Business Requirements Document For [insert Project Name here]

|  |  |
| --- | --- |
| Prepared by: |  |
| Prepared for: |  |
| Date submitted: |  |
| Business Sponsor: |  |
| Project Manager: |  |
| Business Analyst: |  |
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# Part 1: Executive Summary

This is a template that conforms to industry best practices in business analysis but may be scaled as appropriate for a project.

Restate, in summary form, statements from prior project documentation such as the project charter and the vision and scope report. Reconfirm the understanding of project objectives and state any clarification needed for those statements that may be required due to the passage of time.

In the form of a matrix, highlight the results of the business analysis.

|  |  |
| --- | --- |
| **Functional Requirements Summary** |  |
| **Next Steps** |  |
| **Lessons Learned** | 1.  2.  3. |
| **Analysis Duration (Planned and Actual)** | Planned Duration:  Actual Duration:  Reason for Variance: |
|  |  |
| **Analysis Cost (Planned and Actual, in Currency)** | Planned Cost:  Actual Cost:  Reason for Variance: |

# Part 2: Approvals

This part documents the approvals required for sign-off of the business requirements document and establishment of the requirements analysis milestone. Each signatory is described by both organizational title and project functional role. Required signatories are the business analyst and the business sponsor. Other signatories may be required by your company policy.

**Decision Making and Approval Process**

In some cases, projects will have a number of key stakeholders who must discuss and provide interim approval for all or for specific sections of the business requirements document. However, there must always be a single business sponsor who will ultimately approve the document, representing the requirements viewpoint of the business area addressed by the project.

Within project management and business analysis, the business sponsor may delegate a client acceptor, who will be responsible for making decisions and approving documents on behalf of the business sponsor.

Pay particular attention to cultural or behavioral norms within the organization that may affect the decision-making process. This includes standard intervals for getting together (the monthly meeting) and the in-place approval and conflict resolution approach of the group.

This document has been approved as the official business requirements document for the \_\_\_\_\_\_\_\_\_\_ project, and accurately reflects the current understanding of business requirements. Following approval of this document, requirements changes will be governed by the project’s change management process, including impact analysis, appropriate reviews, and approvals under the general control of the project plan and according to company policy.

|  |  |
| --- | --- |
| **Prepared by** |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Business Analyst | Date |
| **Approved by** |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Business Sponsor | Date |

# Part 3: Purpose

The business requirements document is a major deliverable representing the achievement of the business analysis milestone in a typical project management methodology. As such, it requires formal review and sign-off by the business sponsor (representing the interests of business area stakeholders). Under normal circumstances, the business requirements document is created by the senior business analyst delegated to a project.

This business requirements document template conforms to industry best practices in business analysis and is the primary tool for structuring requirements-gathering activities. Interim feedback loops and approvals for business requirements document sections are achieved in an iterative manner, as requirements become clear over successive meetings with project stakeholders, both primary and secondary users. This facilitates the final review and approval of the overall document, which by then will contain “no surprises.”

## Section 3.1: Different Types of Requirements

Functional requirements can be derived only following elicitation and documentation of business and user requirements. The distinctions between these different requirements levels are important.

1. Regulatory Requirements: encompass all the restrictions, licenses, and laws applicable to a product or business. They may be internal (driven by the company itself) or external (driven by a government or other regulatory body), and are usually nonnegotiable.
2. Business Requirements: place the business at the center of focus and tie the project to documented strategic, tactical, and operational goals. If developing products or services as part of the overall direction of the company, product or service features need to be covered at a high level in this section, then in detail under User Requirements.
3. User Requirements: place the user at the center of focus and describe—with flowcharts, use case diagrams, use case scenarios, and other process models—the TO-BE user experience with the new system. In some cases, especially where business processes are being modified, it may also be necessary to document the AS-IS state of user experience with the current system.
4. Functional Requirements: place the proposed system at the center of focus and provide a prioritized list of capabilities the system must demonstrate in order to satisfy business and user requirements.
5. Nonfunctional Requirements: refer to system characteristics that must be fulfilled related to things like the user interface, access security, availability, robustness, system failure, integration, migration, and documentation. As such, they do not deal with the actual functionality of the system, but nevertheless represent key project success factors.
6. Transition Requirements: describe requirements needed for the transition to the new system but will not be needed once the solution is in place.

