**International School**

**System Integration Practices**

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**VISION DOCUMENT**

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**HUMAN RESOURCES AND PAYROLL DASHBOARD**

**Submitted by Group 2**

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Vision

# Introduction

## Purpose

The purpose of this document is to collect, analyze, and define high-level needs and features of the Human Resources and Payroll Dashboard (HRP Dashboard). It focuses on the capabilities needed by the stakeholders, and the target users, and **why** these needs exist. The details of how the HRP Dashboard fulfils these needs are detailed in the use-case and supplementary specifications.

## Scope

The scope of this Vision document includes the development and implementation of the Human Resources and Payroll Dashboard (HRP Dashboard) project. It is associated with the Human Resources and Payroll departments and aims to address the challenges mentioned in the CEO memo. The HRP Dashboard will provide a centralized platform for senior managers to access summarized information about employees, payroll, and benefits. It will streamline information gathering processes, enable timely management decisions, and support management by exception. The project will impact stakeholders such as the CEO, senior managers, Human Resources Department, Payroll Department, and shareholders. The scope also covers the identification of key metrics, data sources, and the development of alerting mechanisms.

## Definitions, Acronyms and Abbreviations

HRP – Human Resources and Payroll

## References

## Overview

Vision document provides a concise summary of its contents and organization. It includes an introduction, problem statement, stakeholder and user descriptions, project perspective, constraints, precedence and priority, product requirements, documentation requirements, and an appendix. The Vision document aims to address the challenges outlined in the CEO memo and provide a comprehensive understanding of the Human Resources and Payroll Dashboard (HRP Dashboard) project and its goals.

# Problem Statement

|  |  |
| --- | --- |
| The problem of | Inefficient human resources and payroll management  Employee’s data from Human Resources Department and Payroll Department do not synchronize |
| affects | CEO, senior managers, Human Resources Department, Payroll Department, and shareholders |
| the impact of which is | - Loss of time in gathering information  - Cannot synchronize between tasks to be done  - Information results after the collection process are limited  - Difficulty in tracking employee data  - Influencing management as well as making decisions at the right time |
| a successful solution would be | - Streamlined HR and payroll processes  - Improved data management  - Enhanced overall efficiency |

# Stakeholder and User Descriptions

## Stakeholder Summary

| **Name** | **Represents** | **Role** |
| --- | --- | --- |
| Employees | Internal stakeholders | - Provide input on HR and payroll processes  - Expect accurate and timely payments  - Need efficient data management |
| HR Department | Internal stakeholders | - Responsible for managing HR and payroll processes  - Ensure compliance with regulations  - Seek streamlined and efficient workflows |
| Payroll Department | Internal stakeholders | - Responsible for processing employee payments  - Require accurate and timely payroll management  - Seek automation and efficiency in payroll processes |
| Management Team | Internal stakeholders | - Oversee HR and payroll operations  - Require accurate reporting and data analysis  - Seek improved decision-making through reliable HR and payroll information |
| Executives | Internal stakeholders | - Set strategic direction for the organization  - Expect effective HR and payroll management to support business goals  - Seek cost control and efficiency in HR and payroll processes |
| Shareholders | External stakeholders | - Invest in the organization  - Expect financial returns  - Seek transparency and accountability in HR and payroll management |
| IT Department | Internal stakeholders | - Responsible for implementing and maintaining HR and payroll systems  - Ensure data security and system reliability  - Seek integration and automation of HR and payroll processes |

## User Summary

| **Name** | **Description** | **Stakeholder** |
| --- | --- | --- |
| Employees | Internal users who interact with HR and payroll processes | Represented by Human Resources Department, Payroll Department |
| HR Department | Internal users responsible for managing HR and payroll processes | Represents employees, management team, executives |
| Payroll Department | Internal users responsible for processing employee payments | Represents employees, management team, executives |
| Management Team | Internal users overseeing HR and payroll operations | Represents employees, executives |
| Executives | Internal users setting strategic direction for the organization | Represents employees, management team |
| Shareholders | External users who invest in the organization | Represents executives |
| IT Department | Internal users responsible for implementing and maintaining HR and payroll systems | Represents employees, management team |

