



Policy Management System

Business Requirements Document

V1.0

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1.0 Introduction

1.1 Purpose of this document

This document is aimed at:

- Providing the necessary inputs to the detailed requirements gathering phase and further on for the SDLC processes.
- This document also serves to establish the traceability between the Business Objectives and the requirements identified in the proposed solution and how they satisfy the stated objectives.
- Provide expectation traceability in terms of the requirements and the user expectation
- Serves as a formal template for documenting the Business Requirements which also includes statutory and regulatory requirements.

The purpose of this document is to systematically capture requirements for the project and the system to be developed. Functional requirements are captured in this document. It also serves as the input for the project scoping.

1.2 Project Overview

1.2.1 Objectives

Policy Management System (PLMS) is basically a system that helps to maintain the Policies and Payments. It also allows to search a Policy.

The following are the modules in this proposed system

- a) User Registration.
- b) Policy Registration.
- c) Edit Policy Registration.
- d) Search Policies.
- e) Policy Payment.

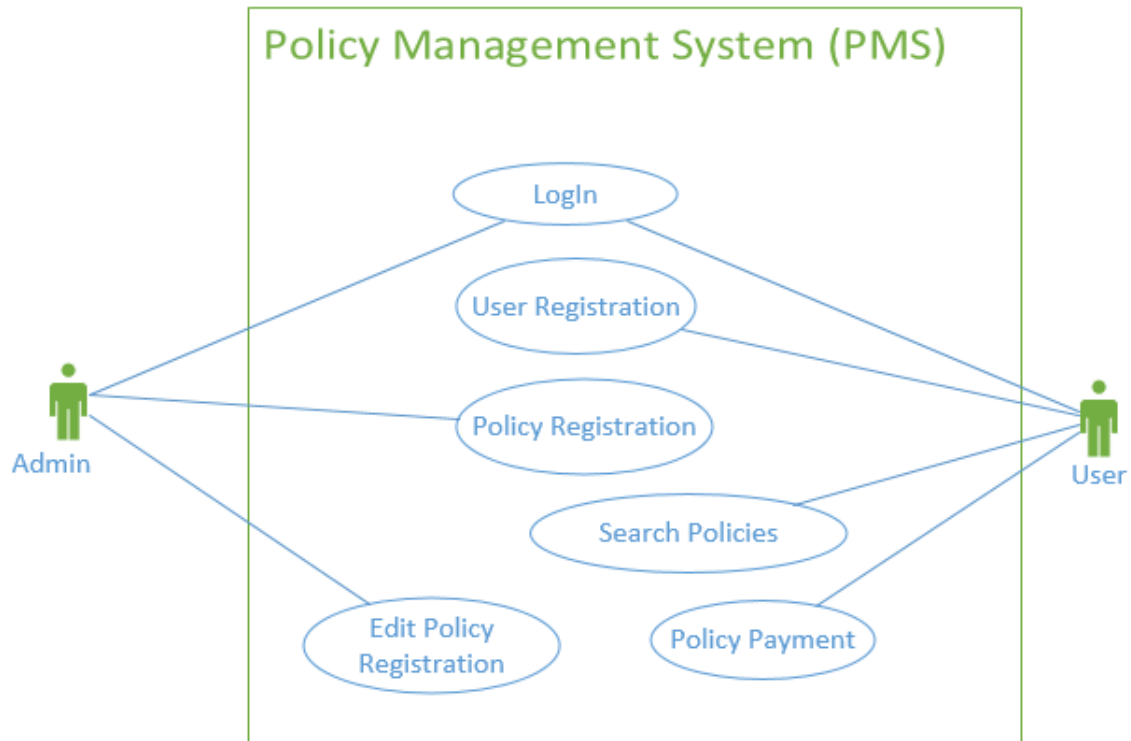
1.3 Intended Audience

- All members of the project.

