



## 1 Introduction

The Requirements Traceability and Verification Matrix (RTVM) is a document that is used to verify that the system being built will satisfy the business requirements. It traces requirements through all phases of the project lifecycle.

### 1.1 Background

[Client] are seeking to replace and better integrate their legacy CRM applications supporting the Participation and Engagement sides of the organisation. These are called ENCORE and STARS and are built on the same technology platform (Stayinfront) but with separate code bases and databases.

The immediate key business objective is the replacement of these legacy applications with Microsoft Dynamics CRM to overcome current system performance limitations and to be able to ensure sustainable, agile and effective business operations by latest end 2011. This will provide a platform for continuous system improvement with priority given to support better integrated ways of working. It is essential that proper consideration be given to the opportunities presented by this transformation, namely:

- Productivity and capability improvements through better integrating the Participation and Engagement business processes, stakeholder (i.e. student and supporter) data and information.
- Downstream business process improvements that are expected to be realised through a review of current business processes, enabled within the new integrated CRM platform.
- Overcoming current performance problems (that are causing a high impact on current operations and staff morale) through the adoption of new, leading technology (Microsoft Dynamics CRM).

### 1.2 Purpose

With a new IT platform we can maximize the use of our resources, be more efficient, and support being an evidence-based organisation. By having all our data on a common system, utilizing the latest technology, we will:

- Increase productivity by staff being able to more easily enter, extract, report and analyse data,
- Provide more comprehensive information to our supporters and corporate partners, who rightly want to see that their contribution is making a difference,
- Support our continuance as an evidence-based organization, and
- Enable better system performance, and handle business growth.

### 1.3 Document Scope

The scope of document is to provide a single point to track all of requirements for the Project. This document has been compiled based on the signed-off OLPs and Functional Requirement Specifications and the CRM Macro Design document.

This document will:

Provide an indication of which requirements are complied by within the current phase of project.

Will be used for requirement management: capturing issues, further details and change requests.

Be revisited at end of each phase of the project.

#### 1.4 Audience

The intended audience for this document is listed below:

- PwC Team assigned to the project
- All Microsoft CRM Designers
- [Client] business stakeholders, including project sponsors, system service owners and other parties that contribute to this project (inclusive of the reviewers and approvers)

Note: This is a non exhaustive list and any other person or group not mentioned can use the information within this document for information purposes.

#### 1.5 Project Vendors

The following list is a summary of vendors and associated applications related to the business requirements (see Req Traceability Matrix tab)

Vendor	Application
PwC	Microsoft CRM 2011
[Client]	Microsoft CRM 2011, VOLT (Microsoft CRM 4)

#### 1.6 Associated Documents

Name	Version	Location
[Client] – CRM Architecture Assessment	1.1	S:\Project Integrate\Dynamics CRM\01 Scoping Phase\Scoping Deliverables\Final
[Client] – CRM Transformation Implementation Plan	1.0	S:\Project Integrate\Dynamics CRM\01 Scoping Phase\Scoping Deliverables\Final
Summary of Key Imperatives	1.0	S:\Project Integrate\Dynamics CRM\01 Scoping Phase\Scoping Deliverables\Final

#### 1.7 Definitions and Acronyms

Term, Abbreviation or Acronym	Definition
FRS	Functional Requirements Specification

RTM	Requirements Traceability Matrix
OLP	Operational Level Process
SME	Subject Matter Expert

See object definitions section in "[Client] – CRM Architecture Assessment" for full glossary of terms

## Version Control

Document Control			
Phase	Design		
Author(s)	Marvin		
Storage	<a href="S:\Project Integrate\Dynamics CRM\02 Design Phase\Design Deliverables\Templates">S:\Project Integrate\Dynamics CRM\02 Design Phase\Design Deliverables\Templates</a>		
Restriction	<b>C4 - Strictly Private and Confidential / Restricted Confidential</b>		