## User Environment

1. The Human Resources and Payroll Dashboard (HRP Dashboard) will be used by senior managers of the company

2. The Human Resources and Payroll Dashboard (HRP Dashboard) should help the senior managers manage everywhere they want

3. The Human Resources and Payroll Dashboard (HRP Dashboard) shows the summarized information of the total earnings by the shareholder, gender, ethnicity, part-time, and full- time employee to date and the previous year, by department, a total number of vacation days taken by the shareholder, gender, ethnicity, part-time, and full-time employee to date and the previous year and average benefits paid to shareholders and non-shareholders to date by benefits plan.

4. The employee should not need to use the HRP Dashboard Application

## Stakeholder Profiles

### Employees

|  |  |
| --- | --- |
| **Representative** | Employees |
| **Description** | Employees within the organization who interact with HR and payroll processes. |
| **Type** | Casual Users |
| **Responsibilities** | - Provide input on HR and payroll processes  - Expect accurate and timely payments  - Need efficient data management |
| **Success Criteria** | - Accurate and timely payments  - User-friendly HR and payroll systems |
| **Involvement** | - User feedback and requirements gathering  - Participate in user acceptance testing |
| **Deliverables** | - User feedback on system usability and functionality |
| **Comments / Issues** | - User training may be required for new systems or processes |

### HR Department

|  |  |
| --- | --- |
| **Representative** | HR Department |
| **Description** | The department responsible for managing HR processes within the organization. |
| **Type** | Business Experts |
| **Responsibilities** | - Streamline HR workflows  - Ensure compliance with labor laws and regulations  - Efficiently manage employee data  - Develop and implement HR policies and procedures  - Support employee recruitment, onboarding, and development  - Handle employee relations and conflict resolution  - Manage compensation and benefits programs  - Ensure HR systems and technology are effective and up to date |
| **Success Criteria** | - Efficient and compliant HR processes  - Effective recruitment and retention of qualified employees  - Positive employee relations and high employee satisfaction  - Compliance with labor laws and regulations  - Accurate and reliable HR data and reporting |
| **Involvement** | - Define HR requirements and provide input during system development  - Participate in requirements gathering and user acceptance testing  - Collaborate with IT department for system implementation and maintenance |
| **Deliverables** | - HR policies and procedures documentation  - User feedback on system functionality and usability |
| **Comments / Issues** | - Integration with other HR systems and applications may be required  - Data security and privacy are critical concerns for HR department  - Training and support for HR staff during system implementation and transition may be needed |

### Payroll Department

|  |  |
| --- | --- |
| **Representative** | Payroll Department |
| **Description** | The department responsible for managing payroll processes within the organization. |
| **Type** | Business Experts |
| **Responsibilities** | - Calculate and process employee salaries  - Ensure accurate and timely payroll disbursements  - Handle tax withholdings and deductions  - Maintain payroll records and data  - Generate payroll reports and statements  - Ensure compliance with payroll laws and regulations  - Address payroll-related inquiries and issues |
| **Success Criteria** | - Accurate and timely payroll processing  - Compliance with payroll laws and regulations  - Efficient and reliable payroll systems  - Adherence to payroll schedules and deadlines |
| **Involvement** | - Define payroll system requirements  - Provide input during system development  - Participate in testing and validation of payroll functionalities  - Collaborate with IT department for system integration and maintenance |
| **Deliverables** | - Accurate payroll calculations and records  - Timely payroll disbursements  - Payroll reports and statements |
| **Comments / Issues** | - Integration with other HR and financial systems may be required  - Data security and confidentiality are critical for payroll department  - Training and support for payroll staff during system implementation and transition may be needed |

### Management Team

|  |  |
| --- | --- |
| **Representative** | Management Team |
| **Description** | The group of executives and leaders responsible for strategic decision-making and overseeing the organization's operations. |
| **Type** | Business Experts |
| **Responsibilities** | - Set strategic goals and objectives  - Make decisions regarding project priorities and resource allocation  - Provide guidance and direction to project teams  - Ensure alignment of project outcomes with organizational objectives  - Monitor project progress and performance  - Approve project deliverables and milestones  - Manage stakeholder expectations  - Ensure project success and value realization |
| **Success Criteria** | - Achievement of project goals and objectives  - Timely and within-budget project delivery  - Stakeholder satisfaction  - Positive impact on organizational performance |
| **Involvement** | - Define project goals and objectives  - Approve project plans and budgets  - Provide guidance and support to project teams  - Review and approve project deliverables  - Monitor project progress and performance  - Participate in project status meetings and reviews  - Make strategic decisions regarding the project |
| **Deliverables** | - Project plans and budgets  - Approved project deliverables  - Project status reports and updates |
| **Comments / Issues** | - Availability and commitment of management team members  - Alignment of project outcomes with organizational objectives  - Communication and coordination with other stakeholders  - Resource allocation and prioritization challenges |

### Executives

|  |  |
| --- | --- |
| **Representative** | Executives |
| **Description** | Top-level leaders and decision-makers within the organization. |
| **Type** | Business Experts |
| **Responsibilities** | - Set strategic direction and goals for the organization  - Make high-level decisions regarding project priorities and resource allocation  - Provide guidance and support to project teams  - Ensure alignment of project outcomes with organizational objectives  - Monitor project progress and performance  - Approve project deliverables and milestones  - Manage stakeholder expectations  - Ensure project success and value realization |
| **Success Criteria** | - Achievement of project goals and objectives  - Timely and within-budget project delivery  - Stakeholder satisfaction  - Positive impact on organizational performance |
| **Involvement** | - Define project goals and objectives  - Approve project plans and budgets  - Provide guidance and support to project teams  - Review and approve project deliverables  - Monitor project progress and performance  - Participate in project status meetings and reviews  - Make strategic decisions regarding the project |
| **Deliverables** | - Project plans and budgets  - Approved project deliverables  - Project status reports and updates |
| **Comments / Issues** | - Availability and commitment of executives  - Alignment of project outcomes with organizational objectives  - Communication and coordination with other stakeholders  - Resource allocation and prioritization challenges |

### Shareholders

|  |  |
| --- | --- |
| **Representative** | Shareholders |
| **Description** | Individuals or entities that own shares in the company. |
| **Type** | Business Experts |
| **Responsibilities** | - Monitor the project's impact on the company's financial performance  - Ensure that the project aligns with the company's strategic objectives  - Provide input on major project decisions that may affect the company's financial position  - Assess the project's potential risks and returns |
| **Success Criteria** | - Positive impact on the company's financial performance  - Alignment of the project with the company's strategic objectives  - Mitigation of project-related risks  - Maximization of returns on investment |
| **Involvement** | - Review and approve major project decisions  - Monitor the project's financial implications and performance  - Assess the project's risks and returns |
| **Deliverables** | - Financial reports and projections related to the project |
| **Comments / Issues** | - Communication and transparency regarding project impact on company's financials  - Alignment of project outcomes with company's strategic objectives  - Addressing potential conflicts of interest among shareholders |

### IT Department

|  |  |
| --- | --- |
| **Representative** | IT Department |
| **Description** | The department within the organization responsible for managing and maintaining the organization's information technology infrastructure and systems. |
| **Type** | IT Professionals |
| **Responsibilities** | - Technical expertise in information technology  - Knowledge of system architecture and infrastructure  - Understanding of software development methodologies  - Proficiency in system integration and deployment  - Familiarity with security and data privacy requirements  - Support and maintenance of the system being developed  - Collaboration with project teams for system implementation |
| **Success Criteria** | - Successful implementation and deployment of the system  - System availability and performance  - Data security and privacy  - Efficient system support and maintenance |
| **Involvement** | - Provide input on technical requirements and specifications  - Collaborate with project teams on system design and development  - Participate in system testing and quality assurance  - Support system deployment and integration - Provide ongoing system support and maintenance |
| **Deliverables** | - System design and architecture documentation  - System integration and deployment plans  - Technical support during system implementation |
| **Comments / Issues** | - Availability and commitment of IT department resources  - Timely resolution of technical issues  - Adequate system support and maintenance  - Alignment with IT department policies and procedures |

