

# System Requirement Summary

**Date:** 1 February 2023  
**Project:** Rebuild UPPFI Membership Portal v2  
 Additional Code Adjustment to UPPFI Membership Portal v1  
**Client:** UP Provident Fund Inc.  
**Prepared by:** V.A. Guanio / Project Manager

AGENDA	DELIVERABLES	CLIENT REQUIREMENTS	DOCUMENTS NEED	ACTION PLAN (THE BOX)	TIMELINE	COSTING
Stayton Server	Additional Reports	Summary Reports (All Campus, Selected, Campus)	Templates are subject for verification to UPPFI	Generate Download (.csv / .xls / .pdf)	3-4 Weeks (max)	We will send separate Quotation via email.
		Membership Ledger Reports (Multiple Selection, Members Details, Equity & Loan Transactions)	Templates are subject for verification to UPPFI	Generate View UI / Front End & Back End Download (.csv / .xls / .pdf)		
	Integration of Data Privacy Act of 2012	Once login – required to display / agree on the DPA of 2012 (members login)	Content care of UPPFI	Create condition upon login Modal pop-up (Notice) Content are written in English and Tagalog version Generate Features that will save status (Agreed on DPA)		
	Additional Reports	Generate Reports List of Members who are already agree on the DPA	Templates are subject for approval (initial template c/o the box)	Alter table add columns for status Generate list of members (agreed on DPA 2012)		
	Manual Testing				1-3 Days	
	UAT Deployment				1 Day	
	Clients Acceptance				1 Day	
Production Server	Deployment Features - Query and Database	N/A	N/A	Ready for Deployment (wait for additional request)		N/A

	Optimizations - Additional Filtering Search - Manage Campus Features				2-3 Days upon client's acceptance (During Weekends Midnight)	
	Deployment Additional Request - Reports - Data Privacy Act of 2012	N/A	N/A	Test & Deploy to Production Server		

#### REBUILD PROJECT (UPPFI MEMBERSHIP PORTAL V2)

AGENDA	DELIVERABLES	CLIENT COMMENTS	DOCUMENTS NEED	ACTION PLAN (THE BOX)	TIMELINE	COSTING
PHASE 1	UAT SERVER	Deploy to Linode server (UAT) rebuild server	Linode Billing	Prepare the Billing information (linode server)	N/A	Billing from Linode (Subscriptions)
	Admin & Member Login (Cookie) Privacy	Content care of UPPFI	Content care of UPPFI	Code Adjustment	Under project timeline	N/A
	(OMA) Online Membership Application	Change Date text to (January, February, and so on)	N/A	Code Adjustment (Apply to all dates)	Under project timeline	N/A
	OMA – Personal Details (Step 1)	Before hitting / clicking “next” must apply the DPA of 2012	Content care of UPPFI	Code Adjustment		
		Check box for no Middle name (Automatically Filled out filed with 'Not applicable' Value)	N/A	Code Adjustment		

		Additional Text Value on the Middle Name	"Please input your complete MIDDLE NAME (Ex. GOMEZ)"	Code Adjustment		
	OMA – Employee Details (Step 2)	Change Message Prompt Text	Care of UPPFI (must check all prompt messages for content revisions)	Code Adjustment		
	OMA – Membership Details (Step 3)	Apply condition to (b) Fixed Amount. Amount value must not be less than to the value of 1% of members Monthly / Gross salary (Validation apply, not proceed if less than)		Code Adjustment Condition Adjustment Apply Computation		
		Percentage must only Whole numbers		Code Adjustment		
	OMA – Reports Generation (Step 4)	Remove manual uploading of forms		Code Adjustment		
		Update Insurance Form (AXA)	Care of UPPFI	Code Adjustment Apply new form and generate		
		Signature	For Verification			
	Alert / Prompt Messages	Contents, Font Size, etc. are subject for checking	Care of UPPFI			
	Admin & Membership Dashboard	Remove Gradient Color  Header Change Size		Code Adjustment		
	Application Movement Validation	Return Notification – Email	Add Remarks per item + email	For development		
	Settings & Configuration	Populate Data  Automatic backup database	Already sent Excel File Every Month			

	Application Trail Status	Email Submitted Application		Ongoing development		
		Search reset history		Ongoing development		
		Continue Application		Ongoing development		
		Return Application apply link automatic for member corrections		For development		
	Loan & Benefits	Subject for separate discussion				

