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| SEDA LOGO New    **NORBAZ**  **DATA SOLUTIONS** |
| Project Progress Report |
| Development, Implementation, Maintenance and Support |
| Seda Business Tools |
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| Project number | L2022/2606 |
| Project description | Development and Deployment of the Automated Business Diagnostic and Assessment Tools & Maintenance of Existing Tools |
| Project Owner | Small Enterprise Development Agency (SEDA) |
| Document name | Monthly Progress Report |
| Version number/Month | Version 06 - September 2022 |
| Purpose | Monthly progress report |
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1. **Background**

The Small Enterprise Development Agency (Seda) is an agency of the Department of Small Business Development, which was established in December 2004, through the National Small Business Amendment Act, Act 29 of 2004. Seda is mandated to coordinate and provide non-financial support services to potential, aspiring SMMEs through its Branches and Service Providers.

Seda currently has a delivery network compromising of fifty-five (55) service delivery points (Branch Offices), with 500 Business Advisors and approximately 50 Information Officers who use Seda’s existing diagnostic tools. The branches have a support structure of provincial offices and a national office supporting the provincial office network.

Seda Diagnostic Tools are different legacy systems used by practitioners at all Seda delivery points. These tools are managed by the Seda national office as follows:

* Assessment content, standards, certification and utilisation—Training and building capacity unit
* Electronic application/system—Business Systems

The Seda Diagnostic Tools are a package of vital applications, which complement the core business operations system, the CRM system, to facilitate and manage client interactions and operations of the provincial delivery network. Diagnostic and Assessment Tools are used to identify areas of weakness in small businesses, including individual entrepreneurs and develop strategies for client business performance improvements. They provide a basis for focused interventions, development and or improvement areas that address the needs of the entrepreneurs or businesses.

One of Seda’s key outcomes is Improved Service Access, through implementing integrated, flexible and responsive systems. The Seda Diagnostic and Assessment Tools support business enablement, process efficiency, thus improving service access. Sound knowledge and experience in system analysis, solutions design, programming, database systems and project management is required to effectively and efficiently deliver the desired solution. Completion and delivery of this work will ensure refinement and standardisation of technologies that support the tools, thus ensuring compatibility to interact with the current ICT infrastructure optimally. To ensure efficiency and productivity for Seda, the Seda stakeholders and clients, Diagnostic and Assessment Tools play a fundamental role in this regard.

1. **Purpose**

As Norbaz Data Solutions, we were awarded the opportunity to assist SEDA with the development, deployment and maintenance of the assessment tools for the period **23 March 2022** to **22 February 2023**; with the following terms of reference.

|  |  |  |
| --- | --- | --- |
| **No.** | **Requirement** | **Description** |
|  | Business Analysis | Business and process analysis must be conducted and supporting document(s) provided |
|  | System Analysis | System analysis of the current system (s) must be conducted and supporting document(s) provided |
|  | System development   * Diagnostic and assessment tools portal * Basic assessment tools * Critical Planning Exercise Tool (CPE) * Assessment of Company Operations Tool (ACO) * Export Readiness Assessment Tool (ERAT) | All Tools must be designed and developed as per Seda requirements.   * Diagnostic and assessment tools portal   The Tools website (Portal) will house all the Tools   * Basic assessment tools   All basic tools Seda uses to assess existing and potential clients. Eg. Checks business idea, personality traits and entrepreneurial capabilities   * Critical Planning Exercise Tool (CPE)   The tool used to assess the business financial health   * Assessment of Company Operations Tool (ACO)   The tool used to assess the efficiency of business operations   * Export Readiness Assessment Tool (ERAT)   The tools used to assess the business readiness to venture into the export market |
|  | Database management (design, development and administration) | The existing database must be maintained and administered together with the database for the new portal that will be deployed. |
|  | System integration with other existing Seda applications | The system must be capable of integrating with other Seda systems |
|  | Offline enabled solution | The system must allow utilisation when users not connected to the network and sync data when they connect to the system |
|  | System maintenance and support | The existing portal must be maintained until the new system is fully implemented and the new one that will be deployed will replace the existing system. |
|  | Reports design and development | All required reports from the system must de be provided |
|  | System Testing | The system must be thoroughly tested before it is released to Seda |
|  | System Training | Train the training must be provided and the supporting documents |

1. **Project Deliverables**

Listed in the table below are the expected deliverables of this project.

|  |  |
| --- | --- |
| **ITEM** | **DELIVERABLE** |
| 1. | Documented business requirements specification and functional specification |
| 2. | Documented system analysis report |
| 3. | Designed, developed and Implemented Tools |
|  | * Diagnostic and assessment tools portal * Basic assessment tools * Critical Planning Exercise Tool (CPE) * Assessment of Company Operations Tool (ACO) * Export Readiness Assessment Tool (ERAT) |
| 4. | System support, maintenance and enhancements |
| 5. | Documented Monthly reports |
| 6. | Maintenance and Support plan |
| 7. | Integrated System |
| 8. | System integration report |
|  | Training |
|  | * User and admin training * Training guide * User guide * Admin guide |
| 9 | Testing   * Test cases and testing report |
| 10 | Project close-off report |

1. **Project Activities**

For convenience, we have grouped the activities into four categories that approximately map to the expected objectives of this project.

