HOW TO CREATE

A BUSINESS REQUIREMENTS DOCUMENT

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How to Create a Business Requirements Doc

A business requirements document — also known as an BRD — serves as an essential framework for your custom enterprise software development project, mobile app development, SaaS startup initiative, or other Digital Transformation project. In fact, the creation of an accurate, highly-specific business requirements document is critical to a Digital Transformation project's success. It's estimated that over seven in ten Digital Transformation projects are ultimately considered failures, resulting in minimal benefits, underperformance and a much lower ROI than was originally projected.

But a negative outcome can be avoided with relative ease if you invest the time and effort to create a comprehensive and well-considered business requirements document. A BRD will establish your needs as an organization, ultimately ensuring that you and your software development team share the same vision for your Digital Transformation project.

A comprehensive, well-written requirements document is highly useful for any and all Digital Transformation and development projects you undertake. This is true whether you're handling the project in-house or partnering with a company like 7T to bring your vision to life. While this ebook will explore the creation of requirements documents relative to enterprise Digital Transformation projects, these exact same principles can also be adapted and applied to other endeavors, such as mobile apps, cloud computing, business process automations and other tech initiatives.

What is Your Vision for a Digital Transformation? What are the Uses and Benefits of a BRD?

A business requirements document is a mission-critical resource that will help you and your Digital Transformation developers plan the build and progress through the various stages of your project. In essence, this is your single source of truth for the project and it will drive the entire

project, from the initial UI/UX mockups to deployment. Let's look at the role of a business requirements document and its purpose.

• Defines the business needs

Unlike the more basic software requirements document, which focuses on the technical aspects of a Digital Transformation project, a BRD explores the organization, its objectives and its need for technologies that support those objectives. To be clear, a BRD contains everything an SRD does but with greater depth and understanding of the business task and user needs — information that should be the driving force of any development project. Understanding these needs is vital if your development project is going to deliver the maximum ROI. We should mention here one of the key philosophies at 7T is "ROI is our currency," meaning that no project should even be started without having a solid understanding of the full business impact and ROI.

• Defines the project scope

The business requirements document contains specifics about the software platform's features, functions and capabilities, giving both your team members and your development team a solid view of the project's scope, along with key insights into the company's needs and objectives, both short term and long term.

• Defines the user profiles and user stories

The best enterprise software platforms and Digital Transformation solutions are architected in a manner that addresses a user's challenges or solves a user's problems. To achieve this goal, you must have a solid understanding of the different user types and the manner in which they use the platform — their user stories or paths through the platform. All successful projects start with well-written user stories for each user profile. We will dive into this in greater depth later in the document with specific examples in the appendix.

• Outlines possible challenges or obstacles for the project

Your business requirements document must contain detailed insights and information about the obstacles and challenges that the company, its employees and customers/clients routinely confront. A BRD should also address the potential obstacles that platform users may confront because these factors will influence the enterprise software / mobile app architecture features and functionalities. By acknowledging these challenges and providing information about how these challenges originally manifested, your Digital Transformation development team will be well-positioned to evaluate the obstacles and develop possible solutions. This process can lead to the development of useful insights into the complexity, cost and timeframe for your Digital Transformation project. In fact, these insights account for our next point.

- **Allows for accurate budget projection and timeframe**

Once the development team has established an accurate idea of the project scope and the precise nature of the Digital Transformation project, they can create a budget projection and development schedule. Quite simply, an accurate, well-detailed BRD dramatically increases your chances of seeing accurate projections for both project timeframe and cost.

- **Ensures a good alignment between a company, its needs and your development partner**

By establishing a detailed overview of your company's needs, future goals, your users and their needs, the organization's challenges and scope of the development project, your business requirements document sets everything on the table. This allows your technology partner to verify that their experience and skill set is right for your needs, while providing you, the client, with confidence that your developers understand the project and feel confident that they can achieve your objectives.

These are just a few of the many factors that are impacted by your business requirements document. These points underscore the importance of taking the time to build out a detailed, well-thought-out BRD that will guide your development project from start to finish.

What's in a Business Requirements Document? The Basic Architecture

A typical Digital Transformation business requirements document will be highly detailed. Compiling the document requires an extensive understanding of the practical aspects of your Digital Transformation project's practical aspects, user profiles and the business as whole. A typical/standard requirements document will include the following sections.

Each company is highly unique which means that your business requirements document should be highly unique as well, reflecting your IT strategy, your overarching business strategy, along with the needs of your organization, its interests, your clients / customers, your employees, your

operations and your company's goals for the future. Therefore, if you need to expand the BRD to include additional sections or find that one of the recommended sections isn't all that relevant for your company, it's totally acceptable to modify the BRD to suit your precise needs. The goal is to create a detailed, complete overview of your company and its Digital Transformation needs/requirements (among other things!)

BRD Section 1: Company and Business Overview

The BRD's first section should consist of a detailed overview of the business, its general business strategy, its interests and the target clientele / customer base. Additionally, you should include information about the company's short term goals, long term goals and any operational challenges or pain points that ought to be considered when creating an enterprise software development strategy.

The company and business overview section of your business requirements doc may also address your company's primary competitors and the manner in which your business is striving to improve its competitive advantage. This can be an important inclusion in your BRD since this information can impact your company's operations, your employees and ultimately, your Digital Transformation strategy.

BRD Section 2: Digital Transformation Project Summary

The Digital Transformation project summary section of your business requirements doc should explore motivations for seeking an enterprise software solution. Factors to explore include strategic motivations, contractual regulatory compliance burdens and financial motivators. Also remember to discuss the pain point(s) that this new software is intended to address and ultimately, resolve for your business. This section should include a definition and criteria for what constitutes success in terms of ROI.

Since this is a business requirements document, this section should also touch upon your organization's user profiles (also called user personas), user paths and overall user objectives. The development team must have a good understanding of who the users are, along with precisely how and why they will be using this technology. With this insight, the developers can create a user-friendly UI/UX that will engage and drive high user adoption rates.

This section offers a high-level project scope outline, including in-scope and out-of-scope components. Identify applications and interfaces that will be impacted. Pinpoint all project stakeholders and address project constraints. Also indicate whether your in-house IT team will be involved in the project. Will in-house developers be handling future updates or maintenance? Do they have the skills, bandwidth and resources? Will the company's internal IT team assist with related projects such as cloud hosting configuration, data migration or third-party software integrations? Indicate who is responsible for each task, lest you end up with scope creep, unexpected time frame changes and cost increases stemming from hiring third-party service providers to perform tasks that were originally going to be handled by in-house IT resources.

BRD Section 3: Definitions and Glossary

Each company has its own unique lexicon and terminology. In the definitions and glossary section of the BRD, you must provide a clear and concise overview of common acronyms, terminology and other key terms and phrases that you may reference both in other regions of the requirements document and throughout the course of your Digital Transformation project. In 7T's experience, you can maximize a project's chances of seeing success if you can get everyone "speaking the same language" prior to the launch of development work on your project. This is also a good opportunity to clearly articulate assumptions and implications associated with the project. For instance, you may reference an upcoming launch date throughout the course of your dealings with your development team. The definitions and glossary section is an appropriate location to make note of the precise launch date.

