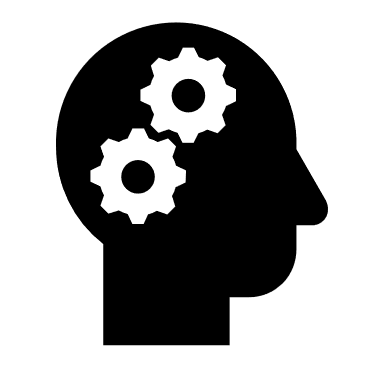
Graphical user interface

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**DESIGN PHASE**

**FOR EASY INSURE**

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EXECUTIVE SUMMARY

Overview

ABC Solutions has now successfully implemented a website for Easy Insure. With the customer successfully obtaining a life insurance policy, a report is generated within Easy Insure company. This report will generally show, overall, how effective the website has been in creating new opportunities throughout the United States. Easy Insure managers have their own portal within the website, they’re able to see and confirm (or deny) all orders on their site. Reports showcase the customer’s request of the type of life insurance requested. Management should focus on these areas generated from the reports:

* Is the website increasing sales nationally?
* Is the database and cloud environment helping with secure client information at all sites?
* Is the website allowing access to each site?
* Has the wait list from every location succeeded?

EXECUTIVE SUMMARY

Statement of System Improvement Objectives

With the creation of the website for Easy Insure the goal to reach a national clientele is easily executable. More people throughout the United States will be able to order life insurance from the comfort of wherever they are. They also have the luxury of checking current life insurance rates and comparing prices with competitors through the website. The reports that are generated after a customer’s order has been placed give the company an overview of the overall traffic the website has been generating and pinpointing major marketing areas that can be further explored. Implementing a page that displays the three types of life insurance (term, whole, and universal) allow management access to the portals to easily refer to the overview of transactions that are occurring within all sites. The regional manager is able to generate a summary report that includes all locations in the Easy Insure company.

EXECUTIVE SUMMARY

Report Contents

**Detailed File Descriptions**

This section includes a list of the details and files used to run Easy Insure’s website.

**Detailed Hierarchy Chart**

This section includes a hierarchy chart of the Easy Insure’s website

**Detailed Screen Layouts**

This section includes the layout of each web page in the Easy Insure database.

**Detailed Report Descriptions**

This section shows the data flow diagram and a narrative that explains the process.

**Background Information**

This section documents the planning sessions and analytical techniques used to evaluate the Easy Insure company’s website.

DETAILED FILE DESCRIPTIONS

Detailed File Descriptions

A list of the files for Easy Insure’s Website

**Description File**

**I. Home Page** easy\_insure\_home.php

**II. Active Directory**

* **Generate Order Report** easy\_insure\_wait\_list.php
* **Add Customer** easy\_insure\_add\_customer.php
* **Remove Customer** easy\_insure\_remove\_customer.php
* **Return User to Homepage** easy\_insure\_home.php

**III. Order Details**

* **Generate Summary at All Locations** easy\_insure\_report.php
* **Generate Order Confirmation** easy\_insure\_order\_confirmed.php
* **Return User to Homepage** easy\_insure\_home.php

**IV. Error Page** easy\_insure\_database\_error.php error.php

DETAILED HEIARCHY CHART

Detailed Hierarchy Chart

Error Page

Order Details

Return User to Homepage

Generate Order Confirmation

Generate Summary at All Locations

Return User to Homepage

Remove Life Insurance

Add Life Insurance

Generate Order Summary Report

Active Directory

Homepage

DETAILED HEIARCHY CHART

Narrative Description of Detailed Hierarchy Chart

The Detailed Hierarchy Chart of the Easy Insure Website depicts various functions, tasks, commands that are logically grouped based on the order of operations that would be taken by an administrator or a customer. After the customer selects their life insurance, they are directed to a set of pages that will collect order information from the customer and generate a summary report. The customer would then confirm the order and be directed to an order confirmation page before being directed to the homepage. The regional manager would begin on the homepage and select the link that would take them to the administrator directory. From there the administrator would be able to select links that would collectively allow them to generate an order summary report and return to the homepage.

DETAILED SCREEN LAYOUTS

HOMEPAGE

Graphical user interface, application

Description automatically generated

DETAILED SCREEN LAYOUTS

**Narrative Description of Home Page**

As requested, the home page has term, whole, and universal life insurance displayed at the center of the page for easy access and design emphasis. It is positioned in the body to draw attention to the three life insurance options. This information will be called from the easy\_insure\_home.php file. The header of the webpage, you are welcomed by a navigation bar with five options to click: “Home”, “New Customer”, “Customer List”, “Waiting List”, and “Report” and asks the customer to learn about term, whole, and universal life insurance. When a customer selects a particular insurance, he/she will be taken to the ‘Order Details’ page where he/she can begin filling out his/her details.

Order Details

A screenshot of a computer

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Order Details

The order details page is accessed through the easy\_insure\_customer\_list.php. The order details page is accessed after the client decides which insurance he/she would like to purchase. The client will type in his or her information which includes:, first name, last name, gender, and whether he/she is a smoker or not. The customer’s ID and the monthly premium of the chosen insurance are automated through the easy\_insure\_db\_functions.php file and is shown to the customer before continuing forward with his/her selection.

