



Basic Requirements for Process Automation

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Purpose of this tool

The purpose of this tool is to gain the necessary information we need to provide you with a proposal. This document should also provide a realistic basis for estimating product scope, risks, and schedules.

1) Problem Statement and Vision

A problem statement is a clear concise description of the issue(s) that need(s) to be addressed by our Nimblex Platform. It is used to centre and focus our efforts at the beginning, keep us on track during the effort, and is used to validate that the effort delivered an outcome that solves the problem statement.

Who - Who does the problem affect? Specific groups, organizations, customers, etc.

What - What are the boundaries of the problem, e.g. organizational, work flow, geographic, customer, segments, etc. - What is the issue? - What is the impact of the issue? - What impact is the issue causing? - What will happen when it is fixed? - What would happen if we didn't solve the problem?

When - When does the issue occur? - When does it need to be fixed?

Where - Where is the issue occurring? Only in certain locations, processes, products, etc?

Why - Why is it important that we fix the problem? - What impact does it have on the business or customer? - What impact does it have on all stakeholders, e.g. employees, suppliers, customers, shareholders, etc? Each of the answers will help to zero in on the specific issue(s) and frame the Issue Statement. Your problem statement should be solvable. That is, it should take a reasonable amount of time to formulate, try, and deploy a potential solution.

The following questions will assist you:

Please give us some background and context to better understand your current situation or problem (i.e. problem statement):

- What is the process you wish to automate?

Our application will automate theprocess or procedures.

It will be called the application.

Please tell us the reasons why your organisation needs to automate this process:



- Why does your organisation need this solution?

The solution will help us to.....

When the solution is finished, we expect the application to:



- For the function of this solution, what are you currently using?

Example: We are currently using a spreadsheet, SharePoint, etc.



Tell us about the target users and what roles they will need to play, or their contributions in using the application:

- Who will be the key target users of the application?

The various user groups would be:



- How often will the above users use the application, i.e. the frequency?



Give us an idea of the major features, or the significant functions that you are expecting from your application once it has been configured on the Nimblex Platform.

- Name some key features which you think will be vital to the success of this application:



- When would you like this application to 'Go Live'?



Feel free to add to this section any additional information that you feel is not covered by the above questions:



2) Scope

When we talk about defining the scope, we are talking about developing a common understanding as to what is included in, or excluded from, a project. We are not talking about deciding how long it will take, or how much it will cost. That comes after the scope is defined.

Please define the deliverables that you see as:

- List any additional items you see as 'in scope':
 -

- What is out of scope for this project? I.e.: Integration with other system(s), data migration, etc:
 -

3) Users

We need to understand how users will interact with the solution. This is in relation to their roles within the solution, and what they will be doing when using the solution.

- What each user class can do with each entity and access to reporting
- After having an understanding of all the user classes, try to understand what are the access limitations for each user class
- Always consider administrator class for maintenance purpose
- Consider users access/limitation to pre-existing Nimblex systems

User Group / Class	Characteristics: Why will they use the solution	Number of Users

4) Process Language and Diagram

The purpose of this section is to gain a high level overview and understanding of the process you wish to automate.

Terminology and Definitions

Please help us to understand your definitions and abbreviations better by completing the following table:

Abbreviation	Explanation	Relating to your solution

5) What do we need to keep in mind?

Assumptions

Examples

- *Expertise regarding X will be made available*
- *On-site access will be provided during development of integration*
- *There will be a server environment to install the system onto (as per eBMS Platform Technical specifications)*
- *Backup and disaster recovery will be responsibility of Client once in-site*

Please reply to the above:



Constraints

Examples

- *Application to be considered non-critical*
- *Performance will be limited by hardware and/or VM provisioning*

Please reply to the above:



Dependencies

Is there anything that the system relies on that might change or break?



6) Process Flow Diagram

The process flow diagram is a summary of the boundaries of the product and how this product will be used. A context or flow diagram of the process / system, in relation to other systems. This diagram shows which systems are interacted with, and which are not. By including a system, and then not linking it, you are clearly specifying that any interaction is out of scope.

How to create a flowchart:

https://www.youtube.com/watch?v=JhCcMYLHR_U

<https://www.youtube.com/watch?v=uGPBNw5uwHE>

Please draw and provide us with a business process diagram:



7) Workflow

- *Is there hand-over of work from person to person, e.g. approvals?*
 -
- *Is there escalation of work that has not been processed?*
 -
- *Should reminders be sent under any conditions?*
 -
- *If the answer is 'yes' to above questions, list the answers:*
 -

8) Notifications

Will your system need any email alerts. We don't need to know the in-depth details at this stage, but please provide us with the high-level expectations of any:

- *Automated email alerts needed, and when the business rule will need to trigger them?*
 -

9) Reports

The Nimblex system comes with a capability to create a variety of reports. Please list other reports you need in your system:



Type of Report	Description	Key filter for this Report	Examples of Reports
Dashboard			
Dashboard			
Tabular Reports			
Tabular Reports			
Tabular Reports			
Tabular Reports			

10) Other Project Expectations

Please write a short paragraph regarding your requirements and expectations for each of the following sections.

Integration Needs:

Will your application need to integrate with other software applications within your ICT Environment, e.g. an accounting system, enterprise document management system or ERP?



Security:

Consider and document below your expectations regarding user access, confidentiality, privacy rules, infrastructure, authentication, protection of data, etc.



Data Migration:

Give us an idea of how many records need to be imported once your application is ready. (Please remember that the onus is on you to ensure your data is clean and accurate.)



Hosting:

The following are hosting options we provide:

	EBMS managed infrastructure	Automatic Updates	Dedicated Equipment + Customisable	ISM Assessable
Hosted	✓	✓	✗	✗
Private Cloud	✓	✗	✓	✗
Government Cloud	✓	✗	✓	✓
On-site (Client Hosted)	✗	✗	Depends on your IT environment	✓

Based on the above table, please indicate your desired hosting arrangement:



Is there any specific security requirements from the client side?



If there is already Nimblex instance, will the new system be part of the current instance or it will be a different instance? (Impact license fees)



Training:

Please indicate how many users will need to be trained on your application:



11) Artefacts

- Please provide (and list here) any files or documents which will enhance our understanding of your desired solution. E.g. spreadsheets, reports, paper forms, etc