Be sure to include glossary terms that are unique to your industry and your company to bring added clarity to your dealings with your development partner.

BRD Section 4: Design Considerations and Platform References

The design considerations and platform references section of the business requirements document is a place to discuss your company's hardware, software, UI/UX design preferences and technology infrastructure. For instance, you might wish to mention that your company is Apple-based and exclusively utilizes Apple hardware from 2021 or later, with the macOS Ventura (version 13.3.1) operating system running on all desktop and

laptop devices. Or maybe your company is the proverbial "MicroSoft shop" and requires all projects to utilize MicroSoft Exchange Server with deployments in Azure.

BRD section 4 provides an opportunity to indicate your preferences for specific UI/UX features and components. User testing is a very important part of the development process and it serves to maximize user adoption, promote greater efficiency and productivity, all while streamlining user experience. You should plan on selecting employees who can participate in at least a couple rounds of user testing, in addition to debriefing / feedback sessions where they will meet with UI/UX developers to share their thoughts and offer useful insights — insights that can prove to be extremely helpful to the development team.

The system overview section should also include information on essential CRMs, ERPs, mobile apps, web apps, data management systems and other platforms that are currently in use (and will remain in use for the foreseeable future.) It's particularly important to touch upon systems and software that will require integration with your new custom software platform. This is an issue that will be explored in greater depth in BRD section 8, which will include information about your organization's required API integrations.

A detailed overview of mission-critical integrations is extremely important if you're going to avoid scope creep, unexpected project cost overruns and unplanned extensions of the development timeframe. In cases where a publicly-accessible API is not available, customized coding work may be required to achieve a successful integration. This can contribute to scope creep, cost overruns and unexpected extensions in the project timeframe — all are events that you want to avoid.

BDR Section 5: References and UI/UX Inspiration

A client often finds inspiration in a specific software platform or mobile app. It's not atypical to hear something like, "I need enterprise software similar to X, but with additional features like A, B and C."

These references can provide your development team with useful context and insights, while adding clarity, offering examples and enabling you to convey your needs and ideas in a manner that's far more concise than attempting to describe your vision from the ground up. Your references can also serve as stylistic examples of what you like or dislike in terms of aesthetics, user interface (UI) and user experience (UX).

The references section of your business requirements document is where you can provide links to relevant apps, software platforms, web apps and other resources that have served to inspire your development project. Add in notations with a goal of clearly articulating what you like and dislike about a particular platform stylistically and functionally. It's also prudent to indicate what additional features you would need or how you would like to modify a specific functionality. An important note here is to avoid a situation where you're limiting yourself to your preferred market vertical. Some of the best user experience innovations arise when you pull in concepts from a completely different market vertical.

BRD Section 6: Detailed Product Features

In other sections of the requirements document, we've provided a high-level overview of platform features and functionalities. But in this section of the platform, we go granular with details such as the following points.

- **What is the feature and how will it work?;**
- **Role(s) of the different users;**
- **User objectives and goals;**
- **What pain point or challenge does the feature address?**
- **External API integrations;**
- **Integrations with internal enterprise platforms;**
- **Technical specifications;**
- **UI/UX design requirements;**
- **Who will handle each aspect of the project including development enterprise platforms; and**
- **Any additional issues or notes for development.**

This information is essential for creating a contract with a detailed scope of work (SOW) document and accurate pricing, a project strategy with phase timelines, along with a plan for user training. It can also be useful down the road when the time comes to develop a software maintenance and update strategy, particularly if there are plans to perform updates that are intended to accommodate business scaling and evolution.

BRD Section 7: User Journeys, User Stories by Persona and User Profiles

User journeys — also called user paths — refer to the route or path that the user takes to arrive at and move through your platform. Let's take the example of an accounting department bookkeeper who's a user on an accounting web app portal. This user journey may begin with a button click on the company's internal enterprise resource planning ERP software system dashboard. From there, they're taken to a login page, which then directs the bookkeeper to the web portal's invoice management module. The user path can then extend in any number of directions, such as entering new invoices into a reconciling workflow. These user journeys can inform the UI/UX development process and guide the development of new features and functions.

User stories by persona refer to a series of "I need to do X" statements — collectively termed user stories — that are offered from the perspective of an individual who represents a specific user persona. This user's "I need to do X" statements are offered with the assumption that the user is interacting with a software platform, mobile app, data management platform, web app portal, reporting and analytics platform or another technology that's part of a Digital Transformation project.

The goal is to capture a simple, clear explanation of a specific feature or functionality. These insights can be used to develop the project's software requirements document (SRD) and will also inform the functional acceptance criteria with supporting notes and data.

User paths, user profiles, user stories and user personas are all essential to the success of your development project. Highly-detailed user definitions will drive the creation of a platform that's intuitive, engaging and user-friendly.

Consider these questions:

- **Who are your typical users on the platform?**
- **What are the roles of the different users who will be interacting with the UI?**
- **What are the unique needs and requirements for each user persona?**
- **How is each type of user utilizing the platform?**
- **What are the priorities and goals for each type of user?**
- **What pain points will the software address?**

User profiles are amongst the most important information in a business requirements document. If you intend to maximize ROI, streamline processes, boost efficiency and drive greater user adoption and productivity levels, then your development partner needs a clear and accurate view of the different user profiles. Beyond this, you should convey information about their broader objectives and common challenges and pain points — if they are to create an engaging, user-friendly software platform. A single miscommunication on this point can be catastrophic for user adoption rates. You could end up with a beautifully-built platform that just doesn't meet your users' needs in an efficient, user-friendly way.

Improved productivity and increased ROI are two primary motivators for deploying new technology. But a lack of clarity surrounding users and their needs can result in the creation of an interface that's difficult to use or missing essential functionalities and features. This translates into project delays, a higher-than-expected cost and lots of frustrations. Yet this is all avoidable if you provide a clear user profile.

BRD Section 8: Current and Future Process Flow Diagrams

Workflows and process flows are essential aspects for every Digital Transformation project. This is true of the processes and workflows that are occurring within the actual platform and the external process flows and workflows that users are performing outside of the platform. This is one of the most useful and critical aspects of the BRD. Most people think in pictures and when this section is done well, all stakeholders and technology partners will rapidly find their way to the same page when it comes to current and future states of business process flow.

Workflows are more localized and highly-focused tasks that involve something such as a step-by-step process within a CRM's email marketing module. Conversely, a process flow typically entails a broader scale and may involve multiple platforms or systems. An example of a process flow would be a logistics company's process for getting a freight shipment from point A to point B. This kind of process would involve multiple shipping companies, with multiple smaller processes occurring within the larger processes occurring within the larger process flow.

Diagramming makes it much easier to depict workflows and process flows, especially when there are multiple variables and potential for multiple courses of action and conditional factors. Flowcharts can be used to depict processes and workflows for the creation of user journey graphics.

User Interfaces

Discuss your user interface and the UI architecture. For example, your company may have several different user types, with varying capabilities/access, which would need to be taken into consideration when developing and testing your new software platform.

