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| SEDA LOGO New    **NORBAZ DATA SOLUTIONS** |
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| System Integration Report |
| SEDA Assessment Tools Vs CRM |

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Contents

[1. Introduction 3](#_Toc82481551)

[2. Integrated Entities 3](#_Toc82481552)

[3. Integration Summary 4](#_Toc82481553)

[4. Entity Relationships 5](#_Toc82481554)

[4.1 User entities relationships 5](#_Toc82481555)

[4.2 Assessment entities relationships 6](#_Toc82481556)

# **Introduction**

SEDA has a Customer Relationship Management system that is in place and primarily used to capture and manage clients and SME data by officers across the country.

SEDA also developed web-based assessment tools, also used by officers to assess businesses and clients to ascertain their statuses and assist accordingly.

Previously, although running from single site infrastructure and having basic ubiquitous data, the two portals were deployed disparately and running on separate databases.

This caused double data-entry procedures for similar data items in either of the two portals, thereby creating duplicate, though inconsistent copies of data. It was therefore difficult to almost impossible to obtain a clear and accurate picture of the nature, structure and amount of similar data being held by and between the two portals.

A solution was required to integrate basic data items from either of the portals so that similar data items would have to be entered only once, and accessible in both platforms.

This document outlines aspects of the integration processes and the related data structures involved.

# **Integrated Entities**

Table below lists entities that exist in both the CRM and the tools databases.

|  |  |
| --- | --- |
| **Entity** | **Description** |
| System Users | A user who captures data into the CRM must be identifiable while capturing similar data for the assessments in tools. These users include Practitioners/Business Advisors, Branch managers, Provincial managers, Support and maintenance personnel.  System users will be verified against the CRM database. |
| Audit Trails | A user working in the tools will only access and use the base data that they captured themselves, or is allocated to them in the CRM |
| Registered Clients | Clients are all registered in the CRM by an officer. The same list of clients must be accessible inside the tools, to the same or related officers for assessments |
| Registered Businesses | Businesses are also registered in the CRM portal by a particular officer. During assessments in the tools’ portal, the same businesses must be accessible to the officer who registered them in the CRM |

# **Integration Summary**

In this section we outline the relationships between the data items that exist in both structures and how they are integrated in the new solutions. Please also see the OVERVIEW INTEGRATION STRUCTURE illustrated in Fig 02.

|  |  |  |
| --- | --- | --- |
| ENTITY | SOURCE | INTEGRATION |
| USERS | CRM/TOOLS | * All main details of users are registered in the CRM. * However, in the tools portal, the following details are registered for each user for the purposes of logging into the portal, and independently activate the user accounts: * CRM user ID * CRM user-email * Independent tools’ password   The related tables in each system are:   * **User table name in CRM = [Users]** * **User table name in TOOLS= [Advisors]** |
| Clients | CRM | Clients will only be registered in the CRM. Only the primary-key (client-Id) will be imported and used for referencing whenever details are required for presentation in the tools.  NO client details will be registered and/or managed in the tools  **Clients table name in CRM= [Person]** |
| Businesses | CRM | Businesses will only be registered in the CRM. Only the primary key (company-Id) will be imported and used for referencing whenever details are required for presentation in the tools.  NO business details will be registered and/or managed in the tools  **Business table name in CRM=[Company]** |

# **Entity Relationships**

# **User entities relationships**

\*\* ADVISOR-ID (P-Key)

**CRM-USER-ID**

OTHER

ADVISORS (TOOLS)

\*\* **USER-ID (P-Key)**

USER-EMAIL

OTHER

USERS (CRM)

# **Assessment entities relationships**

**ASSESSMENT-ID (SK)**

OTHER

**6. ASSESSMENT DETAILS**

**\*\*ASSESSMENT-ID (PK)**

CLIENT-ID

BUSINESS-ID

USER-ID

OTHER

**5. ASSESSMENT (TOOLS)**

**\*\*USER-ID**(**PK**)

OTHER

1. **USERS (CRM)**

**\*\*ADVISOR-ID**

CRM-USER-ID

OTHER

**4. ADVISORS(TOOLS)**

PERSON-ID

CREATED-BY

OTHER

**2. PERSON (CRM)**

**COMPANY-ID**

CREATED-BY

OTHER

**3. COMPANY (CRM)**