- Delivery assurance/excellence group

2.0 Process Architecture

Below is the overall functional flow of the project including the components of interaction



3.0 High Level Business Requirements

Note - Primary focus is to complete developing the critical requirements (highlighted in Yellow) and then to proceed with the remaining requirements

S.No.	Business Requirement ID	Short Description	Description in detail	Interacting Business Processes
1	Req_1	User Registration	Ability of the User to submit the details into the system.	
2	Req_2	Policy Registration	Ability of the system for Policy Registration be used by the admin to register the policies. The system will generate the policy id and if it is a valid policy the system will store the details in the	

			database.	
3	Req_3	Edit Policy Registration	Ability to edit the policy details of a customer by Admin.	
4	Req_4	Search Policies	The ability of the system to provide a search engine mechanism to find the policies. This will access the database by getting the details based on user search criteria.	
5	Req_5	Policy Payment	The policy Payment be used by the user to make Payments for their policies.	

4.0 Detailed Business Requirements

4.1 Functional Requirements

The functional requirements are charted for each of the high level requirements called out in the earlier section:

Additionally, the following elements should be captured for each business requirement in the table provided below:-

* Req. Type = (F Core Functionality, E Exception, UI User Interface, R Reporting)

** Priority of Requirement = (1=Base Functionality, 2=Advanced Functionality,

3=Additional Opportunities)

** Originator = (Name of the business process of the system/ department or function name in the customer organization)

The Requirements in this document are prioritized as follows:

Value	Rating	Description
1	Critical	This requirement is critical to the success of the project. The project will not be possible without this requirement.
2	High	This requirement is high priority, but the project can be implemented at a bare minimum without this requirement.
3	Medium	This requirement is somewhat important, as it provides some value but the project can proceed without it.
4	Low	This is a low priority requirement, or a "nice to have" feature, if time and cost allow it.
5	Future	This requirement is out of scope for this project, and has been included here for a possible future release.

Req. #	Rationale Categorization	Business Requirement	Req. Type *	Priority **	Originator ***	BR Traced to Business Requirement / Use case ID	Impacted Stakeholders
Req_1.1	User Registration	Screen should display the option for Admin login / Registration and User login / Registration	UI	Critical	NA	Req_1	
Req_1.2	User Registration	When the user clicks on the registration link, it should re-direct to registration form.	UI	Critical	NA	Req_1	
Req_1.3	User Registration	User needs to fill some of the basic attributes/fields as mentioned below in requirement: First Name, Last Name, Age, Gender, Contact Number, User Id, Password	UI	Critical	NA	Req_1	Please refer to Table 1.0 under References
Req_1.4	User Registration	Clicking 'Submit' should validate the datatype constraints for each field	F	Critical	NA	Req_1	
Req_1.5	User Registration	User failing to provide information on the mandatory fields be provided with an alert message – 'Please update the highlighted mandatory field(s).' Also, highlight the missed out field in red	E	Medium	NA	Req_1	
Req_1.6	User Registration	Post-successful field level validation, save the information in the database	F	Critical	NA	Req_1	
Req_1.7	User Registration	Upon saving the information in the database, display the message 'Your details are submitted successfully'.	E	Medium	NA	Req_1	

Req. #	Rationale Categorization	Business Requirement	Req. Type *	Priority **	Originator ***	BR Traced to Business Requirement / Use case ID	Impacted Stakeholders
Req_1.8	Credential Authentication	A registered user – is able click 'Login' link, after keying in 'User ID' & 'Password' field and get his credentials authenticated with the existing database entry.	F	Critical	NA	Req_1	
Req_1.9	Admin Registration	When the Vendor clicks on the registration link, it should re-direct to registration form.	UI	Critical	NA	Req_1	
Req_1.10	Admin Registration	Vendor needs to fill some of the basic attributes/fields as mentioned below in requirement: First Name, Last Name, Age, Gender, Contact Number, Vendor Id, Password	UI	Critical	NA	Req_1	
Req_1.11	Admin Registration	Clicking 'Submit' should validate the datatype constraints for each field	F	Critical	NA	Req_1	
Req_1.12	Admin Registration	Admin failing to provide information on the mandatory fields be provided with an alert message – 'Please update the highlighted mandatory field(s).' Also, highlight the missed out field in red	E	Medium	NA	Req_1	
Req_1.13	Admin Registration	Post-successful field level validation, save the information in the database	F	Critical	NA	Req_1	
Req_1.14	Admin Registration	Upon saving the information in the database, display the message 'Your details are submitted successfully'.	E	Medium	NA	Req_1	