Hardware Interfaces

Offer an overview of the exact hardware that your company currently uses (and, if relevant, will be utilizing in the near future). This is also a good time to discuss any devices or equipment that would require integration or compatibility with your new software system, such as point of sale hardware or industrial equipment.

Integrations With Other Platforms

Discuss the integrations that you'll require, whether it's with;

- **Marketing platforms such as Salesforce or Hubspot;**
- **Data and analytics platforms such as PowerBI or Tableau;**
- **Accounting and billing systems;**
- **Data providers;**
- **ERP and CRM platforms; and**
- **Inventory management or point of sale systems.**

To complete this segment of the business requirements document, make a list of all the third-party systems or solutions that your company utilizes; chances are good that you'll need to address integration for each of those platforms. It can be helpful to discuss this topic with various department / management heads, as they'll have a good sense of whether they are aware of any additional platforms that may require integration.

Communications Interfaces

Would your enterprise platform need to be integrated with email or SMS alerts? Would messages sent within the new software system need to be outputted to a third-party app or platform? Consider how users will communicate within the software interface and how that information will flow in, out and through the platform. Does the platform need a communications module like SayHey Messenger®? Visit SayHeyMessenger.co to learn more.

BRD Section 9: Security Requirements

Security requirements are an important consideration when it comes to achieving regulatory compliance and for maintaining more general cybersecurity best practices.

This section will address the security requirements for your custom software platform. The nature of your business and its operations will be a major determiner when it comes to your security risk. A company that deals in classified operations (like the government and military) or collects lots of sensitive, personal and financial information — data that would be valuable to hackers — will require extensive security measures such as encryption, geofencing, multi-factor authentication, biometric authentication and a variety of other security features. In other cases, more standard security measures may be sufficient.

Some industries — such as the healthcare sector and the finance industry — are subject to some very stringent regulations surrounding data handling, compliance requirements, and specific security protocols. If your organization is required to adhere to specific security guidelines, this is where that information should be discussed.

You may be uncertain about exactly what type of security requirements you'll need to implement on your new software platform. If this is the case, you may use this section to discuss vulnerabilities and areas of concern. Your development team will be well-equipped to offer security requirement recommendations.

BRD Section 10: Evolution And Future Scaling

Is your company rapidly growing and expanding? Are you planning to add a new division to your business in the next year or two? Is there a possibility that your operations could evolve and change over time?

The best custom software platforms are scalable and evolution-friendly. Ideally, your development team will be aware of your plans or possibilities for future evolution and scaling so they can build the platform in a manner that allows for easy expansion or modification.

In this section, take some time to discuss where your company will be in six months, one year, five years and ten years. Remember to discuss changes in

operations, company size, company offerings and company processes. Consider how these future plans could affect your software needs. For example, you may be planning to add a new management team, which would necessitate the creation of a new type of user role with some new capabilities. Or perhaps you'll be migrating to cloud hosting and a cloud data platform within the next 12 months. In this case, the 7T team might recommend placing your new software platform directly onto a cloud platform such as Snowflake, even if it occurs a few months ahead of your organization's official shift to the cloud.

What Happens Once Your Business Requirements Document and Scope of Work (SOW) is Done?

After you've completed the business requirements document and a scope of work (SOW) is agreed upon, the development team will begin establishing a timeline and work schedule for the project. You'll also receive a customer agreement based upon the requirements document and SOW. The SOW should contain all details of the BRD as well as specific delivery schedules, total development investment, deployment and server prices, and finally ongoing support plan with associated costs.

Changes are to be expected, so if there is a modification to your software project, it's important that you notify the development team as soon as possible. For small, fairly minor edits — such as a font edit, text color change or another small task that can be performed in the span of a couple hours or less — the development team will typically just perform the modifications without any edits to your documentation or incurring additional costs.

In the case of a more substantial edit or modification, 7T will conduct a scoping session to ensure the development team and client are on the same page concerning the changes. Once the issue is ironed out, a Change Request or CR SOW — separate from the original SOW document — is drafted. The modification will then be worked into the schedule. In cases of more significant and critical edits, your technology partner may add another developer to the project to ensure the project remains on-schedule.

DIGITAL TRANSFORMATION
DRIVEN BY BUSINESS STRATEGY

How a Business Requirements Document Maximizes Your Chances of a Successful Project With High ROI

A detailed, well-written business requirements document can go a long way toward ensuring that your development project progresses smoothly. When you clearly define the scope and articulate your needs for the custom software platform, it's far more likely that your developers can provide an accurate idea of budget, timeframe and development schedule. Otherwise, you could find yourself facing unexpected delays and unexpected costs that may arise as you and your development team realizes that something was omitted, overlooked or misconstrued.

It's possible — likely, even — that several individuals will need to collaborate in order to develop an accurate software requirements doc. Technical knowledge is required to address some issues, while department heads or representatives from various company departments can be useful for providing insight into their workflow, processes and needs in a software platform. Therefore, you should view the requirements document development process as a collaborative, team effort.

Additionally, don't hesitate to include supplementary documents and resources for your developers. Examples of various features, functionalities and even aesthetics can save time and add clarity to your project.

At 7T, we're well-known for our ability to guide clients through every step of the mobile app and software development process, including the process of compiling a requirements document. Our team is committed to providing innovative digital transformation solutions, including ERP and CRM development, cloud solutions, SaaS solutions, custom software development, mobile app development and beyond. To learn more, we invite you to contact us today by submitting a contact form or by calling +1-214-299-5100.

GLOSSARY OF TERMS

How to Create a Business Requirements Doc

In-Scope Features
In-scope features or functionalities are present locally within a platform or workflow. They are usually organized by a user's role or position. Examples include the ability for a bookkeeper to view historical timesheet data, perform leave request form management tasks and the ability to view and manage PI buffer amounts.

Out-of-Scope Features
Out-of-scope features and functionalities are present on external platforms, such as related mobile apps, integrations with third-party SaaS portals, regulatory compliance risk management systems and platforms used for pre-hire processes like background checks.

Scope of Work (SOW)
The scope of work (SOW) document is a component of a contract document or formal written agreement. The SOW details the exact nature and features of the work that will be performed, with notations on milestones, reporting and deliverables. The document will also include information on who will perform specific phases / sprints, plans for what will and what will not be included in the project. The SOW will also usually include information on timelines, costs and the processes that will be used to request modifications.

User Stories
User stories refer to a series of "I need to do X" statements that are offered from the perspective of an individual who represents a specific user persona. This user's "I need to do X" statements are designed to provide a simple, clear explanation of a specific feature or functionality within an enterprise software platform, mobile app, or other Digital Transformation platform. These insights are leveraged as a client creates a requirements document (SRD). User stories also come into play during the development of functional acceptance criteria.

User Paths / User Journeys
User paths refer to the series of localized steps that a user takes after they arrive at a website, software platform, mobile app or other digital platform. The user journey refers to the broader user experience, including how they learned about something such as a mobile app or SaaS platform, what actions they took while engaging with that platform and the point at which they ultimately ended the engagement. User journeys and user paths offer important insight into the efficacy of UI/UX design, advertising and marketing campaigns and efforts to increase user adoption rates.

