



APPTIUS REQUIREMENTS TECHNIQUE[®]

The Apptius Requirements Technique is the result of our research combined with development of best practices and several years of practitioner experience. The key to the success our approach is flexibility and adaptability to each situation. In other words we avoid one-size-fits-all methodologies.

Our Approach

The challenge of providing the services needed by our customers to meet their goals requires significant domain expertise in the analysis of business processes, as well as significant depth in facilitation and change management to successfully identify and detail process automation and reengineering opportunities in client environments. As well, the execution of our projects to create high quality outcomes requires a sound knowledge of the client's operations. This means that client subject experts will be a key part of the team.

Apptius's experience is that process automation and reengineering is not simply replacing what exists. Our approach is to first look at what work is required to be done, not how the organization is structured. Organization restructuring recommendations are considered only after the processes and systems necessary to deliver services are validated. The organization may then be redesigned so it best supports that process.

Flexibility and Collaboration

Apptius's general approach to process analysis and requirements definition is based on practicality and employing flexibility and collaboration to respond to organizational differences. For example, in the critical data collection/activity analysis that will be performed early in the project we have found that there is no single methodology that is suitable for all situations. In fact, most data collection/activity analysis methodologies are collections of different techniques that only address certain portions of activity analysis. Merrill applies initiative and thoughtful practices to respond to different situations.

To better understand our approach, consider that the techniques we employ can be grouped into four categories:

1. Observation and Interviewing
2. Modeling
3. Facilitated Group Decision-Making
4. Performance Analysis

We utilize an approach that recognizes that these categories of techniques are not mutually exclusive and are not sequential. In many situations, all four categories of techniques need to be applied to the analysis of a business area.

Cost Effective Use of Resources and Time

Apptius's approach builds on the considerable value from understanding and documenting the current (AS IS) situation to provide accurate descriptions of the way activities are currently performed. In addition to providing a means for bounding, validating, and analyzing activities, our approach permits accurate performance measures of the activity's cost, time, and quality to be developed. This is particularly helpful in identifying and documenting our target (TO-BE) situation or a description of how the activities will be performed in the future, together with the performance measures.

Our approach is respectful of the financial and resource investments of our client's in all projects. It involves the completion of activity analysis and related documentation tasks sufficient to understand work being done. During the performance of this work Apptius carefully avoids the pitfall of applying too much time and effort in AS IS analysis and documentation that is unfortunately too common a practice in business analysis projects. This translates into higher project costs for work that provides a diminished rate of return for the time and dollar investment.



Project Domains:

The detailed assessment of the requirements using our methodology addresses the domains shown below. The report will define the project at a level of specificity and scope that makes it achievable and manageable.

Domains	Description
Business Processes	Defines what the business unit does, how activities are carried out and in what sequence, what rules are followed and the type of results/output obtained. It also addresses process changes that may be required to improve service delivery.
Organization	Defines the people and organization affected by the project, capabilities, roles, team structures and organizational units.
Locations	Defines where the people and technology physically reside such as branch office or vendor sites.
Data	Defines the data elements, relationships, and information that are required by the business operations.
Application	Defines the general nature of the capabilities and user interactions with the software applications and integration to other systems.
Technology	Defines the hardware, system software, and communications infrastructure used to enable and support the solutions.
Opportunities	Business Process Reengineering Technical (Products, Tools, Methodologies) Development Options (buy vs. build)
Risk Analysis	This is the identification of potential issues, risks and options to address these.
Budget Estimate	This is an estimated cost of the project.
Change Management	This defines the method through which changes to the project will be controlled



Report Format & Content

Our Requirements Reports conform to the **ANSI/IEEE 830-1984 Guide to Software Requirements Specifications**. The project team and client stakeholders in the project initiation process agree upon the final report format and content. This format is adapted from the Atlantic Systems Guild® Volere© template.

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Methodology

Apptius' practice is driven by the clear communication of the goals, purpose, outputs, activities and schedules. As well, we identify constraints and risks, and develop responses to manage the impact of these on the completion of the activities.



To introduce and promote our approach, Apptius includes two events at the start of the engagement to commence the process of team building and partnering with our clients. This involves the definition of common goals and objectives to establish process efficiency.

An Executive Project Initiation Meeting: The purpose is to provide an opportunity for the project stakeholders/sponsors to have a high level discussion on the Vision, Goals, Purpose, Outputs and the Indicators of the project. It confirms and qualifies the requirements and establishes priorities.

In addition, project administration processes, e.g. Apptius/Client Change Management process, are defined and approved by the stakeholders. The results of these discussions are then presented to the project team in the Project Initiation Workshop. This includes the leaders of the various activities. During this event our clients identify suitable candidates with the commitment and authorization to work with Apptius's personnel on various sub-project tasks.

A Project Initiation Workshop: This workshop involves the joint project team members. A number of critical events occur during this workshop that focuses on setting the tone, pace and expectations of the project for its members. This includes:

- Communication and understanding of stakeholder views on project scope, goals, objectives and key indicators.

- Introduction of Apptius and personnel.

- Communication of project administration processes, e.g. Decision Management, Change Management, and Budget Management.

- Apptius's methodology review. This provides all project participants with an idea of the approach and tasks.

- Review of the project plan, additions and adjustments.

The project is comprised of four (4) phases:

1. The Discovery Phase

The primary benefit of this phase of the project is a clear and common understanding of the business processes and organizational structure, and how they tie back to our client's objectives. The following outputs are generated from the Discovery Phase include:

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PROJECT CONSTRAINTS

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FUNCTIONAL REQUIREMENTS

7. The Scope of the Work
8. The Scope of the Solution
9. Functional and Data Requirements

2. Requirements Refinement & QA Phase

In the Discovery Phase the business rules were documented in business or natural language and the terms were defined. The objective of this phase is to verify and validate the business roles, processes, and rules with the result that the requirements are clear, unambiguous, and traceable.



Based on the terms defined earlier, the first step here is to build and then verify the class diagram. The completeness and reliability of the meaning of the terms that result from this thorough data analysis will later support the analysis of rules when they are checked for redundancy, inconsistency, and incompleteness. A review is done of the initial workflow documented earlier and potential improvements to the workflow are considered.

3. Non-Functional Requirements Phase

In this phase the following items are addressed and documented:

- Look and Feel Requirements
- Usability and Humanity Requirements
- Performance Requirements
- Operational Requirements
- Maintainability and Support Requirements
- Security Requirements
- Legal Requirements (e.g. PHIA & FIPPA)

Project Issues

- Open Issues
- Off-the-Shelf Solutions
- New Problems
- Tasks
- Cutover
- Risks Analysis and Plan
- Budgetary Cost Estimates
- User Documentation and Training
- Waiting Room

Solution Options

- Ideas for Solutions
- Buy vs. Build
- List of Commercial (COTS) Solutions & Ranking

4. Report Compilation and Acceptance Phase

In this phase the report drafts are created, reviewed with client stakeholders, refined and approved.