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**ApexCare SolutionsRequirements Analysis**

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# Introduction

# Functionality

## User Critical

## Base

## Nice-To-Have

# Development Plan

## High-Level Task Descriptions

## Dependencies

# User Stories

## Service Desk

* **Title:** Omnichannel Communication
* **User Story:** As a client, I want to report issues via my phone, email, chat, or the ApexCare mobile app so that I can voice my concerns.
* **Acceptance Criteria:**

1. The client should be able to send reports from multiple channels (phone, email, chat or mobile app)
2. The system should log the report and categorize it based the size and type of the issue reported.
3. The system should then validate the report by making sure the clients input is as expected.
4. Then the system should send it to the service desk to be manged by the service desk agents.
5. The client should also receive confirmation that the issue was received by the system via their preferred method of communication.

* **Title:** AI powered call handling
* **User Story:** As a service desk agent, I want to utilize AI to categorize incoming issues so that I can improve my response time.
* **Acceptance Criteria:**

1. The AI model should categorize each issue by urgency
2. The AI model should suggest a suitable technician
3. The service desk agent should be alerted of each incoming issue and validate that the technician is suitable.

* **Additional Considerations:** The model should be reviewed regularly to ensure that the AI model is not biased.
* **Title:** Cross-Platform Integration
* **User Story:** As a service desk agent, I want to automatically retrieve client data and service history so that I access relevant information like previous calls.
* **Acceptance Criteria:**

1. The database should be fully integrated and compatible with the system.
2. The service should retrieve and display all client data upon the service desks agents request.
3. The client data should consist of past service requests, call-history, etc.
4. The system should not take longer than 5 seconds to complete the retrieval.
5. The service agent should be able to add or update relevant client information.
6. The information should be validated and display error messages before completing the addition or update.

* **Additional Considerations:** The system should be tested to ensure that there are no faults when the service agent is requesting, adding or updating data.

## Client Management

* **Title:** Real-Time-Updates
* **User Story:** As a service desk agent, I want to track client interactions and contract statuses in real-time so that I can maintain and update client profiles, and validate the contract status and agreement.
* **Acceptance Criteria:**

1. The system should be able to retrieve and display client information from the database upon request.
2. The information should contain previous interactions, contract statuses, and the contract agreements.
3. The system should allow the service desk agent to update the contract status and agreements as needed.
4. The system should instantly reflect the changes to eliminate confusion between service providers and clients.

* **Additional Considerations:** The system should be tested to ensure that there are no faults when the service agent is requesting, adding or updating data.
* **Title:** Real-Time-Updates for Follow-ups
* **User Story:** As a service desk agent, I want to track client interactions and contract statuses in real-time so that I can notify clients when a follow-up is due.
* **Acceptance Criteria:**

1. The system should automatically flag a client when a follow-up is needed
2. The system should notify the client about the follow-up.
3. The system should prioritize flagged clients for the service agent to review.
4. The service agent should then prioritize the service requests made by the clients.

* **Additional Considerations:** The system should be tested to ensure the clients receive the notification.

## Contract Management

* **Title:** Self-service portal
* **User Story:** As a client, I want to access a dedicated web portal so that I can manage my contract details, service offerings, view service packages, track performance, and automatically renew contracts.
* **Acceptance Criteria:**

1. There should be a dedicated web portal for each user to access.
2. The portal should contain the user’s details, current and past contract details, service packages.
3. The user should be able to track the performance and availability of service packages.
4. The system should showcase promotions and automate contract renewals.

* **Title:** Automated Reporting
* **User Story:** As a administrator, I want to automatically generate data driven insights based on contract performance so that I can identify improvements when assessing contracts.
* **Acceptance Criteria:**

1. The system should be able to generate a report on contract performance.
2. The report should include stats indicating the service time, profitability, etc.
3. The administrator should then be able to access and extract the report for review.
4. The administrator can then advice the client or service provider about potential improvements.

## Field Service Management

* **Title:** AI-Driven Scheduling
* **User Story:** As a client, I want to automatically be assigned a technician based on their skills, location, and the urgency of the task I need completed so that I can be assured a suitable technician will be assigned to me.
* **Acceptance Criteria:**

1. The client will submit a service request.
2. The AI model will categorize it based on urgency, skill, and location.
3. The AI model will then assign a suitable technician for the task.
4. The client will be able to track the job status through a mobile app.

* **Title:** Mobile Access
* **User Story:** As a technician, I want to receive job details and statuses via a mobile device so that I can manage my tasks efficiently.
* **Acceptance Criteria:**

1. Technicians should be able to view current, past, and future jobs via a mobile app.
2. The technician should be able to update the job status as the job progresses.
3. The changes made by the technician should reflect in real-time for the service desk agent to review.

## Customer Satisfaction Management

* **Title:** Automated Feedback Mechanisms
* **User Story:** As a client, I want to receive surveys so that I can review my experience with my assigned technician.
* **Acceptance Criteria:**

1. Once the technician has completed their job, they will be able to change the status of their job via a mobile app.
2. When the status of the job has been set to completed the client will receive a survey that they can complete.
3. The survey will have key elements that the client can complete like the technician that has been assigned to them, a rating to rate the quality of the service, the duration of the project, a general range of cost, and an open ended review and complaint section that will display on the technicians profile.
4. The completed survey will be sent to the service desk agent for their review
5. The reviewed survey will be published once validated.

* **Title:** AI-Driven Sentiment Analysis
* **User Story:** As a client, I want dissatisfaction handled immediately so that potential issues can be addressed promptly and prevent larger problems from occurring.
* **Acceptance Criteria:**

1. The system will use an AI model to monitor client interactions.
2. The AI model will categorize each interaction as negative, neutral or positive.
3. If an interaction is flagged as negative the service desk will receive a notification in real-time.
4. The notification will include the client’s details and a summary of the interaction.
5. After the system has flagged the interaction as negative, the client will receive a message acknowledging the issue and notify them that the company is investigating the issue.
6. The system will suggest steps the service desk agent can take if needed.

# Conclusion