GLOSSARY OF TERMS

How to Create a Business Requirements Doc

Workflow

A workflow refers to the management of a repeatable step-by-step process that's used within a business setting to achieve a very specific objective. Workflows can serve as a mechanism for managing product manufacturing, rendering a service or processing data, amongst other things. Workflows are very narrow and precise in nature. You can think of a workflow as being a very localized mechanism within a larger, broader process flow.

Process Flow

Process flows refer to a set of broader, repeatable step-by-step tasks that are used to achieve a business objective. It's common to have multiple workflows within a process flow. For instance, you may have a process flow for email marketing that begins with a workflow for running adverts on social media. Those adverts then send users to a landing page with a form. There's another workflow for managing the forms and the data that is collected with those forms. Then, prospects enter workflows related to the organization's marketing funnels, marketing email campaigns and lead engagement activities. Collectively these workflows comprise the organization's email marketing process flow.

UI

UI or user interface is part of the UI/UX equation. The UI refers to the actual elements that a user interacts with on a platform such as a software system, mobile app, website or web portal. User interface has a tremendous impact on user experience or UX, and thus, affects strategically-essential metrics such as user adoption rates and ROI.

UX

UX or user experience is the other half of the UI/UX equation. The UX refers to the actual experience of interacting with technology on something such as a website, mobile app, software platform or web-based portal. UX analysis involves performing an analysis of the user, their needs, expectations, challenges, limitations and overarching objectives. The manner in which users engage with the UI has a major impact on design, user adoption rates, strategy development and ultimately, Digital Transformation project ROI.

Example Business Requirements Document
Payroll Automation

Table of Contents

1 Company & Business Overview

This section provides a high-level overview of your organization, business processes and the business challenges you are seeking to address with the proposed effort.

1.1 Overview of current business and business processes

This section provides a high-level overview of your business and the main business processes that drive your business.

Business overview: StaffTech is an IT staffing and placement company. Our main business process involves the recruiting of IT consultants and placing them on our clients' projects. Our consultants work on an hourly basis for our clients. StaffTech's back office provides several functions in support of our business:

- Our Billing Department gathers timesheets from our consultants and invoices our clients for services rendered
- Our Compliance Department manages Leave Requests and also ensures that our consultants are in compliance with all federal regulations relating to employment and immigration.
- Our Payroll Department manages the disbursement of paychecks, management of PI buffers, etc.

1.2 User Personas or Roles

This section lists the different set of user personas or roles that will need to be supported by the proposed system. Please provide a list of user personas/roles and a high-level outline of what role they play in your current business process.

<u>List of User Personas/Roles:</u>

1. Consultant: Provides IT services to StaffTech clients.
2. Compliance Admin: Collects and maintains appropriate documentation related to consultants' compliance with labor & immigration laws.
3. Payroll Admin: Supports the bi-weekly payroll process.
4. Payroll Super Admin: Owns all responsibility for the payroll process and supervises the payroll admins.
5. Billing Admin: Responsible for gathering consultant timesheets and billing clients for IT services rendered.
6. Billing Super Admin: Supervises the timesheet and billing process.

1.3 Business Challenges & Needs

This section provides an overview of the shortcomings of your current business processes and any existing applications. Also include a summary of how you envision the new/proposed application will address existing shortcomings and challenges.

StaffTech's faces the following challenges with our existing processes and applications:

1. Inefficient process for gathering timesheets: The process of gathering consultant timesheets and client approval of these timesheets is conducted using email which makes it a slow and error-prone process.
2. Slow and time-consuming payroll process – takes several days to complete payroll for each pay period.
3. Leave Tracking: The tracking of consultant vacation plans is currently done using Excel spreadsheets which makes it difficult to maintain and share, between the stakeholders, an accurate, up-to-date status of consultant vacation plans and return-to-work dates.

As part of the proposed effort, StaffTech seeks 7T's help with the design and implementation of a user-friendly, secure and highly functional web portal that will support consultants as well as back-office personnel. The web portal will need to support new and improved business processes that will address the current shortcomings listed above. The web portal will need to have two different access points: An administrative portal for the exclusive user or StaffTech's back-office staff and a client portal for use by our consultants.

2 Project Summary

This section captures a high-level overview of the project including the business needs for the custom software development project (strategic/compliance/financial/contractual), main functionality to be achieved by the platform, pain-points being addressed via the proposed solution, and any anticipated timelines.

2.1 Overview of In-Scope Features

This section lists the scope items to be addressed with the execution of the project; this includes both in-scope & out of scope features, the applications/interfaces that will be impacted, identifying all project stakeholders & addressing project constraints.

This proposed effort will address the following high-level features and requirements:

1. Consultant-facing functionality in support of payroll automation. Features supported include the ability for consultants to:
    a. Submit hours on a weekly basis.
    b. Upload approved timesheets.
    c. View paysheets.
    d. Request PI Buffer withdrawals.
    e. Receive and respond to Notifications.
    f. Submit Leave Requests.
2. StaffTech back-office support for various roles including:
    a. Payroll Supervisor.
    b. Payroll Manager.

c. Billing Analyst
d. Billing Supervisor
e. Compliance Admin
f. Portal Admin

3. Integration with HRMS System for periodic import of data from HRMS System.

Features supported for each role are outlined in more detail in the "Details of In-Scope Features" section below.

2.2 Out-of-Scope Features

The following features and integrations are out of scope:

1. Mobile applications (for consultants or StaffTech) will not be supported.
2. Integrations with ADP or Ceipal.
3. Pre-hire process.
4. Processes related to Compliance with the exception of Leave Tracker.

3 User Stories by Persona

This section captures a simple explanation of the feature/function to be developed from a user perspective, along with the functional acceptance criteria & supporting notes/data considerations.

3.1 Consultant User Stories

- As a CONSULTANT, I need to be able to submit my hours on a weekly basis to the payroll team
- As a CONSULTANT, I need to have a place to submit my client-approved timesheet on a weekly/biweekly/monthly basis for the billing team to access and bill the client (in PDF, jpg, png, or other format)
- As a CONSULTANT, I want to be able to see my paysheets and timesheets for historical pay periods
- As a CONSULTANT, I need to be able to see if payroll makes changes to my hours
- As a CONSULTANT, I would like to easily view the contents of my PI buffer if I have one
- As a CONSULTANT, I need to be able to request a withdrawal from my PI buffer to be paid out all at once or over multiple paycheck periods
- As a CONSULTANT, I want to choose texts, emails, or both, (required) to be notified about submitting hours or missing timesheets
- As a CONSULTANT, I need the webapp to be mobile-friendly so that if I click on the link from the text, I can submit my hours on the go
- As a CONSULTANT, I need to be able to fill out and submit the leave request form Leave Request Form

3.2 Payroll Super Admin User Stories

- As a PAYROLL SUPER ADMIN, I need to be notified and able to approve PI Buffer Payout Requests
- As a PAYROLL SUPER ADMIN, I need to be able to address payroll related questions submitted by PAYROLL ADMINS very quickly on payroll submission day before the summary report is generated to send to ADP

