

A Mini Project Report on
Insurance Management System

S.E. - I.T Engineering

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CERTIFICATE

This to certify that the Mini Project report on **Insurance Management System** has been has been submitted by Aditya Ellhe (22204009), Avisha Shah (22204008) Jash Mehta (22204010) and Harsh Joshi (22204012) who are a Bonafede students of A. P. Shah Institute of Technology, Thane, Mumbai, as a partial fulfillment of the requirement for the degree in **Information Technology**, during the academic year **2022-2023** in the satisfactory manner as per the curriculum laid down by University of Mumbai.

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Chapter 1

Introduction

An insurance management system is a software solution that enables insurance companies to manage their policies, customers, and inquiries efficiently. The system includes various policies and features to add policies.

The Insurance Management System has been developed to override the problems prevailing in the practicing manual system. This software is supported to eliminate and in some cases reduce the hardships faced by the existing system. Moreover this system is designed for the particular need of the company to carry out operations in a smooth and effective manner.

We will work closely with our client to understand their business needs and design a system that meets their requirements. The system will be user-friendly, scalable, and secure, and will provide our client with the best available policies

1.1 Purpose:

1. To reduce the manual work done by staff members
2. To maintaining accuracy of membership by automating the process.
3. To increase the efficiency of members and save time.
4. This insurance system is highly reliable and efficient and eliminates chances of any errors.
5. Insurance system of application portal makes the policy process easy.

1.2 Objectives:

The main objective of this system is to reduce consumption of time during maintaining records of policy holders. Separate tabs are provided to maintain record of policy holders and accepted policy holders, etc. In other word our project has following objectives:

- To make User interfaces that are user friendly and attractive.
- To computerize the insurance management system structure.
- To be designed with the aim of providing intuitive experience for all users, regardless of their level of technical knowledge aesthetically pleasing layout.
- The primary goal of the insurance management system is to improve the users trackpolicy.

1.3 Scope

Our project aims at insurance application process automation,

- To create a handy website for the user.
- To have a attractive interface for the user.
- To make it easy for the user to input data.
- It is Rapid & Flexible

Chapter 2

Problem Definition

The existing system is the manual system. The manual system is prone to error. It is time consuming. It is difficult to search for a data Most of the insurance organizations are not having any existing fully computerized system. It is very difficult for a person to produce the report. There are chances for changing the scheme report and do malpractice. they are managing the information in the form of Excel spread sheets.

This system involves a lot of manual entries with the applications to perform the desired task. Every member organization has its own data structure. Usage of papers in the insurance management work leads to less efficiency, less accuracy and less productivity. Due to lack of centralized data structure, it is very difficult to merge the data to analyze the statistics

Proposed Solution

This project system excludes the need of maintaining paper and thus saves paper.

- The system will be user-friendly so that it can be of ease of the user
- Thus, it saves human efforts and resources.

Chapter 3

Proposed System:

Manual processes are prone to errors, such as incorrect data entry or miscommunication between staff members. Without an insurance management system, insurers may have to rely on manual processes to manage policies and other insurance-related tasks. It helps the user to create a virtual diary. Manual processes can be costly, as they require more time and resources to complete. Additionally, errors or delays can lead to increased costs associated with rework or customer dissatisfaction.

This proposed Insurance Management System project overcomes all these drawbacks with the features. It is beneficial to the users. The working speed and performance of the software is faster with high performance which saves time.

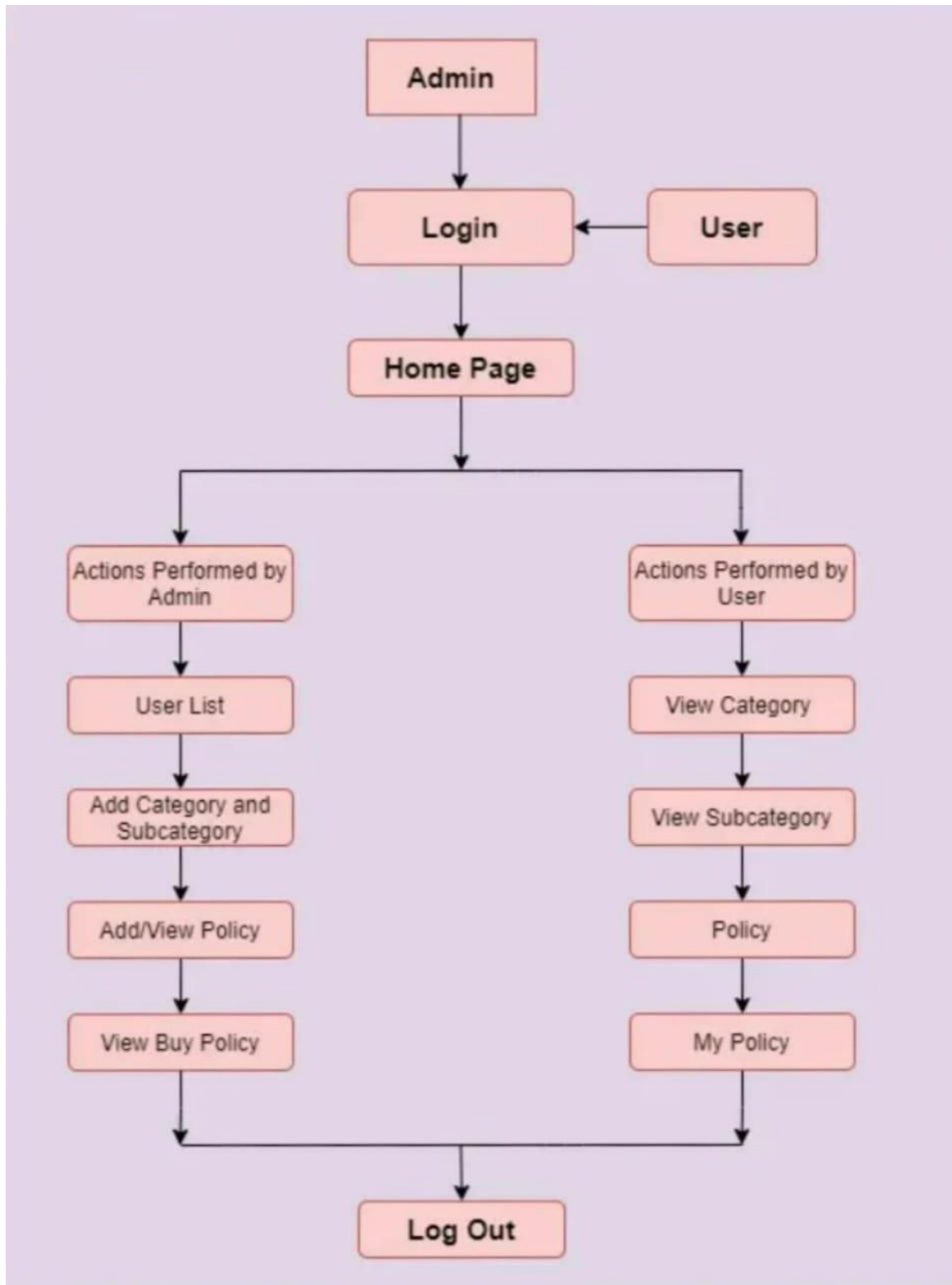


Fig3.1: Flow Chart

3.2 Features and Functionality:

- The design of insurance management system will be modern with a focus on simplicity and ease of use.
- All features will be easy to find and use.
- It helps the user to apply to various policies and connect with the agent easily with the QnA section.
- It offers a secure login to the user
- The system can be accessed by multiple users
- The admin can create a category and add various policies for it

Chapter 4

Project Outcome:

- Improved efficiency: The insurance management system can automate many of the processes involved in insurance management, such as policy creation, underwriting, claims processing, and renewals. This can lead to faster turnaround times and increased efficiency.
- Better customer experience: An insurance management system can provide a streamlined and user-friendly experience for customers, allowing them to manage their policies online and access information easily. This can improve customer satisfaction and retention.
- Increased accuracy: Automating processes can reduce the risk of human error, resulting in more accurate data and fewer mistakes.
- Cost savings: By automating processes and improving efficiency, an insurance management system can help reduce costs associated with manual processes and labor.

Chapter 5

Software Requirements:

- **Development: Visual Studio IDE**

Visual Studio is used for the development

- **Frontend: HTML, CSS, Python**

HTML, CSS, Python was used for frontend development.

- **Backend: Django**

Django is used for storing data.

Chapter 6

Project Design

Landing page of the Site

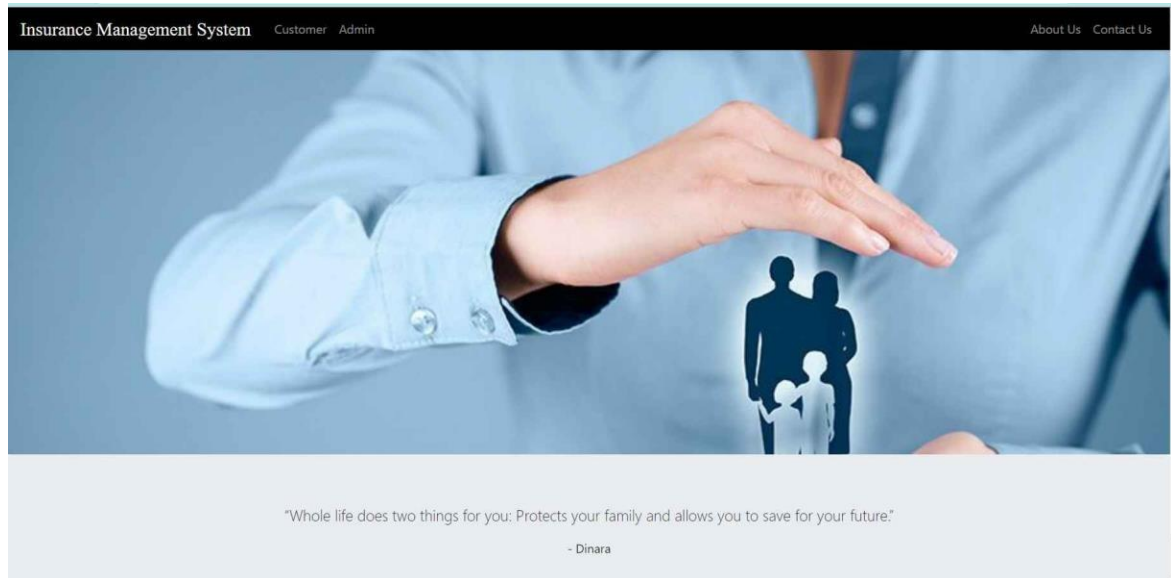


Fig 6.1 : Home Page

Here User can register and create his account

The screenshot displays the 'CUSTOMER SIGNUP' page. It features a black navigation bar at the top with 'Insurance Management System' on the left, 'Customer' and 'Admin' in the center, and 'About Us' and 'Contact Us' on the right. The main heading 'CUSTOMER SIGNUP' is centered in red. Below the heading is a registration form with the following fields: 'Username' (containing 'Kalyan'), 'Password' (masked with dots), 'First Name' (containing 'First Name'), 'Last Name' (containing 'Last Name'), 'Mobile' (containing 'Mobile'), and 'Address' (containing 'Address'). There is also a 'Profile Picture' section with a 'Choose File' button and the text 'No file chosen'. At the bottom of the form is a blue 'Sign Up' button.

Fig 6.2: Registration Page

User can login to his account

The screenshot shows the login interface of an Insurance Management System. At the top, a dark navigation bar contains the text "Insurance Management System" followed by links for "Customer" and "Admin". On the right side of the bar are links for "About Us" and "Contact Us". The main content area is light gray and features a white login box titled "LOGIN TO YOUR ACCOUNT". Inside the box, there are two input fields: the first contains the username "aditya" and the second contains masked characters "*****". Below these fields is a "Login" button.

Fig 6.3: Login Page

User can apply for policy here

The screenshot displays the "Apply Policy" page. A dark sidebar on the left, titled "INSURANCE MANAGEMENT", shows a user profile for "harsh (Customer)" and a menu with options: "Dashboard", "Apply Policy" (highlighted), "History", "Ask Question", and "Question History". The main content area has a "Logout" button in the top right. Below it is a table titled "Available Policies".

Serial No.	Policy Name	Category	Sum Assurance	Premium	Tenure	Creation Date	Apply
1	Term life insurance	life insurance	10000	5000	12	March 22, 2023	Apply
2	medical travel insurance	travel insurance	200000	4000	10	March 22, 2023	Apply

Fig 6.4 Apply Policy

User can view about history of his applied policies

The screenshot displays the 'INSURANCE MANAGEMENT' web application. The header includes the title and a 'Logout' button. The left sidebar shows the user profile 'harsh (Customer)' and navigation links for Dashboard, Apply Policy, History, Ask Question, and Question History. The main content area, titled 'History', contains a table with the following data:

Serial No.	Policy Name	Applied Date	Status
1	Term life insurance	March 23, 2023	Approved
2	Term life insurance	March 23, 2023	Approved

Fig 6.5 View History

Chapter 7

Project Scheduling

Table 7.1 : Project Scheduling

Sr No.	Group Members	Time Duration	Work to be done
1	Aditya Ellhe	2 nd week of february	User Homepage / Landing Page
2	Avisha Shah	4 th week of february	Feedback form for user Designing Admin Panel
3	Harsh Joshi	2 nd week of march	Admin Login and Registration

4	Jash Mehta	3 rd week of march	Designing Login and Registration Page for User
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5	Harsh Joshi	4 th week of march	Dashboard Creation
6	Avisha Shah	1 st week of april	Addition of Policies
7	Aditya Ellhe	2 nd week of april	Backend Connection

Chapter 8

Conclusion:

A computerized insurance management system has been developed and the system was tested with sample data. The system results is regular timely preparations of required outputs. In comparison with manual system the benefits under a computer system are considerable in the saving of man power working hours and effort.

Provision for addition, updation and deletion of customers is there in the system. The entire project runs on windows environments. An insurance management system is a software solution that provides essential functionalities to manage insurance policies, customers, and compliance.

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