Dludla + Maponya Dental Practice System

Help Manual

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1. Introduction

This document focuses on the user documentation of the management side of the Dludla and Maponya Dental Practice System. This side is composed of the functionalities that will be used by the employees of the dental practice including the dentists. The functionalities covered include the logging in of the user, creation, updating, deletion and reading of the sub systems namely: Consultation, Admin, Supplier, Product, Procedure, Patient, Stock, Payment and Reporting. The document also includes a detailed explanation of the reports contained in the reporting sub system.

2. System Help Function

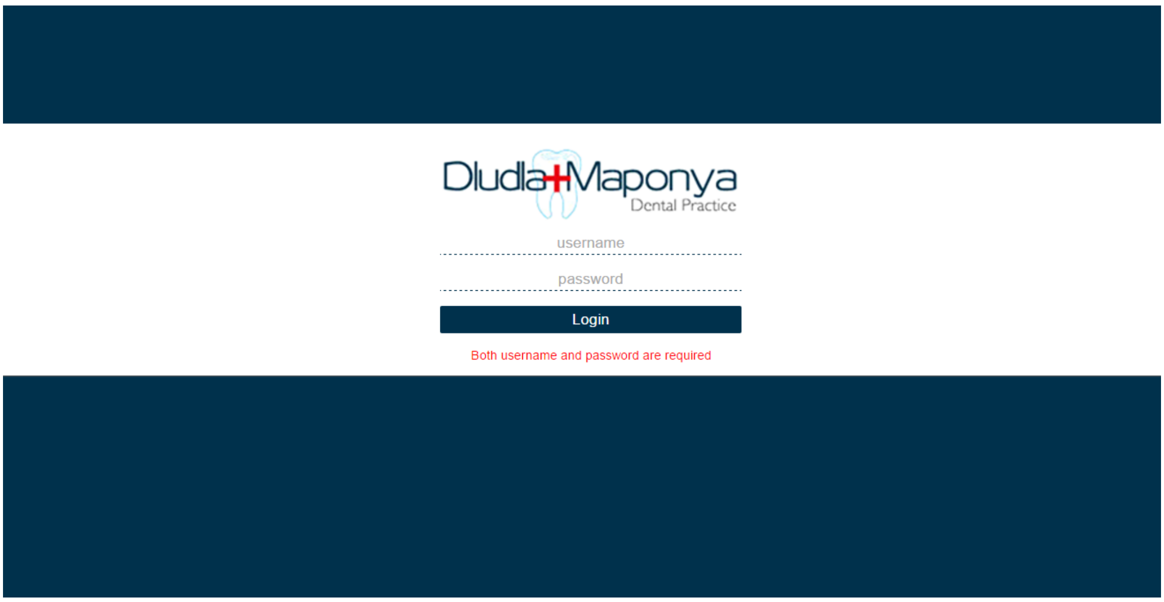
To help function can be accessed on every screen on the top left by clicking on the **Help** link, as shown below:

3. Admin Functions

3.1 Purpose of this function

The purpose of this admin function is to allow the user to log in and out of the system. The admin function is composed of the CRUD(Create, Read, Update, Delete) components of the employee, medical aid and medical aid types. After logging into the system, with the given rights, the user can access and make use of the CRUD components of this admin sub system.

3.2 Login

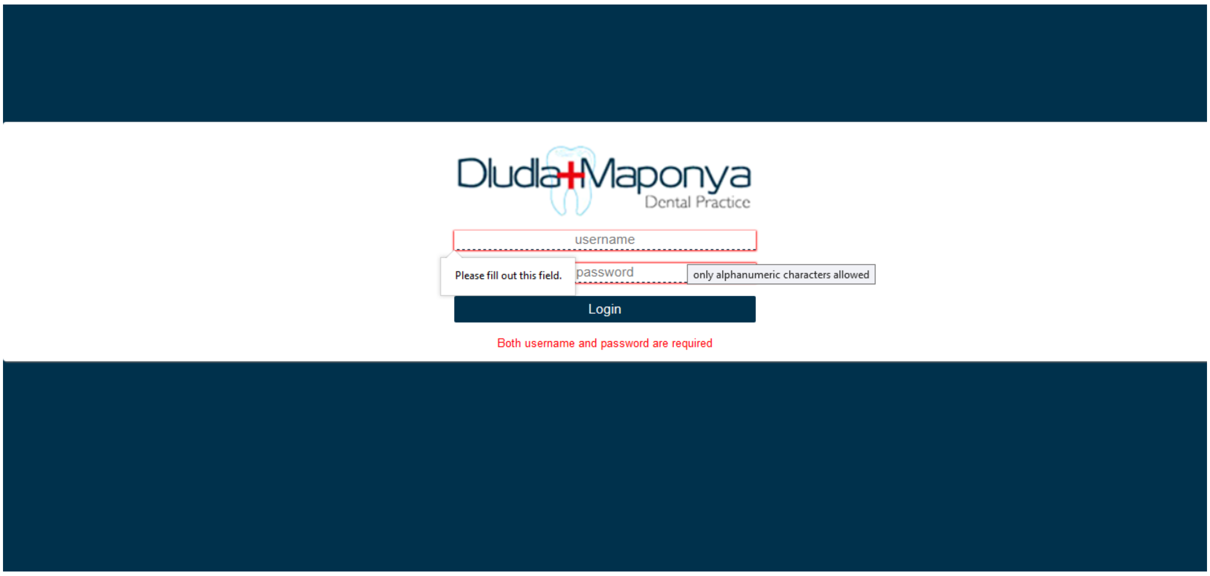


The screen above allows the user to access the system and its functionalities.

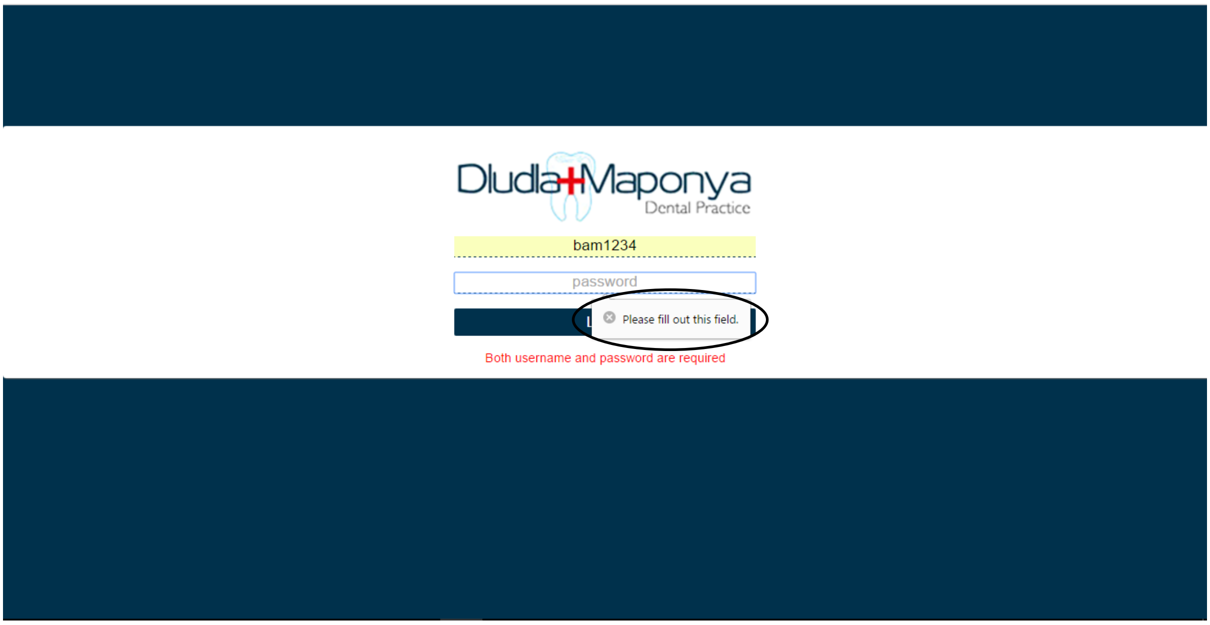
3.2.1 Components of the Login Screen:

1. Username text box: the user's username is to be entered here.
2. Password text box: the user's password is to be entered here.
3. Login button: after the user has entered their username and password, this button will be clicked and provided that all user input is correct, the user will be able to login to the system.

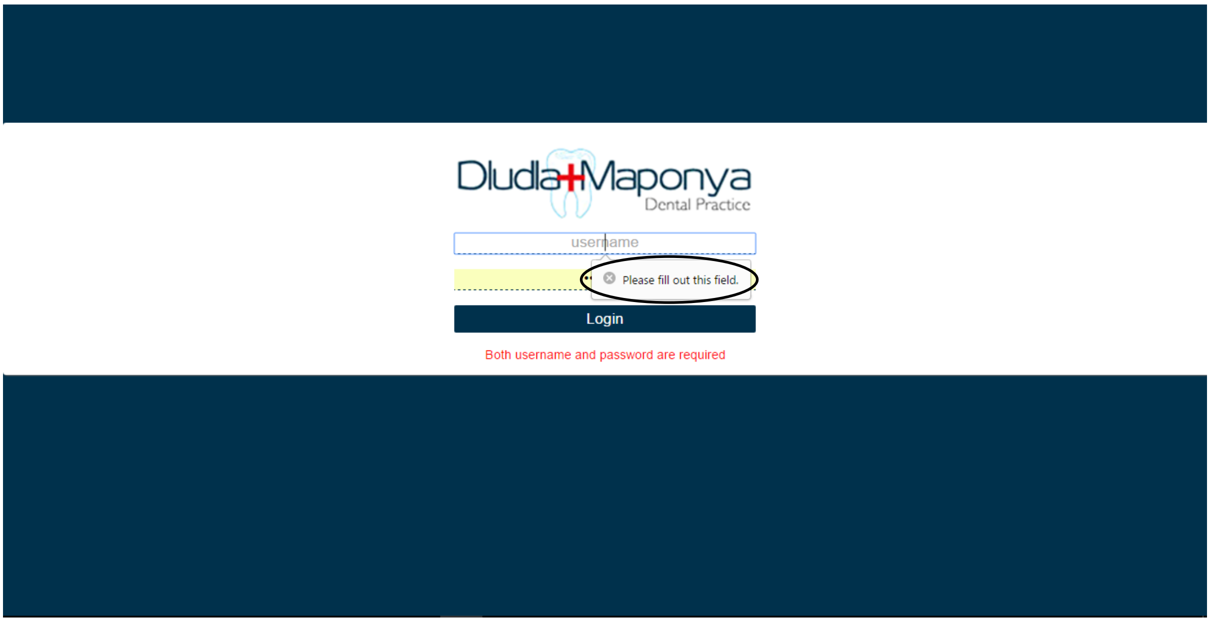
3.2.2 Possible notifications for the Login Screen



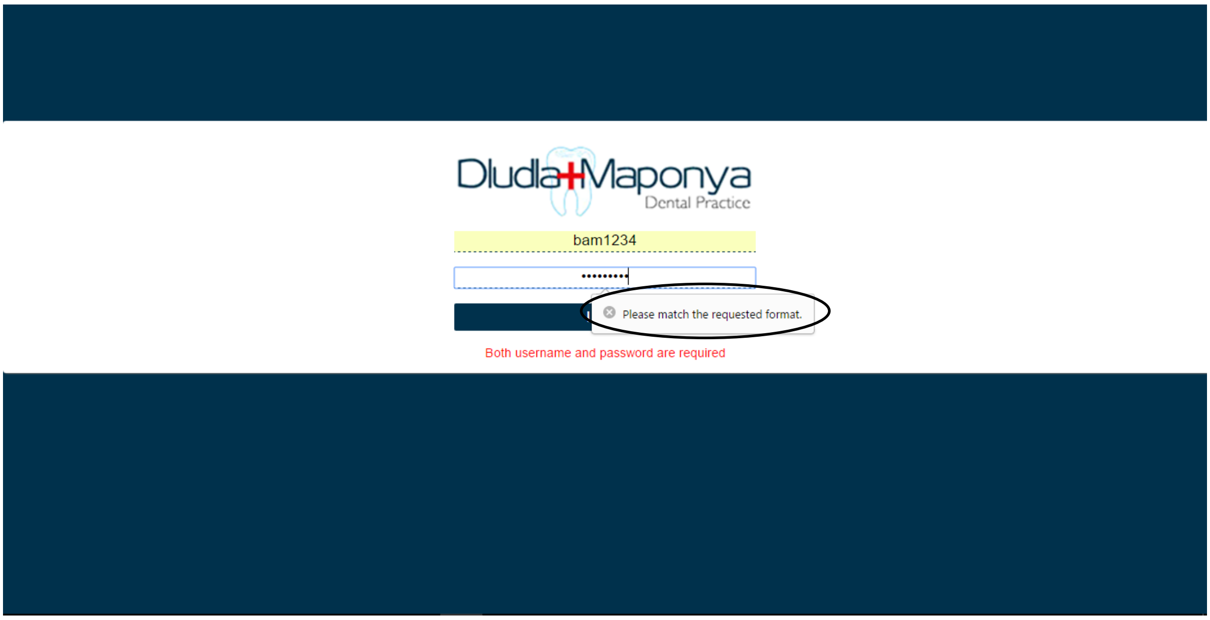
This error message is shown if the user has not provided any input on the screen.



This error message is shown if the user has not provided a password.



This error message is shown if the user has not provided a username.

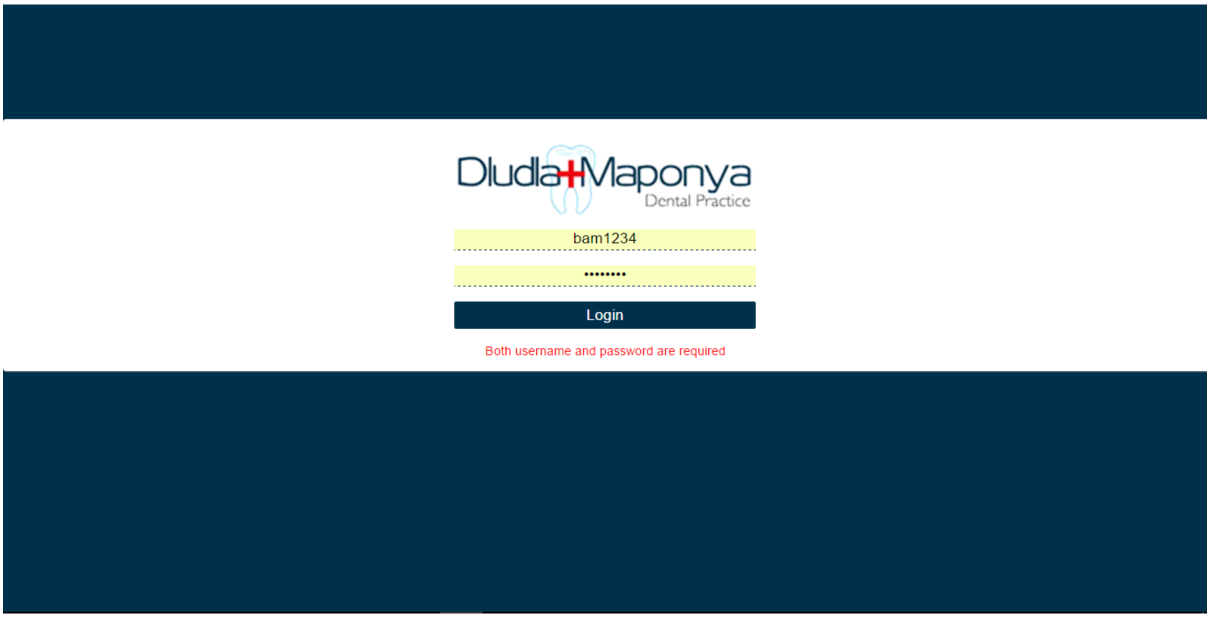


This error message is shown if the user has provided either an invalid username or user password.

3.3 Logout

To Logout, the user will simply click the button Logout.

The following screen below will then appear:



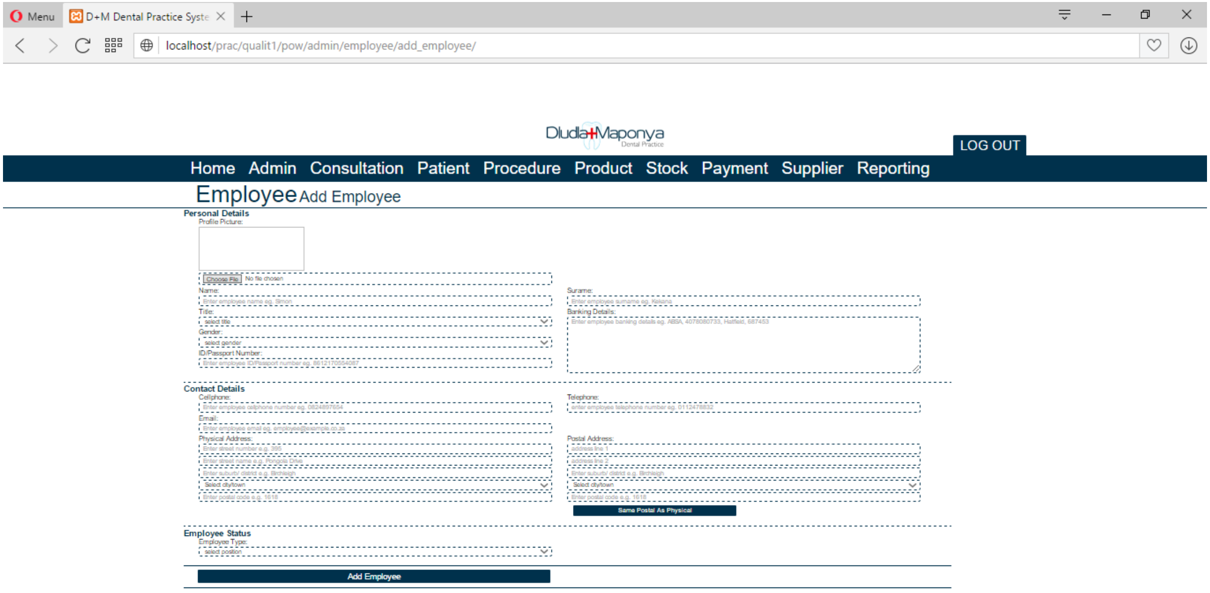
3.4 Add Employee function

When proceeding to the Add Employee function, the user will first need to navigate to the Admin Tab as shown below:

The user must hover over the Admin menu located as the second item on the main navigation item. A sub-menu will appear with the options for "View employee" and "Add employee".

To add an employee, the user will click on the "Add employee" sub-menu option.

The following screen will then appear:



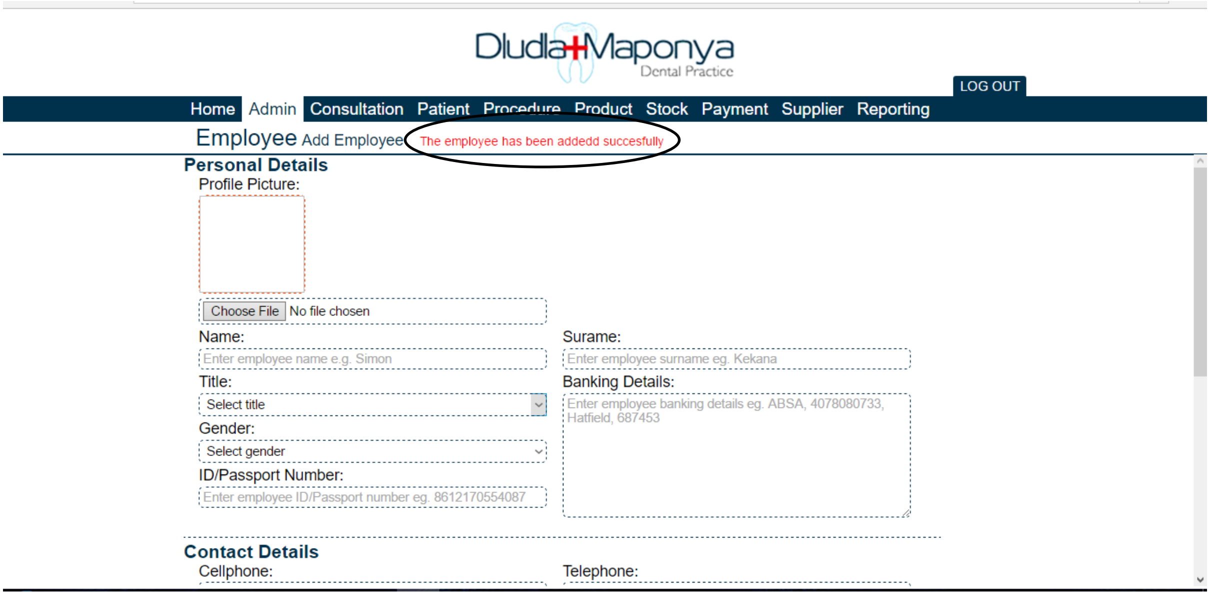
This form allows the user to perform the functions of adding an employee on the system.

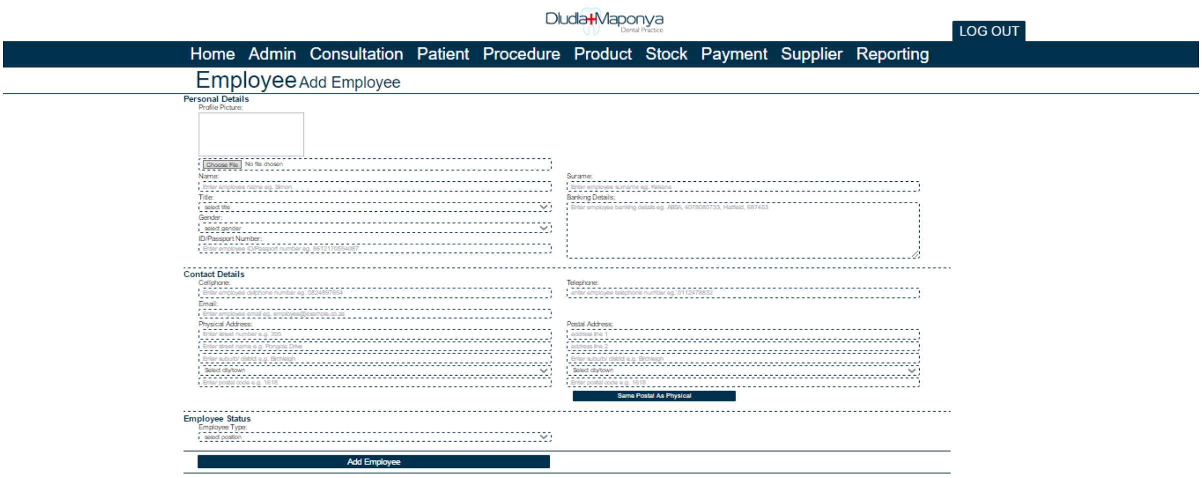
3.4.1 Components of this screen

1. Employee Picture box: this is a photographical representation of an employee that is working on the system for legal purposes. The user is able to add a photo of themselves on the system.
2. Choose File button: This button allows the user to load a picture of an employee.
3. Name text box: This is where the employee's name will be entered.
4. Title combo box: This combo box contains all the title variations. Here, the user is able to select their appropriate title.
5. Gender combo box: This is where the employee's gender will be selected.
6. ID Number text box: This is where the employee's ID number will be entered.
7. Surname text box: This is where the employee's surname will be entered.
8. Banking details text box: This is where the employee's banking details will be entered.
9. Cell phone text box: This is where the employee's cell phone number will be entered.
10. Email text box: This is where the employee's email address will be entered.
11. Street number text box: This is where the employee's street number will be entered.
12. Street name text box: This is where the employee's street name will be entered.
13. Suburb/ district text box: This is where the employee's suburb/ district will be entered.
14. City/ Town combo box: This is where the employee's city/ town will be selected.
15. Postal code text box: This is where the employee's postal code will be entered.
16. Telephone text box: This is where the employee's telephone will be entered.
17. Address line 1 text box: This is where the employee's address line 1 will be entered.
18. Address line 2 text box: This is where the employee's address line 2 will be entered.
19. Suburb/ district text box: This is where the employee's suburb/ district will be entered.
20. City/ Town combo box: This is where the employee's city/ town will be selected.
21. Postal code text box: This is where the employee's postal code will be entered.
22. Employee type combo box: This is where the employee type will be selected.
23. Add employee button: This button will allow the user to save the new employee's information to the database.