3.3 Compliance Admin User Stories

- As a COMPLIANCE ADMIN, I need to be able to receive and approve Leave Requests and have that make an entry in the leave tracker
- As a COMPLIANCE ADMIN, when I approve a Leave Request, I need to have the system start a workflow that notifies the Payroll Admin to make their notes and updates on the Leave Tracker
- As a COMPLIANCE ADMIN, I would like to be able to login to check buffer and deduction amounts

3.4 Payroll/HR Admin User Stories

- As a PAYROLL ADMIN, I need to be able to open a new payroll period
- As a PAYROLL ADMIN, I need to be able to set up new hires as TempWorkings or StaffTech and as Hourly, Performance Incentive $, or Performance Incentive %

- As a PAYROLL ADMIN, I need to be able to set up new projects for employees based on placement forms, which includes a new state for tax purposes (state info is also updated in ADP for Federal and SUI taxes) (probably done in HRMS System and fed into payroll system)
- As a PAYROLL ADMIN, I need to be able to make immigration wage changes and updates from wage worksheets for H1B base wages and PERM 'green card' wages (not in HRMS System)
- As a PAYROLL ADMIN, I need to be able to notify hourly employees to submit their weekly hours and timesheets
- As a PAYROLL ADMIN, I need that a workflow that notifies me about PI Buffer Payout Requests, notifies the PAYROLL SUPER ADMIN and have that update the payroll summary that goes out to ADP
- As a PAYROLL ADMIN, I need to be able to note when payments have not been received from the client
- As a PAYROLL ADMIN, I need to have a workflow area to collect a list of requests, placement forms, consultant time change requests from BILLING ADMIN, project end dates,
- As a PAYROLL ADMIN, when a new project is added to HRMS System, I need a workflow to start to check that employees, start dates and wages are correct and I can make updates in ADP
- As a PAYROLL ADMIN, I need to be able to track when employees start and come back from leave and be notified to make changes like stopping deductions in ADP
- As a PAYROLL ADMIN, I need to be notified to stop deductions and other processes when an employee is off a project or resigns
- As a PAYROLL ADMIN, I need to be able to submit a list of questions or issues to the PAYROLL SUPER ADMIN on payroll processing day prior to the payroll summary being generated for ADP (i.e. if a project or owe amount is negative, if hourly people are not on a project, etc.) (GENERATE EXCEPTION REPORT)
- As a PAYROLL ADMIN, I need to be able to get the PayRoll Summary so employees can get paid
- As a PAYROLL ADMIN, I need to be able to close a payroll period and have the system generate the paysheets for CONSULTANTS

3.5 Admin User Stories

- As a BILLING ADMIN, I need to be able to notify CONSULTANTS to submit their Approved Timesheets on a regular basis
- As a BILLING ADMIN, I would like for the system to convert any timecard submissions to PDF format so that I don't have to spend 60% of my time doing so manually
- As a BILLING ADMIN, I need to be able to easily follow up with individuals who are still missing timesheets after the weekly notification
- As a BILLING ADMIN, I would like for the CONSULTANTS to be sorted by StaffTech and TempWorkings
- As a BILLING ADMIN, I need the CONSULTANTS to be tagged with an ID that marks the frequency that the client is billed which will indicate how often I will need to ask for timesheets (i.e. Weekly, Biweekly, Monthly etc.)
- As a BILLING ADMIN, I need to be able to manually add timesheets to the system for the exceptions

- As a BILLING ADMIN, I need the storage of the PDFs to be easily accessible, as the overseas server is very slow and glitchy currently
- As a BILLING ADMIN, I need to be notified when the data from a new Placement form in HRMS System is pushed to the system so that I can ensure the CONSULTANT's project is setup correctly

3.6 Billing Super Admin User Stories

- As a BILLING SUPER ADMIN, I need to be able to Batch export the PDFs by Billing Branch from the system to upload into HRMS System

- As a BILLING SUPER ADMIN, if I change a CONSULTANT'S hours, I need that action to start a workflow to notify the PAYROLL

4 Details of In-Scope Features

The following section defines the requirements for the features or functions to be delivered for one or more applications identified in the project.

4.1 Consultant

4.1.1 Ability to submit hours on a weekly basis to the payroll team

- **Description**: logging hours for a two week pay period separated by each week and project they are assigned to (projects pull from HRMS System data). Can also log hours to 'sick time' and add notes for the week if further explanation is needed.
- **Business Rules:** can submit zero hours, cannot leave it blank
- **Data elements captured:** number of hours per week per project, sick hours, notes.

4.1.2 Submit client-approved timesheet on a weekly/biweekly/monthly basis in PDF, . jpg, .png, etc. formats

- **Description:** upload an approved timesheet for each week per project. Timesheet can be uploaded as .jpg, .png, .pdf etc. and is converted into PDF format and saved to the DB with naming conventions specific to the consultant, week and project.
- **Business Rules:** section is gray until a timesheet is uploaded, and then turns blue on upload. If hours are submitted without a timesheet, the section turns orange with a warning symbol.
- **Data elements captured:** timesheet converted and named PDF

4.1.3 View paysheets and timesheets for historical pay periods

- **Description:** Paysheet is a running total of all of the consultant's pay periods for the year to date, including the pay period, the paycheck date 'Pay Date', the amount paid, the hour total for that amount paid, and any sick leave hours. There will be a details page for each pay period that includes the information collected from the consultants end for each project (hours and timesheets), whether that project has been paid by the client, administrator adjusted hours and amounts, the pay rates and notes.
- **Business Rules:** Historical paysheets are grouped by year and collapsed at the bottom of the page
- **Data elements captured:** no input is captured, view only

4.1.4 View PI Buffer amount

- **Description:** section in the header that displays the available PI Buffer for the Performance Incentive consultants
- **Business Rules:** not displayed for the Hourly consultants. Data for buffer will be uploaded to the HRMS System or system DB by the billing team each period
- **Data elements captured:** no input is captured, view only

4.1.5 Request PI Buffer withdrawal for entire amount or over multiple paycheck periods

- **Description:** below the buffer amount, the consultant is able to send a request to the admins for a PI Buffer payout to be added to their next paycheck or in partial amounts over the next few pay periods.
- **Business Rules:** Display the next three pay periods, amount in buffer can be split in any form over those periods
- **Data elements captured:** choice between Full Payment or Partial Payment. If Full Payment, apply the total available amount to the next pay period. If Partial, inputs will be the amounts they wish to add to each specified future paycheck

4.1.6 Choose SMS, Email, or both for Consultant notifications

- **Description:** On the Profile page, consultant can select how they would like to receive external notifications apart from the system notifications.
- **Business Rules:** Consultants may not opt out of notifications. They must select text, email or both.
- **Data elements captured:** Notification Preferences: texts, emails, or texts & emails.

4.1.7 Fill out and submit Leave Request

- **Description:** Consultants may submit a request for leave from the Profile Page. This request is sent to the Employee Supervisor for approval. Once approved by Employee Supervisor, it goes to compliance work queue for further action.
- **Business Rules:** all fields are required, e-signature at the bottom
- **Data elements captured:** Inputs are for the Leave tracker on the admin portal. First/Last day of Leave, Exact Return to Work Date, traveling outside US Y/N, date of re-entry, Working remotely while on leave Y/N, if yes dates of remote work with ability to add multiple date ranges, paid while on leave Y/N, reason for leave: marriage, sick/medical, vacation, stamping, other w/ notes required, current address and contact details, address and contact details while on leave, e-signature. Compiled onto a PDF file to print if necessary.