## User Profiles

### Senior Managers

|  |  |
| --- | --- |
| **Representative** | Senior Managers |
| **Description** | Senior-level executives responsible for overseeing and managing various aspects of the company's operations, including human resources and payroll. |
| **Type** | Guru |
| **Responsibilities** | - Utilize the HRP Dashboard to access and analyze summarized information on total earnings by shareholder, gender, ethnicity, part-time, and full-time employees - Generate reports on the total number of vacation days taken by shareholder, gender, ethnicity, part-time, and full-time employees - Monitor and analyze average benefits paid to shareholders and non-shareholders by benefits plan - Make informed decisions based on the data provided by the HRP Dashboard |
| **Success Criteria** | - Accurate and reliable information on total earnings, vacation days, and benefits  - Easy-to-use and user-friendly interface  - Effective data visualization for better decision-making |
| **Involvement** | - Participate in requirements gathering and provide input on system functionalities  - Review and provide feedback on system design and prototypes  - Test and validate the HRP Dashboard during the development process  - Provide ongoing feedback and suggestions for improvement |
| **Deliverables** | - Accessible and user-friendly HRP Dashboard interface  - Generated reports on total earnings, vacation days, and benefits  - Recommendations for system enhancements and improvements |
| **Comments / Issues** | - Timely delivery of accurate data for analysis  - Alignment with senior managers' reporting and decision-making needs  - Addressing any technical issues or system limitations |

### Employees

|  |  |
| --- | --- |
| **Representative** | Employees |
| **Description** | All the individuals working within the organization who will be using the Human Resources and Payroll Dashboard (HRP Dashboard) for various purposes related to their employment. |
| **Type** | Casual Users |
| **Responsibilities** | - Access and utilize the HRP Dashboard to view personal payroll and HR information  - Submit time-off requests and monitor vacation days  - Access and download payslips and tax documents  - Update personal information and contact details |
| **Success Criteria** | - Easy and intuitive navigation within the HRP Dashboard  - Accurate and up-to-date access to personal payroll and HR information  - Efficient processing of time-off requests and updates to personal details |
| **Involvement** | - Participate in user acceptance testing to provide feedback on usability and functionality  - Report any issues or bugs encountered while using the HRP Dashboard  - Provide suggestions for improvements and additional features |
| **Deliverables** | - Time-off requests and related documentation  - Updated personal information and contact details |
| **Comments / Issues** | - Ensuring data privacy and security  - Clear and concise communication of changes or updates to the HRP Dashboard  - Addressing any technical issues or system downtime |

## Key Stakeholder / User Needs

| **Need** | **Priority** | **Concerns** | **Current Solution** | **Proposed Solutions** |
| --- | --- | --- | --- | --- |
| Easy to use | High | Ability for users with little to no previous platform usage to navigate and use menus easily | See proposed | Provide large menu icons with intuitive categories for communication. Have an introduction for each feature |
| Flexible(configurable) | Low | Ability to customize menu and functions based on different user needs. | See proposed | Allow HRP Dashboard to be configured on initial running to allow user to choose needed functions and menu layout |
| The company needs to manage the versioning of project artifacts. | High | As requirements change, artifacts after requirements in the development process become outdated | When require-ments change, the version number of the requirement set is changed so team members can see which artifacts do not have the most current version number. | If a change in requirements immediately flagged all related artifacts and brought them to the forefront, project managers and employees would not have to suffer through organizing version differences. |
| The company needs to preserve data integrity with respect to documents that multiple employees might access and change over time | High | When employees can modify different copies of the same document at the same time, the company runs the risk of losing work. | Employees are simply told not to work on the document at the same time | If only a single copy of each document was stored in a single location and a “check-out” system was implemented such that only one person could open an alterable copy of the document at a time, then the company would not risk any loss of work. |

# Overview

## Perspective

The proposed executive dashboard will be an independent application that integrates data from the company's existing Human Resources and Payroll systems. It will not replace those legacy systems, but rather provide a consolidated view and analytics layer on top of the employee and payroll data within those systems.

