**Requirements Gathering Template**

1. Problem Statement

* What is the problem that you are currently facing?

Main problem: Our current process is not time efficient and effective concerning data collection, recording and updating of information.

* Collection: We receive bits and pieces of information from different clients that are often not complete and/or labelled well. We often have to request more information.
* Recording: We have multiple databases where information needs to be updated on once received from clients and since it does not automatically appear on different databases, the process is very time consuming (and leaves space for errors).
* Updating: Although files are created for new clients, often pieces of information come over time and then it is time consuming to update their information.
* Is there information would you like to be able to keep and access later on?

If yes, what information is this?

YES we do have information we would like to keep and access later. Our process is as follows:

* First we receive new clients that we have to **open a file** for (Therapist details, hospital etc.)
* We **send out a set of documents** regarding the standing frames (Application forms, Permission to take Photos, Information about organisation and Contracts)
* Our **clients then send us documents**:Application forms, Photos for application, and Permission to use photos
* **We analyse the above documents** to check whether the child is a suitable candidate for a standing frame
* **We issue frames to the client** which involves keeping track of frames made at two different locations (with relevant serial numbers), date and amount issued to a specific client).
* Once the child has received the standing frame the **client then sends us documents**: Contract, Photo, Photo permission slip, so that we have record of which frame (according to serial numbers) went to which child on what date.
* **All the above information goes into the client’s file, the hospital database, the complete database for frames and photos filed separately**(to use for marketing).

We would like to access all of the above information in future. We are however open to discussion on reducing information kept.

* Are you going to be keeping personal information about clients?

If yes, what information is this?

YES, please refer to the attached document (the Application form). In this document, the child and caregiver’s personal information is recorded (i.e. child’s full names, medical condition, date of birth, address, contact number etc.)

* How will you use this information in the future?

Personal information about clients:

* Our initial thought regarding collecting this information was to do follow ups at random to see whether the standing frame is still in good working order and being used by the child it was given to.
* We would love to do scientific research in the future and therefore this information would be used to include participants in the research project

Information in general:

* See above two points
* To keep track and follow up on our frames. This would be done to ensure all client’s received their frames and to ensure frames don’t go missing.
* Show value of project via stats to Donors.
* To have contact details for hospitals and therapists for future reference for example for workshops run by us.
* Which departments need this information?
* Possibly SARS if we are ever audited?
* Donors from big companies?
* Therapists/hospitals we work with to compare databases regarding frames issued, received and allocated to children.
* Do you have serial numbers to identify each stand?

Yes we do.

* Will you be willing to make changes to the way you currently do things for better efficiency?

Yes we welcome ideas.

1. Purpose

* Who will be using the service?

There are 3 team members who started Sukumani Dream. Up until this year we were doing the admin ourselves. We now have one person who is helping us on a part time basis.

* How many people will be using the service?

4 people at this stage.

* Who will greatly benefit from this service?

All 4 of us will benefit as well as all the therapists at the various hospitals who issue frames to the clients as it will hopefully help make our administration systems more efficient.

1. Descriptive Summary

* What methods are you currently using to store all the data/information?

As mentioned above, we have the following information folders where information is **manually recorded**:

* Client specific folder (with forms and photos)
* Folder for each hospital which contains 1. Application folder and 2.issued folder (where we place each client folder - which is moved from one to the other once the frame is issued) and 3. **Excel sheet** of summary of applications, issues as well as that specific hospital’s details
* Complete database **Excel sheet** where serial numbers of frames are in chronological order and details of the hospital and child the specific frame is issued to are linked. All hospital and therapist details are recorded here.
* **Excel sheet** summarising all frames that are ordered but not picked up and then updated as the frame is picked up (in theory)
* Photos folder where all photos viewed as appropriate for use is filled (in theory)
* Additional folders include: Marketing information, Workshops, Letters to donors, Frame details, Supplier’s information etc.
* Thus: recording of data on **Microsoft word** and mostly **Microsoft Excel.**
* Communication with therapists at hospitals via **G-mail.**
* We use **Google drive** to share the above information recorded in the databases between the 4 parties within our organisation.
* The 4 parties communicate via **What’s App and G-mail** since all are living in different areas.
* We have a **Facebook** page where we receive questions and orders at times (but we usually try to refer them to our G-mail account to keep better track of information).
* What system do you currently use?

