User Requirements Document

The TOTAL COVER Insurance Company Case Study

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Contents

Abstract

This document contains the user requirements for TOTAL COVER insurance company Case Study.

The document complies with the standards for a User Requirements Document (URD) from the Software Engineering Standard, as set by the European Space Agency (ESA) [1].

CHAPTER 0.   ABSTRACT

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Chapter 1

Introduction

1.1   Purpose

The purpose of this URD is to specify the requirements for the final product of all different end users.

1.2   Scope

The system being developed will be called TCCRMS. TCCRMS enables organizations to beter serve their customers through the introduction of reliable process and procedures of interacting with those customers. This CRMS in specific will improve the company's strategic position.

1.3   List of definitions

CRMS	Customer Relationship Management System
ESA	European Space Agency
UR	User Requirements
URD	User Requirements Document
SR	Software Requirements
TCCRMS	TOTAL COVER CRMS
HR	Human Relations or people management
Risk	Everything that can be insured (insurance vocabulary)
eServices	Insurance service from "system to system"

1.4 References

[1] ESA. *ESA Software Engineering Standards.* ESA Board of Software Standardization and Control (BSSC), 1995.

1.5 Overview

Chapter 2 contains a general description of the product, its capability's and constraints, characteristics of the users and the environment it will run in. Also some assumptions and dependencies are mentioned.

Chapter 3 describes the general capability requirements and the constraint requirements for this project.

Chapter 2

General description

2.1   Product perspective

Over the last decades the client base of TOTAL COVER Insurance has grown continuously. To be able to offer a large variety of customer services and be able to adapt quickly to changes in customer demands, this CRMS is being developed.

Details of the insurances must be documented formerly and must be provided to the government organizations governing the policies, using an interface to their existing software system. Additionally this system will provide an interface to other government departments that help in legal issues, as well as departments that interact with hospitals and the police.

2.2   General capabilities

The TCCMRS consists of several components for various tasks.

For clients, either individuals or organizational representatives, the system will provide some basic calculations on insurance proposals for premiums.

For employees it will be possible to manage client information, policies, payments, claims.

In the future the system might make it possible to manage their personal information, timesheets and tracking their carrier paths. The possibility for future expansions should also be available.

2.3   General constraints

N/A

2.4   User characteristics

TCCMRS supports four types of users. The clients, the employee's and the system administrators. These will be described in the following subsections.

2.4.1   Clients

Individual or organizational representatives in need of insuring risks. Commonly used operations by this group of users are:

- Do basic calculations on insurance proposals for premiums, via the website.

2.4.2   Insurance representative

TOTAL COVER Insurance representative handling requests and questions from the clients. Commonly used operations by this group of users are:

- Convert insurance proposals into real policies.

- Search detailed information on clients.

- Search, add and edit of payment details.

- Add, edit and query clients.

2.4.3   Business Department

The department involved in handling and developing policies and risks. Commonly used operations by this group of users are:

- Add and edit types of offered policy combinations.

2.4.4   System Administrator

TOTAL COVER Insurance system administrators perform commonly used operations by this group of users are:

- Add, remove and query clients, policies and risks.

2.5   Environment description

Interaction with the client is via the TOTAL COVER Insurance website, and thus the client is required to have a webbrowser.

In the near future the system will facilitate client contact through mobile technologies.

2.6   Assumptions and dependencies

Assumptions:

- There exists a user group of system administrators.

- Insurance proposals are registered in the system.

- Initial premiums can be calculated by the system.

- A cross-sell or up-sell is considered to be a combination offer.

Chapter 3

Specific requirements

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3.1   General capability requirements

For possible priories have been defined according to the MoSCoW convention:

1. Must have

2. Should have

3. Could have

4. Won't have

Id	Requirement	Priority
R001	The range of insurances for individual customers are: - vehicle - home - contents - life cover - hospital insurance	1

Id	Requirement	Priority
R002	The range of insurances for organizational customers are: • vehicle • home • contents • life cover • hospital insurance • professional indemnities • workers compensation insurance	1
R003	It will be possible to add new types of insurance products.	1
R004	It will be possible to add a new type of customers.	1
R005	It will be possible for the system to know whether clients represent either themselves, an organization or both.	1
R006	It will be possible for the system to know whether a client is being represented by a 3rd party.	1
R007	All information provided for an insurance proposal must be reused by the system when converting it into a policy.	1
R008	It will be possible to add additional terms and/or conditions to a policy.	1
R009	With an insurance proposal the system will be capable to provide an initial premium amount.	1
R010	A policy may consist of more then one risk.	1
R011	Policies will be issuable on the following basis: • monthly • quarterly • half-yearly • yearly	1
R012	Details of the insurances must be documented formerly.	1
R013	Details of the insurances must be provided to the government organizations governing the policies, using an interface to their existing software system.	1
R014	The system will provide an interface to government departments: • that help in legal issues • hospitals • the police	1

Id	Requirement	Priority
R015	Insurance policies shall be payable by: • cash • check • credit card	1
R016	Payments shall be made in the following terms: • daily • weekly • fortnightly • monthly • quarterly • yearly	1
R017	Premium payments shall be renewable automatically or manually.	1
R018	It will be possible for the system to identify the caller.	1
R019	The system shall provide detailed information of client on the staff's system screen once the caller has been identify.	1
R020	The system shall provide regular information to clients and potential clients via the internet website.	1
R021	The system shall provide a basic calculations on insurance proposals for premiums via the internet website.	1
R022	The system will recommend cross-sell and up-sells opportunities via the insurance combination that have been entered into the system by the business department.	1
R023	The system shall provide a way to add, edit and remove types of combinations.	1
R024	The system shall provide a way to add, edit and remove policies by authorized personnel.	1
R025	The system shall provide a way to add, edit and remove risk by authorized personnel.	1
R026	The system shall provide a way to add, edit and remove proposal by authorized personnel.	1
R027	When a new combination is added to the system, it will check whether it is applicable to existing policies and notify the client.	1
R028	The system shall be expendable with support for mobile technology.	2
R029	The system shall be expendable with support for eServices.	2

Id	Requirement	Priority
R030	The system shall track employee's details: • Name • Contact information • Workers Compensation Details • Timesheets • Career tracking	3
R031	It shall be possible to add, edit, query employees details.	3
R032	It shall be possible for employees to manage their timesheets.	3
R033	The accounting department will have an interface to the system, for processing invoices and payments.	3
R034	The HR module must provide a way to handle internal career tracking.	3
R035	The HR module must provide a way to handle management for employees.	3

3.2   Constraint requirements

Id	Requirement
C001	Customers can have no more then two representatives.