## Section 3.2: Prioritizing Requirements

Ensure that your users are aware of the following interpretations regarding the prioritization of requirements:

The following interpretations regarding the prioritization of requirements have been used:

* Requirements that determine project success (must have)—will be included in this release. These items represent core functionality and must be present. Absence of any “must have” functionality represents project failure.
* Requirements that add value (should have)—will be included in this release provided that all “must have” requirements have been met and sufficient project resources and time remain.
* Requirements that add convenience (nice to have)—will be included in this release provided that all “must have” and “should have” requirements have been met and sufficient project resources and time remain.

## Section 3.3: Intended Audience

Both readers and approvers of the business requirements document are identified here. Organizational titles and functional project roles for each individual are included. An organization chart is very helpful in complex reader/approver environments.

In priority order, the main reviewers of this document are—

1. Business Sponsor: review and approve
2. Project Manager: review and integrate into construction project phase
3. Systems Analyst: review and translate into system specifications
4. Stakeholders: review and provide feedback to business sponsor
5. Users: optional review and provide feedback to stakeholders

## Section 3.4: Analysis Approach

This section describes the—

1. Overall project management approach for the project, including all organizations, such as service providers, system integrators, and external vendors, and the roles they will play.
2. Approach that was used for business analysis activities within this project. These may include, but are not limited to, interviews, focus groups, requirements joint application design (JAD) sessions, surveys, and questionnaires. (These components comprised the requirements work plan.)
3. Choice of modeling technique. The system application group will use one of two methods in developing systems:

* Traditional Structured Analysis: Functional Decomposition
* Business Object-Oriented Modeling: Use Case

These methods achieve the same goals but use different modeling techniques. The business analyst needs to discuss with the system applications group what method is used and choose what is most convenient to document requirements.

# Part 4: Solution Scope

This part is used to restate, in summary form, the project vision and scope statements from prior project documentation such as the project charter or opportunity analysis. It reconfirms the understanding of project objectives, and allows for clarification of those statements that may be required due to the passage of time.

However, the business requirements document is **not** a project scope change device. Should scope have changed, previous project activities must be reopened because the reality represented by the official documentation and the signatures they contain are no longer valid.

Use this part to document high-level project deliverables (what is needed) without drilling down into details or straying into solution specifications (how we will do this).

## Section 4.1: Summary of Regulatory, Business, and User Requirements

All project initiatives exist within the organizational context of your company and consume organizational resources. As such, they must be justified by tying them to strategic, tactical, and operational goals. In some cases, there may also be regulatory governance considerations that must be taken into account. When present, regulatory requirements are documented first. Documenting business-level requirements is a critical exercise, because—

1. Regulatory requirements often provide clear, nonnegotiable project constraints and quantitative success factors.
2. They assist in budgeting when there are specific moneys preallocated to business goals.
3. They facilitate prioritization according to the varying priorities of business goals.
4. They serve as a gauge regarding the ongoing importance of a project. That is, if the business goals or their relative priorities change during the project, your project’s goals and priorities will likewise change.

### Section 4.1.1: Regulatory

### Section 4.1.2: Business Requirements

#### Section 4.1.2.1: Strategic

#### Section 4.1.2.2: Tactical

#### Section 4.1.2.3: Operational

### Section 4.1.3: User

## Section 4.2: Assumptions, Dependencies, and Constraints

In this part, document that which cannot be ascertained in advance. These items may feed the risk section, which follows.

* List any **assumptions** on resources, timeframe, and cost. All projects operate in a less-than-perfect world. Not everything can be officially verified as existing or available ahead of time. These “unknowns” are documented in project assumptions. An example might be “The project assumes the continued availability of funding following the upcoming merger.”
* List any **dependencies** on other projects. These include, but are not limited to, the availability of project resources, applications and systems that interact with this one, hardware, facilities, equipment, business processes, and regulatory approvals. Of particular importance is the dependency on the availability of project stakeholders and users and conformance to approval and change management processes.
* List any **constraints** such as technology standards. These are those regulatory, technological, or business realities that legitimately constrain solution development. An example might be, “The new system must be built in Oracle®.” Although this example might sound, on the surface, like a specification (and therefore not part of a business requirements document) it becomes a constraining requirement when stated up front. It is for this reason that users must be cautioned against careless statements of constraints.