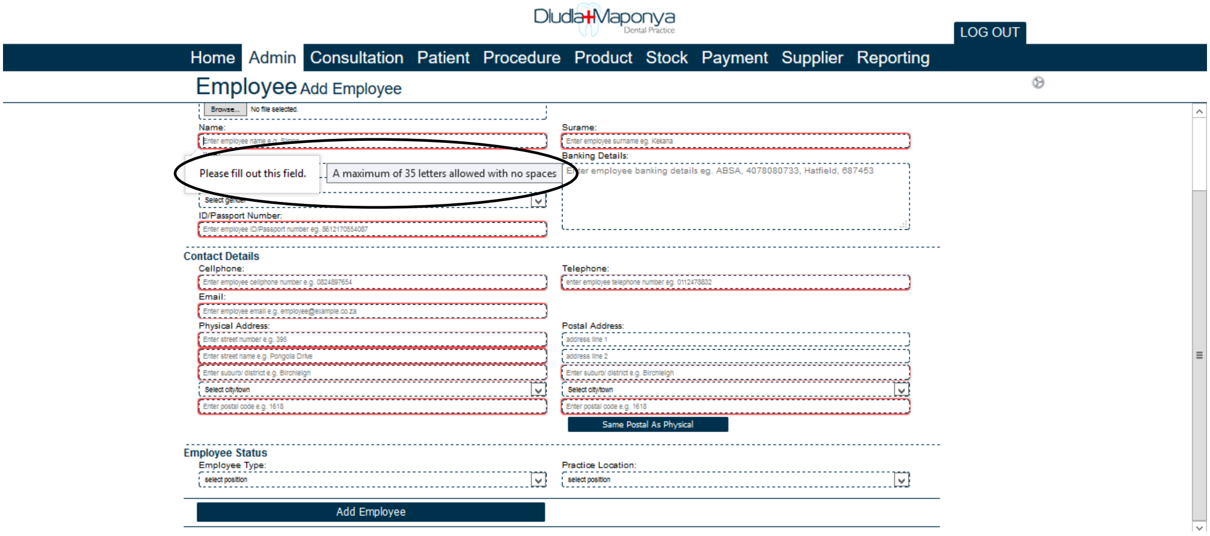
3.4.2 Possible notifications for the add employee screen

When the employee is successfully stored in the database the following notification label on the screen will appear:

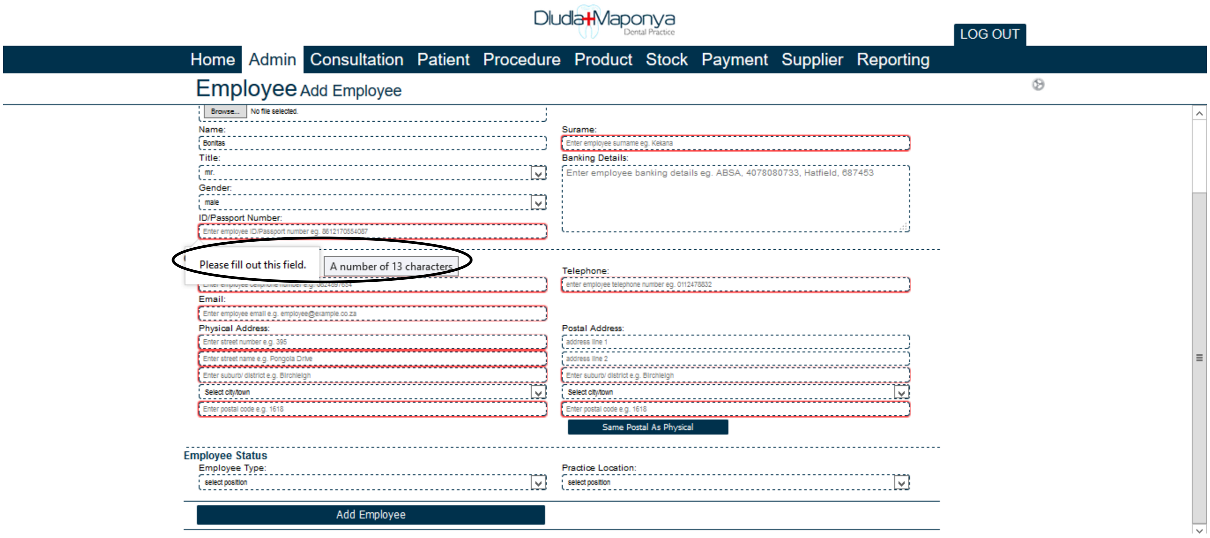




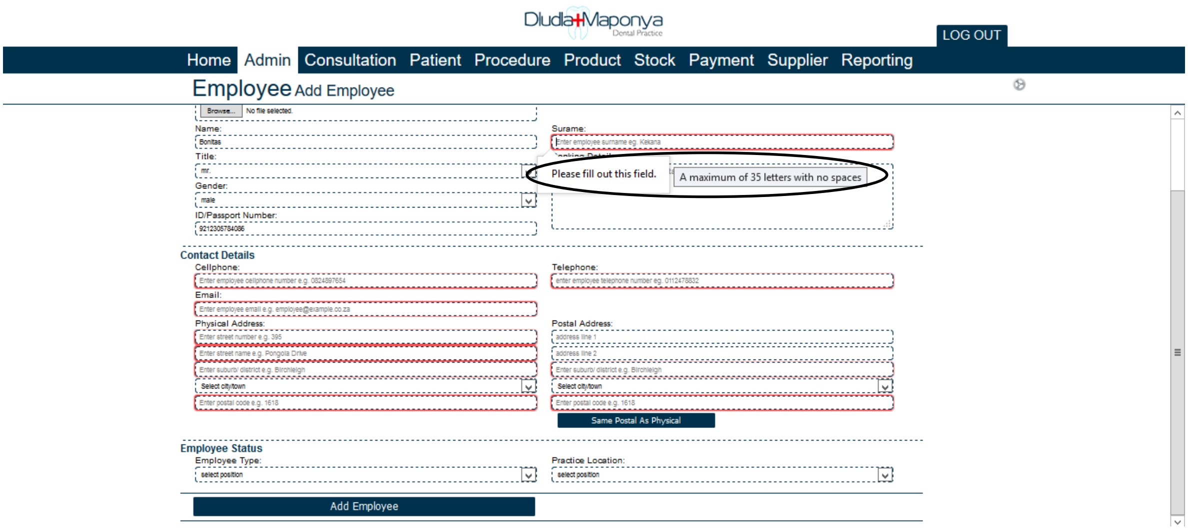
This error is shown if the user has failed to provide an Employee photo.



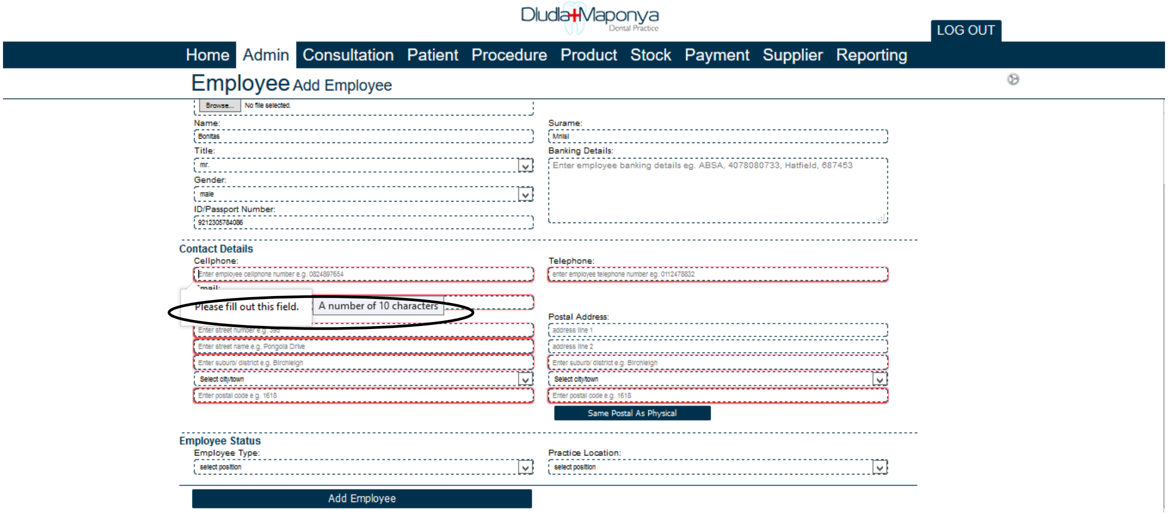
This error is shown if the user has failed to provide a Name.



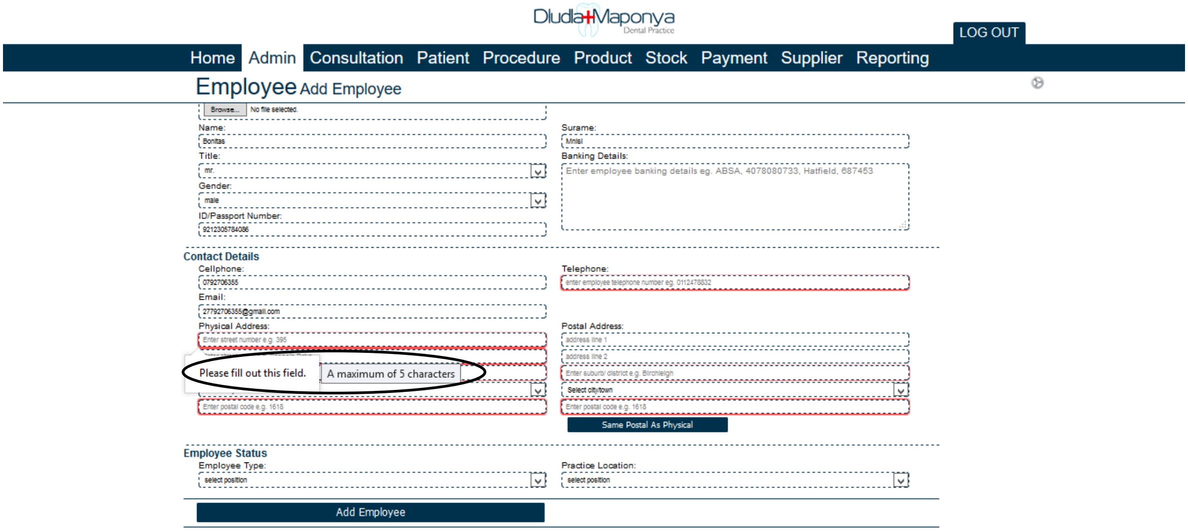
This error is shown if the user has failed to provide an ID number.



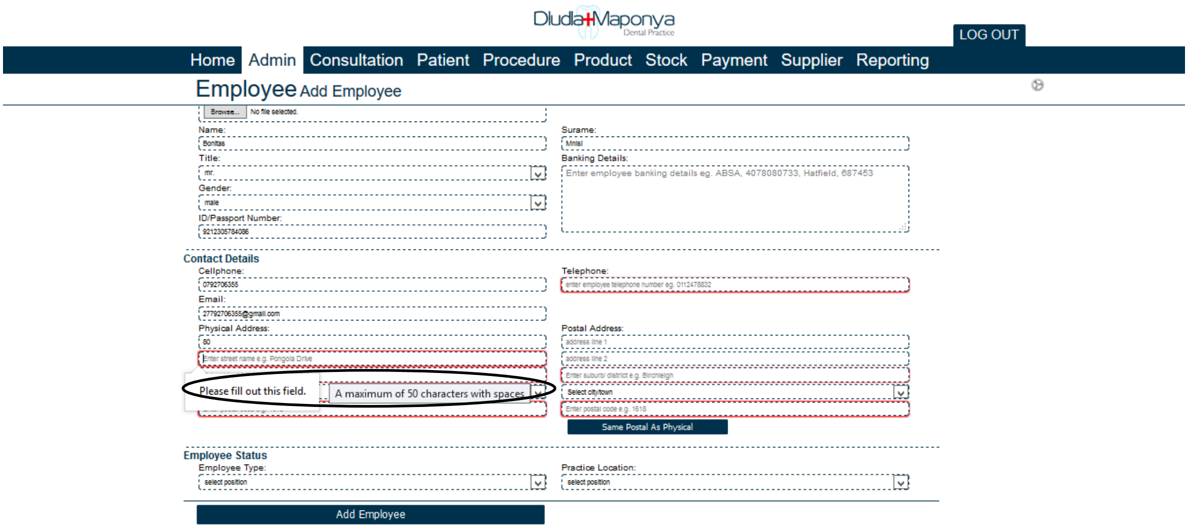
This error is shown if the user has failed to provide a Surname.



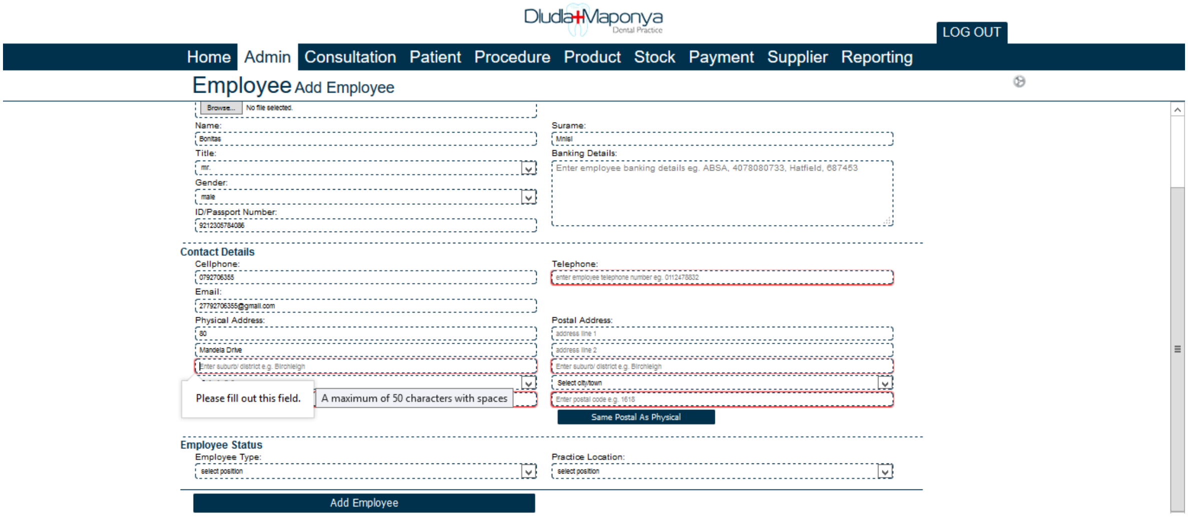
This error is shown if the user has failed to provide a Cell phone number.



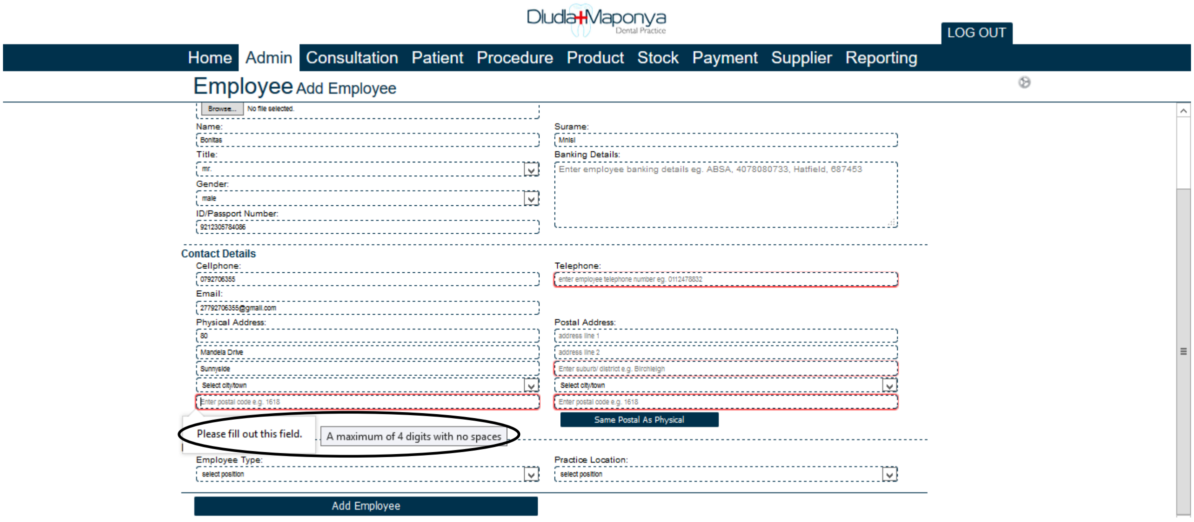
This error is shown if the user has failed to provide a Street number.



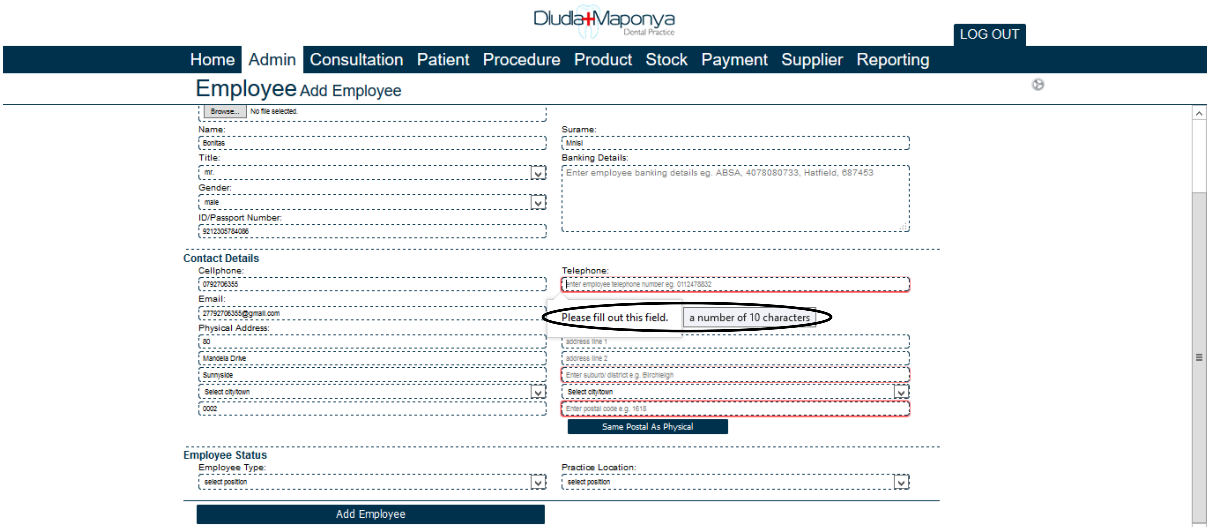
This error is shown if the user has failed to provide a Street name.



This error is shown if the user has failed to provide a Suburb / district.



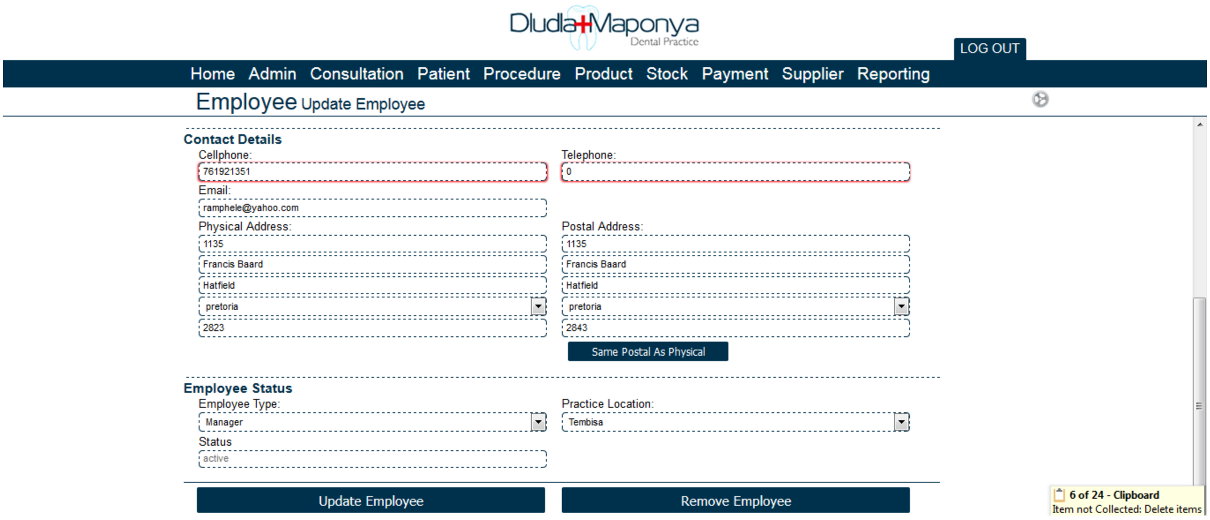
This error is shown if the user has failed to provide a Postal code.



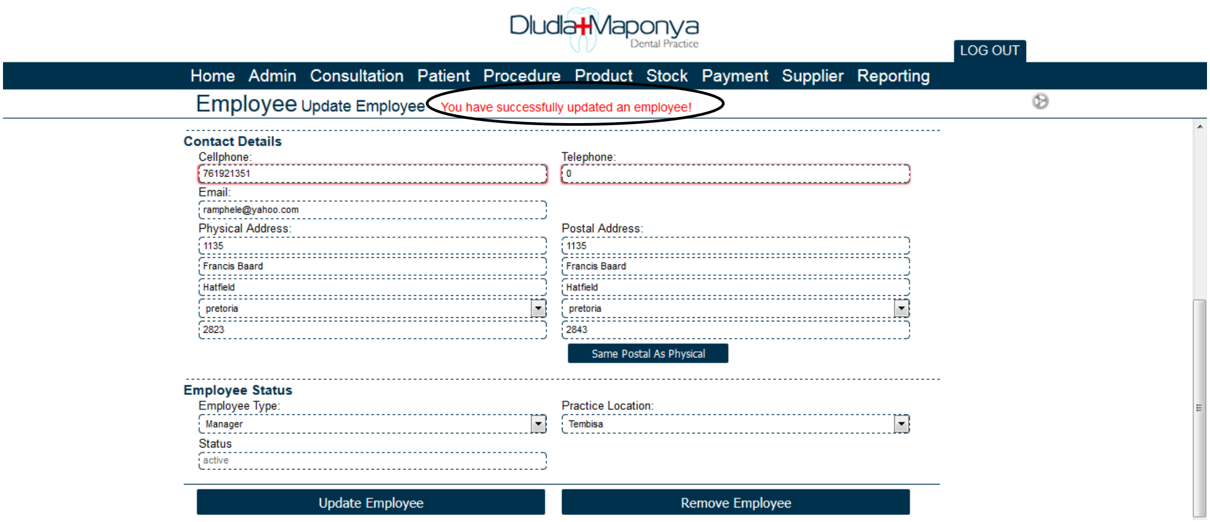
This error is shown if the user has failed to provide a Telephone number.

3.5 Update Employee function

When updating the employee details, the user will need to navigate to the Admin Tab as shown below:



In order to update the changes made to an Employee, the user must click on the Update button after making any changes, after which the above notification will be displayed.

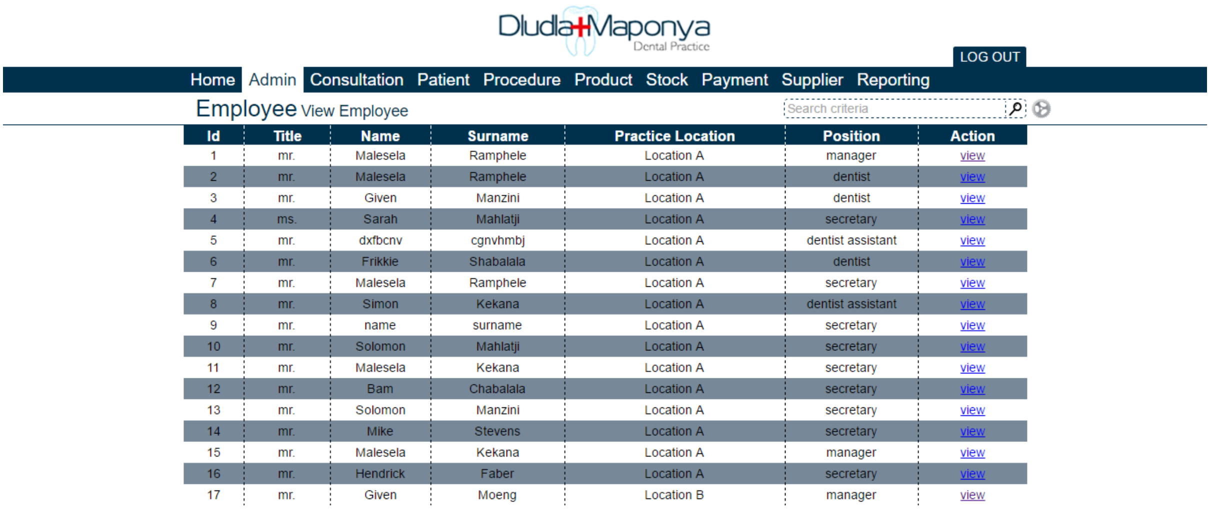


3.6 View/Search for an employee function

Before proceeding with the view employee functionalities, the user will be required to navigate to the Admin menu on the navigation item, as shown below:

To view an employee, the user will click on the "View Employee" sub-menu option.

The following screen will then appear:

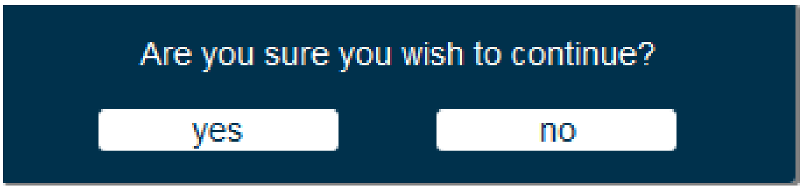


Id	Title	Name	Surname	Practice Location	Position	Action
1	mr.	Malesela	Ramphele	Location A	manager	view
2	mr.	Malesela	Ramphele	Location A	dentist	view
3	mr.	Given	Manzini	Location A	dentist	view
4	ms.	Sarah	Mahlatji	Location A	secretary	view
5	mr.	dxfbcnv	cgnvhmbj	Location A	dentist assistant	view
6	mr.	Frikkie	Shabalala	Location A	dentist	view
7	mr.	Malesela	Ramphele	Location A	secretary	view
8	mr.	Simon	Kekana	Location A	dentist assistant	view
9	mr.	name	surname	Location A	secretary	view
10	mr.	Solomon	Mahlatji	Location A	secretary	view
11	mr.	Malesela	Kekana	Location A	secretary	view
12	mr.	Bam	Chabalala	Location A	secretary	view
13	mr.	Solomon	Manzini	Location A	secretary	view
14	mr.	Mike	Stevens	Location A	secretary	view
15	mr.	Malesela	Kekana	Location A	manager	view
16	mr.	Hendrick	Faber	Location A	secretary	view
17	mr.	Given	Moeng	Location B	manager	view

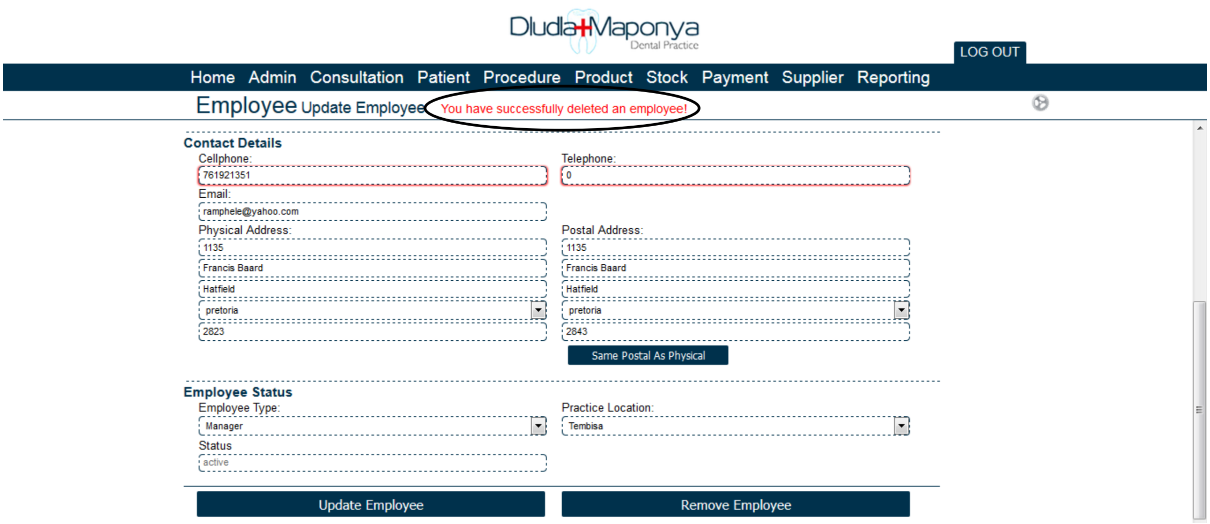
To view a specific employee on the system, simply click on the View link at the end of an employee record given in the list.

3.7 Delete Employee function

If the user would like to delete an employee that already exists on the system, the following notification will be displayed after clicking the Delete button.



