Software Requirements Specification

for

GMC-Group Mediclaim Process Automation

For Future Generali

Version 1.0

Prepared by Planit Software Testing

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Table of Contents

Table of Contents iii

Revision History iii

1. Introduction 1

1.1 Purpose 1

1.2 Engagement Scope 1

2. Overall Description – Health buzz Process 1

2.1 As-Is Process (manual process) 1

2.2 To-Be Process (automated solution) 2

2.3 Software & Hardware Requirements 3

2.4 Design and Implementation Constraints 3

2.5 User Documentation 3

2.6 Assumptions and Dependencies 4

Revision History

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| **Name** | **Date** | **Reason For Changes** | **Version** |
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# Introduction

## Purpose

This document aims to capture automation requirement for member data upload and endorsement upload to Health Buzz application, will also capture validation at loader file level and reports to be generated.

## Engagement Scope

Health Buzz is a web based application which is used to track group health policies in terms of member data upload, addition, deletion and correction of members.

Member data upload and endorsement for members achieved through loader file and FG has a standard template available for it.

FG need a report for a failed transaction at each upload event and same to be emailed at generic email id.

# Overall Description – GMC-Group Mediclaim Process

## As-Is Process (manual process)

Presently all the mentioned below steps for member data and endorsement upload to Health Buzz are carried out manually and can be classified on a high level as:

1. Loader file creation (member data and endorsement)
2. Upload loader file to Health buzz
3. Verification of uploaded data

The details for each of the process steps is provided below:

1. **Loader File Creation (member data and endorsement)**

* Download the input excel file from the email which is sent by customers.
* Copy the data column-wise from input file to loader file in text format only.
* Check all the mandatory information is provided, if not then login to Health buzz and collect the information from there.
* Following mandatory columns data received from input file either to be generated, corrected or fetched from Health buzz
* If age is not provided in input file, then based on DOB provided at input file calculate the age.
* If DOB is not provided in input file, then based on age provided at input file calculate the approx. DOB.
* If gender not provided in input file, keep that field blank.
* If email ID not provided in input file, put random email id.
* If employee code is blank in input file, put random employee code.
* If policy number is not provided in input file, login to Health buzz application, search the policy details and fetch the policy number.
* If company name is not provided in input file, login to Health buzz application, search the policy details and fetch the company name.
* If company joining date is not provided in input file, login to Health buzz application, search the policy details and fetch policy inception date and use it as a joining date.
* If sum insured is not provided in input file, login to Health buzz application, search the policy details and fetch the sum insured.
* If address and corporate name is not provided in input file, login to Health buzz application, search the policy details and fetch the address and corporate name.
* If product code is not provided in input file, take product code from the available product code list.
* If duplicate entry is there for member or its dependent, then write remark as duplicate in Remark column.
* If member level details are not provided in correction scenario, then login to Health buzz application, search the policy details and fetch the member details info.
* In case of member deletion request, login to Health buzz application, search the policy details and fetch the family member details.
* In case of employee leaving date, modify date by adding plus one day.

1. **Upload Loader file**

* Login into Health buzz application.
* Navigate to Proceed for member upload.
* Browse the file and click on Upload.

1. **Verification**

* After every upload, Health buzz will create a log file where information about failed transaction will be recorded.
* Collect those failed record data and demand relevant information against those records to the customer.

## To-Be Process (automated solution)

The intent is to automate the process and the high level features to be automated are described below:

1. **Loader File Creation (member data and endorsement)**

* FG will download the input excel file from email and append it with policy number, which is received from the customers and will place in the local drive.
* Planit Automation Framework (PAF) will pick up the input excel file for processing and transform it to a loader file.
* Following validations will be checked and managed by PAF while transforming input file to a loader file.
* If the below data is not provided in the input file, then the PAF will calculate and update it in the loaded template:
* age of a member based on DOB provided in input file
* approx. DOB of a member based on age provided in input file
* keep the gender field blank if gender is not provided in input file.
* generate random email id in loader template
* generate random employee code in loader template
* PAF will login to Health buzz application, search the policy details and fetch the below details if it is not provided in input file put it in a loader template:
* policy number
* policy details and fetch company name
* company joining date
* sum insured
* address and corporate name
* fetch the member details info
* family member details
* If product code is not provided in input file, PAF will take product code from the available product code list and put it in a loader template.
* PAF will find duplicate entry for member and its dependent in input file and write a remark as duplicate in loader template.
* In case of employee leaving date, PAF will modify the date by adding plus one day and put it in a loader template.

1. **Upload Loader file**

* PAF will login to Health buzz and navigate to ‘Proceed for member upload’ and select the latest file from shared folder for upload and upload it to Health buzz.

1. **Report & Notification**

* PAF will read the event log created for failed transactions at Health buzz after every upload event and put those failed records in a standard template and email it to generic email id for further action.

## Software & Hardware Requirements

Operating system : Window 7 or above

Hard Disk : Minimum 100GB

Ram : 8GB

Software : Python 2.7, Robot framework, RIDE

## Design and Implementation Constraints

* All the required system software for the PAF needs to be installed in Virtual Machines and provided to Planit team before the engagement start.

## User Documentation

* Please find the attached prerequisite Robot Framework installation document.



## Assumptions and Dependencies

* All the dependency documents and excel files formats are to be provided by FG.
* All the business rules to be implemented should be provided in a document format to Planit. Planit will analyze the feasibility of automating the same and in coordination with FG point of contact will finalize the specific business rules to be automated.
* FG will provide the message formats/templates to be used for emailing documents.
* The server configuration for email setup has to be provided by FG for sending out emails