 EPSIPOL

Business Requirements Document (BRD)

**APPLICATION NAME - EPSIPOL**

**CLIENT NAME - SISA FUNERAL SERVICES**

**PHONE NUMBER - 045 9521126**

**BUSINESS CONSULTANTS - MTHETHO NQAYI**

* **SIYANDA MANISI**

**CLIENT SIGNATURE**

# INTRODUCTION

Having to physically store and retrieve documents becomes time consuming and problematic, particularly as the volume of documents increases. It is for this reason that the need for an eFileCabinet application system (EPSIPOL) is deemed as the ideal solution for efficiency and convenience.

The EPSIPOL application system is designed with the primary objective of providing full management and control to the administration functions that aims at bringing efficiency, reliability and effective record keeping of the transactions that takes place within the business enterprise. This application also aims at providing paper-less means of storage of clients’ information and details.

With the acquisition of the EPSIPOL application – Families and prospective clients are guaranteed rapid response services and access to their information.

# OBJECTIVES

The main objective of the EPSIPOL application is to create a dedicated method that will enable automated storage and record-keeping of *ALL CLIENTS’* details and various transactions such as records of payments made by clients.

The application also aims to achieve the capability to monitor premium collections and keep the business informed by way of reports with regards to non-paying clients. The system is adaptable and can be tailor-made to the specific demands and requirements of the business.

Information of client details that are stored in the current system, will be migrated onto the new system (EPSIPOL). This is aimed to be a desktop application, unlike a web-based kind of an application which will have to be accessed by a variety of users.

# FUNCTIONS OF THE APPLICATION

The system is designed to perform the following functions:

* The user must first open the *EPSIPOL* application; by double clicking on the *EPSIPOL* icon on the desktop. *Covered on pg.2*
* The user then has to login, using a username and a password. *Covered on pg.2 - steps, description, expected outcome, validations*
* The login page will offer **3** opportunities for a password entered incorrectly. *Covered on pg.2 - steps, description, expected outcome, validations*
* Once the user login, the user assigned the role and responsibility of capturing client information, can then perform data capturing – such as creating/adding new clients, search functions and amendments to existing policies, when/if the need arises. *Covered on pg.2 - steps, description, expected outcome, validations*
* User will be able to capture/create new clients – using the “New clients” window/tab. *Covered on pg.2 - steps, description, expected outcome, validations*
* When search functionality for a particular existing client is applied: all relevant details of the client will get displayed. These details include: Name & Surname, ID Nr, premium amount & type, payment history, payment method (cash, debit/stop order) etc… *Covered on pg.3 - steps, description, expected outcome, validations*
* Application have the ability to generate plan numbers that will uniquely identify each client, both existing and newly registered clients *Covered*
* When a monthly payment has been made for a plan – the system generates an invoice – in addition to this, the application is aimed at providing a stop order facility whereby there will not be any need to deposit ‘hard cash’ to the bank. *Covered*
* The application must have a calendar visible to the user with various events (funeral activities) – to enable the user to add and view bookings.
* Booking systems for chairs and tents - Ordering systems and invoice for all bookings.
* Casket ordering system to enable the administration of stock taking.

# DEMONSTRATION OF THE WINDOWS

This section gives a demonstration of the various window displays in a sequential order. These demonstrations also include the validations and business rules for the windows. The following window displays are demonstrated:

* *Log-in window*
* *Application Home Page window*
* *New clients window*
* *Existing clients window – this section will also enable the senior administrator to make amendments, cancelations/additions to existing policies*
* *Search function window – is not separate from Existing clients window. Will have the same function as Existing clients window*
* Payment records – Monthly reporting
* Orders
* Stock Inventory (Coffins and tombstones)
* Calendar – to enable the creation of a dedicated booking function for funerals and burials