Change History			
Version	Date	Description	Author
0.1	19/01/2011	Initial version	Marvin Slocombe

# Approval

Approvers				
ID	Name	Division	Title	Signature
AL	Andi	IT	Head of Systems	

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# Requirements Traceability Matrix

System	Use Case	Design Compo	Code File/Component	Unit Test	User Acceptance	Non-Functional	<Add new traceable

**Filling Instructions:**

Supplier RTM is filled by the Supplier and traces the Design Components, Code, and Test Cases to System Re

The following steps provides instructions on adding a new Code Component, Other entries may be added simil

- 1. Identify the row where the parent Design Component is last referred
- 2. Add a new row below that by clicking on the row below the identified row and select Insert -> Rows
- 3. Fill all the columns left to the Code Component, copying them from the row above
- 4. Update the Code Component

The following steps provides instructions on adding a new Acceptance Test Case ID, Other entries may be add

- 1. Identify the row where the parent System Requirement is last referred
- 2. Add a new row below that by clicking on the row below the identified row and select Insert -> Rows
- 3. Fill all the columns left to the Acceptance Test Case ID, copying them from the row above
- 4. Update the Acceptance Test Case ID

Add additional columns, if required, to maintain traceability of additional traceable components like Test Driver,

requirements

early:

ed similarly:

Test Stubs, Unit Test Data



### 3 Requirements Management

#### 3.1 Issues

Issues						
Id.	Status	Requirement ID	Requirement Title	Issue Description	Audit trail	Final Outcome
I1						

#### 3.2 Requirement Changes

Requirement Changes						
Id.	Status	Requirement ID	Requirement Title	Requirement Change Description	Audit trail	Final Outcome
C1						

#### 3.3 Questions

Questions						
Id.	Status	Requirement ID	Requirement Title	Question Description	Audit trail	Final Outcome
Q1						

#### 3.4 Risks

Risks						
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Id.	Status	Requirement ID	Requirement Title	Risk Description	Audit trail	Final Outcome
R1						

**3.5 Business Rules**

Business Rules						
Id.	Status	Requirement ID	Requirement Title	Business Rules Description	Audit trail	Final Outcome
B1						

## **|Appendix A - Compliance Indicator**

Compliance Indicator is used to track that the solution being implemented complies with the requirements of the project. This indicator is updated as part of reviews conducted at the end of the design phase of the project.

### **Design Phase – Compliance Indicator**

During the design of the project, OLPs and Functional Requirement Specs are developed. A compliance indicator is used to map whether the designs consider each of the identified requirements and defines a solution to meet the requirements. At this stage sufficient detail must be captured to identify how the requirements will be satisfied. Detailed Design responses are gathered from architects and solution designers (by checking Design documents) and documented within the Detailed Design Response column, used in conjunction with the compliance indicator column.

The indicator levels and their interpretations are as follows:

#### Compliant (C)

Indicator is set to Compliant Level, when the requirement is identified in Design Documents and detailed solution / process is defined on how the requirement could be met. Details on how solution will work to meet requirement are provided. More detail might also be provided in Micro Designs completed within Build Phase of project.

#### Partially Compliant (PC)

Indicator is set to Partially Compliant Level, when the requirement is identified in Design Documents and detailed solution / process are defined on how parts of requirement could be met. Details of how solution will work to meet parts of requirement are provided. It may be dependant on more detailed Micro Design or information from vendor to clarify how other aspects of the requirement could be met.

#### Not Compliant (NC)

Indicator is set to Not Compliant Level, when it is known that a requirement cannot be met and no solution exists to meet the requirement. Also set to Not Compliant when the requirement is not catered for within the design documents and it is not dependant on any third part for further information (that is: not "Unknown").

#### Unknown (U)

Indicator is set to Unknown, when the requirement is known or identified, but no solution is defined in design documents, as further information (from vendors, business) or details are required to define a solution.

## **|Appendix B - Approval Emails**

**Design**

Feedback from Review