

User Requirements Document

The TOTAL COVER Insurance Company Case Study

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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].

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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 better 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

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, it's capability's, 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, etc.

In the future the system might make it possible to manage their personal information, time-sheets 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.

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

Verhaal!

3.1 General capability requirements

For possible priorities 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: <ul style="list-style-type: none">• vehicle• home• contents• life cover• hospital insurance	1

Id	Requirement	Priority
R002	The range of insurances for organizational customers are: <ul style="list-style-type: none"> • 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 new type of customers.	1
R005	It will be possible for the system to know that client represents either themselves an organization or both.	1
R006	It will be possible for the system to know that a client can be represented by a 3rd party.	1
R007	All information provided for an insurance proposal is reused when converted 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 shall consist of more then one risk.	1
R011	Policies will be issuable on the following basis: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • that help in legal issues • hospitals • the police 	1

Id	Requirement	Priority
R014	Insurance policies shall be payable by: <ul style="list-style-type: none"> • cash • check • credit card 	1
R015	Payments shall be made in the following terms: <ul style="list-style-type: none"> • daily • weekly • fortnightly • monthly • quarterly • yearly 	1
R016	Premium payments shall be renewable automatically or manually.	1
R017	It will be possible for the system to identify the caller.	1
R018	The system shall provide detailed information of client on the staff's system screen once the caller has been identify.	1
R019	The system shall provide regular information to clients and potential clients via the internet website.	1
R020	The system shall provide a basic calculations on insurance proposals for premiums via the internet website.	1
R021	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
R021	The system shall provide a way to add, edit and remove types of combinations.	1
R022	The system shall provide a way to add, edit and remove policies by authorized personnel.	1
R023	The system shall provide a way to add, edit and remove risk by authorized personnel.	1
R024	The system shall provide a way to add, edit and remove proposal by authorized personnel.	1
R025	When a new combination is added to the system, it will check whether it is applicable to existing policies and notify the client.	1
R026	The system shall be expendable with support for mobile technology.	2
R027	The system shall be expendable with support for eServices.	2

Id	Requirement	Priority
R028	The system shall track employee's details: <ul style="list-style-type: none"> • Name • Contact information • Workers Compensation Details • Timesheets • Career tracking 	3
R029	It shall be possible to add, edit, query employees details.	3
R030	It shall be possible for employees to manage their timesheets.	3
R031	The accounting department shall be able to interface with the system.	3
R032	The HR module shall manage internal career tracking.	3
R033	The HR module shall manage employees.	3

3.2 Constraint requirements

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