|  |  |
| --- | --- |
| Project Title: |  |
| Requestor: |  |
| Business Sponsor: |  |
| JIRA Number: |  |



|  |
| --- |
|  |
| UTD Business Requirements |
|  |
| Business Requirements for New or Modified BI Capability |

*General Instructions for Using this Template:*

1. *Text in grey italics font like this text is comments and instructions for persons using this template. Such text should be deleted from documents created from the template once it has served its purpose. All example images should be replaced with actual project specific images. All the text in these general instructions should be deleted from the final document created from this template.*
2. *Actual content inserted into the document in place of text in grey italics font should be in* black, non-italics 10 point Calibri font like this.

*Specific Template Instructions:*

*This template is used to create the Business Requirements Document (BRD) that accompanies a* ***request*** *for new or modified Business Intelligence (BI) capability of the OIR EAS BI team.*

*This template, and the Business Requirements Document built from it, has two sections:*

* *Overview – This section provides the business information for the request*
* *Detailed Requirements – This section specifies what new or modified BI capability is being asked for in the request*

*The complexity of requests for new or modified BI capability can range from very simple to very complex. To assist the request author, the Detailed Requirements section of this template is composed of 4 different sub-sections, each for a common “Request Type”. Each sub-section provides guidance for the kind of information to be provided for each kind of request.*

*To create a specific BRD from this template, the BRD author should make a copy of this template and do the following in the copy:*

1. *Fill out the “Overview” section.*
2. *Scan through the Request Type sub-sections in the Detailed Requirements section, select the ones that apply to the request at hand, and delete the others.*
3. *Replicate the retained Request Type sub-sections as necessary.*
4. *Complete each sub-section.*
5. *Obtain approval of the resulting document from the appropriate business approver*
6. *Send the document and approval to the BI Team.*

*This document uses the following terminology to describe what a typical BI capability request can ask for:*

* *A* ***Sub-Report*** *– A set of data values, typically displayed in tabular form or as a graph/chart, along with the prompts and other features used to select the data.*
* *A* ***Report****– One or more Sub-Reports shown together on the same screen, along with the prompts and other features used to select the data applicable to all Reports on the page.*
* *A* ***Dashboard*** *– A collection of one or more Reports, along with the mechanisms for moving between them.*

*In several places in this document, references to a “report name” are made. Since, as of this writing, there is no “official” name for a report, a report should be identified by providing the complete “navigation path” used to display the page on which it appears along with a description as to where on that page the report exists or needs to exist.*

Document Control

# Version Control

All revisions made to this document are listed below in chronological order.

|  |  |  |  |
| --- | --- | --- | --- |
| **Version**  | **Date** | **Author(s)** | **Notes** |
| 1.0 |  |  | Original Draft |
|  |  |  |  |
|  |  |  |  |

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Please reference the [Terminology](#term) section for a glossary of technical terms that may be used in this document.

# Overview

## Request Summary

*In a few sentences, describe the request. A more detailed description of the request will be provided below.*

## Business Need/Problem Statement

*In plain business terms, describe the business need or problem that this request is to address. Do so in a way that no special technical knowledge is required to understand what is being requested.*

## Business Goals

*In bullet points, list the impact on the business that the fulfillment of this request must have for it to be considered a success. For example, impacts might include:*

* *The ability for the business to get the information needed to answer specific business questions (if so, specify the questions),*
* *The ability to analyze information from various points of view (if so, specify the information and viewpoints),*
* *The ability to get the information needed to satisfy a specific regulatory requirement (specify it),*
* *A reduction in the amount of time and/or labor it takes to complete some task (describe the task and the expected efficiency improvement)*
* *etc.*

## Business Assumptions

*List the assumptions that affected or, if changed, will affect, the content of this BRD.*

*Such assumption include, for example:*

* *If there is a chance that they might change in the near term, assumptions as to who the business contacts are.*
* *Assumptions that data already being used on an existing Sub-Report is suitable for use on a new one.*
* *Assumptions as to the business roles that might need to use a new Report that affected the security specification for that request.*
* *Assumptions that the software to be used to fulfill this request has the capability to do so, e.g., to provide some exotic type of graph or chart.*

|  |  |
| --- | --- |
| ID | Description |
| A-1 |  |
| A-2 |  |

## Business Groups/Team members

*Identify the business group(s) initiating this request along with specific business team members who will be the contact points for clarifying requirements, involvement in user acceptance testing, and providing all needed approvals.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Contacts Type** | **Organization** | **Contact Name(s):** | **Contact Phone Number**  | **Contact Email** |
| Initiating the request |  |  |  |  |
| Requirements clarification |  |  |  |  |
| Testing involvement |  |  |  |  |
| Requirements approval |  |  |  |  |
| Final acceptance approval |  |  |  |  |
| For changing requirements  |  |  |  |  |

*Indicate here which OIR technology organizations besides the OIR EAS BI organization may need to be involved in the request, if any.*

# Requested Capability

*Based on the nature of the request, fill out one or more of the following sections using the steps described in the* [*Specific Template Instructions*](#SpecificTemplateInstructions) *above. Repeat sections as necessary. Remove sections that do not apply.*