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Log-in Window  Home Page  New Clients Window  Existing Clients Window  Search Function Window (is linked into the Existing Clients Window)  Payment records  Orders  Stock Inventory (Coffins & Tombstones)  Calendar | | | | |
| STEPS | DESCRIPTION | EXPECTED OUTCOME | VALIDATIONS |  |
| 1 | Double click the *EPSIPOL icon*  C:\Users\mnqayi\Pictures\EPSIPOL.png | This action should navigate to the *Log in window* which has the following text: “*Please enter your User Name and Password*” accompanied by the following fields:   * User name * Password * Log-in   Image result for log in screen types for an application   * The ***user name*** is a field and allows a minimum of 1 to a maximum of 20 *characters*. Only allows characters. * The ***password*** *is a field that allows the user the flexibility to enter* a minimum of 1 to a maximum of 20 *alpha-numeric and special characters*. * The ***log-in*** is a *push button field*. | ***i.*** When/if the user enters the password/user name incorrectly for 2 attempts: the following text displays:  *“Password entered is incorrect, last attempt to enter the correct password*”. If the user enters the incorrect password for the 3rd attempt, the following content displays:  “*Content is locked please contact administrator*”  ***ii.*** *The administrator will then enter his/her credentials to unlock the content.* |  |
| 2 | Enter the correct user name and password  Click Log-in push button | This action should navigate to the *Home page*  The Home page displays the name and surname of the user that is logged in  The user is able to navigate to all the tabs available on the Home Page  Image result for home menu screen types for an application software  Substitute ‘Clover’ with ***EPSIPOL***  Substitute “Clover Home” with ***EPSIPOL HOME***  The Home page comprise the following tabs:   * New clients window * Existing clients window * Search function window * Payment records - Monthly reporting * Orders (funerals booked) * Stock Inventory (Coffins & Tombstones) * Calendar |  |  |
| 3 | Open the New client’s icon/tab (by right clicking and selecting “*ADD CLIEN*”)  Capture client details | This action should navigate to the *New client’s window*  cid:image001.png@01CD4F87.12D12C90  This page entails the following tabs in which the user captures for a new applicant:   * ***Client Plan Relationship*** – *Plan Holder* (right click and enter name & surname). *Payer* (right click and enter the name & surname of the payer). *Beneficiaries* (right click and enter name(s) & surname(s) of beneficiaries) * Attachments of the application form and ID documents of applicants. * Unique plan number generated/allocated to the applicant * ***Payment details Window tab*** – (right click and enter payment method – debit/stop order). Will also generate an invoice as proof of payment and store payment record – ***monthly reporting***. (*same as payment details on epsilon*). Also offers customized sms notification to clients. This section of the application displays the monitoring of premium collections and keep the business informed by way of reports with regards to non-paying clients.   cid:image003.png@01CD4F87.9EC78EB0   * ***Plan details*** – this tab entails the following details: *pensioner products, family plans, additional optional benefits*   cid:image005.png@01CD4F87.9EC78EB0   * ***Information*** – the “*Information*” tab shows an indication of the overall tabs   cid:image010.png@01CD4F87.CB089910 | In this window, the user is able to capture the details of a new client that is applying for a policy/cover. |  |
| 4 | Open the Existing client’s icon/tab (by right clicking and selecting “*EXISTING CLIENS*”)  Will function same way as when ‘*Search*’ is called  This window enables functions such as deleting a member, as well as amendments of a policy | This action should navigate to the *Existing client’s window*  The Existing client’s page comprise the following text fields:  Member Enquiry & Search   * Policy Number (text field) * ID number (text field) * Surname (text field) * Search (push button * Clear (push button) – clears the text fields that were entered * Delete/Terminate policy – enables the deletion/termination of a client’s existence   http://www.pol360.co.za/wp-content/uploads/2016/04/index.jpg | The user need to have the necessary permissions to delete and make amendments to existing clients. |  |
| 5 | Open the Ordering icon/tab  *To be discussed and shared with Siya to bring specific ideas to this window* | This action should navigate to the *Ordering window*  https://iz.zohostatic.com/sites/default/files/gather-the-info-you-need.jpg |  |  |
| 6 | Stock Inventory | ???? *To be discussed and shared with Siya to bring specific ideas to this window* |  |  |
| 7 | Open the Calendar icon/tab (by right clicking and selecting “*CALENDAR*”)  This window functions as an automated notification whereby bookings for funeral and burial activities are made | ???? *To be discussed and shared with Siya to bring specific ideas to this window*  Idea in mind is that - this functionality enables the user to manually enter functions/funerals to take place on a particular date, after which this will automatically log into the calendar with a reminder about that particular booking. |  |  |

# Application Process Workflow

EPSIPOL APPLICATION SYSTEM

\* Unique plan number generated to the Payer & Beneficiary if applicable

\* Unique plan number generated to Plan Holder

Applicant

SMS notification when monthly payment is paid

Debit order

Cash payment

Sms reminder sent if payment is not made

Payment records stored for record keeping purposes

## Current Business Processes to be included in the new proposed systems (this section include all the aspects which will be improved by the EPSIPOL (*to discuss with business on process improvement*)

## Proposed Business Process (To-Be)

# Executive Summary

## Project Summary

### Objectives Achieved

The system provides administrators with a large amount of flexibility in allowing different amendments. For example, the data capturer does not have access to the financial figures as well as the authority and rights to make amendments to existing clients, but this too is customizable according to the client’s needs.

The system incorporates document storage for each member. Policy documents and other important documents (such as ID) are uploaded onto each member and stored electronically allowing ‘online’ accessibility to required documents. Images can also be uploaded via a smartphone for member. This is useful in getting documents almost instantly from wherever the member may be. An image of the ID document can be sent to claims department within seconds for example.

The application employs multiple collection methods interfacing with various institutions directly. These include debit order to all the major banks. The application is flexible to cash collections via Easy Pay and the Post Office.

#### Business Drivers

* Customers are guaranteed faster updates to information on the application.
* Quick amendments in client’s details

## Project Scope

Estimation for delivery **4 months**

# Business Process Overview

[Describe how the current process(es) work, including the interactions between systems and various business units. Current Business Process (Discuss with business to outline the current process).

# Business Requirements

This section will be amended based on the recommendations and additions of the Business.

The requirements from business will be documented in this document and prioritized as follows:

|  |  |  |
| --- | --- | --- |
| **Value** | **Rating** | **Description** |
| 1 | Critical | This requirement is critical to the success of the project. The project will not be possible without this requirement. |
| 2 | High | This requirement is high priority, but the project can be implemented at a bare minimum without this requirement. |
| 3 | Medium | This requirement is somewhat important, as it provides some value but the project can proceed without it. |
| 4 | Low | This is a low priority requirement, or a “nice to have” feature, if time and cost allow it. |
| 5 | Future | This requirement is out of scope for this project, and has been included here for a possible future release. |