API, or Admin Web UI.
- **Surveys & Forms:**
 - Distribute via integrated channels, auto-ingest responses.
- **Document Analysis:**

- Upload existing documents for AI-powered extraction and synthesis.

5.3 Requirement Documentation

- **Template-Based Generation:**
 - Select or customize standards-compliant templates (e.g., BABOK Requirements Elicitation).
 - Auto-populate with elicited content, stakeholder data, and traceability links.
- **Formatting & Output:**
 - Generate outputs in Markdown, PDF, or JSON.
 - Publish directly to Confluence, SharePoint, or export locally.

5.4 Requirement Validation

- **Stakeholder Review:**
 - Distribute generated documents via email, Confluence, or SharePoint for review.
 - Capture feedback through ADPA's integrated feedback mechanisms.
- **Automated Consistency Checks:**
 - Use AI to flag conflicting, vague, or incomplete requirements.
- **Approval Workflow:**
 - Route documents for electronic sign-off via integrated identity management.

5.5 Requirement Management

- **Version Control:**
 - Track all changes via built-in VCS integration (GitHub, Azure DevOps).
- **Change Management:**
 - Log, review, and approve requirement changes; maintain traceability matrix.
- **Audit & Compliance:**

- Automated logging and regulatory audit trail generation for all requirement activities.

6. Outputs

- **Requirements Documentation:**
 - Baseline requirements specification (BABOK/PMBOK/DMBOK compliant)
 - Traceability matrix
 - Stakeholder analysis and approval records
 - Integration-ready output (API, CLI, or document export)
 - **Regulatory Compliance Artifacts:**
 - Evidence of GDPR, SOX, PCI DSS, and other standard adherence, auto-generated as needed
 - **Versioned & Auditable Requirement Sets:**
 - All requirement artifacts are versioned, signed, and accessible for audit
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7. Roles & Responsibilities

Role	Responsibilities
Business Analyst	Lead requirement elicitation and documentation
Project Manager	Ensure requirements align with scope and schedule
Technical Lead	Validate technical feasibility and constraints
Stakeholders	Provide inputs and approve requirements
Compliance Officer	Validate regulatory adherence

Role	Responsibilities
AI Orchestration Lead	Configure and monitor AI provider integrations

8. Unique Project Considerations

- **AI-Driven Contextualization:**
Leverage multi-provider AI for dynamic, context-aware requirement gathering and smart document population.
 - **API-First, Multi-Modal Input:**
Accept requirements via CLI, REST API, or Web UI for maximum flexibility.
 - **Enterprise Integration:**
Direct hooks to Confluence, SharePoint, and version control for seamless enterprise workflow.
 - **Full Standards Coverage:**
Templates and requirements management aligned to BABOK, PMBOK, DMBOK, and evolving regulatory standards.
 - **Security and Compliance:**
All requirements handling is secured, logged, and audit-ready; supports SSO and granular permissions.
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9. Practical Guidance

- **Configure AI providers and frameworks before workshops to maximize automation.**
- **Use built-in template libraries as a starting point; customize as needed for unique business domains.**
- **Publish and manage requirements through integrated enterprise tools to streamline collaboration and approvals.**
- **Leverage automated checks and traceability to minimize risk of incomplete or conflicting requirements.**

- **Utilize ADPA's analytics and reporting features for continuous improvement of the requirements process.**
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10. Related Artifacts and References

- **BABOK v3, PMBOK 7, DMBOK 2.0** official documentation
 - **ADPA User and Admin Documentation** ([GitHub Wiki](#))
 - **Enterprise Integration Guides:** Confluence, SharePoint, Adobe, API Center
 - **Testing and API Validation Reports**
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11. Process Monitoring & Improvement

- **Regularly review requirements process metrics via ADPA analytics**
 - **Solicit stakeholder feedback post-elicitation and post-delivery**
 - **Update templates and workflows as standards evolve or business needs change**
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This process is subject to continuous improvement and should be reviewed at each major project milestone or after each significant release.