**Note:** It is important that all project initiatives and their requirements comply with existing technology standards. Position this project within that framework.

Remember that specific technologies are not normally a part of requirements. If presented as such, they are constraints. For example, a user might state “the solution must use a Microsoft® SQL Server database.” Because this might be a violation of the approved information architecture and technology infrastructure, the project must verify compatibility, documenting any variances.

Note also that the existing infrastructure was justified by a prior project. If changes are needed to the infrastructure, the project will need to support those changes via a business case.

Do not prejudge approval or disapproval of technology constraints that are presented as requirements. Simply document the issue, providing information to support a decision. However, if the decision is made during business analysis activities, document the requirement and the decision as a constraint indicating parties involved and when the decision was made. This information will be needed by the systems analyst developing the technical specification.

**Assumptions**

**Dependencies**

**Constraints**

## Section 4.3: Solution Options

As a business analysis vehicle, the business requirements document focuses on requirements, not specifications or solutions. Nevertheless, as requirements are elicited and documented, discussion about solution options will occur. This section is used to document those options which have been considered to date, rejected, or approved for further investigation. It is important to include rejected entries for the historical record of the project and to preempt future readers who may ask “did they consider such-and-such?”

Remember that solution options must be derived based on clear understanding of project requirements, assumptions, dependencies, and constraints.

# Part 5: Functional Requirements: Solution Behaviors in Priority Order

This part provides detailed user and functional requirements information through text and process modeling. Companies will have standard tools that have been approved for use. These may include—

* Flowcharts
* Context-level data flow diagrams
* UML®-based use case diagrams and scenarios
* Swim lane or UML®-based activity process workflow diagrams
* IDEF0 process models

Clear description of functional requirements defines success factors for the project. As such, functional requirements are closely tied to the project’s quality plan. It is critical to understand that quality conforms to documented and approved requirements and specifications. It is, therefore, not the same as excellence or perfection. Excellence is a moving target representing the highest level of quality achievable within the timeframe of the project. Perfection is zero defects. In addition, quality has a cost expressed as follows:

Cost of Quality = Cost of Conformance + Cost of Nonconformance

Nonconformance of deliverables is frequently tied to insufficient levels of detail in the documentation of requirements. In light of this, the real focus of the business requirements document can be expressed as the establishment of project quality standards for project deliverables. An overall focus on the identification, definition, elicitation, and documentation of quantitative measures versus qualitative descriptions is a key element of functional requirement definition. Begin descriptions using qualitative language such as “improved” or “faster,” but follow this with quantifiable metrics.

## Section 5.1: Requirements that Determine Project Success

## Section 5.2: Requirements that Add Value

## Section 5.3: Requirements that Add Convenience

# Part 6: Nonfunctional Requirements: Solution Characteristics

This part documents characteristics of the solution that are not directly related to the functionality of the proposed system. Like functional requirements, the clear, quantitative definition of these requirements feeds the project’s quality plan. Be conscientious in the investigation of nonfunctional requirements; these are often overlooked or given insufficient attention.

## Section 6.1: Operational Environment

## Section 6.2: User Interface Requirements

## Section 6.3: User Access/Security Requirements

## Section 6.4: Service Level/Performance/Capacity Requirements

## Section 6.5: Business Continuity and Recovery Requirements

## Section 6.6: Integration/Migration Requirements

## Section 6.7: Administrative/Backup/Archive Requirements

## Section 6.8: Expected Life Span Requirements

## Section 6.9: Documentation Requirements

## Section 6.10: Training Requirements

## Section 6.11: Other Nonfunctional Requirements

# Part 7: Transition Requirements

This part documents characteristics of the solution that are not directly related to the functionality of the proposed system but are needed to facilitate the implementation of the solution. These requirements are temporary, transition-specific requirements and will not be needed once the solution is in place. Be conscientious in the investigation of transition requirements; these are often overlooked or given insufficient attention.