The dashboard will extract data from the HR and payroll databases, transform and load it into its own data repository. From there it will generate dashboards, reports, and alerts for consumption by executives, managers and other authorized users. No direct integrations or interfaces with other systems external to the company are anticipated.

## Summary of Capabilities

|  |  |
| --- | --- |
| **Key Benefit** | **Supporting Features** |
| Consolidated executive reporting | - Total earnings reporting by employee segments and departments  - Vacation days taken reporting by employee segments  - Average benefits paid reporting for shareholders vs. non-shareholders |
| Proactive workforce alerts | - Alerts for upcoming employment anniversaries  - Alerts for excessive vacation balances  - Alerts for benefits plan changes affecting payroll  - Alerts for employee birthdays |
| Drill-down analytics | Ability to click through summary views to underlying detailed employee/payroll records |
| Automated distribution | Option to schedule automatic report generation and distribution |

## Assumptions and Dependencies

Continued use of the existing HR System and Payroll System in the near-term

Ability to directly access and extract data from the HR and payroll system databases.

Adequate server infrastructure (computer, storage, networking) to deploy the new dashboard application.

Dedicated project resourcing from IT to implement data integration and pipelines.

Executive leadership support and change management to drive user adoption across departments.

The accuracy of reporting/analytics will depend on the data quality and consistency within the source HR and payroll systems. The project is also dependent on getting access and extracts from those systems set up properly.

# Constraints

# Precedence and Priority

|  |  |
| --- | --- |
| **Priority** | **Features** |
| Must Have | - Integration for updating data back into the HR/payroll source systems  - Total earnings reporting by employee segments and department  - Vacation days taken reporting by employee segments  - Drill-down capability from summary to detail employee/payroll records - Ability to directly access and extract data from existing HR and payroll databases |
| Should Have | - Average benefits paid reporting for shareholders vs non-shareholders  - Alerts for employees nearing employment anniversaries  - Alerts for employees with excessive vacation balances  - Secured role-based access controls |
| Could Have | - Alerts for employees changing benefit plans affecting payroll  - Alerts for employee birthdays  - Automated report scheduling and distribution  - Advanced analytic visualizations (trends, forecasts etc.) |
| Won't Have | - Workforce planning/modeling capabilities  - Compliance reporting for external parties |

# Other Product Requirements

## System Requirements

Supported Server Operating Systems: Windows Server 2019, Red Hat Enterprise Linux 8

Database: Microsoft SQL Server 2019, Oracle 19c

Browser Support: Latest versions of Chrome, Edge, Firefox

Minimum 8GB RAM for dashboard application server

Integrated with corporate Active Directory for authentication.

## Performance Requirements

Ability to support at least 500 concurrent users.

Dashboard query response times < 5 seconds for simple queries, < 20 seconds for complex queries

End-user report Generation < 2 minutes for typical reports

Data extracts from source systems must run during off-peak windows.

## Environmental Requirements

System must meet corporate security policies for encryption, auditing, etc.

Ability to scale compute/storage resources up/down based on demand.

High availability/disaster recovery capabilities for business continuity

Self-service, easy-to-use interface for non-technical business users

Documented backup, archiving, and data retention processes

# Documentation Requirements

## User Manual

The user manual will provide end-users with instructions on how to access and use all features of the executive dashboard application. It should include:

* Overview of the dashboard's purpose and core capabilities
* Step-by-step guide with screenshots for using each main feature.
* Explanations of all data fields, filters, and reporting options
* Troubleshooting tips for resolving common issues
* Glossary of key terms

The user manual should be a medium-length PDF document, around 20-30 pages. It should be comprehensive but easy to follow, avoiding overly technical jargon.