**4.1 Activity Categories**

The four service categories are described as:

1. **Maintenance and Support of the current tools**

This category of the project deals with all issues related to the maintenance and support of the currently running automated diagnostic tools. The project’s intention is to retire these tools when the new tools have been implemented.

1. **Implementation of the developed tools**

There is a total of 8 (eight) new tools that were developed and almost ready to be rolled out into production. We will outline continuous progress related to the implementation of these tools under this category.

1. **Development and implementation of the remaining tools (CPE, Business Planning Framework)**

In this service category, we are in the process of designing and developing the new, online versions of the Critical Planning Exercise and the Business Planning Framework Tool

1. **Transfer of skills to identified Seda for sustainability and institutional capability**

We will transfer skills to the Seda stuff as will be advised and agreed. This will be in the form of user and administrator’s training, to enable Seda to use the tools effectively, and give minimum level support on especially notn-technical issues.

**4.2 Detailed Activities**

The table below details the activities carried out during the period under review.

| **ITEM** | **TOOL/ASPECT** | **PROGRESS/COMMENT** |
| --- | --- | --- |
| **1.** | **CURRENT TOOLS SUPPORT & MAINTENANCE** | |
|  | * **Database** | * Current tools database is up to date * Current tools database was restored to server 10.64.0.157 |
|  | * **Current Tools** | * All current tools are running, reported issues brought within the reporting period were attended to and resolved |
| **2.** | **IMPLEMENT NEWLY DEVELOPED TOOLS** | |
| **2.1** | **Development activities on the newly developed tools awaiting implementation** | |
|  | * Business Idea Assessment (BIAT) * Pre-Startup Assessment (PST) * Export Readiness Assessment (ERAT) * Entrepreneurial Diagnostic (EDT) * Small Business Assessment (SBAT) * Assessment of Company Operations (ACO) | * The new tools are still in the first phase of piloting with selected users * Major issues that were encountered by most users included the following:   + Users’ emails or correct email addresses not found on the CRM   + Users not appearing in any branch, or in incorrect branches in the CRM   + Some branches not appearing at all in the list of branches that were pulled from CRM   These issues were all resolved. We had a meeting with the Seda’s CRM expert who advised us on new database tables that we needed to pull the correct users and branch tables and respective fields.  This exercise was followed by manually correcting branch/province details of users who had already registered in the new tools.  We are monitoring to see if any new users will experience any issues with registering in the new tools, so we can attend to the issues.  Functionally, we have not yet received any significant feedback on how the new tools are performing. |
| **3.** | **Development & implementation of new tools** | |
|  | **Critical Planning Exercise**  **Please refer to document on the Git repository: Design Specifications: CPE** | * We had the last presentation of the CPE on the 13th of September 2022. * All feedback that we received from present users was incorporated into the CPE that is being developed. * Current version of the CPE has been published to the SEDA infrastructure for participants to walk-through in preparation for the oncoming demonstration. * We are continuing with the integration of CRUD API’s to the development database on Seda’s infrastructure * Current modules are now complete and are interacting with the database:   + Company information and background   + Sales categories   + Sales details for each category   + Sales related formulas   + Sundry Income   + Donations/Grants information   + Expenses categories   + Expense details for each category   + Loans categories   + Loans details |
|  | **Business Planning Tool**  **Please refer to document on the Git Repository: Design Specifications: Business Planning Framework Tool** | * We are finalizing the development of the RDCL final report of the Business Planning Tool * The next phases will deal with the integration of the Business Planning tool with the rest of the tools, including Authentication, Authorization and the CRM database |
| **4.** | **Skills Transfer** | |
|  | **Training** | * We conducted a more detailed walk-through of the new CPE to SEDA users on the 13th of September 2022, for users to appreciate the new interfaces of the tool. |

1. **Conclusions**

All the activities scheduled for the period under review were successfully covered.

We are now entering the 8th month of the contract and the main focus would be on:

* Incorporating received feedback from users that are participating in piloting the new tools
* Performing regression testing onto the beta version of the new tools before they are released for second round of piloting.
* Developing CRUD APIs for the new CPE
* Developing other middle-tier components of the CPE to link up interfaces to the CRUD APIs
* Developing report interfaces, charts and graphs for the CPE
* Finalizing development of the Business Planning Tool and testing
* Integrating the Business Planning tool’s authentication and authorization modules with the rest of the new tools