DETAILED SCREEN LAYOUTS

Waiting List

DETAILED SCREEN LAYOUTS

Narrative Description of Waiting List

The waiting list, that is contained in the file easy\_insure\_wait\_list.php, can be accessed by all locations and all staff. However, the main people that would be using the waiting list would be the front desk. Here the clerk can fill out the following fields: First Name, Last Name, Phone Number, Date, Time, and Email. The date is formatted with mm/dd/yyyy and time is formatted with hours, minutes, and seconds. The waiting list is in ascending order by time. This allows for first in first out.

DETAILED SCREEN LAYOUTS

Order Confirmation

Graphical user interface, text, application

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Order Confirmation

Order confirmation is contained in the add\_confirm.php file. This happens after you fill out all of the necessary fields in the Add New Customer web page. When you click calculate not only will you get the amount they owe, you will also add them to the data base. After this onclick action you will be directed to the add\_confirm.php web page. Which states “New Customer Added” at the top followed by the name of the person stating that they have been added. There is another button on this page, when clicked will take you to the easy\_insure\_customer\_list.php web page. Where you can manually check the list to see if they were added.

DETAILED SCREEN LAYOUTS

Error Page

Graphical user interface, text, application

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Error Page

The error page handles any errors that someone might come across while using the website. When you reach this page, you will receive an error message that you can search on the internet for to determine the solution. You will also receive a description of the problem. This will be triggered when the webpage cannot connect to the data base, leave a field blank that is not supposed to be blank, or you enter the wrong type of information.

DETAILED SCREEN LAYOUTS

Admin – Directory

Graphical user interface, application

Description automatically generated

*Administation Directory Login*

*User name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

DETAILED SCREEN LAYOUTS

Narrative Description of Admin – Directory

When the admin inputs the correct password from the Home Page using the ‘Admin Login’ link, they will be taken to this page. The header is labeled ‘Admin – Directory’ and the body header is labeled the same. The admin is advised to ‘Please select which admin page you would like to access.’ A hyperlink is available to take the admin to the Reports, Add Customer, or Remove Customer admin pages. An option to return to the Home Page is also given.

DETAILED SCREEN LAYOUTS

Admin - Reports

Graphical user interface, application

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Admin - Reports

This web page pulls crucial data from the data base and lists it in a very understanding format. There are two pie charts that pull from a customer’s plan. The first pie chart titled “Customers by Plan” lists the percentage of customers that have a term, whole, or universal plan. The other pie chart lists the corresponding value, which is $1 million, $500 thousand, and $250 thousand. At the bottom of the page you can see the total number of customers, the number of customers on the waiting list, and the total monthly premiums there are.

DETAILED SCREEN LAYOUTS

Admin – Add Customer

Graphical user interface

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Admin – Add Customer

DETAILED SCREEN LAYOUTS

Admin – Remove Customer

A screenshot of a computer

Description automatically generated

DETAILED SCREEN LAYOUTS

Narrative Description of Admin – Remove Customer

DETAILED REPORT DESCRIPTIONS

A picture containing text, businesscard, screenshot

Description automatically generated**Data Flow Diagram (DFD) of Easy Insure Website**

DETAILED REPORT DESCRIPTIONS

Narrative Description of the Data Flow Diagram

The diagram shows the process for how the insurance system is set up. There are two sides to this system: The customers side and the employees’ side. Subsequently, an employee can view the website either through a customer perspective or an employee perspective; this diagram represents all the possible functions from the employees’ perspective.

1. First, the process will evaluate the customer side. The customer will contact the insurance company to make an appointment and/or file a claim. Once this is done, everything else switches over to the employees side of the process.
2. Next, the employee will add the customer to the waiting list. They will enter in the customers first and last name, their phone number, the date they wanted to schedule an appointment for, and the time they want that appointment to be at. After all this information is typed in, the employee will then click the ADD button, and the customer will be added to the waiting list, which is viewable right on that page. The waiting list can now be viewed by the employee as needed to see who is waiting to be taken care of.
3. Then, the customer will arrive for the appointment. Next, the customer’s information must be created once the day for the appointment arrives. The customer will provide his/her first and last name, age, gender, value, what plan he/she would like to set up, and whether they smoke or not. The employee will click on the calculate button to calculate how much his/her monthly premium will be. This information will then be displayed on the screen, along with a new button that says, “add customer”. The employee can click the add customer button, and he/she will be available on the customer list, which is an update to the records. Now the records can be viewed, and the employee can categorize what type of records he/she would like to view; by selecting the different plans on the left side of the screen, on the “customer list” page.
4. Finally, the process will conclude at the end of each week with a report. The employee will access the report page and generate a report. When the report is complete it will be sent to regional manager to analyze.

BACKGROUND INFORMATION

List of Group Meetings Conducted and Individual Work

DATE SUBJECT NOTES

10/07/2021 Individual Work **Kirk Paitsel**

10/09/2021 Individual Work **Kirk Paitsel**

10/10/2021 Group Meeting Project Design Phase Planning

6pm – 8pm Active: