User Requirements Document

The TOTAL COVER Insurance Company Case Study

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Version 1.1
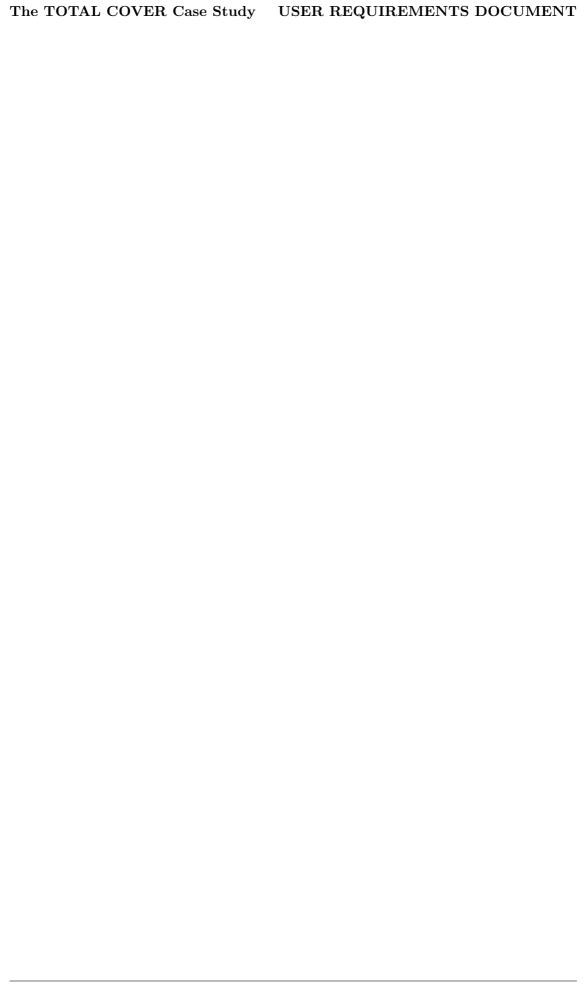
12th October 2005

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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].

Document Status Sheet

Document Status Sheet		
Document Title	User Requirements Document	
Document Identification	URD/1.1/	
Authors	W.F. Schellekens / O.M. Schinagl / T.A. van Roermund	
Document Status	draft / internally accepted / conditionally approved / **approved**	
Document History		
Version	**Date**	**Reason for change**
1.0	16-09-2005	Document creation
1.1	12-10-2005	Changes in requirements (§3.1.3) and user characteristics (§2.4) and some minor changes.

Document Change Record

Document Change Record		
DCR Number		
Date		
Originator		
Approved by		
Document Title	User Requirements Document	
Document Identification	URD/1.1/	
Page	**Paragraph**	**Reason for change**
-	-	-

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

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 client services and be able to adapt quickly to changes in client 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 track their career 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: clients, insurance representatives, bussiness department staff and system administrators. These will be described in the following subsections.

2.4.1   Clients

Individual or organizational representatives in need of insuring risks. Tasks performed 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. Tasks performed by this group of users are:

- Convert insurance proposals into real policies.

- Add, edit and query of payments.

- Add, edit and query clients.

- Manage their own timesheet.

2.4.3   Business Department

The department involved in handling and developing policies and risks. Tasks performed by this group of users are:

- Add new types of insurance products and clients.

- Add, edit and query types of combinations of insurances.

- Add, edit and query policies, risks and proposals.

- Manage their own timesheet.

2.4.4   System Administrator

In addition to the tasks performed by the insurance representatives and employees of the bussiness department, TOTAL COVER Insurance system administrators can perform these tasks:

- Add, edit and query employees.

- Remove clients, policies, risks and proposals.

- Manage their own timesheet.

2.5   Environment description

Interaction with the client takes place via the TOTAL COVER Insurance website. Therefore, 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:

- A user group of system administrators exists.

- 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

In this chapter all requirements and constraints of the product to be developed are specifically stated. The product will adhere to these requirements. Each of the requirements has a Unique Identifier (or UID for short) so it can be traced throughout the entire project.

3.1 General capability requirements

Four possible priorities have been defined according to the MoSCoW convention:

1. Must have

2. Should have

3. Could have

4. Won't have

3.1.1 General

UID	Requirement	Priority
RGE01	It will be possible for the system to know whether clients represent either themselves, an organization or both.	1
RGE02	It will be possible for the system to know whether a client is being represented by a third party.	1
RGE03	All information provided for an insurance proposal must be reused by the system when converting it into a policy.	1
RGE04	The system will recommend cross-sell and up-sells opportunities using the insurance combination that have been entered into the system by the business department.	1

3.1.2   Interaction

UID	Requirement	Priority
RIN01	Details of the insurances must be provided to the government orga-	

UID	Requirement	Priority
RPA02	Insurance policies shall be payable by: • cash • check • credit card	1
RPA03	Payments shall be made in one of the following terms: • daily • weekly • fortnightly • monthly • quarterly • yearly	1
RPA04	The system shall make it possible for premium payments to be renewed manually or automatically.	1

3.2   Constraint requirements

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