## On-line Help

An online/contextual help system within the application itself should supplement the user manual. This will allow users to quickly access documentation and guidance while using specific features. The online help should:

* Use a modern HTML5 help authoring tool.
* Provide step-by-step instructions for common tasks.
* Definitions/explanations for all UI elements.
* Incorporate tooltips and in-app guided walkthroughs.
* Search and natural language query capabilities.

## Installation Guides, Configuration, Read Me File

Technical documentation for IT personnel managing the deployment should cover:

Installation Guide

* Software/hardware requirements.
* Step-by-step server installation and configuration instructions.
* Setting up data integration from source HR/payroll systems.

Configuration Guide

* Configuring data sources, schedules, and distribution lists.
* Managing user roles, security, and access controls.
* Monitoring, logging, and performance tuning.

Read Me

* Overview of this release's new features/changes.
* Known issues, limitations, and workarounds.
* Upgrade instructions from previous versions.
* Contact info for product support.

# Appendix 1 - Feature Attributes

## Status

|  |  |
| --- | --- |
| Proposed | A potential feature or requirement for the executive dashboard has been suggested by stakeholders (CEO, management, etc.) but not yet evaluated by the project team. |
| Approved | After reviewing the CEO's memo and conducting requirements analysis, the project team has approved this as a core requirement that must be implemented in the initial dashboard release. |
| Incorporated | This approved requirement has been incorporated into the project plan and design specifications. Development work is underway to build this capability into the dashboard application. |

## Benefit

[Set by Marketing, the product manager, or the business analyst. All requirements are not created equal. Ranking requirements by their relative benefit to the end user opens a dialogue with customers, analysts, and members of the development team. Used in managing scope and determining development priority.]

|  |  |
| --- | --- |
| Critical | Essential features. Failure to implement means the system will not meet customer needs. All critical features must be implemented in the release, or the schedule will slip. |
| Important | Features important to the effectiveness and efficiency of the system for most applications. The functionality cannot be easily provided in some other way. Lack of inclusion of an important feature may affect customer or user satisfaction, or even revenue, but release will not be delayed due to lack of any important feature. |
| Useful | Features that are useful in less typical applications will be used less frequently, or for which reasonably efficient workarounds can be achieved. No significant revenue or customer satisfaction impact can be expected if such an item is not included in a release. |

## Effort

Set by the development team. Because some features require more time and resources than others, estimating the number of team or person-weeks, lines of code required or function points, for example, is the best way to gauge complexity and set expectations of what can and cannot be accomplished in each time frame. Used in managing scope and determining development priorities.

## Risk

Set by development team based on the probability the project will experience undesirable events, such as cost overruns, schedule delays or even cancellation. Most project managers find categorizing risks as high, medium, and low sufficient, although finer gradations are possible. Risk can often be assessed indirectly by measuring the uncertainty (range) of the projects teams schedule estimate.

## Stability

Set by analyst and development team based on the probability the feature will change or the team’s understanding of the feature will change. Used to help establish development priorities and determine those items for which additional elicitation is the appropriate next action.

## Target Release

Records the intended product version in which the feature will first appear. This field can be used to allocate features from a **Vision** document into a particular baseline release. When combined with the status field, your team can propose, record and discuss various features of the release without committing them to development. Only features whose Status is set to Incorporated and whose Target Release is defined will be implemented. When scope management occurs, the Target Release Version Number can be increased so the item will remain in the **Vision** document but will be scheduled for a later release.

## Assigned To

In many projects, features will be assigned to "feature teams" responsible for further elicitation, writing the software requirements and implementation. This simple pull-down list will help everyone on the project team better understand responsibilities.

## Reason

This text field is used to track the source of the requested feature. Requirements exist for specific reasons. This field records an explanation or a reference to an explanation. For example, the reference might be to a page and line number of a product requirement specification, or to a minute marker on a video of an important customer interview.