If the user clicks on "No", the notification screen will close. However, if the user clicks "Yes", the following screen will be displayed:

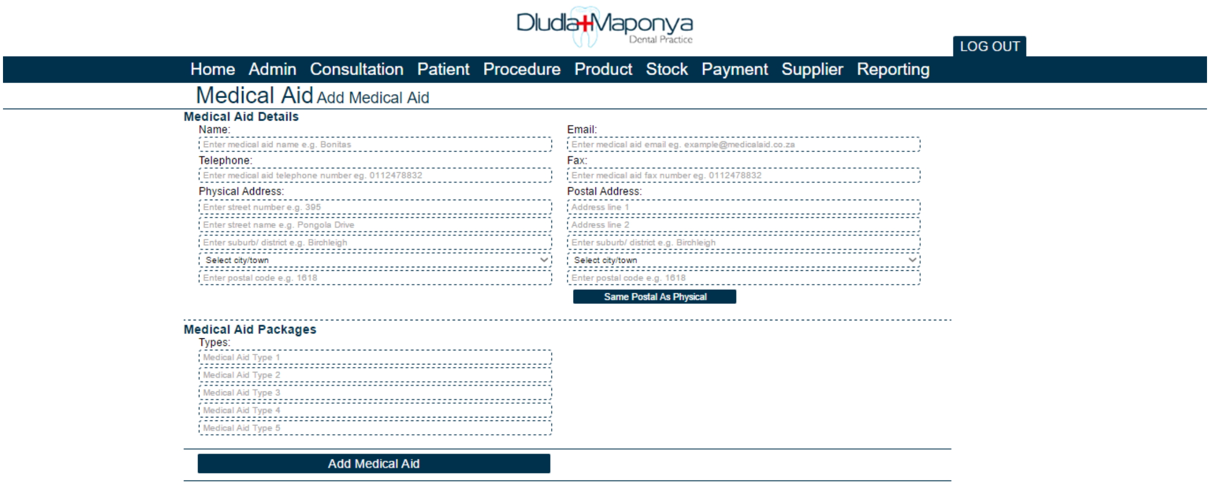


3.8 Add Medical Aid and Medical Aid Type function

Before proceeding with the add medical aid functionality, the user will be required to navigate to the Admin menu on the navigation item, as shown below:

To add a medical aid, the user will click on the “Add a medical aid” sub-menu option.

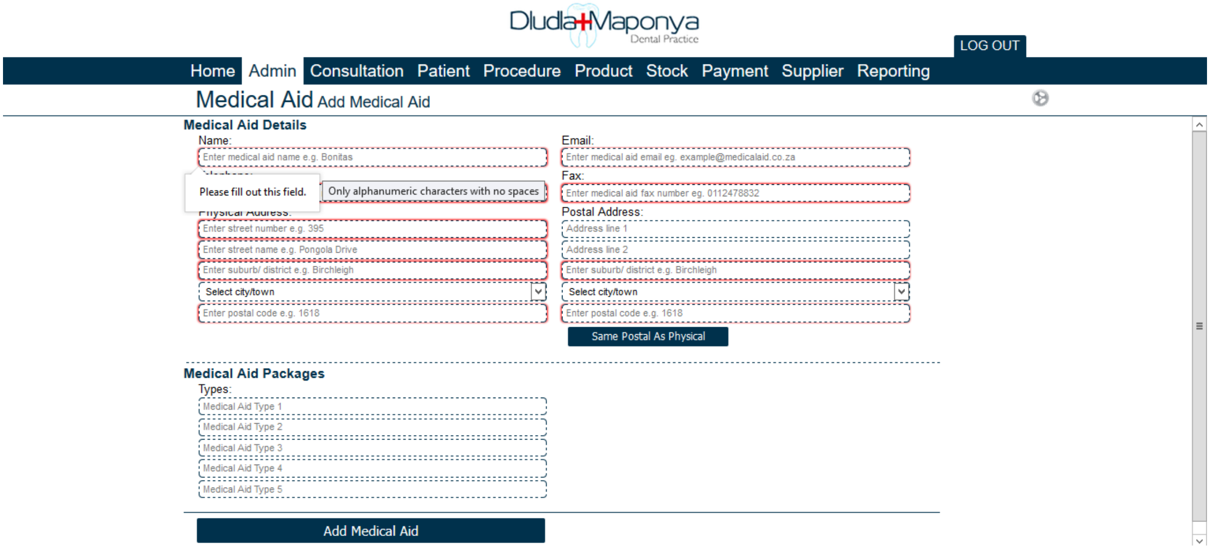
The following screen will then appear:



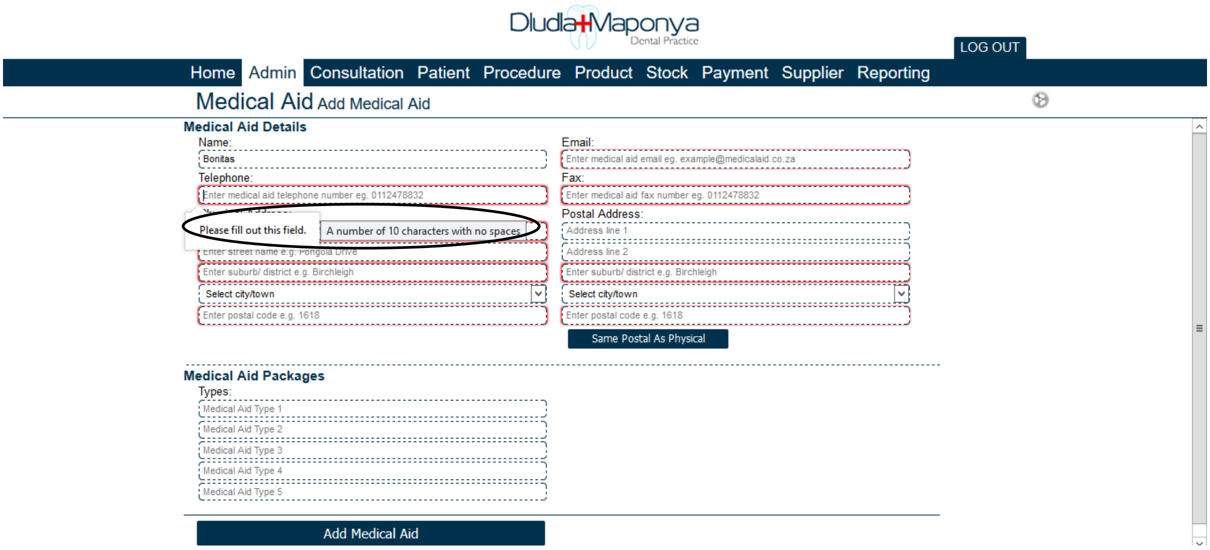
3.8.1 Components of this screen

1. Name text box: the user enters a medical aid name here.
2. Telephone text box: the user enters a medical aid telephone here.
3. Physical Address text box: the user enters a medical aid physical address here.
4. Email text box: the user enters a medical aid email here.
5. Fax text box: the user enters a medical aid fax.
6. Postal Address text box: the user enters a medical aid postal address here and if physical address is the same as the postal address click the button “Same Postal as the Physical”.
7. Medical Aid Type 1 text box: the user enters a medical aid package 1 here.
8. Medical Aid Type 2 text box: the user enters a medical aid package 2 here.
9. Medical Aid Type 3 text box: the user enters a medical aid package 3 here.
10. Medical Aid Type 4 text box: the user enters a medical aid package 4 here.
11. Medical Aid Type 5 text box: enters a medical aid package 5 here.
12. Click the button Add Medical Aid.

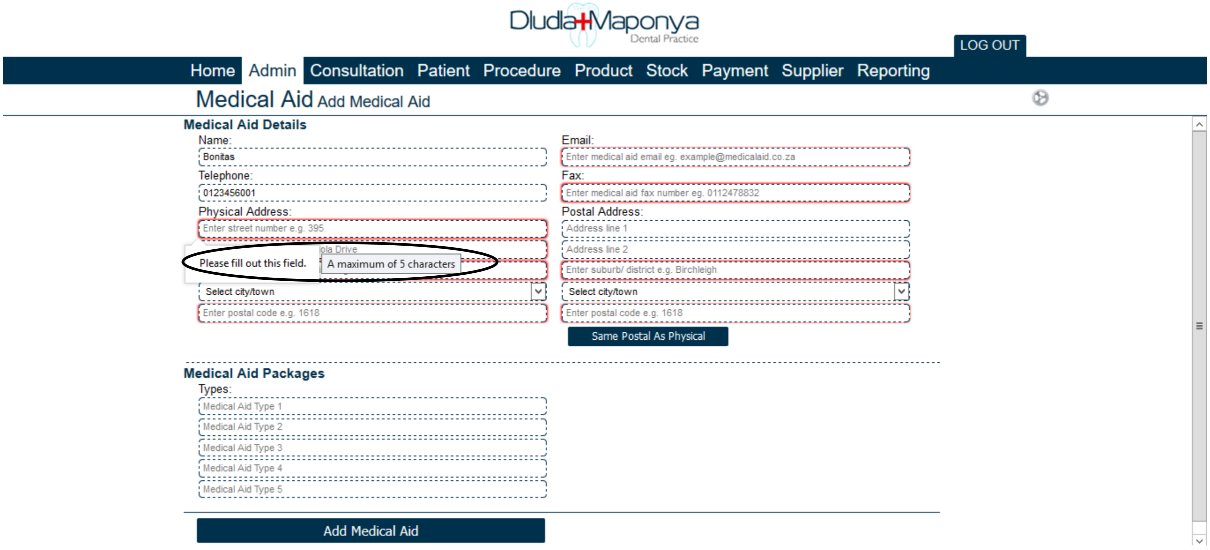
3.8.2 Possible notifications for the add medical aid and type screen



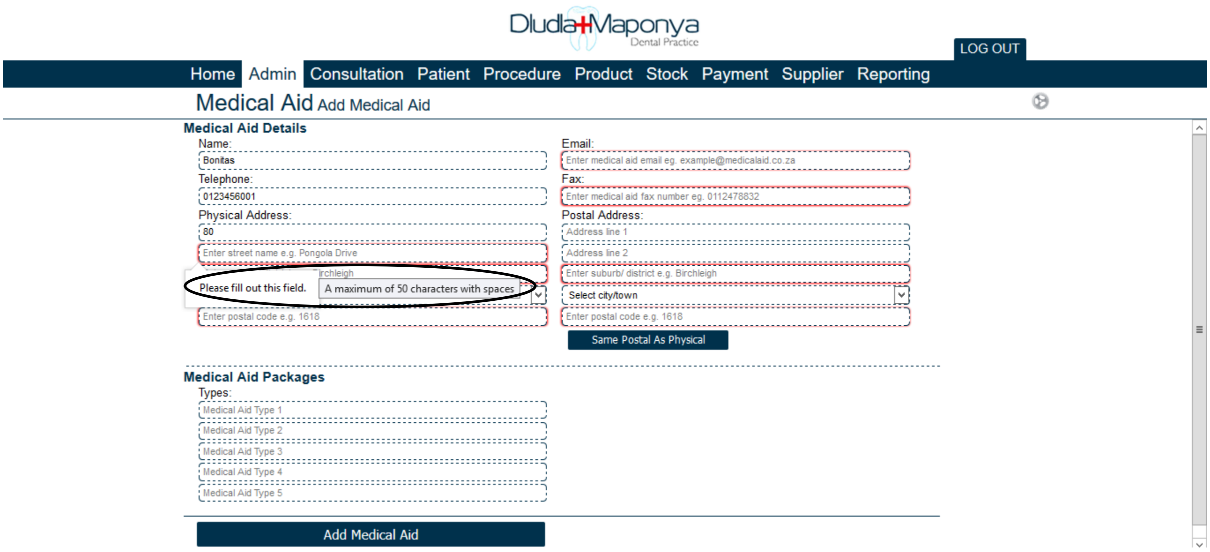
The above error message is shown if the user has not provided a medical aid name.



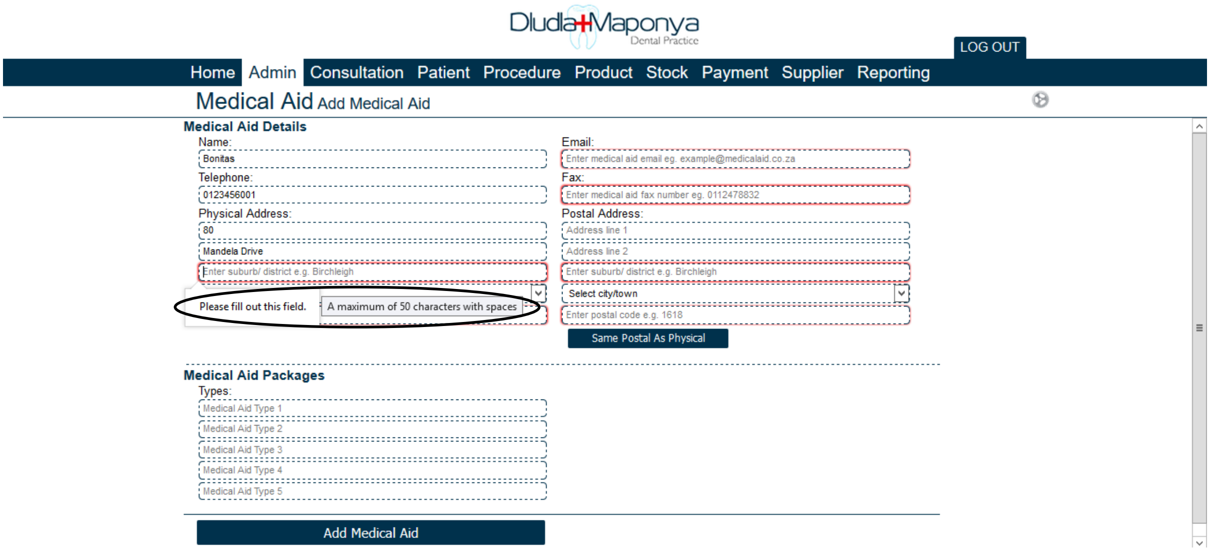
The above error message is shown if the user has not provided a medical aid telephone.



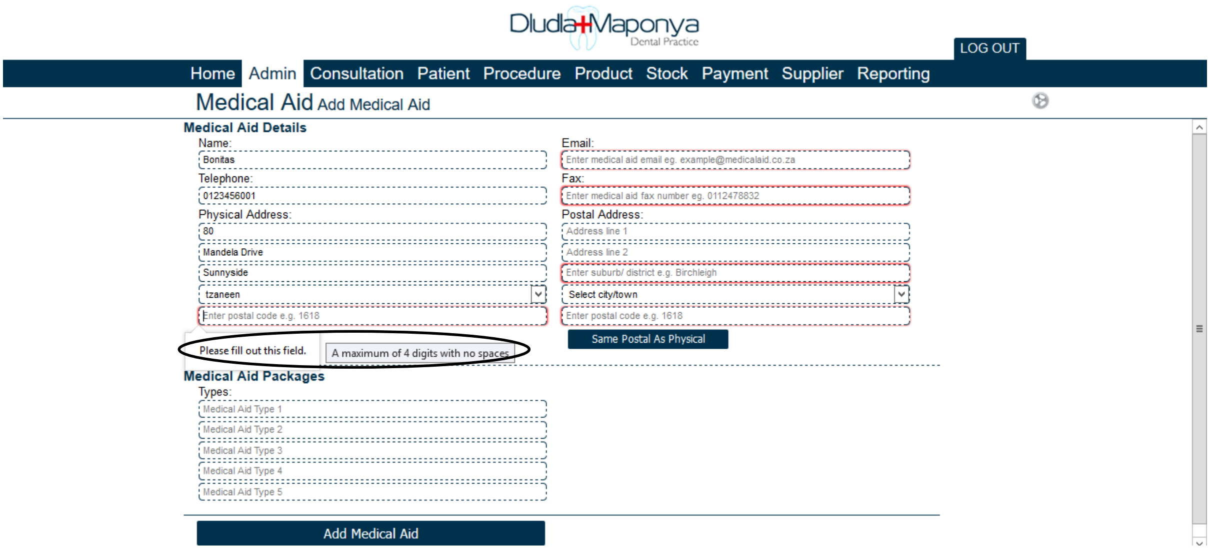
This error is shown if the user has failed to provide a Street number.



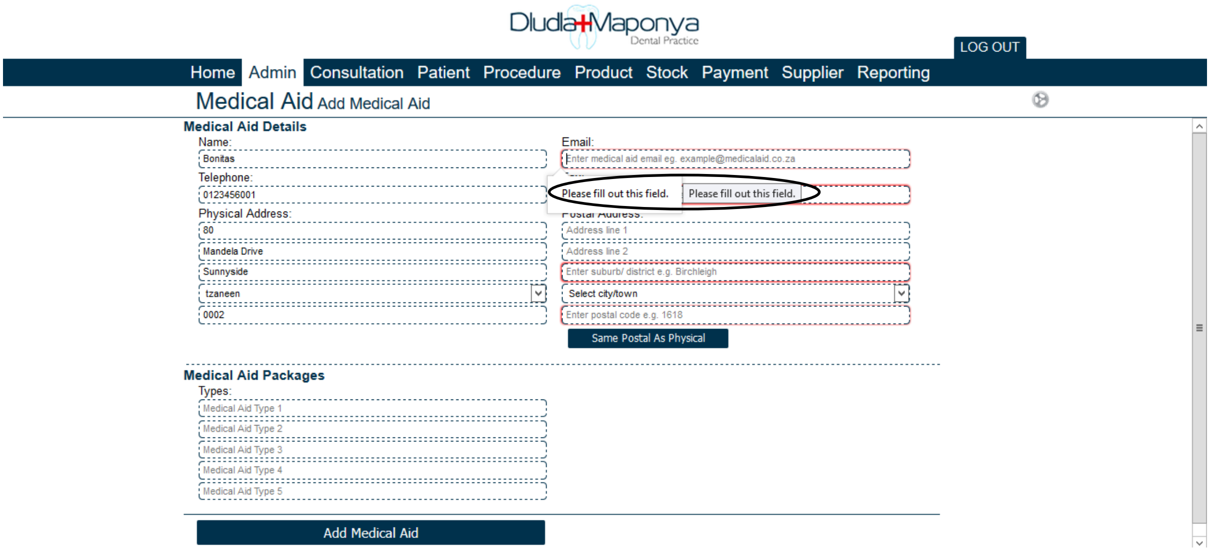
This error is shown if the user has failed to provide a Street name.



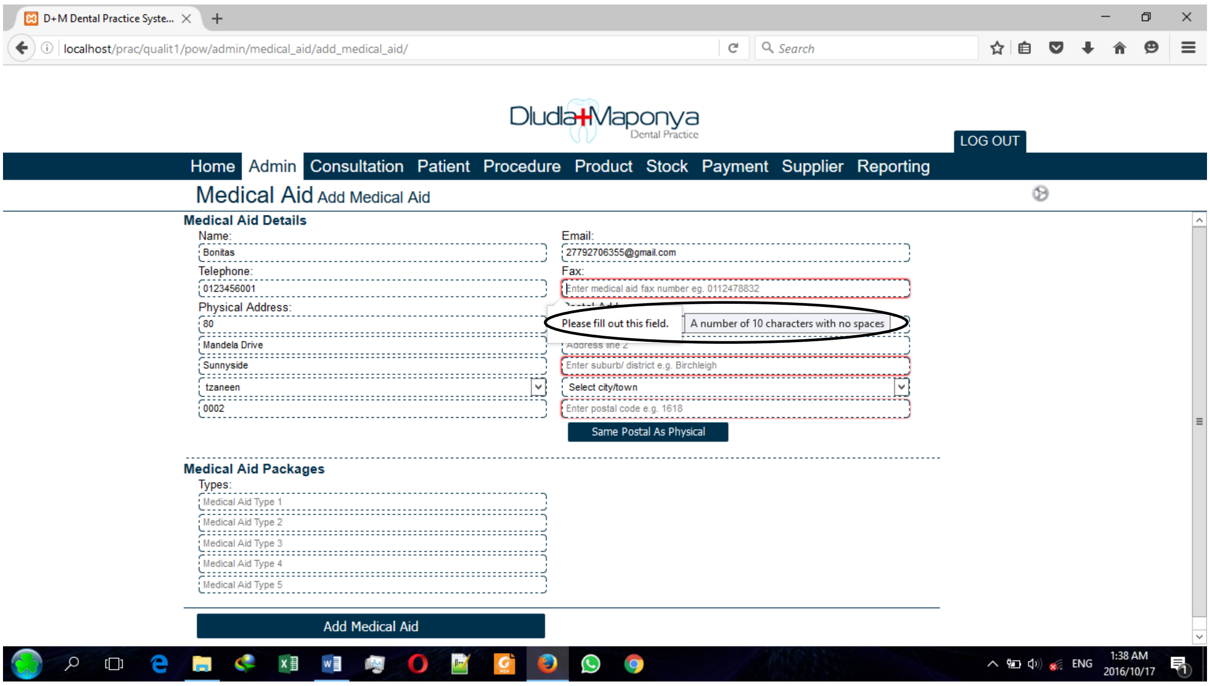
This error is shown if the user has failed to provide a Suburb / district.



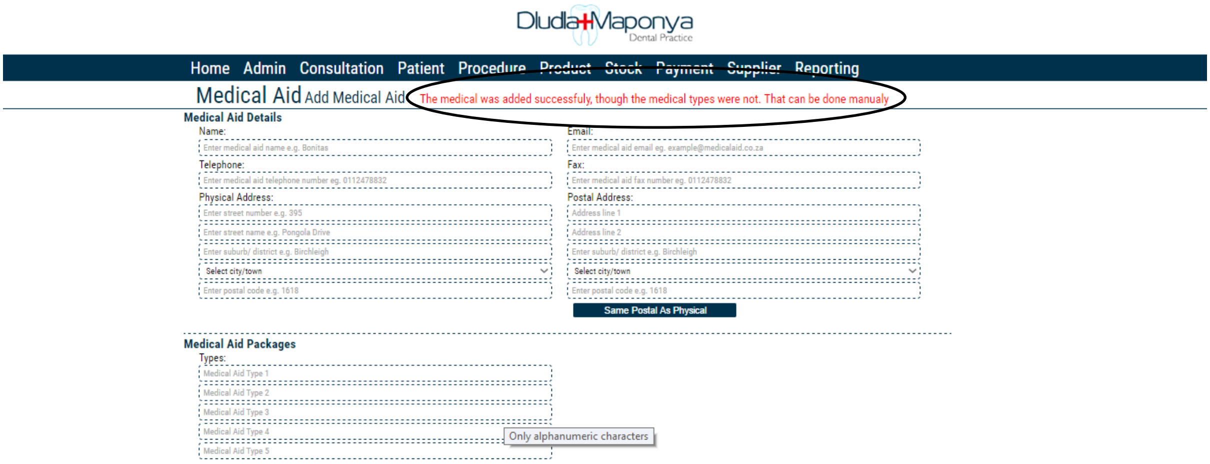
This error is shown if the user has failed to provide a Postal code.



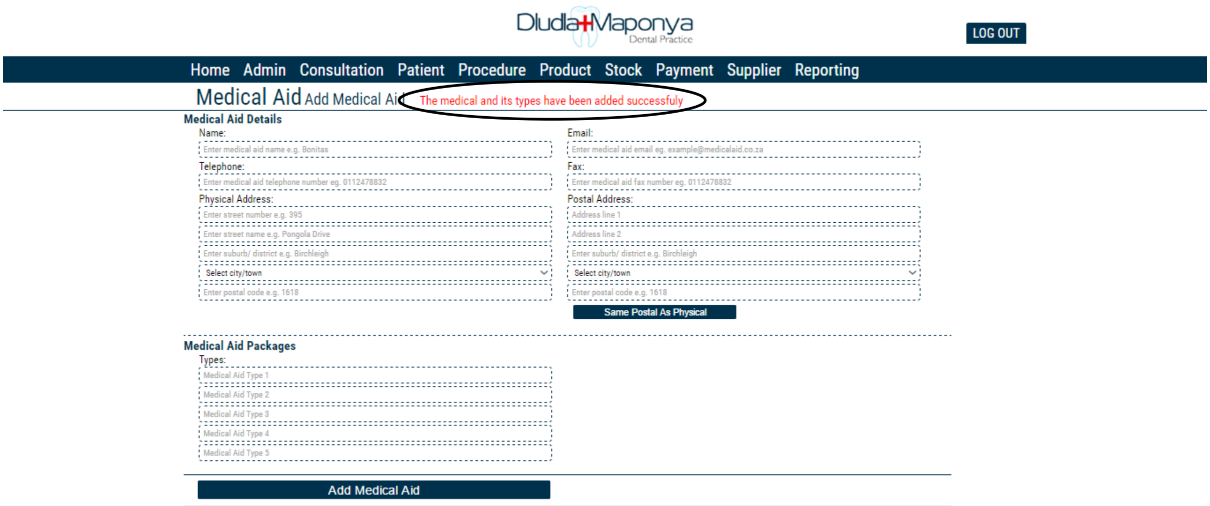
The above error message is shown if the user has not provided a medical aid email.



The above error message is shown if the user has not provided a medical aid fax.



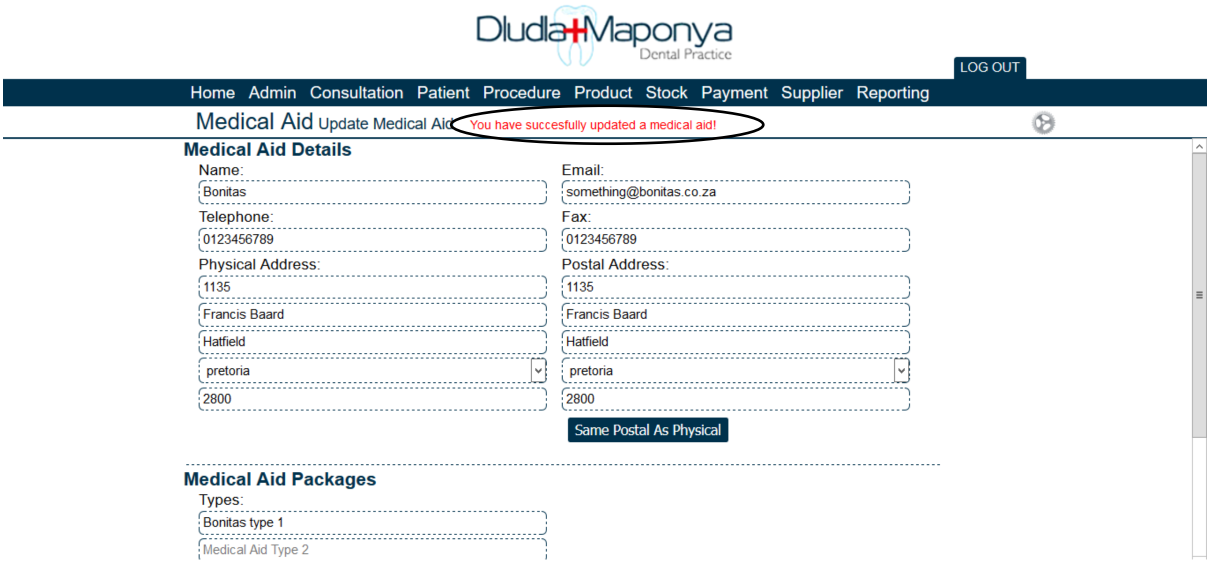
The above error message is shown if the user has not provided a medical aid types only.