4.1.8 Receive notification on approval or denial of leave request

- **Description:** when the Employee Supervisor approves or denies a leave request, the consultant who requested receives a notification and the Leave history section is updated to show approved or denied, then goes to the compliance and payroll queues.
- **Business Rules:** must be approved by Employee Supervisor, listed as submitted or pending until approval. If denied, ability to view a note from the admin requesting them to edit and resubmit or to contact compliance.
- **Data elements captured:** no input is captured, notification only, when clicked – navigates to profile page with Leave History section

4.1.9 Edit and resubmit Leave Request Form

- **Description:** in the Leave History section on the Profile Page, on open/pending requests, a more options button allows for printing the request or editing and resubmission
- **Business Rules:** editing triggers a required reapproval from the Employee Supervisor
- **Data elements captured:** any fields in the original request form may be editing for resubmission

4.2 Payroll/HR

4.2.1 Employee Supervisor

4.2.1.1 PI Buffer notification and approval

- **Description:** when a consultant makes a PI Buffer Payout Request, the Employee Supervisors receive a notification and work queue item to approve or deny the request
- **Business Rules:** Requests only go to the Employee Supervisors over the company they work for (i.e. StaffTech vs. TempWorkings). Approval or denial sends a notification back to the consultant and also adds as a work queue item and notification to the Payroll Manager's list if approved
- **Data elements captured:** Approval or denial of request

4.2.1.2 Leave Request Approval

- **Description:** when a consultant submits a leave request in the consultant portal, a work queue item is created for the Employee Supervisor to review the request and approve or deny it. If approved, a work queue item is created for the Payroll Manager and for the Compliance Admin, and the information creates a record in the Leave Tracker. If denied, a note is added and the consultant is notified to either add information or make changes and resubmit or to contact the Employee supervisor for more information.
- **Business Rules:** if the request is denied and resubmitted, the resubmission will create a new work queue item and must be approved by the Employee Supervisor
- **Data elements captured:** Approval or Denial and note

4.2.1.3 NLE Approval based on Project End

- **Description:** When a project end date is added to HRMS System, a work queue item is created for the Employee supervisors to approve or deny sending the employee to 'No Longer Employed' status. If yes, there needs to be a yes/no for eligible for rehire and experience letter. Once in NLE status, Payroll Manager, Compliance Admin, and Billing Analyst is notified in their work queues. If remain active, a project end queue needs to go to specific Admin users to take action in their own queue
- **Business Rules:** NLE status change is marked with a date/time stamp for record purposes
- **Data elements captured:** approval or denial of changing employee's status to No Longer Employed

4.2.1.4 Exception Report actions (approve, deny, edit amount, notes)

- **Description:** At the end of each pay period, a list of exceptions are created in the exception report that includes mainly Paysheet balances that are in the negative. Payroll manager makes notes on each and sends them to a queue for the Employee Supervisor to select an action and/or make notes.

- **Business Rules:** Employee Supervisor can view the exception and go to the corresponding consultant's paysheet to view. The actions in the dropdown are selected and submitted. Once submitted, they are updated on the Exception report and a notification is sent to the Payroll Manager
- **Data elements captured:** the actions in the dropdown are: approve, deny (with a note), or an adjusted dollar amount to pay (with a note).

4.2.2 *Payroll Manager*

4.2.2.1 *Send 'Hours Submission' reminders to Consultants*

- **Description:** in addition to the regular programmed reminders, the Payroll Manager is able to send out notifications to consultants who are missing their weekly hours submission.
- **Business Rules:** notifications sent only to the consultants missing hours. If they are missing hours, a red x is displayed on the Consultants page in the Hours column
- **Data elements captured:** notification request, Consultants missing hours

4.2.2.2 *Workflow Queue*

4.2.2.2.1 New employee notification and setup

- **Description:** a status field in HRMS System will be monitored for new entries that will signal a new employee being added to the system. When this occurs, the Payroll Manager should be notified in the work queue so that they can check their profile settings and set up the employee in ADP. Item can be marked as 'Complete'
- **Business Rules:** fields from HRMS System to be specified with a mapping document
- **Data elements captured:** task marked as complete

4.2.2.2.2 PI Buffer Requests

- **Description:** When the consultant requests a PI Buffer Payout, and the Employee Supervisor approves, the Payroll Manager is notified to ensure that the amount is applied properly to the future paychecks. Item can be marked as 'Complete'
- **Business Rules:** Payroll Manager should be notified on approval or denial
- **Data elements captured:** task marked as complete

4.2.2.2.3 New Placement Form/Project

- **Description:** a status field in HRMS System will be monitored for new entries that will signal a new project being added to the system. When this occurs, the Payroll Manager should be notified in the work queue so that they can check the project is set up correctly with the corresponding consultants assigned to it. Item can be marked as 'Complete'
- **Business Rules:** fields from HRMS System to be specified with a mapping document
- **Data elements captured:** task marked as complete

4.2.2.2.4 Project End Dates

- **Description:** a status field in HRMS System will be monitored for entries that signal a new Project End Date has been added to a project, the Employee Supervisor either notes the employee as NLE (eligible for rehire or not) or as 'Remain Active'. The Payroll Manager should be notified in the work queue so that they can check the project pay will end correctly with the corresponding consultants assigned to it. Item can be marked as 'Complete'
- **Business Rules:** fields from HRMS System to be specified with a mapping document

- **Data elements captured:** task marked as complete

4.2.2.2.5 No Longer Employed

- **Description:** If the Employee Supervisor receives a Project End notification and sends the Consultant to either NLE status or Remain Active. If NLE, the Payroll Manager is notified and ensures that the 'eligible for rehire' option is correct and takes action on in other systems.
- **Business Rules:** fields from HRMS System to be specified with a mapping document
- **Data elements captured:** task marked as complete, Consultant is paid until owe amount is zeroed out.

