

SARS REQUEST FOR INFORMATION

E-LEARNING MANAGEMENT SYSTEM

BUSINESS REQUIREMENTS SPECIFICATION

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SARS RFI 0006-2022

Business Requirements Specification E-LEARNING MANAGEMENT SYSTEM

This RFI document sets out the business requirements that SARS has for a An E Learning Management System, which must be considered by the Bidder in compiling a proposal.

1 USAGE OF TERMS IN THIS DOCUMENT

1.1 References to Other Documents in the RFI pack

None.

1.2 Glossary Table

The capitalised terms in this document appearing in the glossary table below will have their corresponding meanings. The Bidder is referred to the RFI Main Document for the use and meaning of capitalised terms generally in the RFI pack.

Term	Description of abbreviation or terminology
LMS	Learning Management System
RCBs	Recognised Controlling Bodies
RFI	Request for information
SCORM	Shareable Content Object Reference Model
TPs	Tax Practitioners

2 BACKGROUND

The Government and Tax Practitioner Segment would like to undertake a SARS Tax Practitioner Readiness Programme. The intention of the training is to ensure that Tax Practitioners (TPs) have the required knowledge to effectively represent taxpayer clients. An E-Learning Management System (LMS) is required, that allows for:

- Registration of attendees,
- Loading and hosting of learning material (video, written, interactive platforms to raise questions, tracking of progress on modules, etc), and
- Assessment (taking of assessments, receiving feedback on pass rate, has ability to allow multiple attempts where the attendee was unsuccessful, receiving of a certificate of successful completion)

Although SARS has a LMS for staff, such a system does not exist for external stakeholders.

It is proposed that SARS design, purchase or purchase and modify a LMS that will host the SARS Tax Practitioner Readiness Programme. The initial requirement is for the SARS Tax Practitioner Readiness Programme; however, the intention is that the LMS acquired must be applicable for all other external training initiatives that SARS may want to pursue. As such, the LMS acquired must meet the SARS requirements, of which the requirement from the Government and Tax Practitioner segment is one part.

There are international online course platforms offered through websites e.g., Udemy, LinkedIn Learning, Distance Learning Education Learning (DELES), Free and Open-Source Software (FOSS) and Moodle, however, this is an area that SARS would need to investigate to decide on the best solution.

3 REQUIREMENTS

3.1 Context Diagram

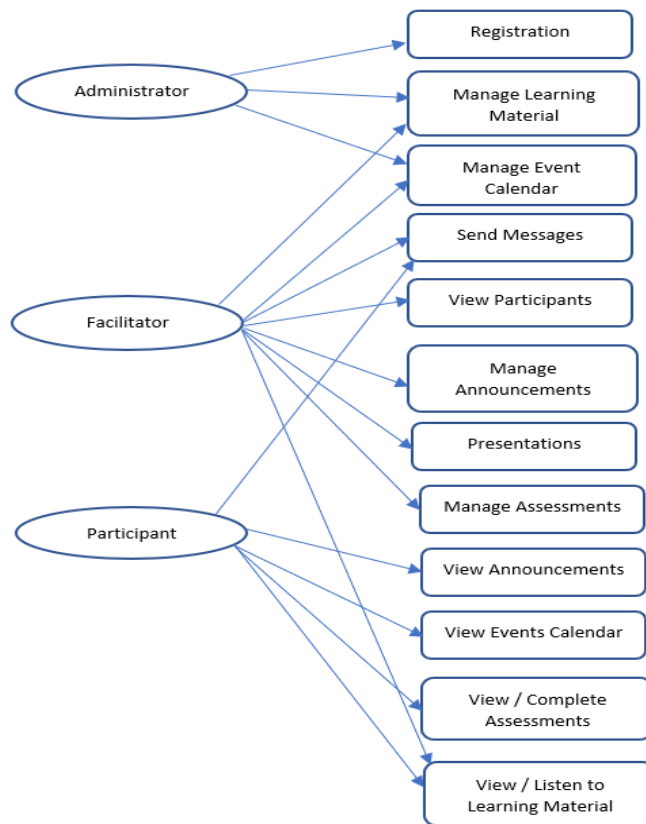


Figure 1

The case diagram is a high-level business requirement for a LMS for external stakeholders:

1. Establish a LMS to manage and maintain e-learning content
2. The system must have the ability to upload and update SARS training modules for external use of which the SARS Tax Practitioner Readiness Programme Modules are one example
3. The system must track progress and allow for Interactive discussions moderated by SARS
4. The system should allow for online assessments and discussion forums
5. The system should allow for the registration of external stakeholders (example, TPs)

3.2 Business Requirements

Establish a LMS for external stakeholders	
Output	<p>A LMS for external training that will allow:</p> <ul style="list-style-type: none"> • Training of TPs and other taxpayers in other SARS segments e.g., SMTT, PIRE, TEI, Estates • Loading of for example the SARS Tax Practitioner Readiness Programme Modules by SARS and all other modules that Segments may design for their taxpayers • Registration of individuals, and tracking of progress and completion of modules • Interactive discussions moderated by SARS • Online Assessment of knowledge provided
Business Requirements	<p>Establish a LMS to manage and maintain the SARS e-learning content</p> <p>The platform will consist of the following:</p> <ul style="list-style-type: none"> • Main home page • Administrator page • Facilitator page • Learner page <p>The main home page is where the administrator, facilitators and participants will login</p> <p>The administrator page after a successful login allows the administrator to:</p> <ul style="list-style-type: none"> • view to learning content • view and create profiles • view, grant and remove admin user's access • view, grant and remove participant's access • view, grant and remove facilitator access • search • view calendar of events along with a link to sign out <p>The facilitator page after a successful login allows the facilitator to:</p> <ul style="list-style-type: none"> • Manage, create and upload learning material • view, upload, edit and delete assessments • view, add, edit and delete announcements • search • view and edit and the calendar of events • with the link for signing out

	<p>The participant page after a successful login allows the participant to:</p> <ul style="list-style-type: none"> • view and listen to the learning material • view profile and update certain field e.g., contact details • complete assessments and quizzes • view completed assessments and certificates • participate in discussion forums • search • view the calendar for upcoming <p>The System should have the ability to be accessed via Laptop/Desktop environment as well as a Mobile device</p> <p>The system should also have the functionality to upload videos, audio, images, animation, documents, presentations and web-pages</p> <p>The system should have the ability to schedule live vILT sessions with registration with recording functionality</p> <p>For the purpose of this programme, the following information should be compulsory for registration:</p> <ul style="list-style-type: none"> • name, surname, ID/passport number, email address and cell phone number. • However, if one is required to complete an assessment (in the instance of the tax practitioner recognition criteria as set by SARS), it should also require him/her to select an RCB. • In the instance of other segments, the additional information required or the process for an assessment will still need to be determined. <p>The system should allow Hyperlinks which direct the participants to relevant SARS YouTube videos</p> <p>The system should allow for the creation of scenario-based activities featuring video role-play, chat exercises and audio responses</p> <p>The administrator / facilitator should be able to update the modules as and when required</p>
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	<p>The system should be able to integrate quizzes or assessments with a wide range of question types to determine understanding and application of the material and provide marks (% achieved) of the assessment and indicating a pass or fail at the end of each module or lesson, and the overall mark for the entire programme.</p> <p>The system should Issue a certificate upon successful completion to the relevant RCB. Note: Other segments of SARS may require that a completion certificate is issued to the participant also</p> <p>For the Government and Tax Practitioner Segment, the participant taking part in the assessment should only be able to view the overall mark on the screen which should not be downloadable, nor should it indicate the programme the mark obtained for, e.g., on the screen, it only shows 90% pass, or 85% failed</p> <p>For the Government and Tax Practitioner Segment, Allow for more than one assessment (e.g., 3 attempts of the same assessments within a 3 month) if the individual has not met the required pass mark. The system should block a person after failed 3 attempts with the period, and automatically unblock after 6 months after failed the 3rd attempt</p> <p>Allow participants to explore and navigate through the system freely within the course elements (skip through the course material and return to the course material)</p> <p>Allow for interaction with through online discussion forums</p> <p>The system should be accessible to the visually impaired who would access the system via JAWS or similar products</p>
Functional Requirements	Description
Usability	<p>Ability to support Desktops, Laptops and Mobility (e.g., phones and tablets).</p> <p>The system must support all current versions and any previous supported versions of modern web browsers including Edge, Firefox, Safari and Chrome</p>