Microsoft word, **Microsoft Excel, Google Drive**, G-mail.

* What information does this system keep?

All data gathered as described above:

* Forms: Application forms, Photo Permission forms, Contracts
* Photos: Photo with application, photo with receipt – then folder for approved photos
* Dates for applications and issues
* Serial numbers of frames
* Contact details of hospitals and therapists (2places) as well as clients within standing frame database
* Additional details: workshops, marketing, suppliers, frame details
* Financial details
* How effective is it?

Not very. It becomes very overwhelming to keep track of 20+ different hospitals.

There is often missing information. This is often from the therapists side and then to follow up with them is time consuming and often doesn’t lead to answers.

Problems with the system:

* Time consuming
* Leaves space for errors
* Difficult to cross reference
* Delays in updating of system due to time required and thus delay in follow-ups which increase overall delays and loss of information or poor service provision
* Therapist not able to view progress of frames and thus have to ask us
* What are its disadvantages?

Many individuals involved in processing of data capturing and recording of information which makes the need for easy and effective measures more NB to avoid information falling through the cracks.

What are its advantages?

* Keeps high amount of information for future use
* Google drive works well to share information over a distance
* What’s App provides quick and easy communication
* G-mail account helps us keep record of information received in-case there are problems with our personal databases

It still has quite a personal nature about it as the therapists can contact us directly but I sometimes think this is why there is information missing

* Which disadvantage would you like to change first?

I would love to see a more efficient data collection system in place.

* If its possible for the data that therapists give us to be immediately converted into a spread sheet it would help us a huge amount
* The ability to update information on one sheet and then it is automatically updated to other relevant sheets in our system
* What would you like to keep from your current system?

We don’t have to keep anything if you feel it’s not necessary.

1. Project Scope

* Where will the service be used?

From our laptops wherever internet connectivity is possible

* Who will be affected by the service and in what way?

The 4 of us administrating the service – in terms of making the system more efficient, effective and less time consuming.

The therapists issuing frames from hospitals in terms of being able to get the information to us more easily and then to have a more efficient service in terms of them receiving their standing frames. Thus better service delivery and follow-up procedures.

* Will the services be used in or out of your offices? (Or both)

Out of office: We don’t have offices; we all work part time from home or at our places of work when we have time.

1. System Interface
   1. Hardware

* Do you want to access this information on a computer or mobile device?

Yes both if possible (PC, Laptops, Smartphones)

* 1. Software
* How many people will be using the service?
* Will different people need to access the same information on the service?
* The 4 of us involved in administration to be able to access the entire database
* Possibly the therapists from each hospital **accessing their individual hospital’s information only.**
* How long do you plan to keep all the information on the service?

Forever if possible?

6. Benefits and Objectives (optional)

* What should the service be able to do?

In my mind, but I don’t know if this is even a possibility, I see therapists applying for their standing frames online; they complete the documents online from their phone or computer and then submit. This information is then stored directly onto their hospitals database which the 4 of us as well as the therapists at the hospital concerned have access to. This way everyone can keep track of how many frames have been applied for and how many have been issued or are waiting to be issued.

To summarise:

* Online application procedures
* Automatically generated summary sheets that can be accessed by us and therapists
* Connected databases that can automatically update on different databases as data is entered
* Automatically generated e-mails regarding follow up on documents?
* Cross-referencing
* Progress summaries
* Automatically generated reminders (as discussed above)
* What benefits are do you want from the service?

More streamlined capturing of data. Easier access to information.

* Quicker recording procedures
* Quicker updating procedures
* Cross-referencing abilities
* Double checking of information procedures
* Ability to search databases by entering key words
* Automatically generated reminders i.e. who is waiting longer than needed for frames, who has not replied on requests for documents after a time period etc.