## Section 7.1: Requirements for the Generation of Production Data

## Section 7.2: Requirements for the Conversion and Migration of Production Data

## Section 7.3: Other Transition Requirements

# Part 8: Traceability Matrix

In this part, create a matrix that traces all functional requirements to higher-level requirements. This will ensure that all functions support the business/user requirements.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **A** | **B** | **C** | | | **D** | **E** | **F** | **G** | **H** | **I** |
| **Requirement** | | **Source** | | | **Business Need** | **Business Rule(s)** | **Model(s)** | **Test Scenario(s)** | **Test Case(s)** | **Notes** |
| **Requirement Identifier** | **Name and Location** | **Project Docs.** | **Individuals/ Group** | **Historical Docs.** |
|  |  |  |  |  |  |  |  |  |  |  |
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# Part 9: Risks

This part documents project risks that—

1. The business analysis uncovered
2. Relate to the business analysis itself (such as not having adequate time to perform required analysis and nonavailability of key requirements voices)

In the form of a matrix, list each risk event, qualitative probability rating (high, medium, low), a qualitative impact rating (high, medium, low), a response strategy (avoid, transfer, mitigate, accept), and a person responsible for the risk.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Risk Event** | **Probability** | **Impact** | **Strategy** | **Responsibility** | **Status/ Action Date** |
|  |  |  |  |  |  |
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# Part 10: Revision Log

This part documents requirements that have changed over the course of successive documentation iterations during business analysis activities. Pay particular attention to requirements with ongoing adjustment. These are high-risk areas that may represent—

1. Lack of clear business process definition
2. Unclear reporting requirements
3. Areas of regulatory flux
4. Unclear secondary user hand-off points
5. Unclear governance related to specific requirements

If the majority of the “must have” requirements cannot be determined or agreed upon by stakeholders, there may be a situation where the project itself must be reassessed at a scope level.

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Revision** | **Revision made by** |
|  |  |  |  |
|  |  |  |  |

# Part 11: Glossary

This part identifies any industry or line of business jargon, acronyms, common words used in special context, and special terms that are used within the project and the business requirements document itself. Pay particular attention to acronyms that may have multiple meanings (such as a commonly used meaning and a meaning that has special significance to the business area). For example, the acronym PMO is an industry-wide acronym for project management office. It may also stand for prime minister’s office or preventive maintenance optimization. The project and business context determine the meaning.

# Part 12: Appendixes

Each appendix must have—

* A separate header, numbered A-Z, with an appropriate descriptive title. For example  
  Appendix A – Regulatory Requirements
* **Note:** Use the Heading 1 Style for each appendix header. This style will automatically insert a page break.

# Appendix A: User Class Profiles and Key Delegations

Users are categorized by functional groups, then by job titles as appropriate. Actual names of key individuals are supplied. The following groups are identified and described:

1. Sponsorship and stakeholders
2. Primary users: Those who will interact with the proposed system on a daily or regular basis and whose job functions are directly involved with it
3. Secondary users: Organizations, groups, departments, and individuals who benefit from, provide input to, or derive output from the proposed system without direct involvement in its daily processes. This group also involves business or system administration personnel who must support the proposed system.

# Appendix B: Logical Data Model

This is a very high-level, requirements-oriented set of diagrams that will be elaborated upon by database analyst personnel during solution design. This section may be limited to simply identifying database systems and their interactions with project applications. Alternately, it may include actual database schema diagrams and descriptions. The amount of detail will vary by project and company policy.

# Appendix C: State Model

This section describes the various state changes of an entity as it proceeds through the business process. Entity attribute values may change with each state change. For example—

A food order follows these states:

* Taken by the server
* Submitted to the chef
* Delegated to the cook
* Ready to serve by the chef
* Picked up by the server
* Served by the server
* Billed by the server

# Appendix D: Online Query and Printed Reporting

This section describes the requirements of primary and secondary users related to online and print output from the proposed system. This includes but is not limited to—

* Ad hoc queries
* Scheduled/batch reports
* Audit or control reports

Also included here are—

* Recipient information maps—who gets what information (need to know, should know, want to know)
* Business rules that govern output generation—who, what, where, when, why, how much

# Appendix E: Business Rules Catalog

This section describes the rules that are followed by the business. These rules are extracted from the management interviews, policy and procedure documents, as well as data and use case models.