## Request Type: ModificatIon to existing Sub-Report

Name of existing Report containing the Sub-Report to be modified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of the Sub-Report to be modified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Description of needed modification:

*Consider taking a screen shot of the existing Report, “marking it up” to indicate what needs to change, and embedding the result here. Also address the following as appropriate:*

1. *If new fields are to be added, either to tabular data or a corresponding graph of a Sub-Report, or to the filtering/data selection criteria for the Sub-Report:*
	1. *Provide a description of the new fields that makes clear the system into which the data is originally entered. One way to do this is to include a screen shot of where the fields are entered in PeopleSoft or appear on another Report.*
	2. *If the data values to be in the tabular data or corresponding graph are not always exactly the data values entered into PeopleSoft (for example, if cryptic codes need to be translated into understandable words), specify how the values are to be changed.*
	3. *If the data values to be in the tabular data or corresponding graph represent only some of the values entered into PeopleSoft, specify the conditions under which values are to be used on the Report.*
2. *If the change involves fields that are to be counted or summed, specify which data is to be included in the count/sum, and which, if any, is to be excluded.*
3. *If the change involves fields whose values are to be computed using a calculation other than a simple sum or count, provide the calculation.*
4. *If a new filtering criteria is to be added or modified, specify how the field is to be used to filter/select data.*
5. *If changes to security are needed, describe the new criteria to be used to control access.*
6. *Navigation - If changes in the ability to move from this Sub-Report or Report to another one are needed, describe what other Reports are to be accessible from this one, and under what conditions*.

## Request Type: Addition/ModificatIon to Report Prompt

Specify one or more of the following:

Name of existing Report whose prompt(s) are to be modified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of existing Sub-Report whose prompt(s) are to be modified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Specify the (changed) default values to be used for the prompts:

|  |  |
| --- | --- |
| **Prompt Field Name** | **Default Value**  |
|  |  |
|  |  |
|  |  |

## Request Type: New Sub-Report

*Fill out the embedded spreadsheet, or provide the equivalent information (e.g., by providing examples and explanatory material that address the topics covered in the spreadsheet, or by describing (perhaps by using a screen print of it) how an existing Report can be modified to create the new one).*

 

## Request Type: Other

*Briefly describe the request here. The OIR EAS BI team will contact you for further information.*

# Information for the Requestor

## Change Management

The OIR EAS BI team appreciates the challenge in specifying a precise, perfect request for new/modified IT functionality on the first attempt. Until such time as an enterprise wide, formal change management process is in place to handle changes to requests for IT functionality, the BI team will work informally with the requestor to address those changes. Keep in mind that such changes can result in significant delay in delivering what is requested and can significantly increase the delivery cost. In some cases, changes can result in a decision to abort the effort to deliver what was requested. The OIR EAS BI team will work with the requestor and with the “changing requirements” contact mentioned above to address changes to these requirements after this document is approved.

## Knowledge Transfer

Information about the status of the request that this BRD is associated with can be found at any time on the request ticket (e.g., JIRA ticket). In addition, the OIR EAS BI team typically shares information with and/or interacts with requestors and interested parties at the following times during the project that addresses a request:

* During the process of approving this BRD
* For large projects, when the decision is made to actually start the project
* During periodic project meetings involving all parties
* Throughout the User Acceptance Testing process
* When it is time to make the final user acceptance decision
* Whenever additional information or clarification is needed

Of course, requestors and other interested parties are free to contact the project manager or the BI Program Manager at any time to obtain further information.

# Approvals

*Clear and complete business requirements are essential to the subsequent project development steps and overall success of the effort. Proceeding to the next project phase requires one approval and one review:*

1. *A formal approval from the requestor and the appropriate person in the requestor’s management chain who will act as the sponsor indicating that the requirements stated in this BRD are complete and correct.*
2. *A formal review of the BRD by BI Program Manager to acknowledge receipt of the requirements and initiate formal review of contents.*

*Approvals and reviews can be provided in several ways:*

1. *By printing this document and obtaining traditional written signatures from all relevant persons.*
2. *By the following exchange of emails:*
	1. *The requestor sends an email containing this BRD and indicating their approval of it to the appropriate person in their management chain.*
	2. *That person reviews the BRD as necessary, then forwards the email, indicating their approval while doing so, to the BI Program Manager.*
	3. *The BI Program Manager reviews the BRD and, if it seems adequate for taking the next step, replies to all, communicating that judgement. The BI Program manager adds the project manager to the reply if the project manager is known at the time.*

#### Requestor

<Name> Date

#### Business Sponsor

<Name> Date

#### EAS BI Program Manager reVIEW

<Name> Date

# Terminology

**OIR** – Office of Information Technology

**EAS** – Enterprise Application Services

**BI** – Business Intelligence

**Sub-Report** – A set of data values, typically displayed in tabular form or as a graph/chart, along with the prompts and other features used to select the data.

**Report** – One or more Sub-Reports shown together on the same screen or “page”.

**Dashboard** – A collection of one or more Reports, along with the mechanisms for moving between them.

**JIRA** – A ticketing system used to request that work be done and to track the progress of that work.