Accessibility	The platform interface must be accessible to external stakeholders (in this instance Tax Practitioners, but can also be applied to other external stakeholders)
Assessment	<p>Ability to set up assessments and quizzes</p> <p>Allow for Discussion Forums</p> <p>Allow for more than one assessment (e.g., 3 attempts of the same assessments within 3 months) if the individual has not met the required pass mark. The system should block a person after failed 3 attempts with the period, and automatically unblock after 6 months after failed the 3rd attempt</p> <p>Only the most recent passed assessment should be saved and displayed with the results</p>
Customisable interface	<p>The interface must be capable of being customised to adapt to the participants preferences</p> <p>Ability to change the screen colours, font and font size</p>
Navigation and search	Ability to navigate and search with ease
Authentication	<p>Participants must be uniquely identified and verified.</p> <p>There should be a consistent approach to authentication; for example, every user may have a unique username and password linked to an individual</p>
Data protection	<p>All stored data must be secure</p> <p>Conformance with current legislation and the requirements of the Data Protection Act for personal data shall be required</p>
Roles	Ability to be allocated to one or more roles
Scheduling	Access to resources must be controllable. Access may depend upon time constraints or be linked to other events e.g., access to a task may be dependent upon successful completion of another task or only be available for a set time linked to a timetable
Tracking	<p>Ability to track participants (This must include reporting whether a participant has completed a particular module and assessment)</p> <p>The system must allow data to be extracted and imported</p>

	<p>The system must create and produce reports and work lists based on selected data elements</p> <p>The system must display and print reports that present the progress</p> <p>The system must present a course enrolment status which includes number of TPs enrolled</p> <p>The system must manage and generate individual transcripts.</p> <p>The system must track and produce an attendance report by course.</p> <p>The system must track the successful completion of a course.</p> <p>In the instance of the Government and Tax Practitioner Segment, the system must verify that a Tax Practitioner is not enrolled in the same course offering to avoid duplicate registration</p>
Capacity	<p>The system must be scalable and have the ability to store and retrieve 5 years of training history within a specified time</p>
Manageability	<p>The system must be compatible with LMS standards such as SCORM v1.2, xAPI, TinCan and CMI5</p> <p>The system must accept training material in the following file types:</p> <ul style="list-style-type: none"> • Microsoft supported product formats for Word, Excel and PowerPoint. • Adobe Acrobat Reader (PDF) • Animation • Standard video file formats (e.g., vob, wmv, mp4) • Standard image formats (e.g., png, jpg, gif) <p>The system should be accessible to the visually impaired who would access the system via JAWS or similar products</p> <p>The system must maintain an audit log of all user transactions and have the ability to report on those audits</p> <p>The system must provide reports upon request and detailed results of import and export activities</p> <p>Ability to launch digital content via a web browser or other applications</p>

	<p>Ability to load, store and make sharable content objects available to participants. Runtime interactions with content objects should be supported. This includes being able to load bundled resources (content packages) and unpack them</p> <p>Ability to load digital content into a storage area that can be presented and accessed via the platform interface</p> <p>Ability to create new resources, integrate them with the platform and export them.</p>
Discussion forums	Users must be able to take part in discussion forums by posting and reading messages
Web services	The system must be capable of transparently interacting with web services using standard protocols
Audio-visual conferencing	Audio- and videoconferencing should be supported
Communication	One-one and one-many messaging should be facilitated. Email, chat and forum should be available to users
Help	<p>Help systems should be conveniently accessible in locations where users can possibly gain insight</p> <p>Help systems such as FAQ should be available</p>

4. NOTIFICATIONS

In order to keep the participants informed of any updates, notifications must be sent to participants when updates are made.

5. WORKFLOW

The following workflows are required: Action	Result
Participant / Facilitator registered successfully	Trigger event: A participant / facilitator is registered After registration, the participant will receive an automatic registration confirmation.
Participant / Facilitator deregistered successfully	Trigger event: A registered participant / facilitator is deregistered After deregistration, the participant will receive an automatic deregistration confirmation.
Participant / Facilitator Requests a replacement password	Trigger event: A registered participant / facilitator requests a password reset After a Replacement Password is requested, a link to replace the password should be sent to the participant / facilitator.