|  |  |  |
| --- | --- | --- |
| **Identification Number** | **Business Rule** | **Source of Rule** |
|  |  |  |
|  |  |  |
|  |  |  |
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# Appendix F: Decision Tables

This section describes the various conditions that occur in the business workflow. Each set of conditions results in a business action. Note that the number of sets is determined by the formula (2 to the Nth power, where N is the number of conditions). See example below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Condition 1** | Y | N | Y | N |
| **Condition 2** | Y | Y | N | N |
|  |  |  |  |  |
| **Result** | A | B | C | D |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
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# Appendix G: Use Case Models

This section contains the use case diagrams and scenarios. The analysis draws user and functional requirements from this model.

# **Using This Template**

This section contains information designed to assist you in using this template. Please delete it from your actual business requirements document reports.

# About the Heading 1 Style

The above heading is in Heading 1 style. Like all special styles in the template, it has a keyboard shortcut that begins with holding down the <CTRL><ALT><SHFT> keys. Your left hand should be able to do this easily. Then press h.

Special Note: The Heading 1 style inserts a page break in front of the heading text.

## About the Heading 2 Style

Use for subsections. Press <CTRL><ALT><SHFT> j

### About The Heading 3 Style

Use for topical headings within sections and subsections. Press <CTRL><ALT><SHFT>k

#### About the Heading 4 Style

Use for lower-level headings. Press <CTRL><ALT><SHFT>L

##### About the Heading 5 Style

Use for lowest-level headings. Press <CTRL><ALT><SHFT>;

About the Normal Text Style

Press <CTRL><ALT><SHFT>n

About the Typefaces and Page Layout

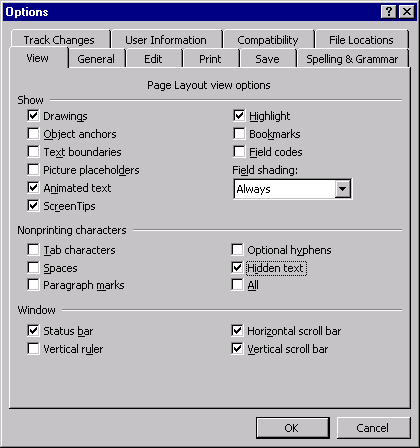
This template uses Verdana as a base font. Times New Roman and most other popular fonts are optimized for reading hard copy. When displayed onscreen, these fonts can become “scrunched” which decreases readability. Verdana is one of a growing family of fonts optimized for reading comprehension onscreen. It maintains high readability in hard copy.

# About Viewing/Printing Hidden Text Instructions

Microsoft® Word has a font characteristic called **hidden text** that allows for selective viewing and printing. Each of these two functions is controlled separately. When made visible, Word indicates that a text passage is configured as hidden by including a faint dotted underline. When made invisible, Word collapses the space that is normally taken up by hidden text, so that you don’t get big white blank spaces in your document.

This template employs a customized style called **instructions** that uses the hidden text attribute. The instructions appear as blue text under each header in the template. If you do not see them, you have not told Microsoft® Word to display hidden text. Here is how you do it:

1. Select **Tools/Options** from the menu bar. The Options menu appears as shown below.
2. To control display, check or uncheck Hidden Text on the **View** tab.
3. To control printing, check or uncheck Hidden Text on the **Print** tab.



# About Using Microsoft® Word Templates

By default, Microsoft® Word stores its templates in subfolders under **the Program Files/Microsoft® Office/Templates** folder on your C drive. While normal Word documents have the .doc file extension, templates have a .dot file extension. This template is an example of this and is called **BRD.dot.**

To prepare this template for use, use Windows Explorer to create a subfolder called **Business Analysis** underneath the Program Files/Microsoft® Office/Templates folder. Copy this template into your Business Analysis folder.

To create a document that uses this template, select **File/New** from the menu bar. Word automatically opens the Program Files/Microsoft® Office/Templates for you. You will see that Word has added a tab for your Business Analysis folder. Click on the tab, double click the template file. Word opens a new document (.doc) that uses the template.

**Note:** In the above discussion, we have used Business Analysis as a sample folder name only. You may call this folder anything you wish. However, it is recommended that you place any special non-Microsoft® issue templates in their own folders for ease of navigation and sharing with other users.

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