Project Management Essentials

**Business Requirements**

Template

August 31, 2021

# Template Description

## Purpose

The PM Essentials Requirements Document provides a basic requirements collection, analysis, and tracing tool for projects. Requirements documentation captures, clarifies, and communicates what the business needs so that technical providers are in the best position to deliver the solution.

## How to Use

Complete the fields with details of what the business needs from the solution or the project.

## Best Practice

Requirements may start out at a high level and become progressively more detailed as more information is known. In the end, requirements should be **unambiguous** (measurable and testable), **traceable**, **complete**, **consistent**, and **acceptable** to key stakeholders.

A common error that requirements gatherers can make is that in addition to defining the business need they also define the solution itself. Confusion with regard to this subtle difference can cause unnecessary re-writes for the project team and loss of clarity of what the core needs are. Requirements should not be technical—rather it should clarify the to-be business practice in business language. A good rule of thumb is that a requirement can remain the same regardless of what technical solution is put in place. Another rule of thumb is that a requirement describes *what*, and the technical solution describes the *how*. Examples:

|  |  |
| --- | --- |
| **What the business needs (i. e. the requirement)** | **How it will be solved technically (i.e. the design or solution)** |
| *Good:*   * Agency officer shall be able to search cases based on first name, last name, and phone number. * Searches shall be executable from any desktop or laptop computer.   *Not as good:*   * Using an Acme browser and an Acme laptop computer, an agency user can search for cases based on first name, last name, and phone number.   *Why:* *It specifies the solution along with the business need.* | * Browser-based system with Acme database in the LAN   OR   * Acme client software (2.0) with Acme cloud-based backend   OR   * Acme terminal software with Acme mainframe application and Acme database |
| *Good:*   * The table in Conference Room #100 shall accommodate a minimum of 12 attendees and their laptop computers.   *Not as good:*   * A large redwood table shall be purchased from Acme Office Furniture for Conference Room #100.   *Why: It specifies the solution while being ambiguous about the volume of customers it should serve.* | * Fourteen feet long mahogany table purchased from approved vendor (Acme Office Furniture)   OR   * Fifteen feet long brush finish metal table available from the agency warehouse   OR   * Add leaves to existing conference table |

Another best practice is—if it doesn’t exist already—to document the as-is process. The as-is process is the current process or current functionality which the project seeks to replace or improve. Knowing the as-is process will help close any gaps that the requirements may have and also clarify where the improvements reside.

The PM Essentials Requirements Document Template is customizable as you see fit, on a per project basis, meeting specific needs of the project and/or your organization’s policies. The below sections are suggestions but can be tailored as applicable.

\*\*NOTE: Please remove this section and any contents in brackets ([ ]) when creating your Requirements Document.\*\*

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Business Requirements for [project name]

# Document Overview

## Document background

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project name** | **Division** | **Requirements author** | **Version** | **Version date** |
|  |  |  |  |  |

## Approval

| Approver Name | Title | Signature | Date |
| --- | --- | --- | --- |
|  | Business Owner |  |  |
|  | Project Manager |  |  |
|  | Business analyst (optional) |  |  |
|  | Subject matter expert |  |  |
|  | [add others as needed] |  |  |

## Project References

|  |  |
| --- | --- |
| **Project Plan** | [Location] |
| **Project Charter** | [Location] |

## Legend and Glossary

*The tables below provide an explanation for contents found in Section 2 and elsewhere.*

* + 1. Requirement flags

|  |  |  |
| --- | --- | --- |
| **Flag** | **Name** | **Description** |
| F | Feature or function | Characteristics or functionality available from the solution when the project is complete |
| R | Reporting | Characteristics of the reports that the system needs to deliver |
| U | User access level | Types of user access required |
| I | Interfaces | Characteristics needed to send data to, or receive data from, other systems |
| S | Security | Security characteristics to be in place, in addition to user access controls |
| O | Other | Any other requirements such as for schedule, cost, communication, support, policy, performance, release, training, scalability, maintainability, etc.). PM Essentials recommends providing new requirement flags if any of these are found to need extensive or complex elaboration. |

* + 1. Priority flags

*Projects may not always be able to complete all of the requirements. The Priority flag provides a way for project teams to focus on the most important ones.*

|  |  |
| --- | --- |
| **Priority** | **Description** |
| H | High – Must have. The solution must provide this feature or functionality. |
| M | Medium – Should have. Although secondary in importance, it is important to satisfy this requirement. |
| L | Low – Nice to have. Customers would benefit from having this feature but is not an absolute need. |

* + 1. Glossary and Acronyms

*Provide explanations for terms that are used in Section 2.*

|  |  |
| --- | --- |
| **Term** | **Description** |
| FTI | Federal Tax Information – any information, especially personal information, that is ultimately provided by the IRS. |
| LBB | Legislative Budget Board |
|  | [add others as needed] |

# Requirements

## Business flow

*As needed, provide a diagram of the to-be business process and existing process that illustrate the business solution.*

|  |
| --- |
|  |

## Detailed requirements

*Provide the detailed business requirements to be met by the project.*

| **REQ ID** | **Requirement** | **Supports HLR ID** | **Priority (H,M,L)** |
| --- | --- | --- | --- |
| F-01 |  |  |  |
| F-02 |  |  |  |
| F-03 |  |  |  |
| F-04 |  |  |  |
| F-05 |  |  |  |
| F-06 |  |  |  |
| F-07 |  |  |  |
| F-08 | [add others as needed] |  |  |
| R-01 |  |  |  |
| R-02 |  |  |  |
| R-03 |  |  |  |
| R-04 |  |  |  |
| R-05 |  |  |  |
| R-06 |  |  |  |
| R-07 |  |  |  |
| R-08 | [add others as needed] |  |  |
| U-01 |  |  |  |
| U-02 |  |  |  |
| U-03 |  |  |  |
| U-04 |  |  |  |
| U-05 |  |  |  |
| U-06 |  |  |  |
| U-07 |  |  |  |
| U-08 | [add others as needed] |  |  |
| I-01 |  |  |  |
| I-02 |  |  |  |
| I-03 |  |  |  |
| I-04 |  |  |  |
| I-05 |  |  |  |
| I-06 |  |  |  |
| I-07 |  |  |  |
| I-08 | [add others as needed] |  |  |
| S-01 |  |  |  |
| S-02 |  |  |  |
| S-03 |  |  |  |
| S-04 |  |  |  |
| S-05 |  |  |  |
| S-06 |  |  |  |
| S-07 |  |  |  |
| S-08 | [add others as needed] |  |  |
| O-01 |  |  |  |
| O-02 |  |  |  |
| O-03 |  |  |  |
| O-04 |  |  |  |
| O-05 |  |  |  |
| O-06 |  |  |  |
| O-07 |  |  |  |
| O-08 | [add others as needed] |  |  |

## Detailed requirements rationale

*As needed, provide the rationale for specific business requirements to record the reasons for the decisions made.*

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Req. Flag** | **ID** | **Business rationale** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

## Design considerations

*As needed, provide any design concepts including screenshots to help clarify the business requirements. Note that this is neither the design nor a requirement description but a supplement to help clarify the detailed requirements. The project team, and especially the technical subject matter experts, will develop the final technical design for development and implementation.*

|  |
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|  |

# Appendix

*As needed, provide any other documentation, analysis, examples, or research, to support the requirements.*

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|  |

# Feedback

If you have any questions on PM Essentials or on project management practices, please contact DIR’s Project and Portfolio Management Office at ppmo@dir.texas.gov.