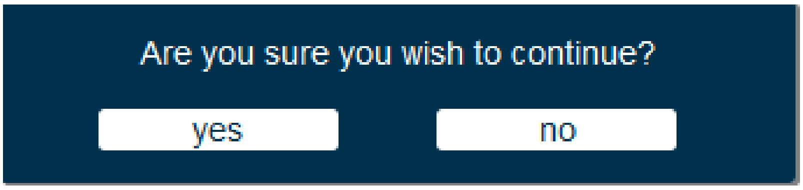
The above error message is shown if the user has provided all the correct input.

3.9 Maintain (Delete and Update) Medical Aid and Medical Aid Type function

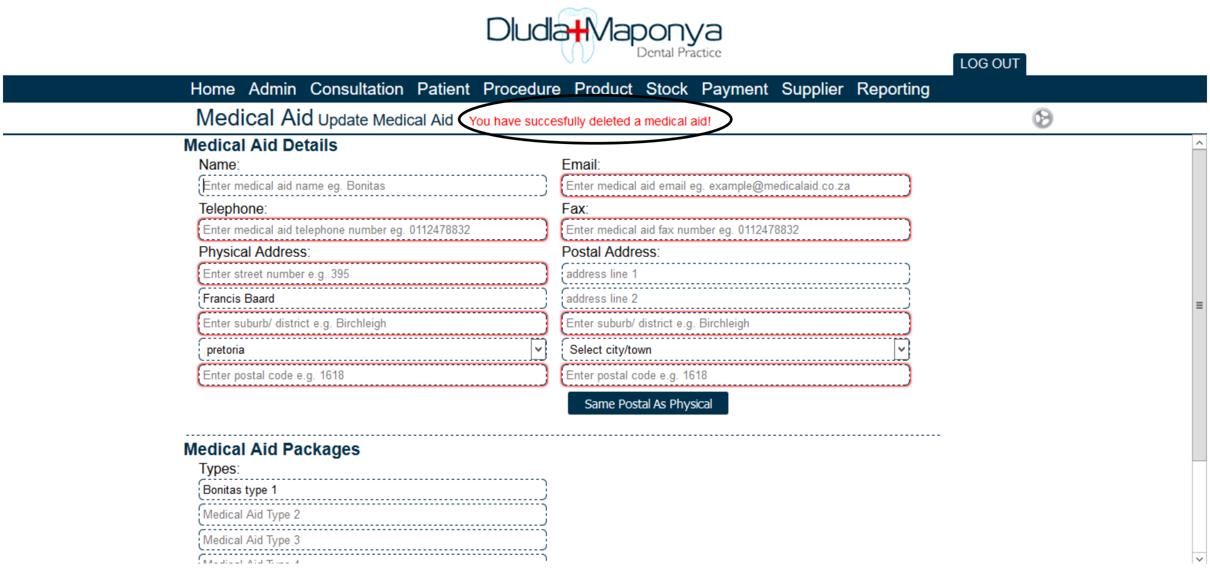
In order to update the changes made to an Employee Role, the user must click on the Update button, after which the above notification will be displayed.



If the user would like to delete a medical aid that already exists on the system, the following notification will be displayed after clicking the Delete button.



If the user clicks on "No", the notification screen will close. However, if the user clicks "Yes", the following screen will be displayed:



4. Consultation Functions

4.1 Purpose of this function

The user should be able to create a new appointment, and thereafter maintain existing appointments and if necessary cancel an appointment from the system. All appointments made on the system can be updated, and cancellation depends on whether the scheduled appointment has passed or not. In an event where the appointment has passed and patient was consulted the appointment cannot be cancelled from the system. The requirements that are fulfilled by this function include:

- Make Booking
- View Booking
- Update Booking
- Cancel Booking
- Make Online Booking
- Capture Patient Arrival
- Make Consultation Notes
- Capture Dentist Schedule
- View Dentist Schedule

To navigate between consultation functions, the user will be required to hover over the 'Consultation' tab as shown below:

The user must hover on the Consultation tab located as the third item on the main navigation ribbon.

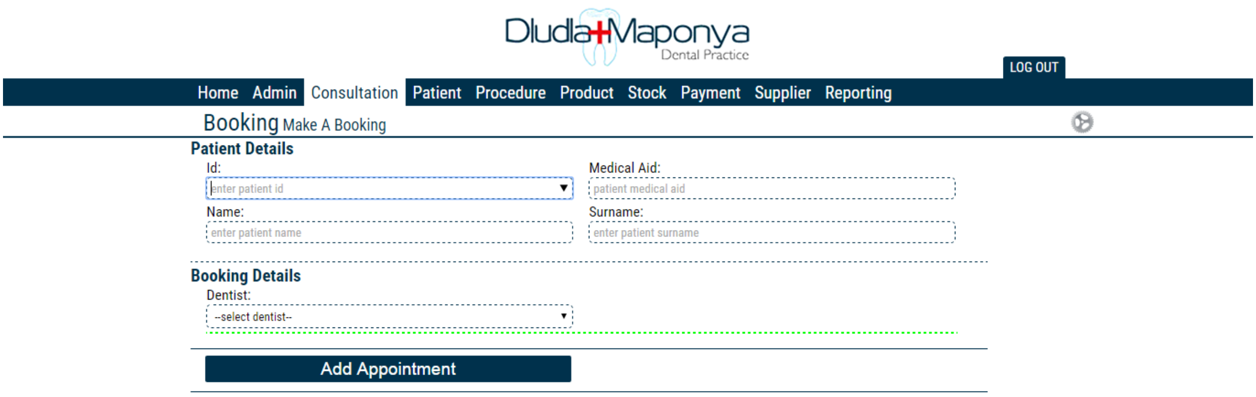
4.2 Make Booking Function

Before the user can proceed with the Make Booking functionality, they will need to navigate to the Consultation tab/make a booking option, as shown below:

The user must hover over the Consultation tab located as the third navigation on Make Booking, in the third navigation ribbon, the sub-menu will appear with options for ‘View Booking’, ‘Make a Booking’, ‘Make Notes’,’ View Dentist Schedule’ and ‘Capture Dentist Schedule’.

To make a booking, the user will click on the ‘Make a booking’ sub-menu option.

The following screen will appear:



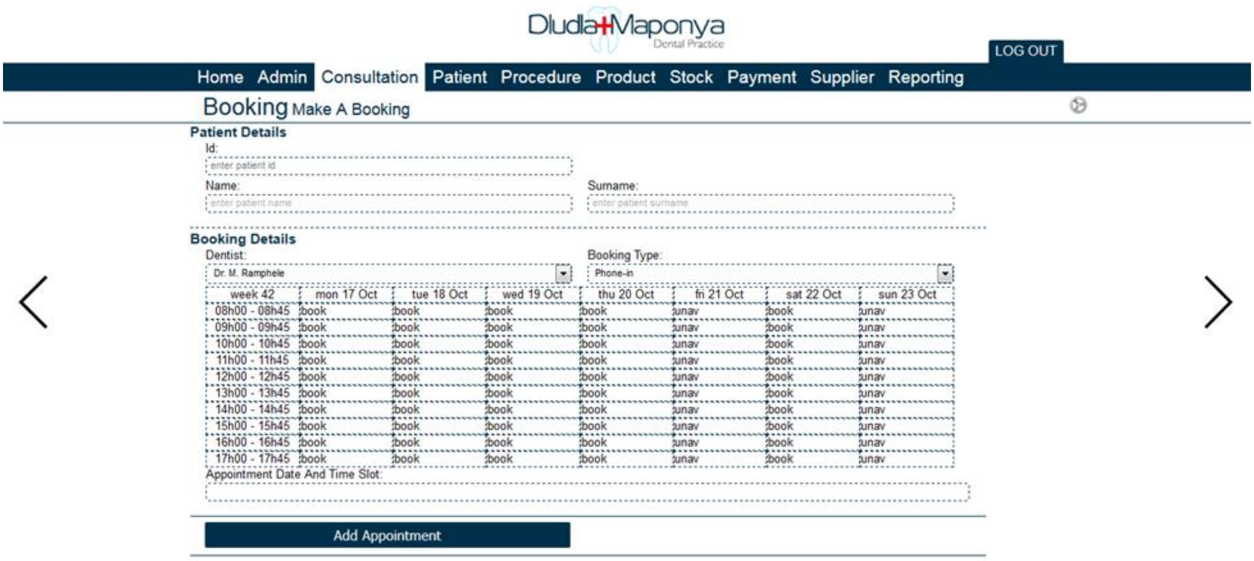
On this screen the user is able to enter the details the booking to be made.

4.2.1 Components of this screen

<u>Patient Details:</u>

1. Help Icon: The user will be able to retrieve help information by clicking on the Help link that will appear after the user hover over the help icon located on the right corner in the same level as the page title.
2. Id text box: In this text box the user may enter the ID number of the Patient already on the system that is making a booking.
3. Medical Aid: Auto-filled after the user enter the patient ID number with the patient medical aid
4. Name text box: Auto-filled after the user enters the patient ID number with patient name.
5. Surname text box: Auto-filled after the user enter the patient ID number the patient surname.
6. Dentist combo box: The user is able to select the dentist name from the list of Dentist names in this combo box.

7. Add Appointment Button: The user can click on this button to save the appointment to the system
8. Calendar Scroll arrows: These arrows on the left and right of the page, allow the user to navigate the calendar.
9. Calendar: The user will be able to view the calendar and make a booking after the Dentist is selected. The following screen will appear:



Once the user has completed all details required to make a booking, the Add Appointment button should be clicked in order to add the booking to the database. The following screen displays all the user input fields once they have been populated.

4.2.2 Possible notifications for the Make Booking screen

The above notification will appear once the booking has been created. Once the user has clicked the Add Appointment button, the input fields should be clear and this notification will appear.

The above notification will appear if, after clicking the Add Appointment button, the user has not completed all the provided input fields with the requires details.

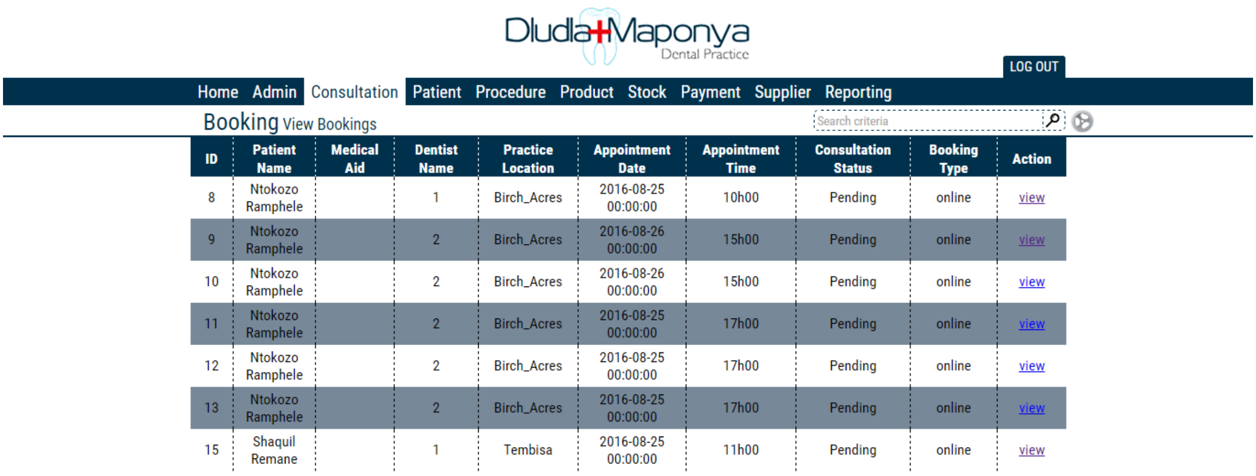
4.3 View Booking

Before proceeding with the View Booking functionality, the user will be required to navigate to the Consultation tab as shown below:

The user hover over the Consultation tab located as the third item on navigation ribbon, a sub-menu will appear with option for ‘View Bookings’, ‘Make a Booking’, ‘Make Notes’, ‘View Dentist Schedule’ and ‘Capture Dentist Schedule’.

To view a booking, the user will click on the ‘View Bookings’ sub-menu option.

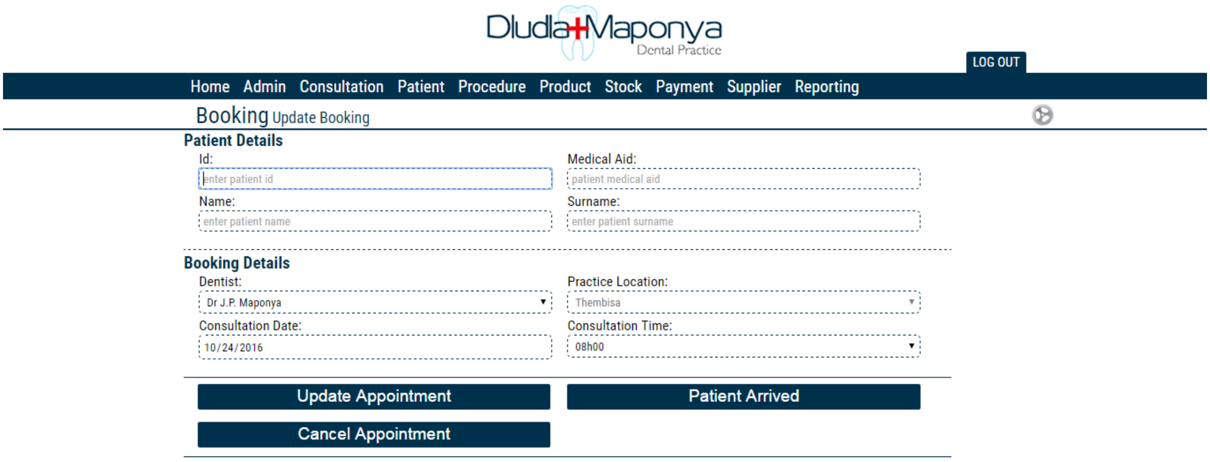
The following screen will then appear:



ID	Patient Name	Medical Aid	Dentist Name	Practice Location	Appointment Date	Appointment Time	Consultation Status	Booking Type	Action
8	Ntokozo Ramphele		1	Birch_Acres	2016-08-25 00:00:00	10h00	Pending	online	view
9	Ntokozo Ramphele		2	Birch_Acres	2016-08-26 00:00:00	15h00	Pending	online	view
10	Ntokozo Ramphele		2	Birch_Acres	2016-08-26 00:00:00	15h00	Pending	online	view
11	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
12	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
13	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
15	Shaquil Remane		1	Tembisa	2016-08-25 00:00:00	11h00	Pending	online	view

As displayed above, the booking details are displayed by default from the database because the user has not specified which booking they want to view. To view a specific booking on the system yet not visible on the screen the user will be required to use the search facility where the enter any booking details and the filtered bookings will be displayed.

The screen below displays a case where the user clicks on ‘View’ of the specific booking selected.



4.4 Update Booking

In order for the user to update an appointment, the user will be required to navigate to the consultation tab, and then click on view booking sub-menu option then click on the view link of the specific booking to be updated. The following screen will appear:

In order to update changes made to a booking, the user must click on the update button after making changes, after which the above notification will be displayed.

4.4.1 Components of this screen

1. Id text box: This text box will be auto-filled with the patient ID number from after the user selects to view the specific patient
2. Name text box: Auto-filled with the patient name after the user selects to view the specific patient
3. Medical Aid text box: Auto-filled with the patient medical-Aid after the user selects to view the specific patient

4. Surname text box: Auto-filled with the patient surname after the user selects to view the specific patient.
5. Dentist name combo box: The user will use the combo box to select the dentist name
6. Consultation Date Calendar: The user will be able to select the consultation date from the calendar
7. Practice Location combo box: This combo box is auto filled after the user selects the dentist name
8. Consultation Time combo box: The user will be able to select the time from the consultation time combo box
9. Update Appointment Button: Allows for the user to update the appointment and save updated data on the system
10. Patient Arrived button: Allows the user to capture the arrival of a patient and saves the status on the system
11. Cancel Appointment button: Allows the user to cancel appointments with dates that have not yet passed

4.4.2 Possible notifications of this screen

The below notification will appear once the user has clicked on the 'Update Appointment' button:

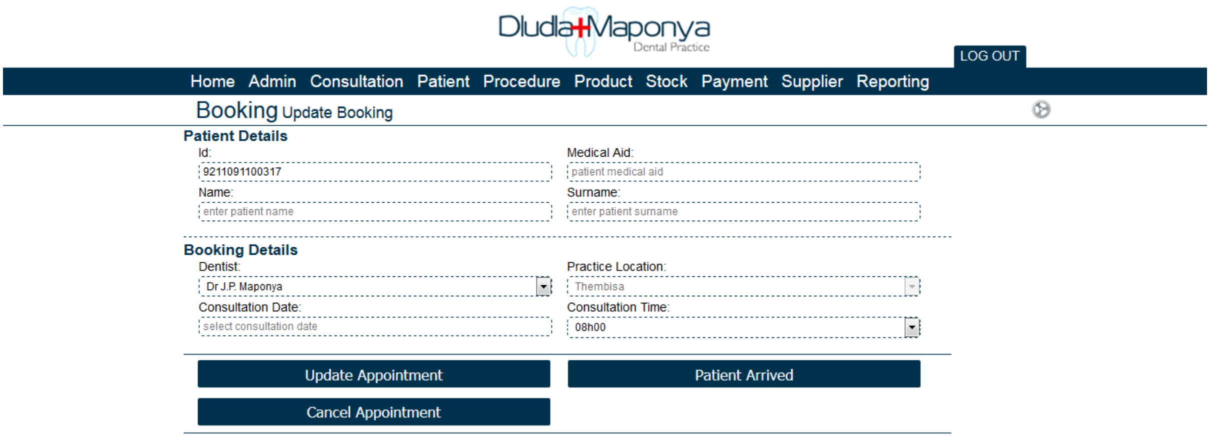
This notification will be displayed when the user clicked on the 'Update Appointment' button without completing the required fields correctly.

In a case where the user enters the data correctly and then clicks on the Update Appointment button the screen below will appear:

The screen is cleared and the notification is displayed.

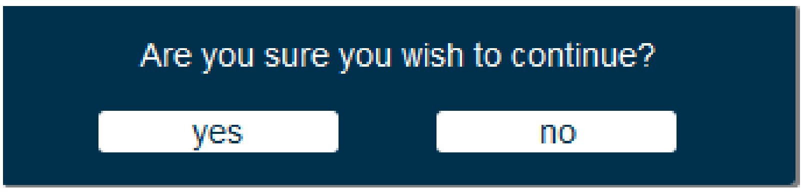
4.5 Cancel Booking

Before a user can cancel a booking, they will be required to navigate to the Consultation tab, click on view patient as mention previously and further click on the view link of the booking that needs to be cancelled. The screen below will display after the user click the view link of the specific booking:



4.5.1 Possible notifications of this screen

The following notification will appear after the user has clicked on the cancel appointment button, requesting the user to confirm the cancelation of the appointment. The user will be required to click on the ‘Cancel Booking’ button; the following notification will be displayed:

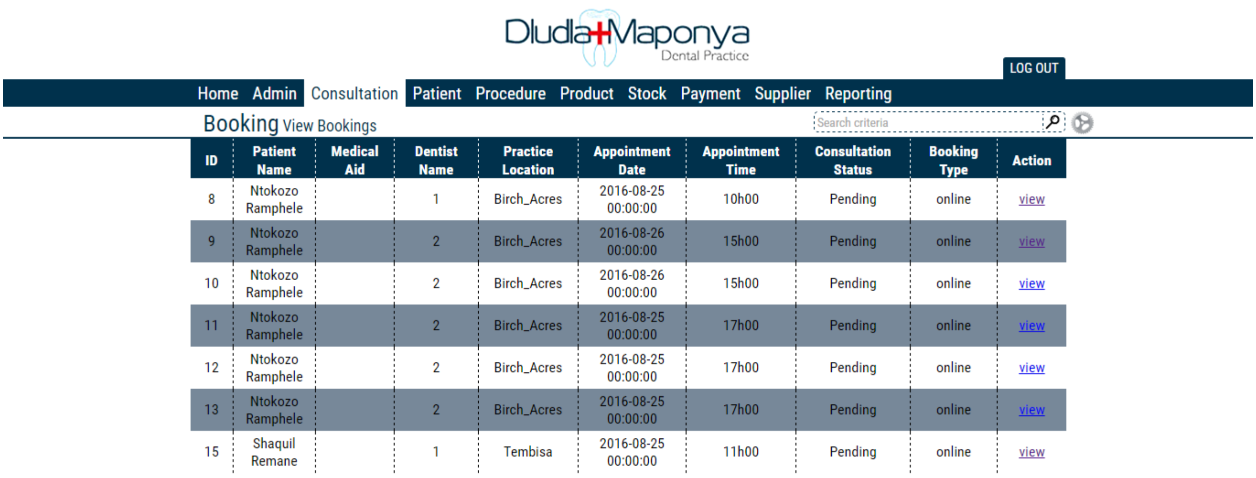


If the user clicks on ‘No’ the notification will close. However if the user clicks ‘Yes’, the following screen will be displayed:

The screen above appears after the user has clicked on the 'Cancel Appointment' button and cancels the Appointment successfully.

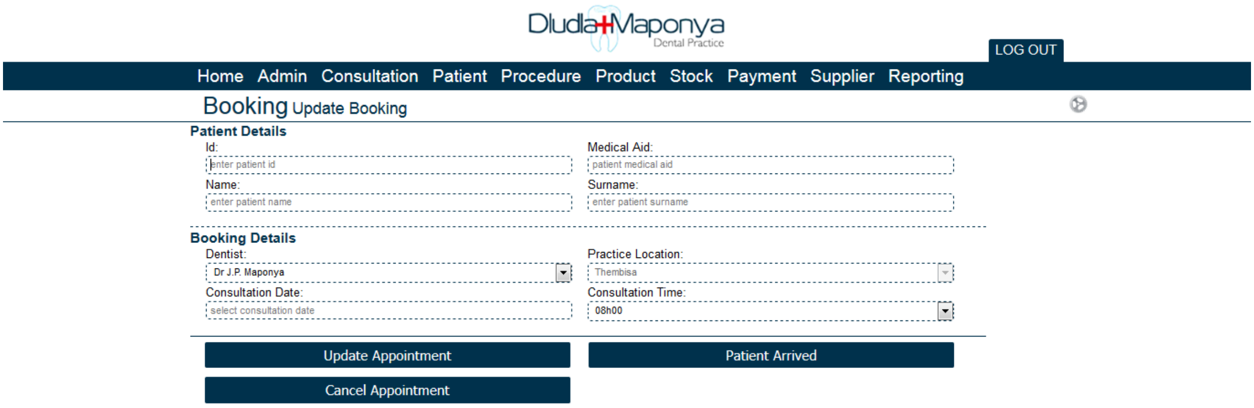
4.6 Capture Patient Arrival

The user hovers over the Consultation tab located as the third tab on the navigation ribbon, then clicking on the View Booking option from the list of sub menu options that will appear the following screen will appear:



ID	Patient Name	Medical Aid	Dentist Name	Practice Location	Appointment Date	Appointment Time	Consultation Status	Booking Type	Action
8	Ntokozo Ramphele		1	Birch_Acres	2016-08-25 00:00:00	10h00	Pending	online	view
9	Ntokozo Ramphele		2	Birch_Acres	2016-08-26 00:00:00	15h00	Pending	online	view
10	Ntokozo Ramphele		2	Birch_Acres	2016-08-26 00:00:00	15h00	Pending	online	view
11	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
12	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
13	Ntokozo Ramphele		2	Birch_Acres	2016-08-25 00:00:00	17h00	Pending	online	view
15	Shaquil Remane		1	Tembisa	2016-08-25 00:00:00	11h00	Pending	online	view

The user will be required to click the view link from the action column of the Booking of the Patient that would have arrived. The below screen will appear after the user has clicked on the View action of the Booking of the arrived patient:



The user will be required to click on the ‘Patient Arrived’ Button to Capture the Patient’s arrival and save the Arrival status onto the system.

4.6.1 Possible notifications of this screen

The following screen will appear once the user has clicked on the ‘Patient Arrived’ button:

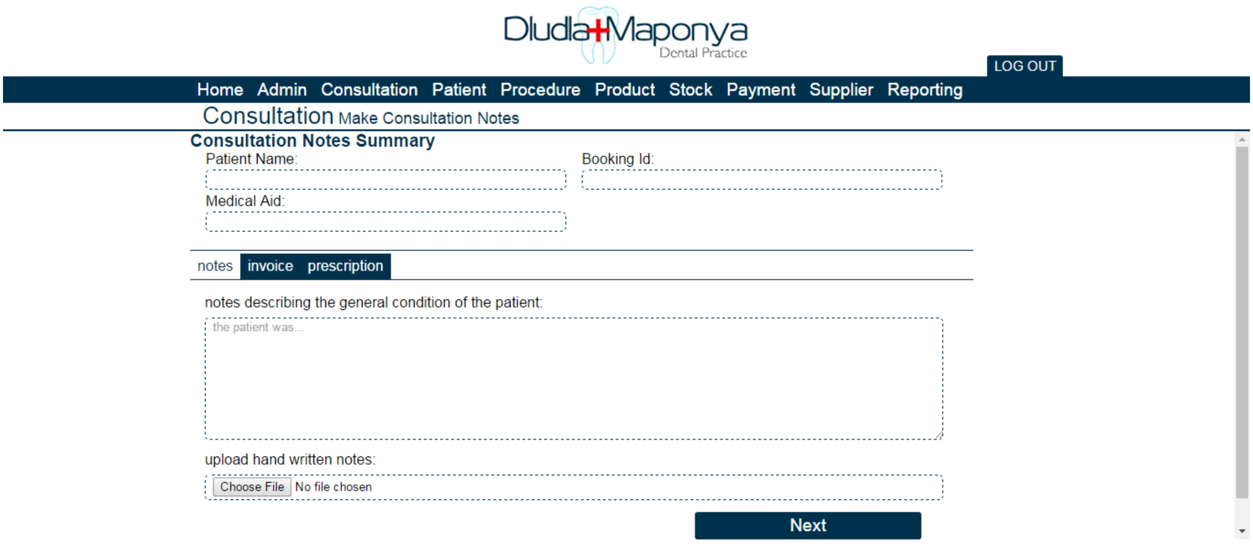
The screen above displays after the user clicks on the ‘Patient Arrived’ button for a valid Patient Booking.

4.7 Make Consultation Notes

Before proceeding with the Make Notes functionality, the user will be required to navigate to the Consultation Tab, as shown below:

The user must click on the Make Notes sub-menu option that will appear after the user hovers over the Consultation tab located as the third item on the main navigation ribbon.

The following screen will then appear:

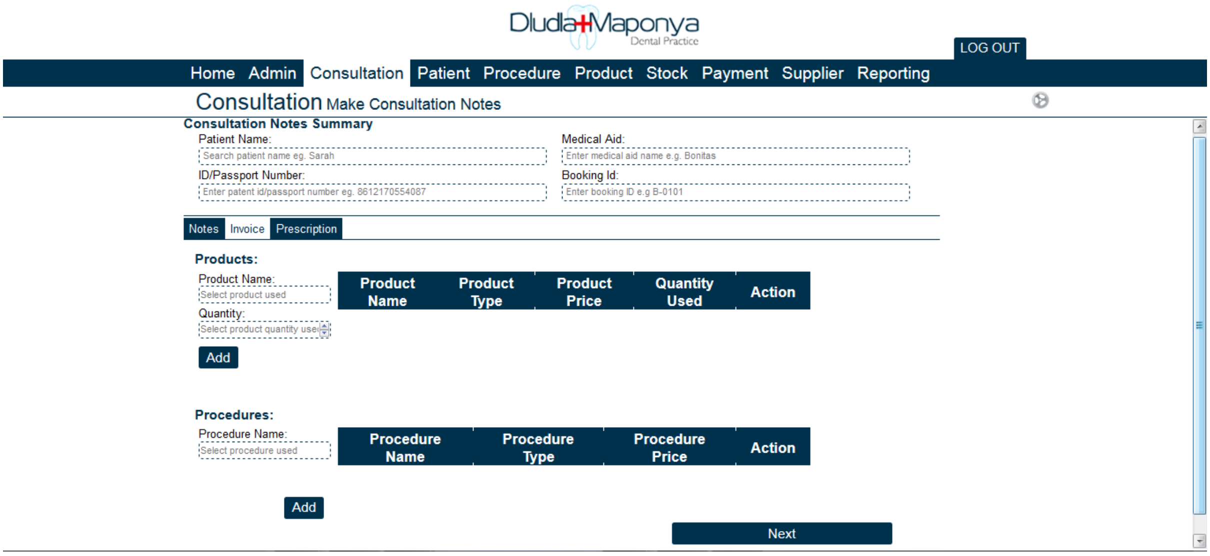


On this screen, the user is able to make consultation notes of a particular patient of a particular booking.

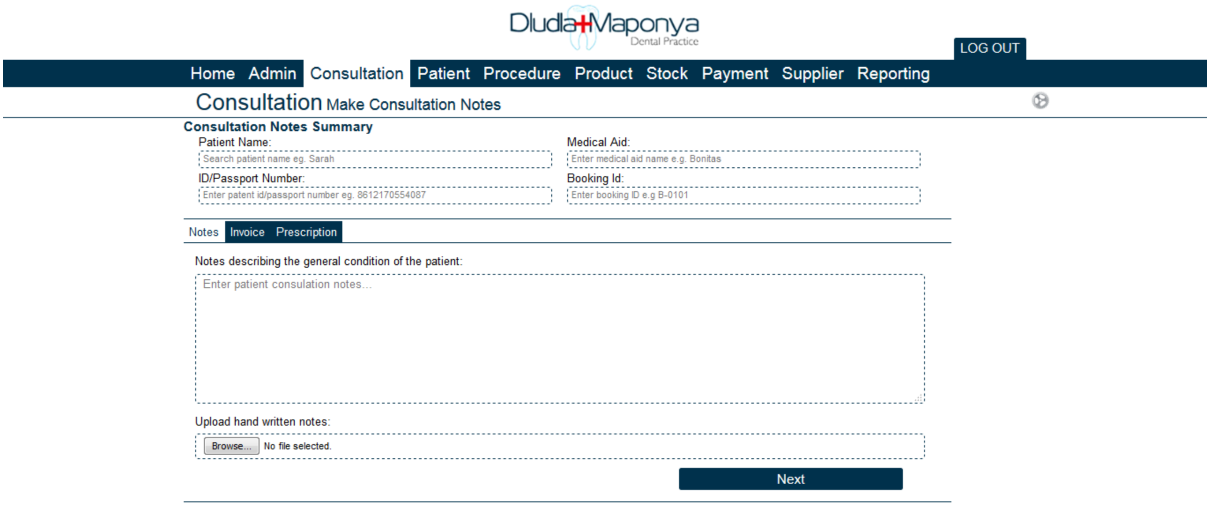
4.7.1 Components of this screen

1. Patient Name Text box: When the user wants to add consultation notes, after selecting the patient from the list of arrived patients, the Patient Name text box is populated with the Patient Name.
2. ID/Passport Number text box: The user can enter patient ID/passport number.
3. Medical ID text box: This text box is populated after the user selects the Patient from the list of Arrived patient, provided the patient is on medical aid and the system records it as being so.
4. Notes Tab: This tab is selected by default when the user wants to make consultation notes.
5. Note Multi-Line text box: This text box is used by the user to enter any notes that they would like to keep about the patient in the consultation room.
6. Choose File Button: This button is used by the user to select hand written notes that may have been stored on the system.

7. Next Button: This is used by the user to navigate to the Invoice tab after notes have been entered, the below screen will appear:



1. Invoice Tab: This tab indicates that the user can add invoice items here.
2. Product combo box: This combo box will be populated with products for the user to choose from when adding invoice items
3. Price text box: This text box will be auto filled with the product unit price after the user selects the product name.
4. Quantity Numeric up down: The user will use the numeric up down to enter the quantity of the selected product
5. Add Product Button: This button will be clicked by the user to add the product to the list of products being added to the invoice.
6. Product List: This list displays the products the user has added to the invoice that were used during the consultation.
7. Remove Link: This link, when clicked, allows the user to remove the product from the list.
8. Procedure Combo box: The user will select the procedure from the list of procedures in the combo box
9. Add Procedure Button: The user will click on the Add Procedure button when the procedure is ready to be added to the procedure list on the invoice items.
10. Procedure list: This list displays the procedure the user has added to the invoice, these are procedures that were conducted on the patient during the consultation.
11. Remove Link: This link when clicked, allows the user to remove a procedure from the procedure list.
12. Next Button: The user will click on the next button to navigate to the prescription tab which will display the following screen:

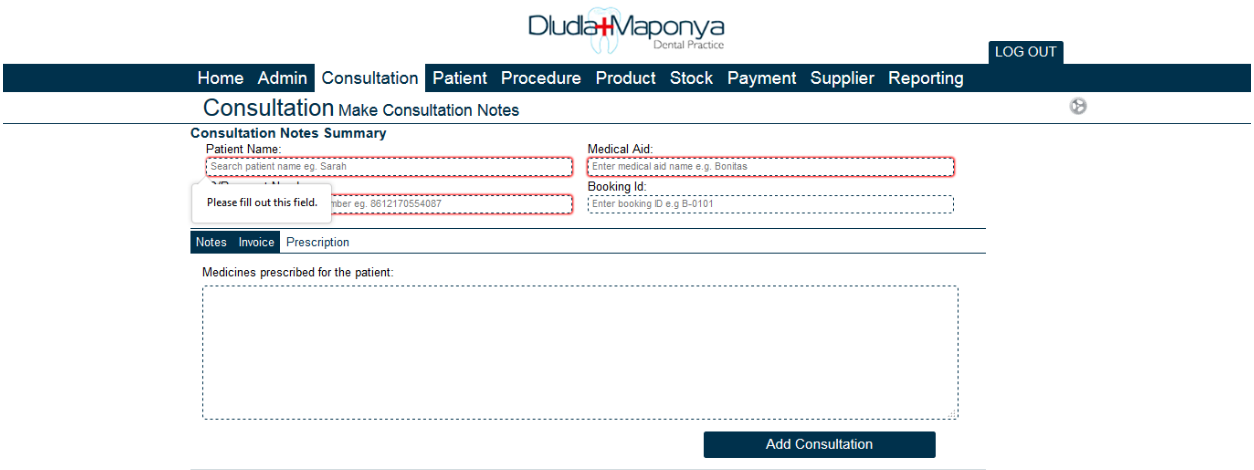


1. Prescription Tab: This indicates that the user can add the patient prescription.
2. Prescription multi-line text box: The user enters the patient prescription in this text box.
3. Add Consultation Button: This button, when clicked, add the consultation details to the system and saves it on the system.

4.7.2 Possible notifications for this screen

The following screens will appear after the user has clicked on the Add Consultation button:

The screen below will appear, displaying to the user input fields that must be filled before clicking on the Add Consultation button. Input fields outlined in red indicate that they should be filled.



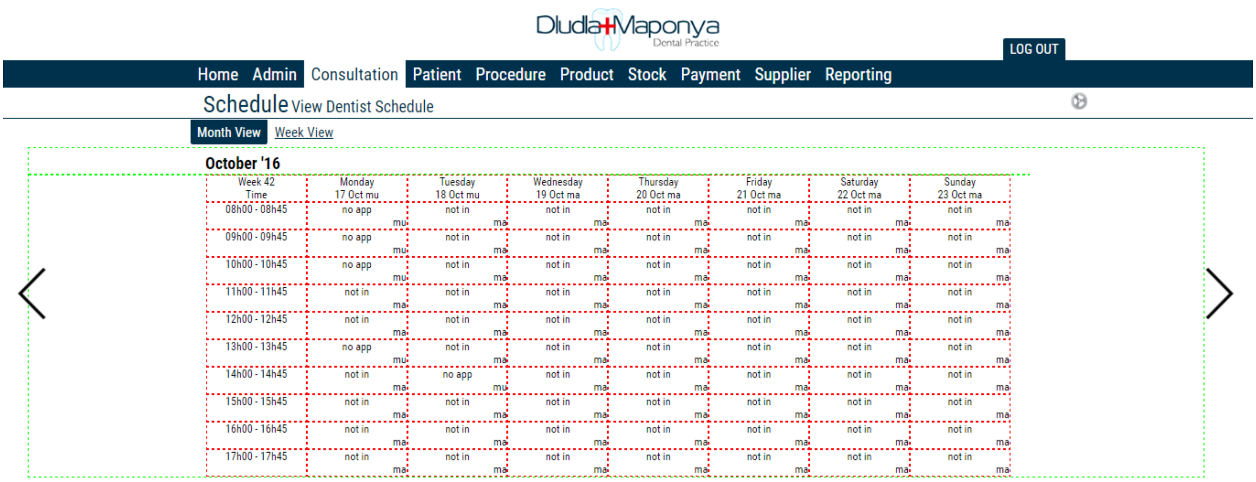
The screen below will appear once the user clicks on the Add Consultation button to save consultation notes correctly entered:

4.8 Capture Dentist Schedule

The user will be able to capture dentist schedule by selecting the Make Available icon which is indicated by a Green Tick Sign with in the Date that they would like to make available in the Month View. In a case where the user wants to make the entire day unavailable, the user would have to click on the make unavailable icon indicate by a red cross sign with in the date.

To select specific time slots that they would like to make available in the selected date, the user would have to click the date in the Month view which will redirect the user to the screen below:

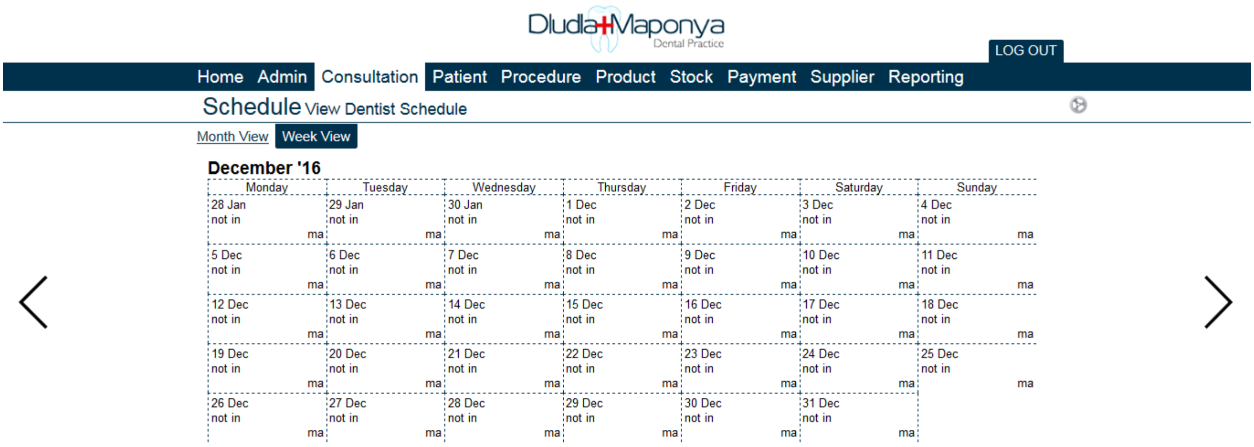
The screen below displays a week view with timeslots of the selected date. The user will be required to click on the timeslots of the date that they would like to create a schedule for and make it available by clicking on the make available icon indicated by a green tick.



The following will appear when the user has selected the timeslots to be made available.

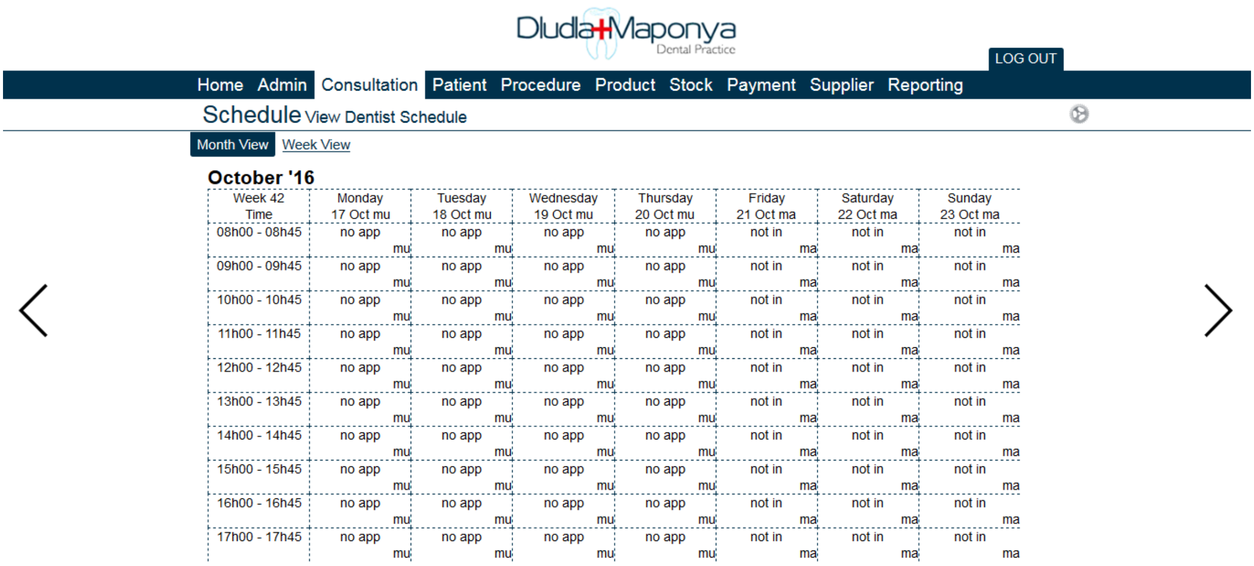
4.9 View Dentist Schedule

The screen below appears whent the user navigates to the Consultation tab and clicks on the View Dentist Schedule:



On the above screen the user will have to select the Dentist from the Dentist combo box to see the Month view of the Dentist schedule. The user can select a date to see week view of that selected date of the selected dentist.

The screen below will appear when the user clicks on a date in the month view:



The screen above shows a week view of the selected date from the Month view; the user can see the dentist schedule for the week and coming weeks.

5. Patient Functions

5.1 Purpose of this function

The user must be able to edit anything pertaining to any existing and new patients on the system, so that all patients are kept up to date. All patients are kept dynamic on the system, meaning that they are able to be updated or deleted by the user. The requirements of the system that are fulfilled by this function include:

- Add employee,
- View employee,
- Update employee,
- Delete employee

5.2 Add Patient Function

Before proceeding with the Patient functionalities, the user will be required to navigate to the Patient menu, as shown below:

5.2.1 Components of this screen

5.2.2 Possible notifications for the Make Booking screen

5.3 View or Search for Patient

5.4 Update Patient

5.5 Delete patient

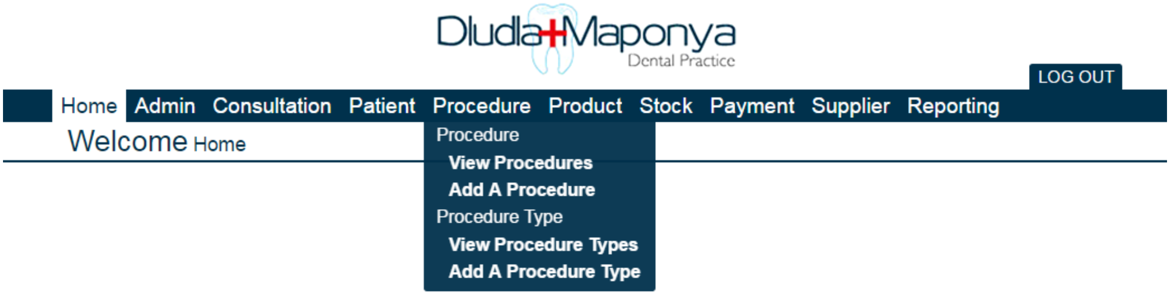
6. Procedure Functions

6.1 Purpose of this function

This function allows the logged in employee to CRUD a procedure and its procedure type. These procedure details should be updated and kept up to date in line with the national procedure codes from the ICD10 codes for hospital procedures. This function is fulfilled by the following requirements:

- Add Procedure
- Add Procedure Type
- View Procedure
- Update Procedure
- Delete Procedure
- Maintain procedure Type

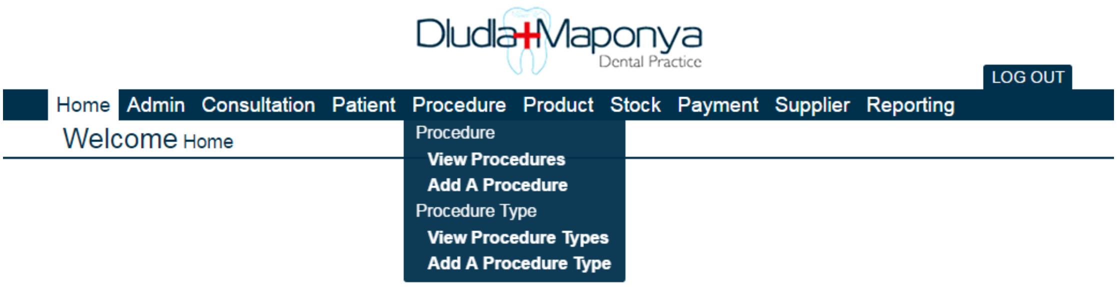
Before the user can access these functionalities, they first need to navigate to the **Procedure Tab** by hovering over the Procedure menu item as follows:



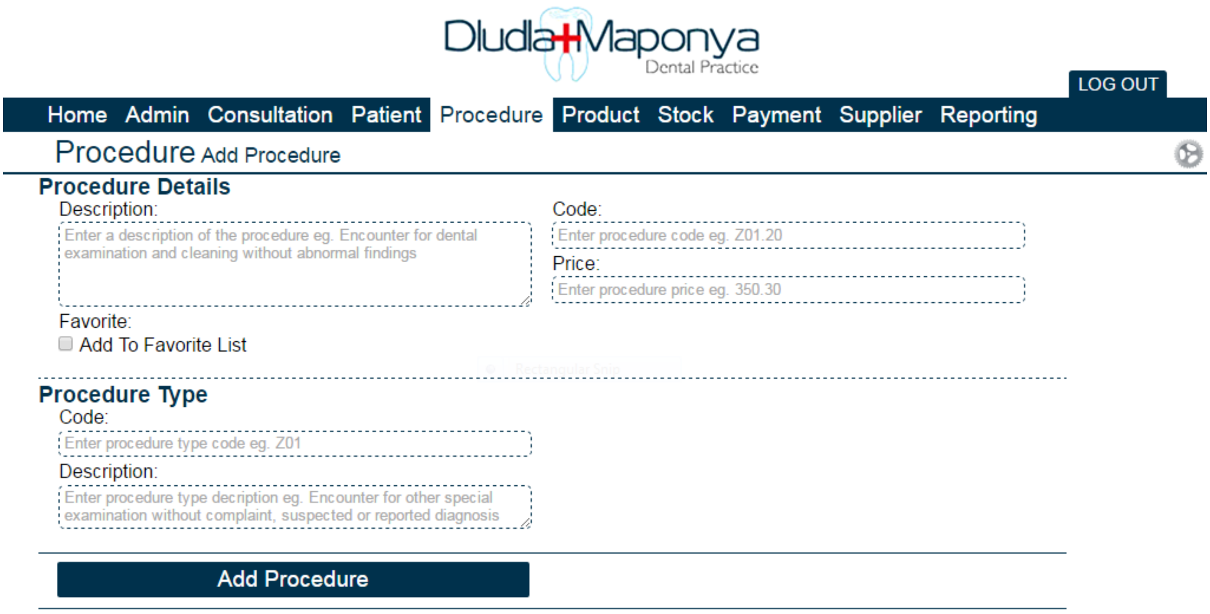
The Procedure Tab will list the functions on a menu list and the employee can click on any listed one of their choice.

6.2 Add Procedure Function

Before the employee can add a procedure, they first need to navigate to the **Procedure Tab** and click the **Add A Procedure** option as displayed below:



After the employee has clicked the **Add A Procedure** option the following add procedure screen will appear:



This screen allows for a procedure to be added, viewed, updated and or removed from the system.

6.2.1 Components of the add procedure screen

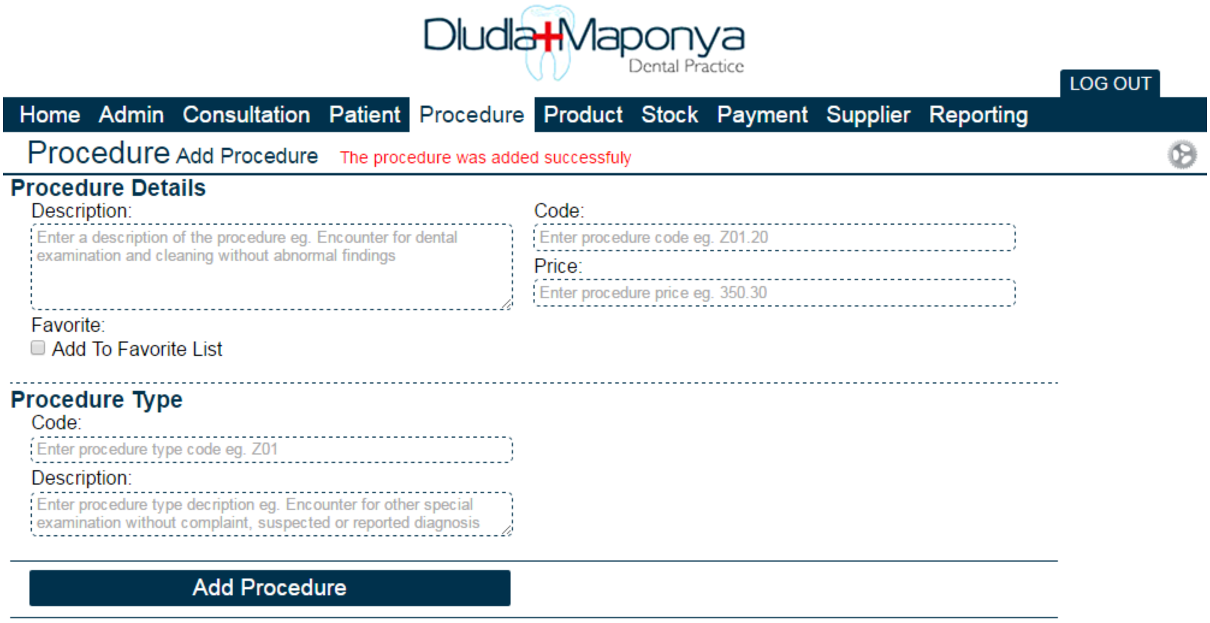
<u>Procedure Details:</u>

1. Description Textbox: This is where the procedure description will be entered.
2. Favourite Checkbox: This is where the procedure will be marked as a favourite or not.
3. Code Textbox: This is where the procedure ICD10 code will be entered.
4. Price Textbox: This is where the procedure cash price will be entered

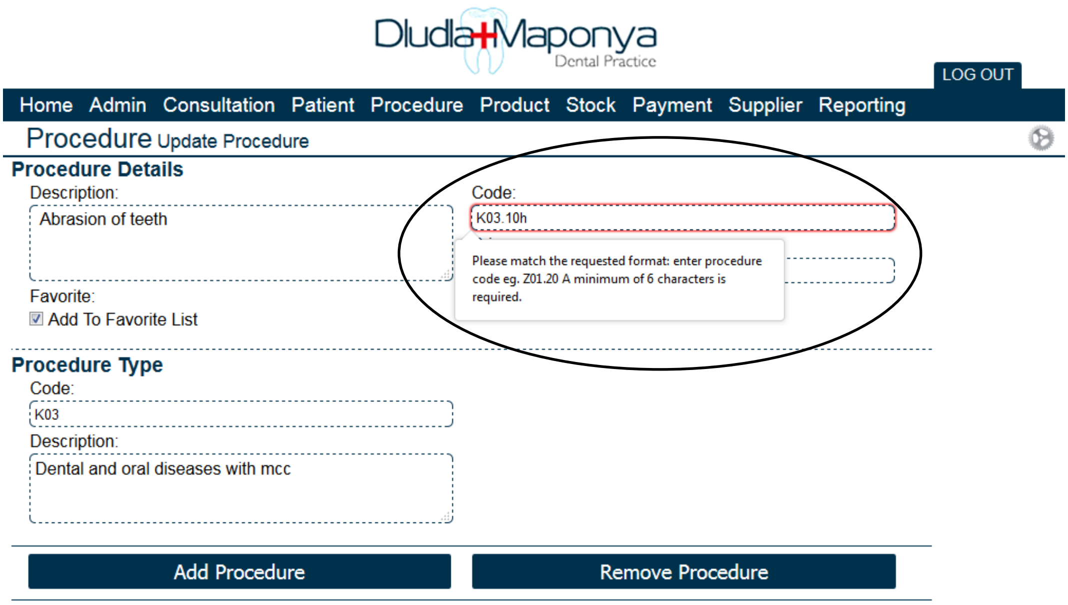
<u>Procedure Type:</u>

1. Code Textbox: This is where the procedure type code will be entered by the system automatically.
2. Description Textbox: This is where the procedure type description will be entered.