4.2.2.2.6 Consultant retroactive time changes from Billing Team

- **Description:** The Billing Supervisor and Analyst is able to make changes to the consultants' submitted hours if the client contests the hours submitted once the invoice is received. Those changes should trigger a notification in the Payroll Manager's work queue so that they can ensure the adjusted hours will pay correctly on the next paycheck. For Hourly Employees, changes applied to next paycheck. For Performance Incentive Employees, the changes are applied to the Owe amount. Item can be marked as 'Complete'
- **Business Rules:** hour changes are reflected in the Adjusted Hours Column on the Paysheet Details
- **Data elements captured:** task marked as complete

4.2.2.2.7 Leave requests

- **Description:** When leave requests are approved by the Employee Supervisor and Compliance takes further action. The Payroll Manager is notified on the leave start date in the work queue to go update ADP. Payroll managers and Compliance have the ability to edit a few fields on this sheet to keep track of updates. Item can be marked as 'Complete'
- **Business Rules:** on the Leave Tracker, the Leave End Date, ADP Updated, Paid (y/n/p), Remote Work (y/n), confirmed returned, and comments fields are editable. Once the Leave End Date and the Confirmed Returned fields are both added, the record can be moved to 'Returned from Leave' section
- **Data elements captured:** task marked as complete. Leave End Date, ADP Updated, Paid (y/n/p), Remote Work (y/n), confirmed returned, and comments

4.2.2.2.8 Payroll Questions for Consultants that have a negative Owe Amount or PI Buffer

- **Description:** On the Consultants page, under the Payroll Questions tab, at the end of each payroll period an exception report should be generated for consultants that have a negative balance. The Payroll Manager can add notes explaining the situation and suggesting a fix. Once the notes are added, the questions will be sent to the Employee Supervisors for Approval/denial/adjustment. Once approved/denied it automatically updates in the paysheet and the payroll summary.
- **Business Rules:** Exact calculations will be specified, tentatively if the owe amount is less than the upcoming paycheck amount, they will land on this report
- **Data elements captured:** notes for each entry, questions send to Payroll Supervisor's work queue for input

4.2.2.2.9 Generate and edit Payroll Summary report

- **Description:** A Payroll summary will be generated at the end of each payroll period. This summary is a combination of fields pulled from the HRMS System DB, pulled from the new Payroll system, date range calculations, and generated batch numbers. Certain fields in the Summary are editable with the option to return to the original, system generated summary in case of editing errors. The Summary can also be downloaded to the local device as a CSV file. A historical file will be available for past payroll periods at the bottom of the page, but are not editable once the pay period is closed.

- **Business Rules:** exact fields and contents will be provided in a mapping document
- **Data elements captured:** edited fields, download requests

4.2.2.2.10 Export ADP Payroll Summary report to CSV

- **Description:** the ADP Payroll Summary report will be generated based on the Payroll Summary from 4.2.2.4. The report is a stripped down version of that report formatted based on the specifications for ADP's upload process and is not editable. It is available to be downloaded as a CSV, and the Payroll Manager will then manually upload that CSV into ADP themselves.
- **Business Rules:** exact fields and contents will be provided in a mapping document
- **Data elements captured:** download requests

4.3 Billing

4.3.1 Billing Analyst

1.1.1.1 Send 'Timesheet Submission' reminders to Consultants by Billing Branch (Line of Business)

- **Description:** in addition to the regular programmed reminders, the Billing Analyst is able to send out notifications to consultants who are missing their weekly timesheet submission. Each consultant is classified in a Billing Branch or Line of Business (LOB) which the Billing Analyst uses to identify when to send out timesheet reminders. In the send Timesheet Notification, they will be able to send out notifications based on missing and LOB.
- **Business Rules:** notifications sent only to the consultants missing timesheets. If they are missing timesheets, a red x is displayed on the Consultants page in the Timesheets column. Consultants are sortable and notified based on LOB
- **Data elements captured:** notification request with LOB, Consultants missing timesheets

1.1.1.2 System conversion of all timesheets to PDF file with naming conventions

- **Description:** See Item 3.1.2;

1.1.1.3 Manually add missing timesheets

- **Description:** In rare exceptions, the Billing Analyst will be able to submit timesheets for projects and pay periods on behalf of the consultant through the Timesheet view in the consultant's page.
- **Business Rules:** Timesheet can be uploaded as .jpg, .png, .pdf etc. and is converted into PDF format and saved to the DB with naming conventions specific to the consultant, week and project.
- **Data elements captured:** timesheet converted and named PDF

1.1.1.4 Workflow Queue

1.1.1.4.1 New Employee

- **Description:** a status field in HRMS System will be monitored for new entries that will signal a new employee being added to the system. When this occurs, the Payroll Manager should be notified in the work queue so that they can check their profile setting. Item can be marked as 'Complete'
- **Business Rules:** fields from HRMS System to be specified with a mapping document

- **Data elements captured:** task marked as complete

1.1.1.4.2 New Placement Form

- **Description:** a status field in HRMS System will be monitored for new entries that will signal a new project being added to the system. When this occurs, the Payroll Manager should be notified in the work queue so that they can check the project is set up correctly with the corresponding consultants assigned to it. Item can be marked as 'Complete'
- **Business Rules:** fields from HRMS System to be specified with a mapping document
- **Data elements captured:** task marked as complete

4.3.2 Billing Supervisor

1.1.1.5 Batch Export timesheet PDF's by Billing Branch ID

- **Description:** At the end of each billing period, the Billing Supervisor downloads the timesheets for each consultant and uploads them into HRMS System to be added to the invoicing process to the clients. The timesheets will be batched by pay period month and Billing Branch ID. ??
- **Business Rules:** ZIP file download to local machine with naming conventions
- **Data elements captured:** requested branch and month, download ZIP file request

1.1.1.6 Edit Consultant's hours with a note, trigger a workflow notification to Payroll Managers

- **Description:** The Billing Supervisor is able to make changes to the consultants' submitted hours if the client contests the hours submitted once the invoice is received. The changes can be made on the timesheet tab of the Consultant page. The changes should then trigger a notification in the Payroll Manager's work queue so that they can ensure the adjusted hours will pay correctly on the next paycheck.
- **Business Rules:** Hours changes must include a note of explanation when submitted, will be reflected in the Adjusted Hours Column on the Paysheet Details
- **Data elements captured:** adjusted hours, notes field

4.4 Compliance Admins

4.4.1 Receive and approve/deny Leave Requests, log in Leave Tracker

- **Description:** When a Leave Request is approved by the Employee Supervisor, Compliance is notified and a work queue item is added. Details of the full request are available to view and download as a PDF. Approval also adds the record to the Leave Tracker and triggers a notification and work queue item for Compliance and the Payroll Manager
- **Business Rules:** require a custom note on denial
- **Data elements captured:** approve/deny action, custom note

4.4.2 View only access to Paysheets and PI Buffer amounts

- **Description:** the Compliance Manager has permissions to search for specific Consultants on the Consultants page and view their profile, Paysheets and PI Buffer Amounts. The only editable fields for the Compliance admins is adding deductions.
- **Business Rules:** no access to send notifications or edit hours. Only adding deductions
- **Data elements captured:** deductions

4.5 Portal Admin

This is an StaffTech employee responsible for maintaining the portal.

4.5.1 User Authentication & Roles

- Initial list of users will be pulled from u/staff for consultants? Manual entry for admins?
    - o Initial upload to come from a list of active employee IDs in ADP and the data for each match in HRMS System
    - o Manual entry for admins
    - o Terminated employees should come from the employee supervisor NLE approval in the queue. Maybe have an additional queue item for final payouts, where the employee's access is then turned off at that time.
- How will the list of users be updated? How will consultants get sign-up invitation?
    - o Ongoing new users can be added from HRMS System
    - o Sign up instructions can be sent out during the onboarding process from HR
- OTP (one-time password) for security

4.6 Batch/CRON Jobs

- Implementation data migration of current population, existing clients, pay rates etc.
- Job to periodically pull new and updated consultant info from HRMS System
- Email alerts to consultants missing timesheets – on 16th and 1st of every month – or specific to billing branch
- Email alerts 1-2 days before timesheets due
- Manual group notifications for missing data (hours and timesheets)

4.7 Reporting

List of reports the portal admin can generate:

- Consultants who have not set up accounts
- Consultants who regularly submit timesheets and hours late
- Consultant status changes by pay period

External Integrations

- HRMS System – a) Pull data from HRMS System into the portal.