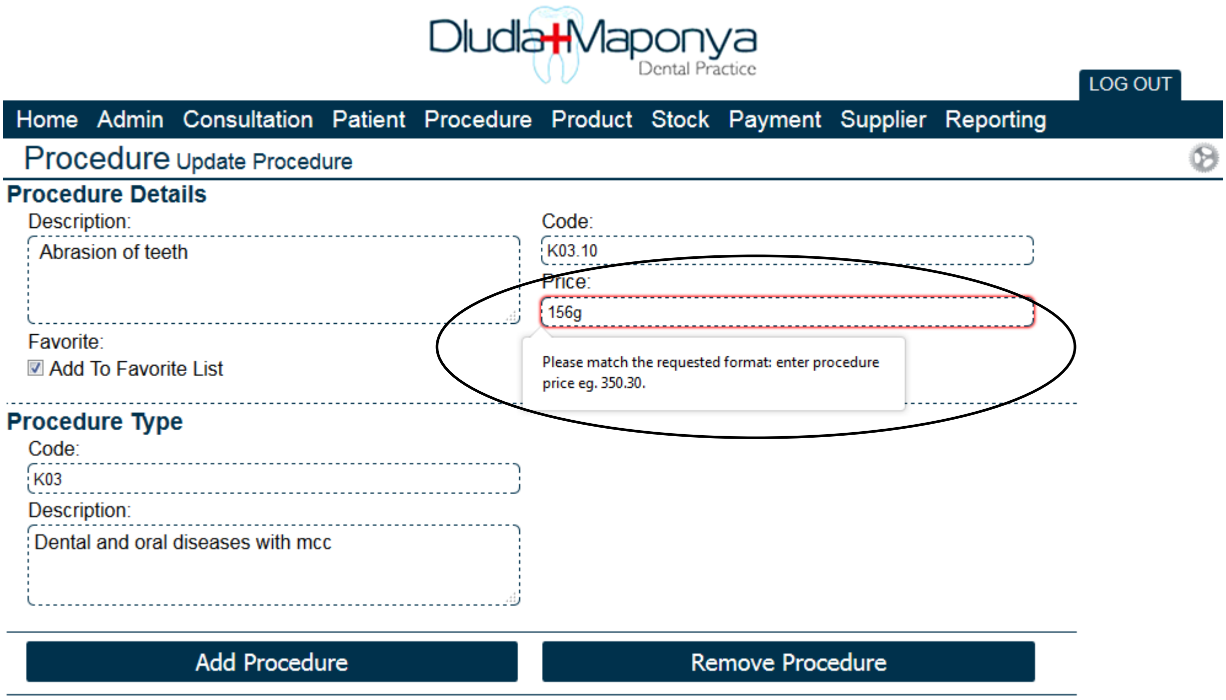
6.2.2 Possible notifications for the Make Booking screen



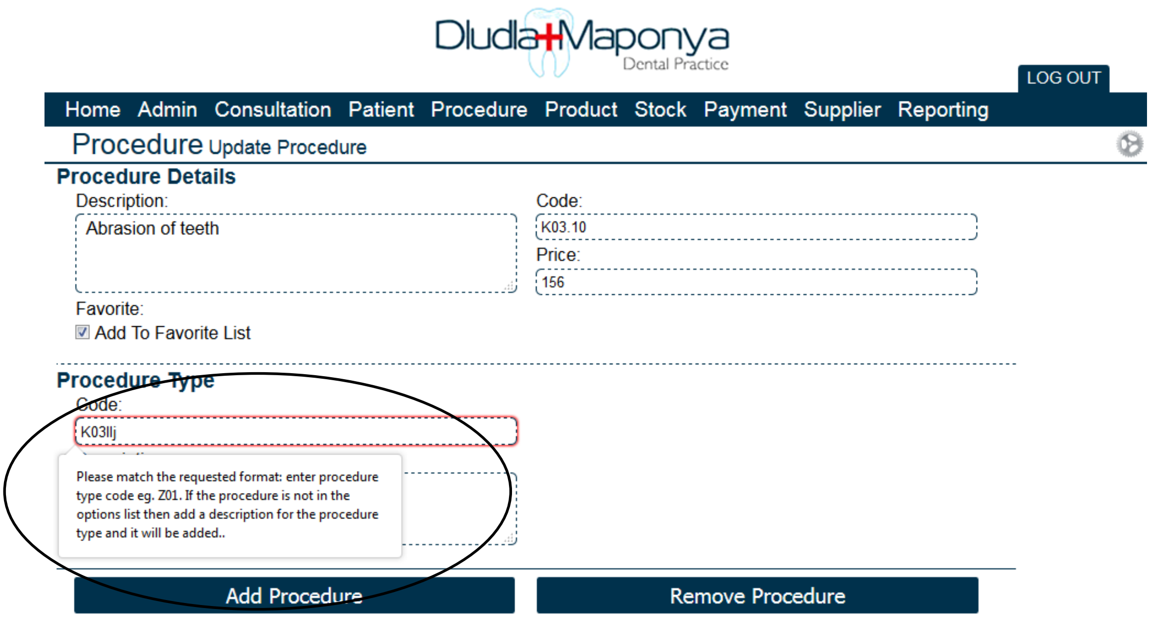
This notification appears once the procedure is successfully added onto the system.



This error message appears once the employee has entered an incorrect procedure code



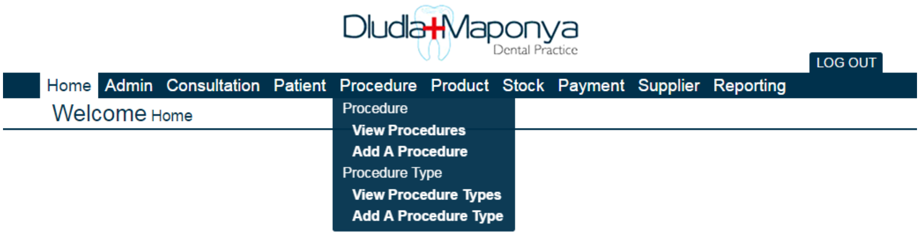
This error message appears once the employee has entered an incorrect procedure price format.



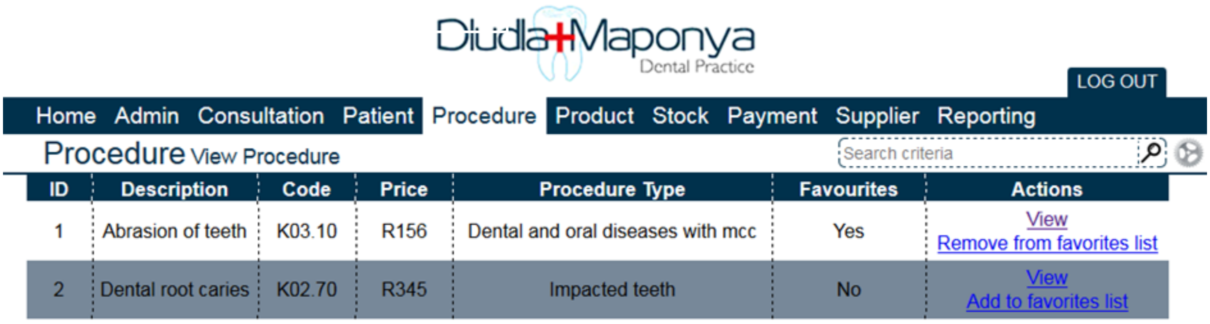
This error message appears once the employee has entered the incorrect format of the procedure type ID code.

6.3 View Procedure

Before the employee can view a procedure, update or delete a procedure, they first need to navigate to the **Procedure Tab** and click the **View Procedures** option as displayed below:

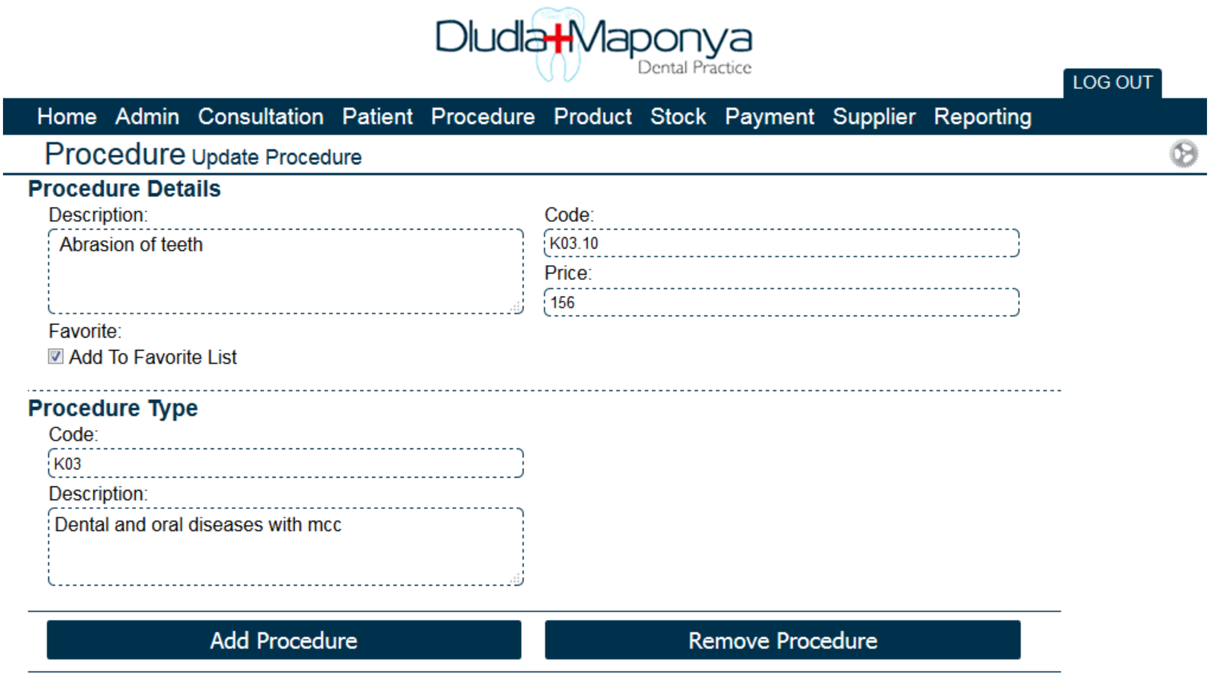


After the employee clicked the **View Procedures** option, the following screen will appear:



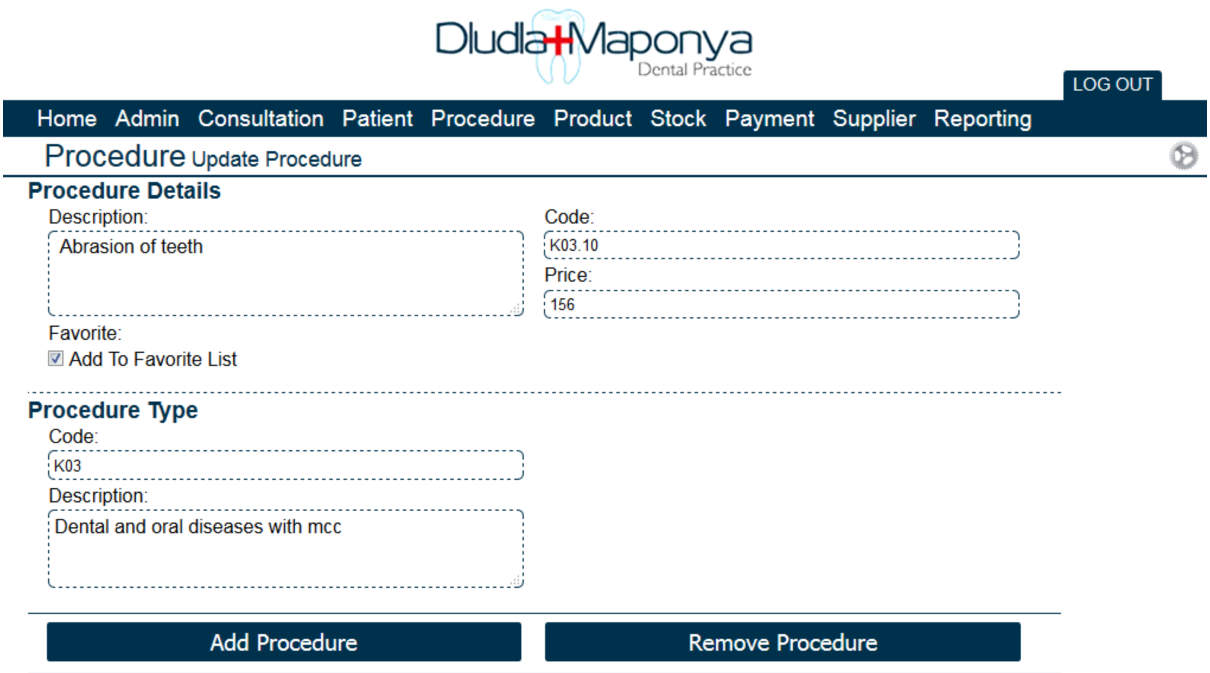
This screen displays a table of all the procedures on the system. If the employee wants to view all the details of a specific procedure, they should click on the **View** link on that specific procedure result (under the **Actions** column) as shown above.

The following screen will appear with the populated information and the employee can choose to delete or update the procedure.



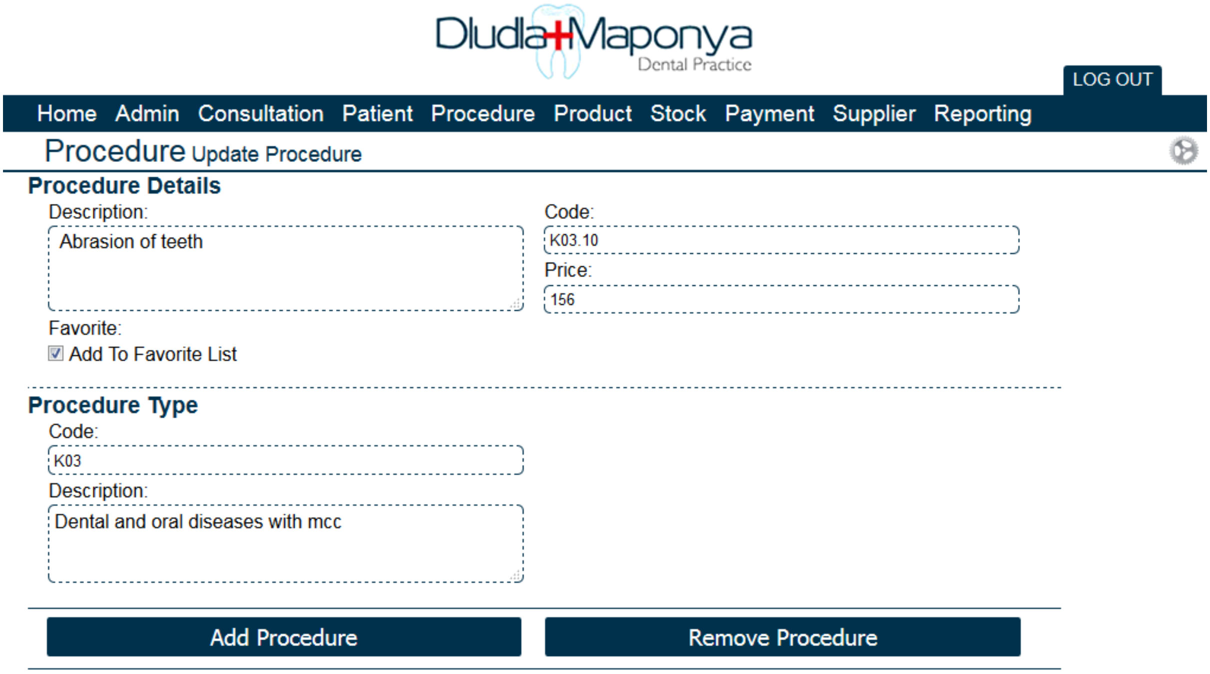
6.4 Update Procedure

On the following screen, after the employee has followed all the steps to view a procedure, the employee is enabled to edit any field. The employee should click on the **Update Procedure** button to submit their new information.

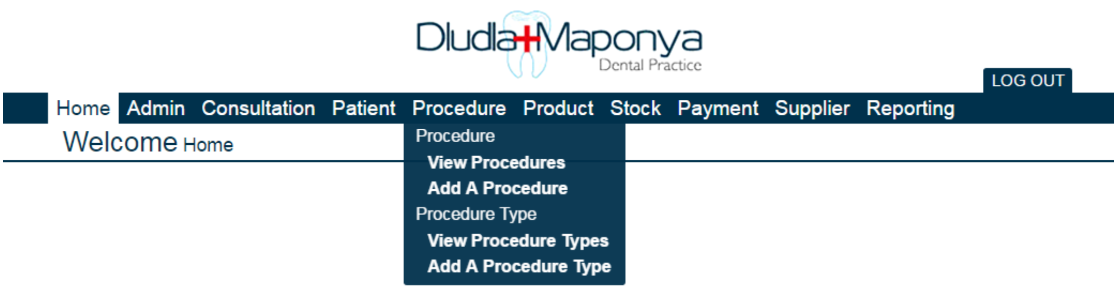


6.5 Delete Procedure

On the following screen, after the employee has followed all the steps to view a procedure, the employee is enabled to remove the procedure. The employee should click on the **Remove Procedure** button to submit their request.



Before the employee can add a procedure type, they first need to navigate to the **Procedure Tab** and click the **Add Procedure Types** option as displayed below:



After the employee has clicked the **Add Procedure Types** option the following add procedure type screen will appear:

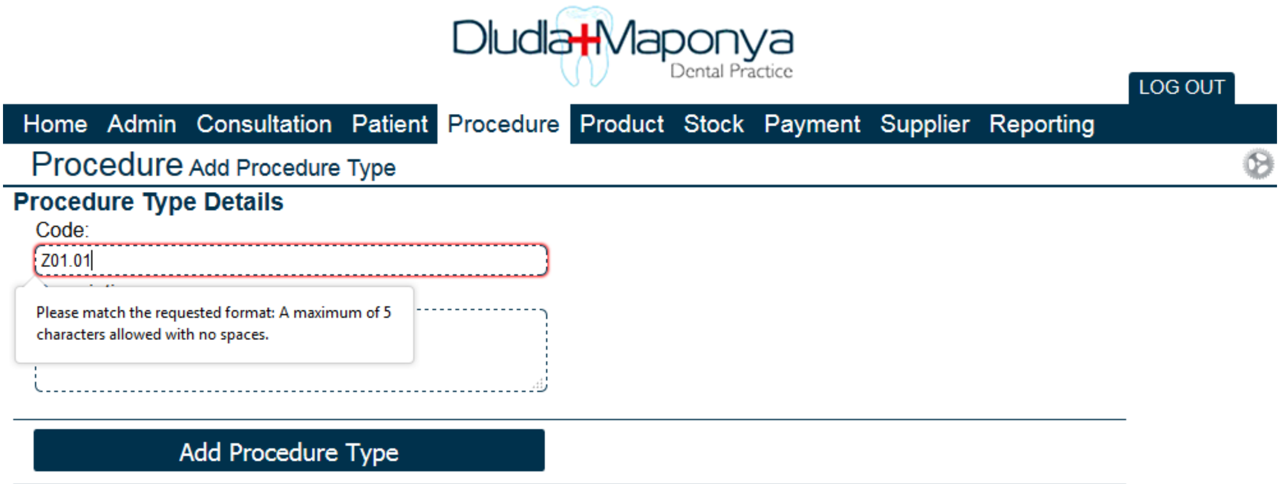
This screen allows for a procedure type to be added, viewed, updated and or removed from the system.

6.6.1 Components of this screen

<u>Procedure Type Details</u>

1. Code Textbox: This is where the procedure type id code will be entered.
2. Description Textbox: This is where the procedure type description will be entered.

6.6.2 Possible notifications for the Add Procedure Type screen

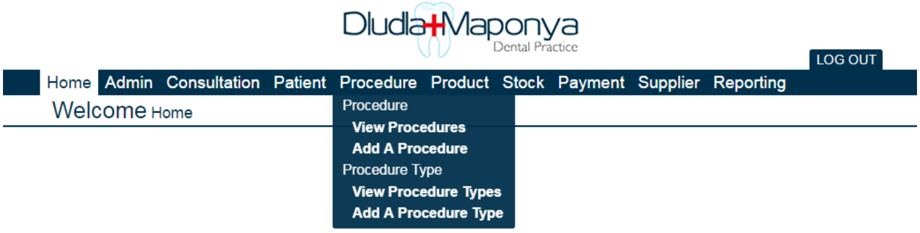


This error message appears once the employee has entered the incorrect format of the procedure type ID code.

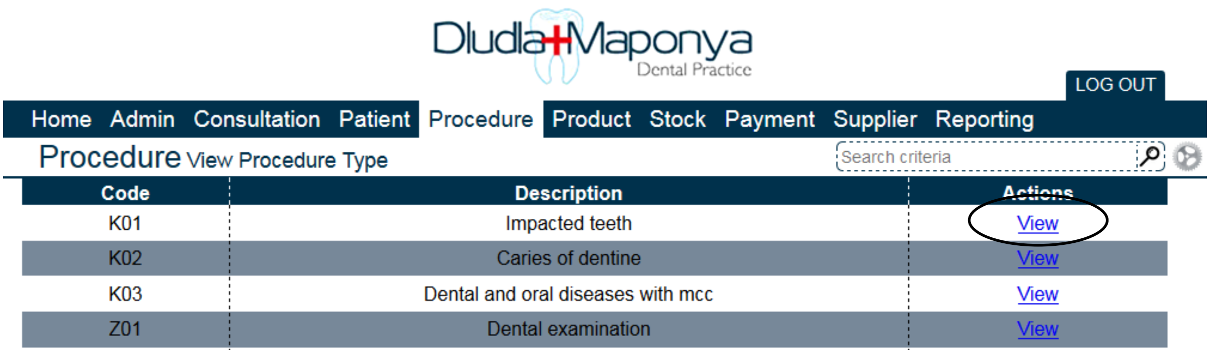
This notification appears once the procedure is successfully added onto the system.

6.7 Maintain Procedure Type

Before the employee can proceed to maintain, they first need to navigate to the Procedure menu item and click the View Procedure Type option as shown below:

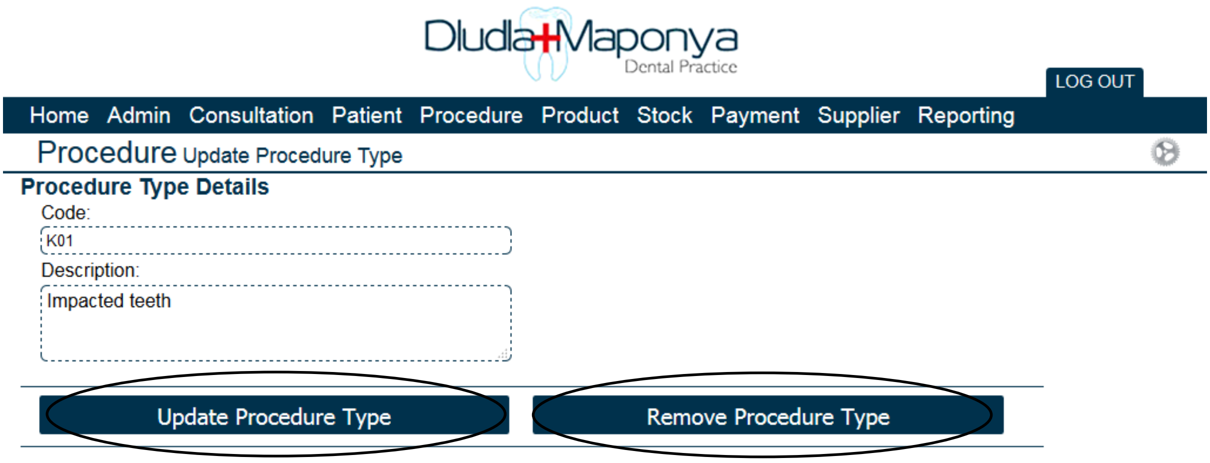


After the employee clicks on the View Procedure Types option, the following screen will appear, displaying results of all the procedure types on the system in a table format.



If the employee wishes to delete or update the specific procedure type, then they should click on the View link under the Actions column as shown above.

The following screen will appear once the View link is clicked:



The employee will click on the Update Procedure Type button if they wish to update a procedure type, or they will click the Remove Procedure Type button if they wish to delete the procedure type. The buttons are shown above.

7. Product Functions

7.1 Purpose of this function

This function allows the logged in employee to CRUD a product and its product type. These product details should be updated and kept up to. This function is fulfilled by the following requirements:

- Add Product
- Add Product Type
- View Product
- Update Product
- Delete Product
- Maintain product Type

Before the user can access these functionalities, they first need to navigate to the **Product Tab** by hovering over the Product menu item as follows:

The Product Tab will list the functions on a menu list and the employee can click on any listed one of their choice.

7.2 Add Product

Before the employee can add a product, they first need to navigate to the **Product Tab** and click the **Add A Product** option as displayed below:

After the employee has clicked the **<u>Add A Product</u>** option the following add product screen will appear:

This screen allows for a procedure to be added, viewed, updated and or removed from the system.

7.2.1 Components of this screen

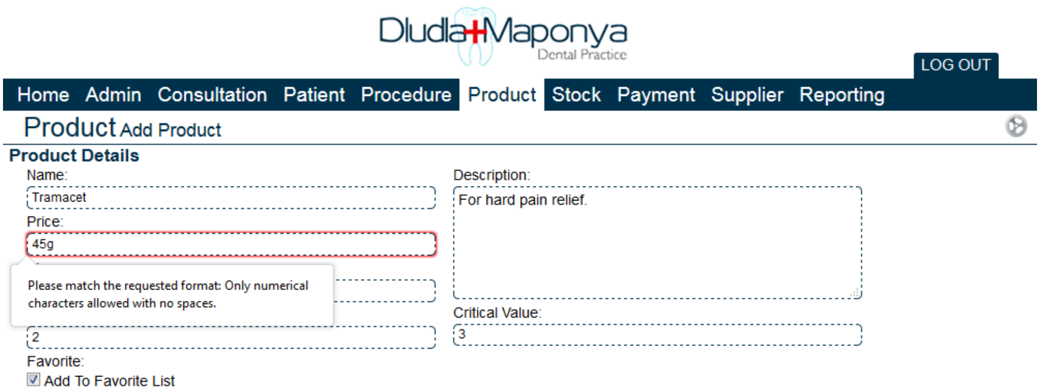
<u>Product Details:</u>

1. Name Textbox: This is where the product name will be entered.
2. Price Textbox: This is where the product price will be entered.
3. Size Textbox: This is where the size of the product will be entered.
4. Unit Quantity: This is where the quantity of the product will be entered is units.
5. Favourite Checkbox: This is where the product will be selected as a favourite or not.
6. Description Textbox: This is where the description of the product will be entered.
7. Critical Value Textbox: This is where the value, of which the system must report when it reaches this number, will be entered.

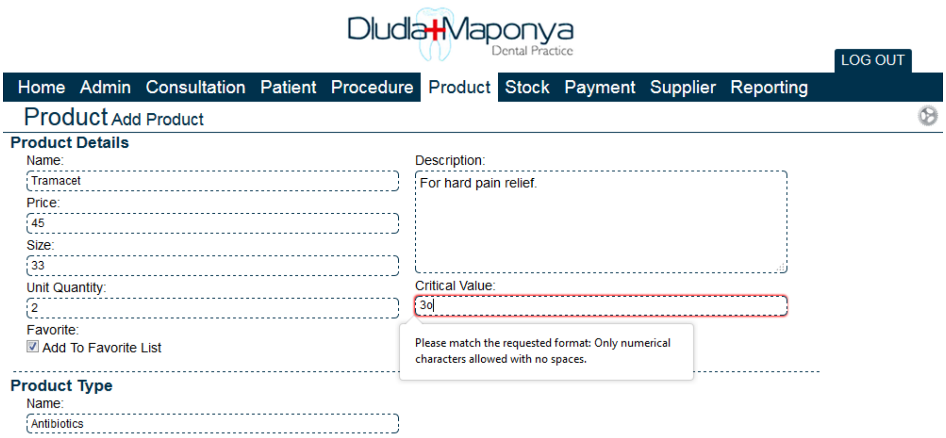
Product Type:

1. Name Textbox: This is where the product type name will be entered.
2. Description Textbox: This is where the description of the product type will be entered.

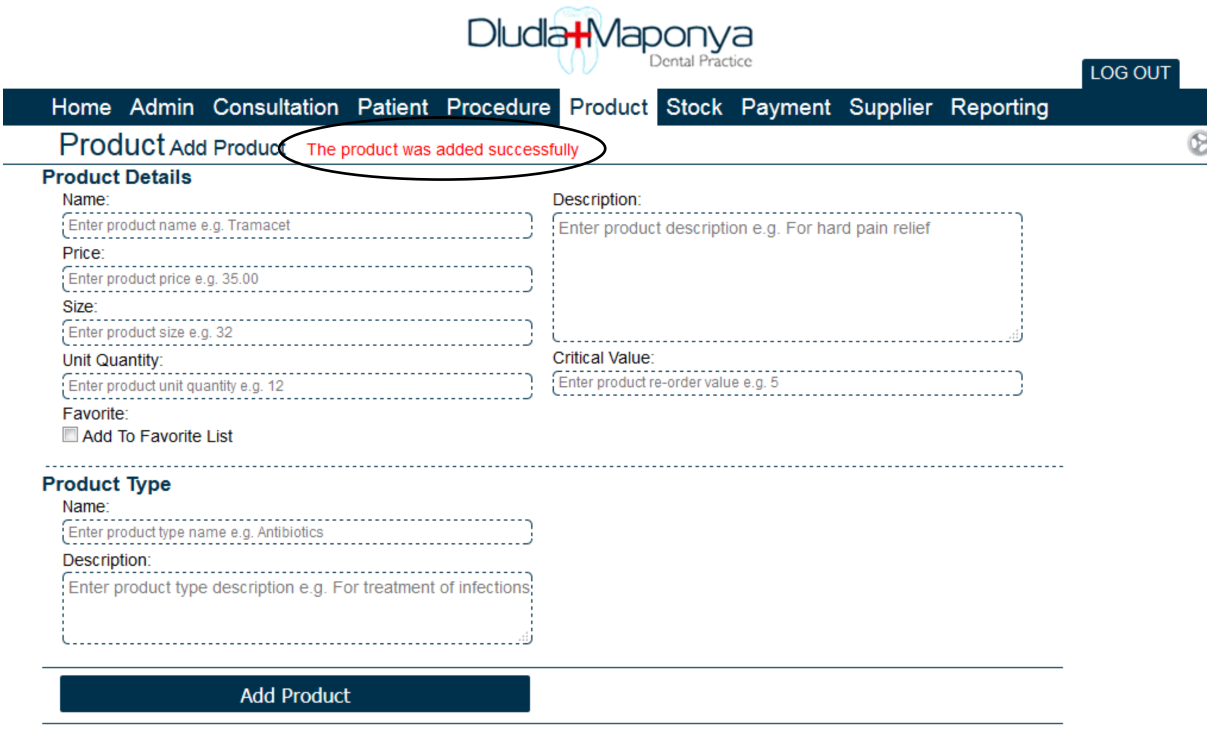
7.2.2 Possible notifications for the Add Product screen



This error appears once the employee has entered the incorrect format in the Price field.



This error appears once the employee has entered the incorrect format in the Critical Value field.

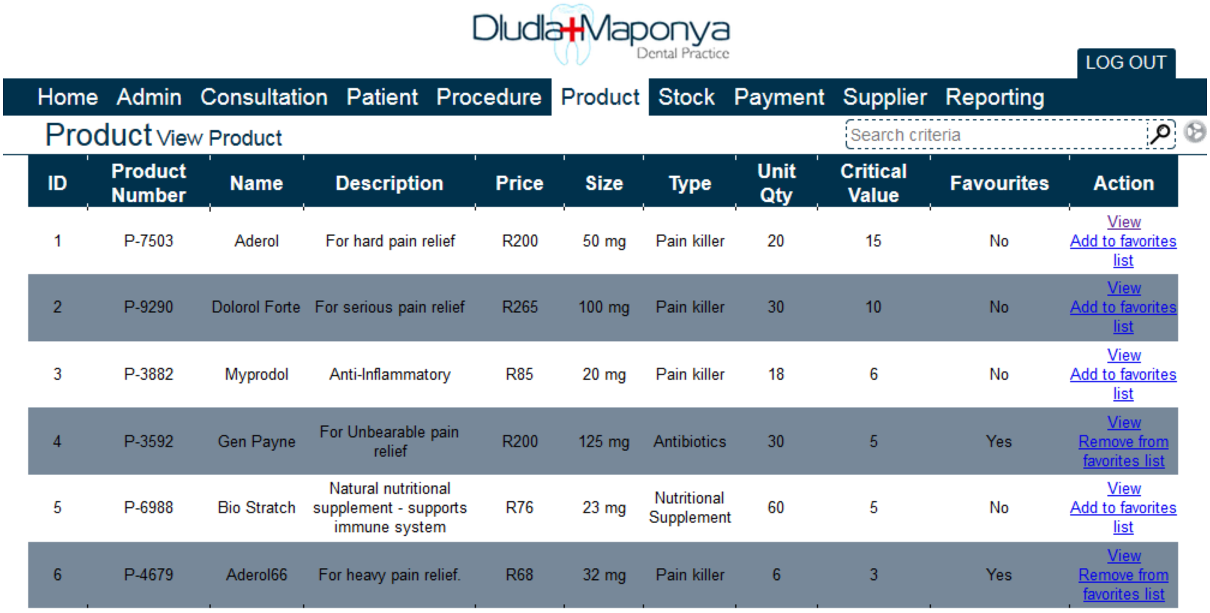


This notification appears once a product is successfully added.

7.3 View Product

Before the employee can view a product, update or delete a product, they first need to navigate to the **Product Tab** and click the **View Products** option as displayed below:

After the employee clicked the **View Products** option, the following screen will appear:



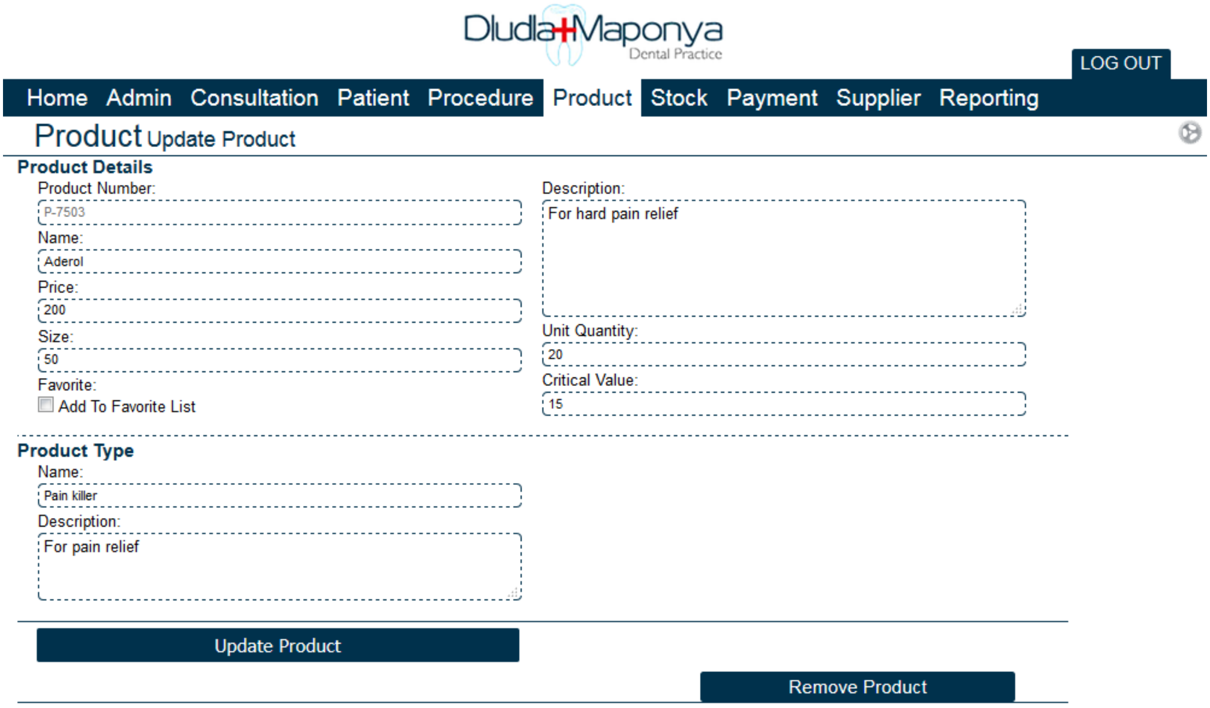
This screen displays a table of all the products on the system. If the employee wants to view all the details of a specific product, they should click on the **View** link on that specific product result (under the **Actions** column) as shown above.

The following screen will appear with the populated information and the employee can choose to delete or update the product.

The employee can update or delete the product from this screen.

7.4 Update Product

On the following screen, after the employee has followed all the steps to view a product, the employee is enabled to edit any field. The employee should click on the **Update Product** button to submit their new information.



7.5 Delete Product

On the following screen, after the employee has followed all the steps to view a product, the employee is enabled to remove the procedure. The employee should click on the **Remove Product** button to submit their request.

On the following screen the notification of a successful deletion of a product will appear after deleting the product.

7.6 Add Product Type

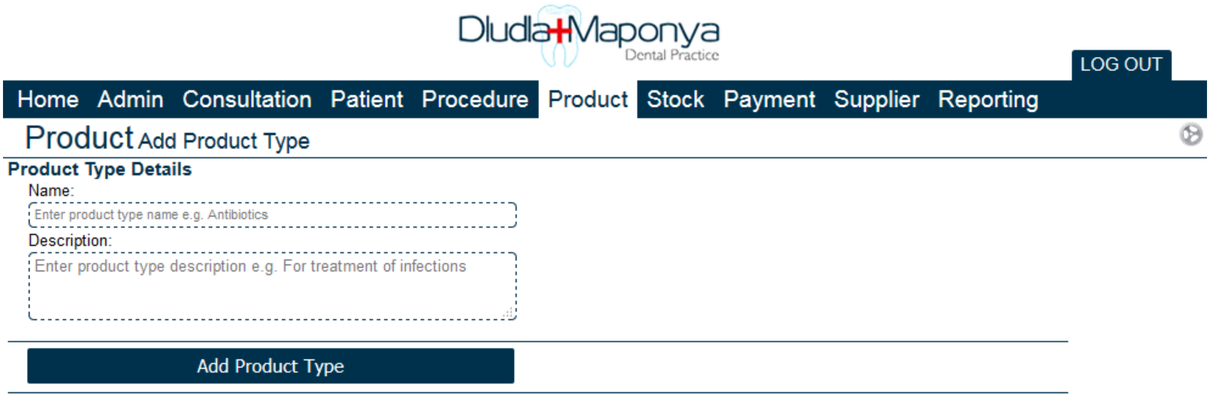
Before the employee can add a product type, they first need to navigate to the **Product Tab** and click the **Add Product Types** option as displayed below:

After the employee has clicked the **Add Product Types** option the following add product type screen will appear:

This screen allows for a product type to be added, viewed, updated and or removed from the system.

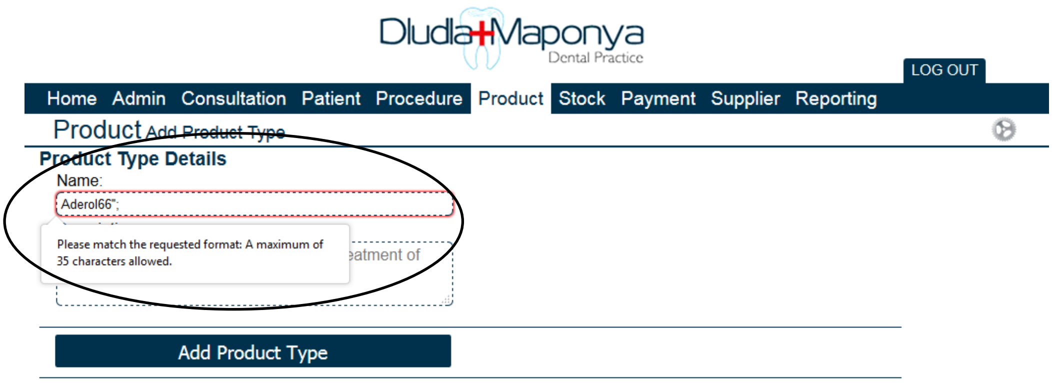
7.6.1 Components of this screen

<u>Product Type Details:</u>



1. Name Textbox: This is where the product type name will be entered.
2. Description Textbox: This is where the product type description will be entered.

7.6.2 Possible notifications for the Add Product Type screen



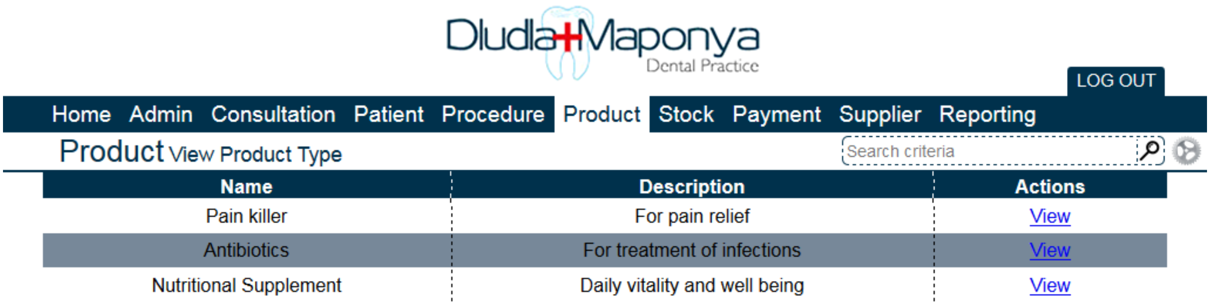
This error message appears once the employee entered the incorrect format in the Name field.

This success message appears once a product type has been added onto the system.

7.7 Maintain Product Type

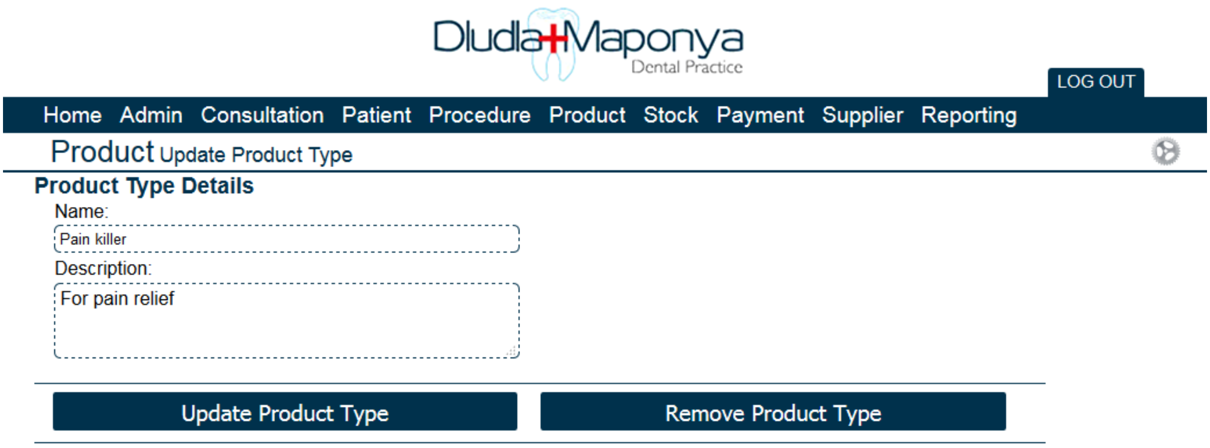
Before the employee can proceed to maintain a product, they first need to navigate to the Product menu item and click the View Product Type option as shown below:

After the employee clicks on the View Product Types option, the following screen will appear, displaying results of all the product types on the system in a table format.



If the employee wishes to delete or update the specific product type, then they should click on the View link under the Actions column as shown above.

The following screen will appear once the View link is clicked:



The employee will click on the Update Product Type button if they wish to update a product type, or they will click the Remove Product Type button if they wish to delete the product type. The buttons are shown above.

8. Stock

8.1 Purpose of this function

This function allows an employee to view stock and its respective stock on hand (stock level). The employee can equally write stock off with appropriate reason after having done a stock take to update stock levels.

This functionality is fulfilled by the following requirements:

- View Stock Levels
- Do Stock Take
- Write off stock

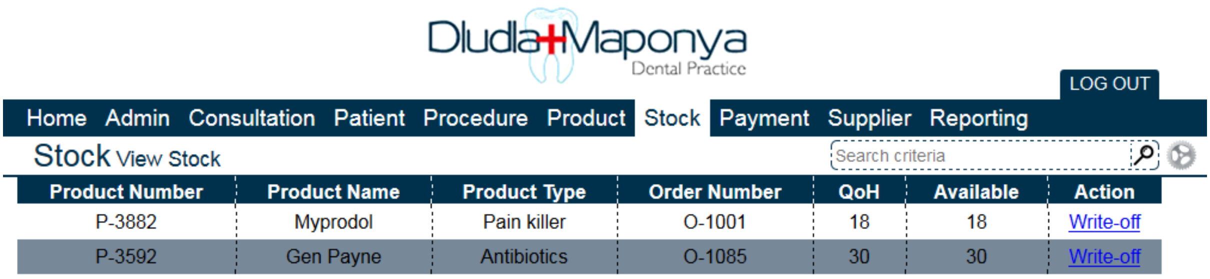
Before the user can access these functionalities, they first need to navigate to the **Stock Tab** by hovering over the Stock menu item as follows:

The Stock menu item will list all its options that the employee can choose from.

8.2 View Stock

Before the user can view stock, they first need to navigate to the Stock tab and click View Stock option from the list dropped down when hovering over the Stock tab.

The following screen will appear listing the results in a table format of all the stock in the system:



8.3 Do Stock Take

Before the user can view stock, they first need to navigate to the Stock tab and click Stock Take option from the list dropped down when hovering over the Stock tab.

The following screen will appear:

8.3.1 Components of this screen:

Status:

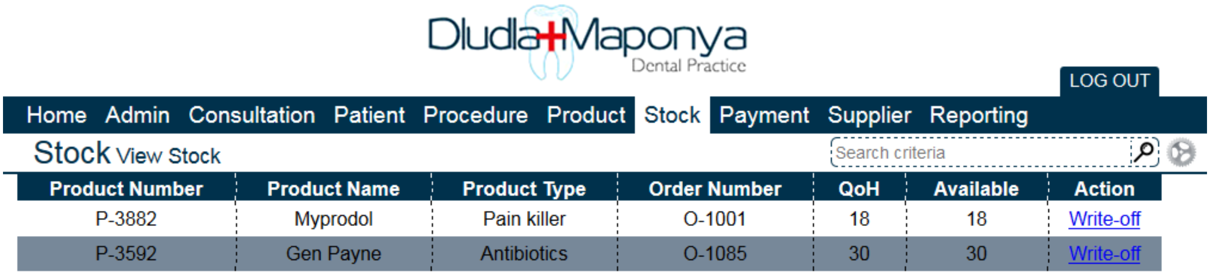
1. Date of Change Textbox: This is where the employee will enter the date on which the stock taking process.

2. Notes Textbox: This is where the employee will enter notes with regards to the stock take.

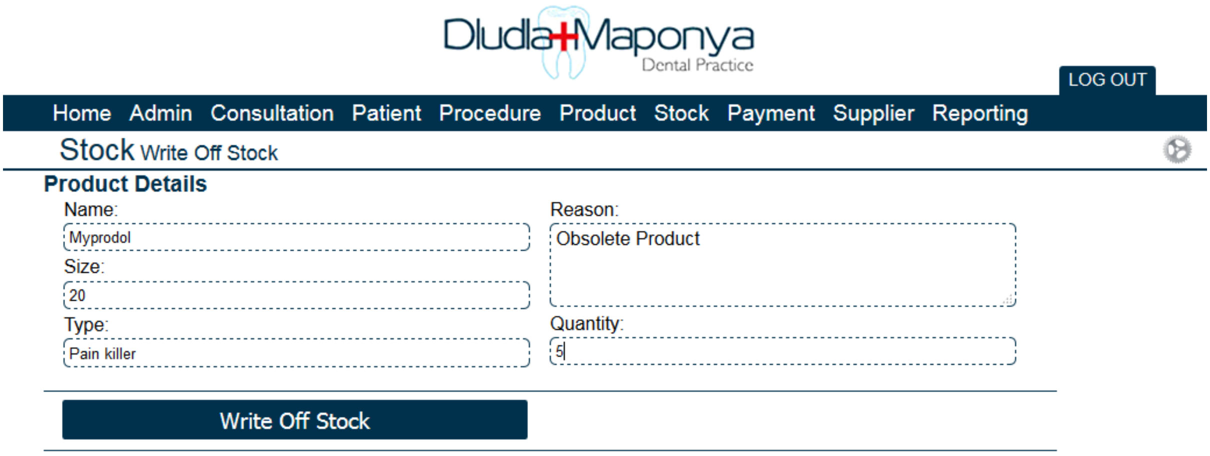
8.4 Write off Stock

Before the user can write off stock, they first need to navigate to the Stock tab and click View Stock option from the list dropped down when hovering over the Stock tab.

The following screen will appear listing the results in a table format of all the stock in the system:



The employee should click on the Write-Off link and will see the following screen:



This screen allows the employee to write off stock with appropriate reason.

8.4.1 Components of this screen:

Product Details:

1. Name Textbox: The name of the product will be entered here.
2. Size Textbox: The size of the product will be entered here.
3. Type Textbox: The type of product will be entered here.
4. Reason Textbox: The reason for write off will be entered here.
5. Quantity Textbox: The quantity to be written off will be entered here.

9. Payment

9.1 Purpose of this function

9.2 Capture a Payment

9.2.1 Components of this screen

9.2.2 Possible Notifications of this screen

9.3 View Payments

9.4 Reconcile Payments

9.4.1 Components of this screen

9.4.2 Possible notifications of this screen

9.5 Generate Payment Claims

9.5.1 Components of this screen

9.5.2 Possible notifications of this screen

10. Reporting Functions

10.1 Purpose of this function

The user must be able to view any reports generated by the system. The requirements of the system that are fulfilled by this function include:

- Generate Daily Appointment Report
- Generate Monthly Purchase Report
- Generate Patient History Report
- Generate Weekly Stock Level Report
- Generate Weekly Payment Report
- Generate Audit Log
- Generate Outstanding Invoice
- Generate Client Statement
- Generate Goods Receiving Note

Before proceeding with the Reporting functionalities, the user will be required to navigate to the Reporting menu, as shown below:

The user must click on the Reporting menu located as the last item on the main navigation item.

10.2 Daily Appointment Schedule

After navigating to the Reporting, the user will click the Daily Appointment Schedule. Select the dentist name you want to see the daily appointment report for and click “View” button. The following will be generated:

Dludla+Maponya Dental Practice

Dludla + Maponya Dental Practice
5 Quintus van der Walt Drive
Norkem Park
1618

Dr J.P Maponya
011 972 4075
dr.maponya@gmail.com
Practice No: 0324868

Daily Appointment Report

Date: 08/06/2016

Schedule Date	Start Time	End Time	Employee Name	Patient Name	Booking Description
7/15/2016	10:15	10:30	J.P Maponya	Given	Tooth extraction
7/15/2016	10:30	10:45	J.P Maponya	Malesela	Gold tooth
7/15/2016	10:45	11:00	J.P Maponya	Palesa	Gold tooth

9.2.1 Components of this report

1. Date: The current date on the system.

2. Schedule Date: The date when the patient appointment is going to take place.

3. Start Time: The time that the patient appointment is going to start at.

4. End Time: The time that the patient appointment is going to end at.

5. Employee name: The name of the dentist that the patient has an appointment with.

6. Patient Name: The name of the patient who made the appointment.

7. Booking Description: Brief description of the appointment.

9.3 Generate Monthly Purchase Report

After navigating to the Reporting, the user will click the Monthly Purchase Report. The following will be generated:

Dludla+Maponya Dental Practice

Dludla + Maponya Dental Practice
5 Quintus van der Walt Drive
Norkem Park
1618

Dr J.P Maponya
011 972 4075
dr.maponya@gmail.com
Practice No: 0324868

Monthly Purchase Report

Order Date	Order Status	Supplier ID	Order Amount
08/01/2016	Received	S0003	1000
14/01/2016	Cancelled	S0005	790
14/01/2016	Pending	S0011	2040

10.2.1 Components of this report

1. Order Date: The date when the order was made.
2. Order status: The progress status of the order.
3. Supplier ID: The unique supplier identification number.
4. Order Amount: The total amount of the order, calculated by multiplying the unit price and the item number and taking the sum of the results.

10.2.2 Possible notifications of this screen

10.3 Patient History Report

After navigating to the Reporting, the user will click the Patient History Report. Enter the patient ID number in the ID text box and click View button. The following will be generated:

Dludla+Maponya Dental Practice

Dludla + Maponya Dental Practice
5 Quintus van der Walt Drive
Norkem Park
1618

Dr J.P Maponya
011 972 4075
dr.maponya@gmail.com
Practice No: 0324868

Patient History Report

Date: 08/06/2016

Consultation Notes	Consultation Date	Employee Name	Patient Name
Tooth filling	08/01/2016	E0003	Ntokozo
Gold tooth	14/02/2016	E0005	Ntokozo
Tooth extraction	14/03/2016	E0011	Ntokozo

10.3.1 Components of this report

1. Date: The current date on the system.
2. Consultation Notes: The notes written by the dentist during consultation session.
3. Consultation Date: The date when the consultation took place.
4. Employee name: The name of the dentist that the patient has an appointment with.
5. Patient Name: The name of the patient who made the appointment.

10.3.2 Possible notifications of this screen

10.4 Audit Log

10.4.2 Components of this screen

10.5 Client Statement

10.5.1 Components of this screen

10.5.2 Possible notifications of this screen

10.6 Goods Receiving Note

10.6.1 Components of this screen

10.6.2 Possible notifications of this screen

10.7 Monthly Purchase Report

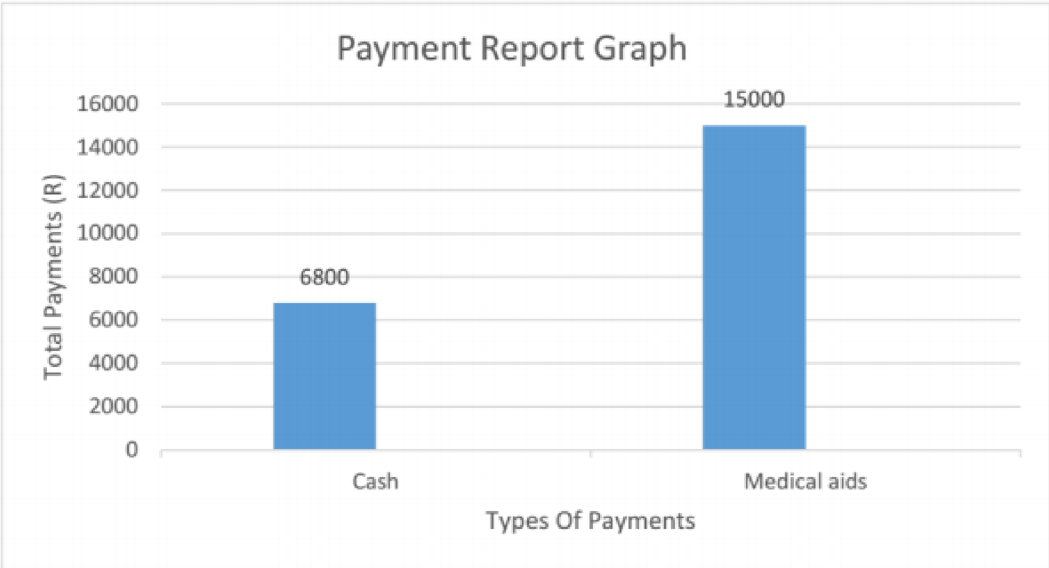
After navigating to the Reporting, the user will click Weekly Payment Report. The following will be generated:

Dludla + Maponya Dental Practice
5 Quintus van der Walt Drive
Norkem Park
1618

Dr J.P Maponya
011 972 4075
dr.maponya@gmail.com
Practice No: 0324868

Weekly Payment Report

Date: 08/06/2016



Medical Aid Claims:	15000
Cash Payments by Patients:	6800
Total:	21800

9.6.1 Components of this report

1. Date: The current date on the system.
2. Bar graph: The cash payments and medical aids payments.
3. Medical Aid claims: Total medical aids payments.
4. Cash Payments: Total cash payments by patients.
5. Total: The sum of medical aids payments and cash payments.

10.7.1 Components of this screen

10.7.2 Possible notifications of this screen

10.8 Outstanding Invoice List

10.8.1 Components of this screen

10.8.3 Possible notifications of this screen

10.9 Weekly Payment Report

10.9.1 Components of this screen

10.9.2 Possible notifications of this screen

10.10 Weekly Stock Level Report

After navigating to the Reporting, the user will click Weekly Stock Level Report. The following will be generated:

Dludla + Maponya Dental Practice
5 Quintus van der Walt Drive
Norkem Park
1618

Dr J.P Maponya
011 972 4075
dr.maponya@gmail.com
Practice No: 0324868

Weekly Stock Level Report

Date: 08/06/2016

Product Type	Product Name	Product Quantity	Product Price
Pain Killers	Panado	10	60
Hypothermic	Syringe	20	100
Latex	Gloves	30	90

10.10.1 Components of this screen

1. Date: The current date on the system.
2. Product Type: The medical category of the product.
3. Product Name: The name of the product.
4. Product quantity: The number of product units.
5. Product price: The price of unit product.

10.10.2 Possible notifications of this screen

1. Supplier Functions

1.1. The purpose of this function

The user should be able to add a Supplier, and thereafter maintain existing suppliers and if necessary remove a supplier from the system provided they have not orders made to them; their service has never been used before. The user should also be able to place orders to suppliers and keep a record on the system of the placed orders; the user should also be able to add new products. The user should be able to Receive Order when the order has arrived thus changing the status of the order on the system to receive. The user should be able to record that the order is paid once therefore changing the status of the order to Paid. The user should also be able to cancel an order provided it has not arrived and it has not been paid. The requirements that are fulfilled by this function include:

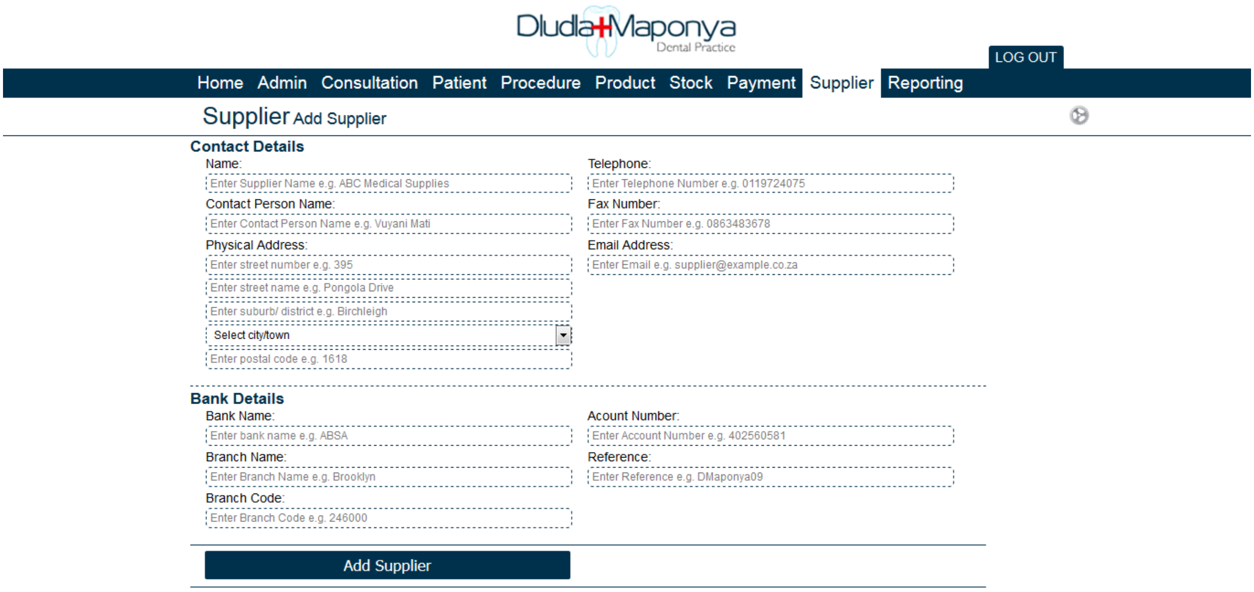
- Add Supplier
- View Supplier
- Update Supplier
- Remove Supplier
- Place Order
- Add New Product
- Remove Order
- Pay
- Cancel Order

2.2. Add Supplier

Before the user can use the ‘Add Supplier’ function, the user will be required to navigate to the consultation tab, located as the third navigation tab in the navigation ribbon as displayed below:

The user will be required the click on ‘Add A Supplier’ sub-menu option.

The following screen will appear:

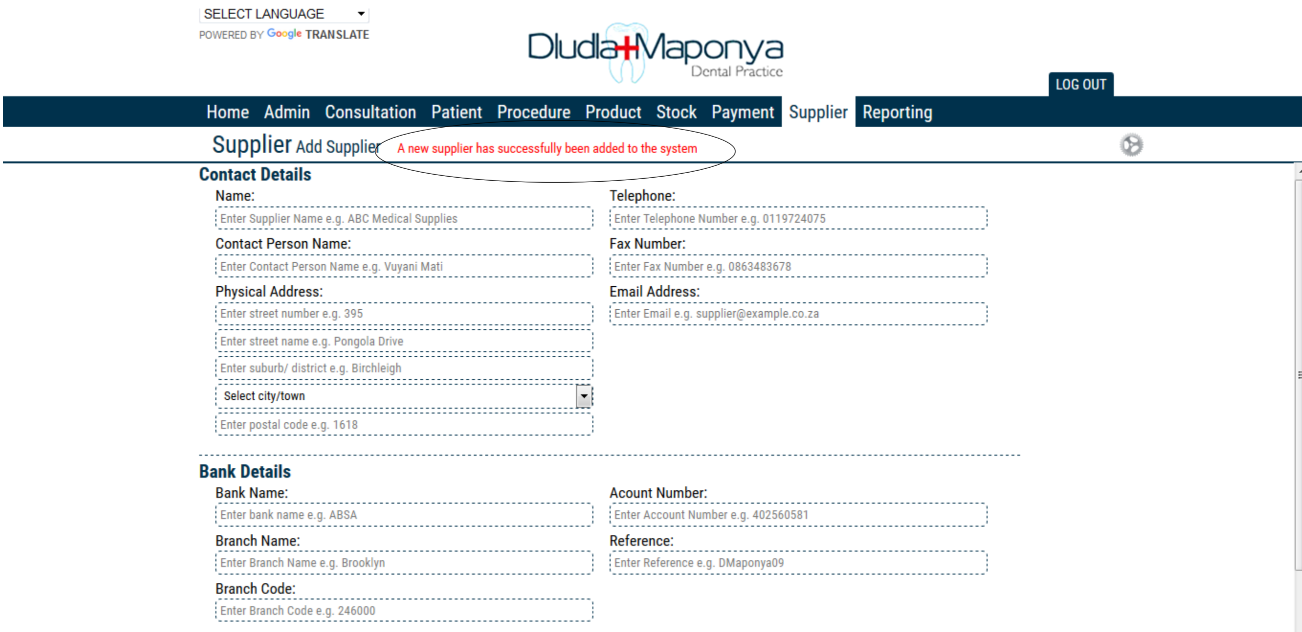


2.5.1. Components of this screen

- Help Function icon: The user will be able to access the help information about this screen
- Name text box: The user will be able to enter the supplier name to add to the system
- Contact Person Name text box: The user will enter the supplier contact person's name
- Street number text box: The user will be able to enter the supplier's address street number
- Street name text box: The user will be able to enter the supplier's address street name
- Suburb/district text box: The user will be able to enter the supplier address suburb/ district
- City/Town combo box: The user will be able to enter the supplier's address city/town
- Telephone Text box: The user will be able to enter the supplier's telephone number
- Bank Name text box: The user will be able to enter the supplier's bank name
- Branch Name text box: The user will be able to enter the supplier's branch name
- Branch Code text box: The user will be able to enter the supplier's bank branch code
- Account Number text box: The user will be able to enter the supplier's bank account number
- Reference text box: The user will be able to enter the supplier's reference with regards to banking details
- Add Supplier button: The user will be able click on the button to save the supplier details and add the supplier to the system

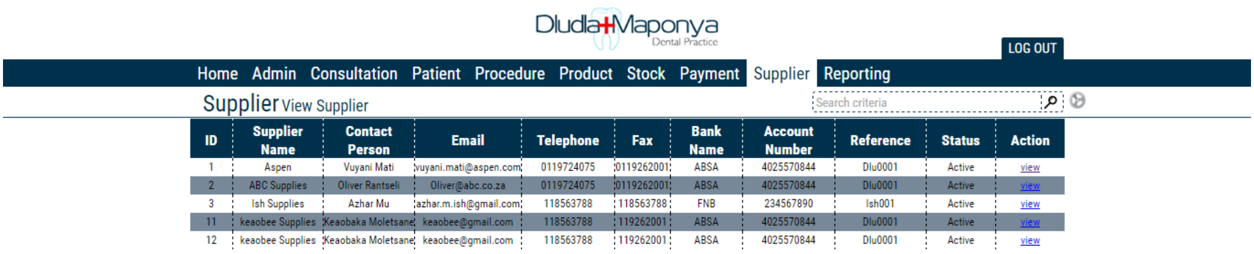
2.5.2. Possible Notifications for this screen

The screen below will appear after the user has entered the correct supplier information and clicks on the Add Supplier Button.



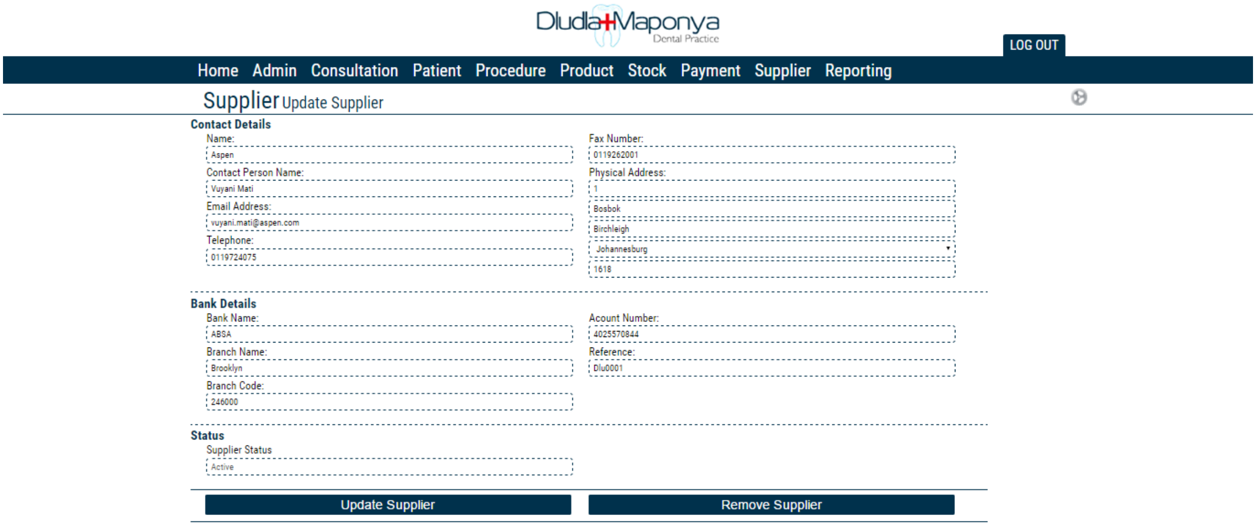
2.3. View Supplier

Before the user can proceed to view a supplier, the user must navigate to the Supplier tab located as the second to last navigation tab on the navigation ribbon. The user will thereafter select 'View A Supplier' from the Supplier sub-menu as shown below:



The user can search for a supplier not visible on the list of suppliers by entering the supplier's search criteria which could be any supplier information e.g. Supplier Name: ABC Supplies.

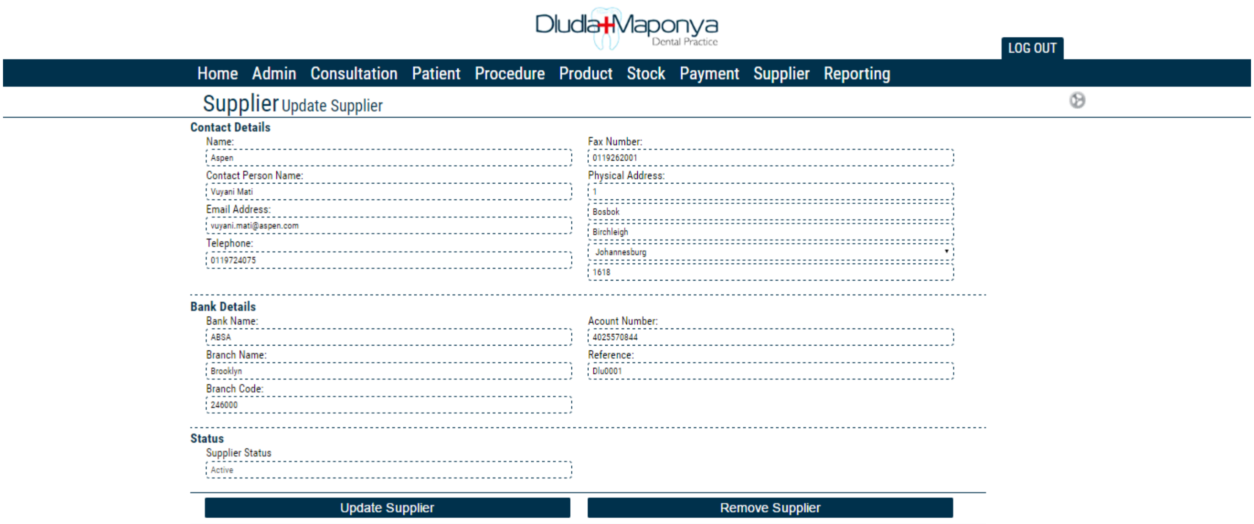
To view the selected patient details, the user will click on the view link of the specific supplier and the following screen will appear:



The screen above displays the supplier details of the supplier that was selected by the user. The Screen components are auto-filled after the user clicks the view click of the supplier.

2.4. Update Supplier

In order for the user to be able to use the Update Supplier function, the need to navigate to the supplier tab located as the second to last tab on the navigation ribbon.



2.5.1. Components of this screen

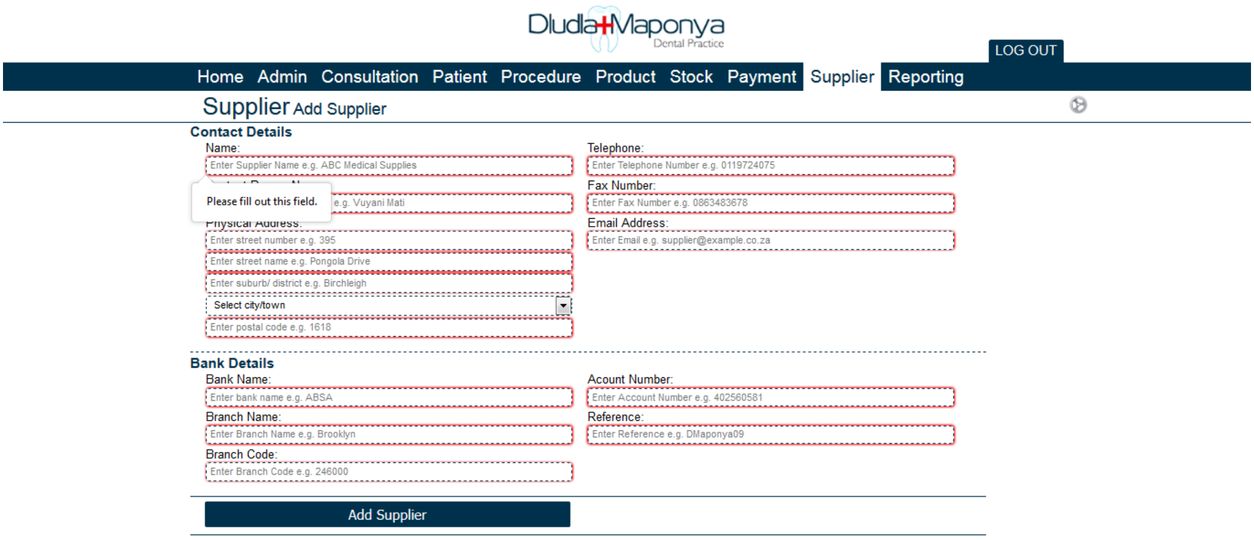
All input fields on this screen are auto-filled after the user clicks to view the supplier.

- Help Function icon: Allows the user to access help information about this screen
- Supplier Name text box: The user can change the supplier name
- Contact Person Name text box: The user can edit the supplier’s contact person’s name by entering the name in this text box
- Email Address text box: The user can edit the supplier’s email address by entering the email address in tis text box

- Telephone Text box: The user will be able to change the supplier’s telephone number in the telephone text box
- Fax Number text box: The user will be able to change the supplier’s fax number in this text box
- Street number text box: The user will be able to change the supplier’s street number in this text box
- Street Name text box: The user will be able to change the street name in the street name text box
- Suburb/District text box: The user will be able to change the suburb/district in this text box
- City/Town combo box: The user will be able to change the supplier city/town by selecting it from the combo box
- Postal Code text box: The user will be able to change the supplier postal code
- Bank Name text box: The user will be able to change the supplier’s bank name
- Branch Name text box: The user will be able to change the supplier’s bank branch name
- Branch Code text box: The user will be able to change the supplier’s bank branch code
- Account Number text box: The user will be able to change the supplier’s bank account number
- Reference text box: The user will be able to change the supplier’s reference.
- Supplier Status text box: Displays the supplier’s status
- Update Supplier Button: The user will click this button to add the updated supplier details to the system
- Remove Supplier Button: The user will click on this button to remove a supplier from the system provided they have not been used before

Possible Notifications for this screen

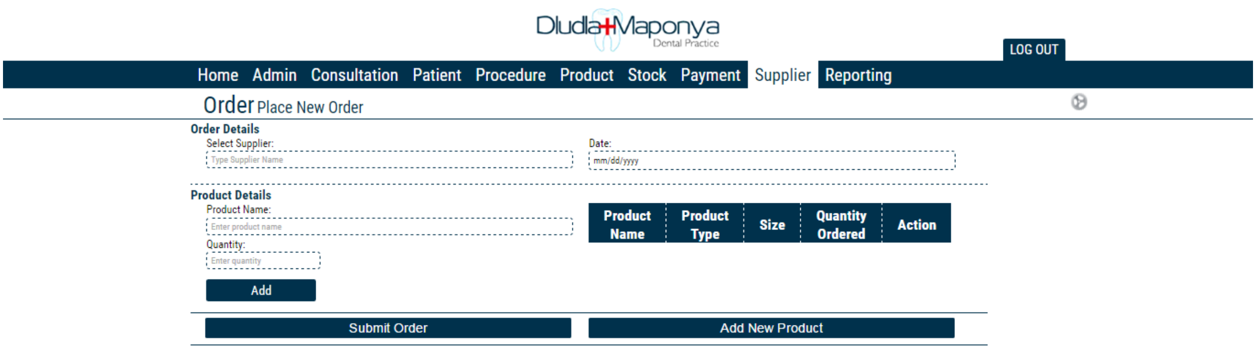
The following screen will appear after the user clicks on the Add Supplier Button, where not information has been captured into the input fields as indicated by the red outline:



2.5. Place Order

Before proceeding with the Place order functionality, the user will be required to navigate to the Supplier tab as shown below:

The user must click on the Place Order sub-menu option that will appear after the user hovers over the supplier tab on the navigation ribbon. After the user has clicked on the 'Place Order' sub-menu option, the following screen will appear:



On this screen, the user is able to place an order on the system.

2.5.1. Components of this screen

- Help Icon: The user will be able to access help information about this screen

- Select Supplier text box: The user will be able to select a supplier from the existing suppliers on the system, as the user enters the supplier name the system will filter suppliers
- Date date-picker: The date (today) will be displayed on this date picker
- Product name text box: The user will be able to enter the Product name into the textbox and the system will filter and display filtered product names
- Quantity numeric up down: The user will be able to enter the quantity of the product by using the numeric up down.
- Product table: Product details will be displayed on the product table after the user click on the add button
- Add button: The user will click on this button to add enter product details to order
- Submit Order button: The user will click on this button to submit the order and save the order details onto the system
- Add New Product button: In a case where the product does not exist on the system, the user will click on this button to add a new product to the system. The system will direct the user to a screen that will allow the user to add a new product to the system.

2.5.2. Possible notification for this screen

The screen below will display after a user clicks on 'Submit Order' button without entering the required information into the input fields. The red outline indicates that those input fields should be fields:

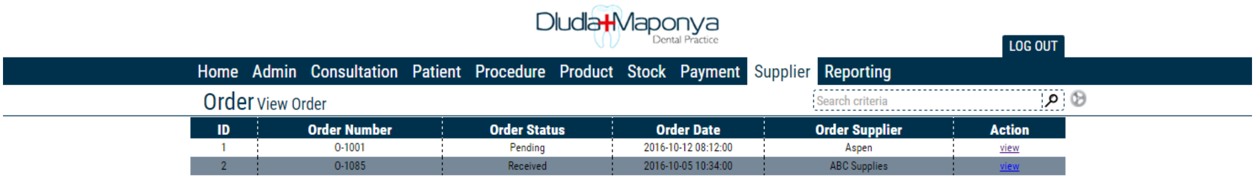
The screen below will display after the user clicks on Submit Order and the order information has been added correctly:

2.6. View Orders

Before the user can use the View Orders functionality, the user will be required to navigate to the supplier navigation tab, located as the second to last tab. A sub-menu will appear with the following options: 'View Suppliers', 'Add a Supplier', 'View Orders' and 'Place Orders'.

The user will be required to click on the 'View Orders' sub-menu option.

The following screen will appear:



If the order the user needs to view is not visible on the list of orders the User can search for the order by using the search facility on the screen.

3. System Implementation Procedure

3.1. Introduction

A system implementation procedure will be used to find the database that needs to be installed for the system, the user training and documentation that need to be developed and strategy used to convert from the old system to the new system.

In this project, we will be implementing a new system, therefore there will be no conversion from the old system. This section of the document will highlight the components and instructions needed to setup the system, as well as the training that will be offered to those that will be responsible for administration and maintenance of the system.

3.2. Hardware Requirements

3.2.1. Back End Requirements

• CPU	Intel Core i3
• RAM	2GB
• Storage	20 GB hard disk Free Space
• Processor	1.6 GHz Dual Core or faster processor
• USB	1.1 port (2.0 recommended)
• Display	Standard
• Operating System	Microsoft Windows 7
• Network Adapter	Dual-band Wi-Fi-certified 802.11a/b/g/n-compliant adapter
• Input	Compatible Keyboard, webcam and Mouse
• Internet Connection	1024kbs broadband

More advanced specifications will improve the response and functionality of the system.

These are the step that will have to be followed to setup the system.

1. Ensure stable internet connection
2. Download and Install Mozilla Firefox

3.2.2. Front End Requirements

To be able to access the system, a user would need to install it. The user will need a laptop or computer, mouse, keyboard and stable internet connection.

3.3. Software Requirements

3.2.1. Back End Requirements:

- Windows 7 or higher
- MySQL Server (2008 or later)
- XAMPP
- Google Chrome/Mozilla Firefox or other browsers that supports HTML5 and CSS3
- Afrihost Cloud Server Hosting (Sliver Package)
- Adobe Reader
- Office Suite

3.2.2. Front End Requirements:

The user will need to install the system through the use of the installation files. After installation the user will be able to use the system.

3.4. Network Requirements

3.3.1. Back End Requirements

An internet connection with a speed of 1024kbs broadband, web-server and an email service will be required.

3.3.2. Front End Requirements

The user will need a stable internet connection.

3.5. End User Requirements

3.4.1. Back End Requirements

The end users will be required to be computer literate. The user will be provided with help information to assist in case difficulty is faced.

3.4.2. Front End Requirements

User will need to be computer literate. Help information is provided to assist the user if they face difficulty while using the system.

3.6. Back Up and Restore Procedure

The backup and restore functionality will backup/restore all data. The user will navigate to the Admin tab and click 'Backup System' sub-menu option.

The following screen will appear:

Upon clicking on the Backup System Button the system is triggered to run a backup, which will back up the system and create a BackUp file which can be saved.

Upon clicking on the Restore System button the system is triggered to run a restore on the system, restoring the system to its previous state.

3.6. Online Help Function

The user will be able to access online help information on the system by hovering over the help icon which is available on every screen. The user will be able to view the help information which will appear in a separate tab, displaying a pdf with the help information for the user. The user will be able to download, print, bookmark help information.