4.8 Logging

- Approval tracking

4.9 Current and Revised Workflow Process for the Consultants and StaffTech Back Office Roles

Include any available business process or data diagrams/flows for the existing system(s) that support the scope of the project in this section. Also provide the desired/revised workflow process.

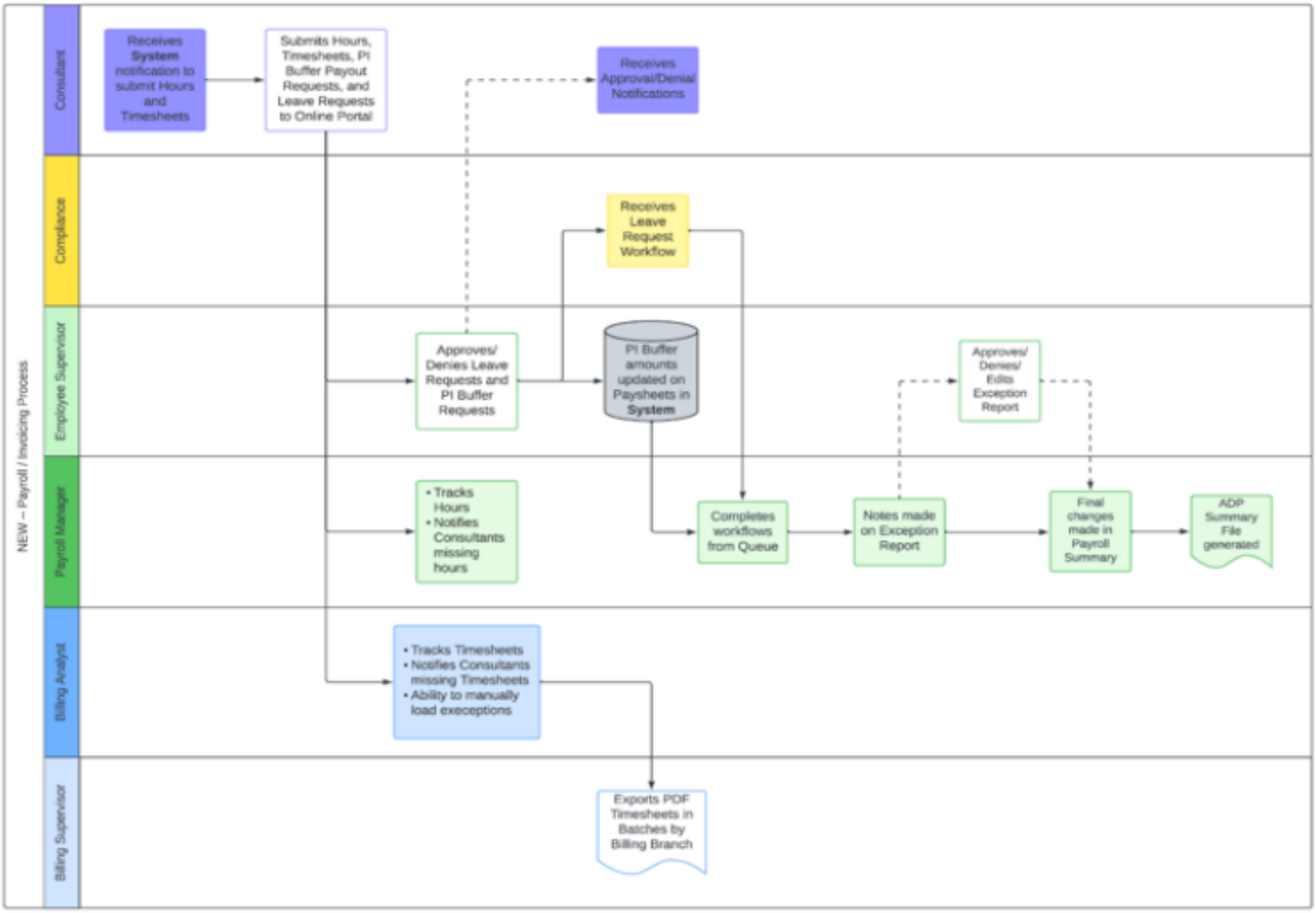
4.9.1 Current Process Flow

Include a process flow diagram for your current (AS-IS) business processes if applicable.

INSERT A COPY OF YOUR CURRENT
BUSINESS PROCESS FLOW IF APPLICABLE

4.9.2 Revised Process Flow

Include a process flow diagram that depicts the revised/desired business process flow.



5 UI/UX Considerations

This section is where you can provide links to relevant apps, software platforms, web apps and other resources that have served to inspire your development project. Add in notations with a goal of clearly articulating what you like and dislike about a particular platform stylistically and functionally.

6 Integrations

Discuss the integrations that you'll require, whether it's with other enterprise software platforms, data providers, industry-specific software such as CRMs ERPs, Analytics platforms or POS systems.

The following are the required integrations for the platform.

- UltraStaff HR System
- PI Buffer data feeds via FTP connection

7 Security Requirements

Security requirements are an important consideration when it comes to achieving regulatory compliance and for maintaining more general cybersecurity best practices. However, if you are unsure of your requirements or even options this section is often best left open and discussed with your technology partner.

No SSO integration or other outside system access is required or allowed in the platform. The platform should be housed in AWS with the following security protocols.

- Enable CloudTrail logging across all of AWS.
- Turn on CloudTrail log file validation.
- Enable CloudTrail multi-region logging.
- Integrate CloudTrail with CloudWatch.
- Enable access logging for CloudTrail S3 buckets.
- Enable access logging for Elastic Load Balancer (ELB).
- Enable Redshift audit logging.
- Activate Virtual Private Cloud (VPC) flow logging.
- Require multi-factor authentication (MA) to delete CloudTrail buckets.
- Turn on multi-factor authentication for the "root" account.
- Turn on multi-factor authentication for IAM

8 Scaling and Product Evolution

In this section, take some time to discuss where your company will be in six months, one year, five years and ten years. Remember to discuss changes in operations, company size, company offerings and company processes.

The number of users is expected to remain relatively consistent, however the data loads and consulting staff it must support is expected to increase 50% per year for the next 3-5 years. To that end the project requires AWS auto-scalers for all servers in a single Region but with Multi-zone deployment. The AWS relational Aurura database should be reviewed every quarter as to capacity and bandwidth.

Next Phase Features that should be considered in the architecture planning for the platform include.

- Mobile applications (for consultants or StaffTech) will not be supported.
- Integrations with ADP or Ceipal
- Pre-hire process related to Compliance and Onboarding
- SayHey Messenger

9 Definitions and Glossary

In this section you provide a clear and concise overview of common acronyms, terminology and other key terms and phrases that you may reference both in other regions of the requirements document and throughout the course of your development project.

--- END OF DOCUMENT ---

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