Req. #	Rationale Categorization	Business Requirement	Req. Type *	Priority **	Originator ***	BR Traced to Business Requirement / Use case ID	Impacted Stakeholders
Req_1.15	Credential Authentication	A registered user – is able click 'Login' link, after keying in 'Admin ID' & 'Password' field and get his credentials authenticated with the existing database entry.	F	Critical	NA	Req_1	
Req_2.1	Policy Registration	On successful authenticating the Admin,system should allow the admin to create policy	F	Critical	NA	Req_2	Please refer to Table 2.0 under References
Req_2.2	Policy Registration	On valid creation of the policy,system should create a policy ID	F	Medium	NA	Req_2	
Req_2.3	Policy Registration	Admin on clicking the Submit button, all the fields should be validated and the details has to be saved in the database.	E	Medium	NA	Req_2	
Req_2.4	Policy Registration	Admin failing to update the required fields, Message should be thrown as – 'Please update the highlighted mandatory field(s).' Also, highlight the missed out field in red	E	Medium	NA	Req_2	
Req_3.1	Edit Policy Registration	Admin should be able to edit the name of the policy	UI	Medium	NA	Req_3	
Req_3.2	Edit Policy Registration	Admin should be able to edit the Policy type	UI	Medium	NA	Req_3	
Req_3.3	Edit Policy Registration	Admin should be able to edit the duration of the policy	UI	Medium	NA	Req_3	
Req_3.4	Edit Policy Registration	Admin should be able to edit the amount of the policy	UI	Medium	NA	Req_3	
Req_3.5	Edit Policy Registration	Admin on clicking the Submit button, all the fields should be validated and the details has to be saved in the database.	F	Medium	NA	Req_3	

Req. #	Rationale Categorization	Business Requirement	Req. Type *	Priority **	Originator ***	BR Traced to Business Requirement / Use case ID	Impacted Stakeholders
Req_3.6	Edit Policy Registration	Admin failing to update the required fields, Message should be thrown as – 'Please update the highlighted mandatory field(s).' Also, highlight the missed out field in red	F	Medium	NA	Req_3	
Req_3.7	Edit Policy Registration	Upon saving the information in the database, display the message 'Your details are submitted successfully'.	F	Medium	NA	Req_3	
Req_4.1	Search Policies	User Should be able to select policy type, policy id, Number of years, Company Name,Policy name	UI	Critical	NA	Req_4	
Req_4.2	Search Policies	System should display the list of policies as per the search criteria	UI	Medium	NA	Req_4	
Req_4.3	Search Policies	User should select atleast one criteria before selecting the search policy button	F	Medium	NA	Req_4	
Req_4.4	Search Policies	User upon clicking the Search policy button without selecting any fields should be prompted with an error message	F	Medium	NA	Req_4	
Req_5.1	Policy Payment	The user on going to Policy payment page should display the user details – policy Id, Bill Date, Payment amount, Fine, Due date	UI	Critical	NA	Req_5	
Req_5.2	Policy Payment	User upon clicking the Payment button user will pay the corresponding bill amount through the gateway and he/she will have different options to pay the amount like Credit card,debit card,upi.	F	Critical	NA	Req_5	

Req. #	Rationale Categorization	Business Requirement	Req. Type *	Priority **	Originator ***	BR Traced to Business Requirement / Use case ID	Impacted Stakeholders
Req_5.3	Policy Payment	After successful payment the user will be displayed a success message that 'Payment is successful' and the status of the bill should be changed from 'pending' to 'paid' in the database.	F	Critical	NA	Req_5	

5.0 References

5.1 Table 1 – User Info

Field Name	Field Type	Data Type	Mandatory	Possible Values
First Name	Text(50)	Alphabetic	Yes	
Last Name	Text(50)	Alphabetic	Yes	
DOB	Text(10)	DD/MM/YYYY	Yes	
Gender	Drop Down	NA		Male, Female
Contact Number	Text(10)	Numeric	Yes	
Address	Text(60)	Alphanumeric	Yes	
Email Id	Text(15)	Alphanumeric	Yes	
Qualification	Text(10)	Alphanumeric	Yes	
Salary per Month	Numeric(10)	Numeric	Yes	
PAN No	Text(10)	Alphanumeric	Yes	
Employer type	Text(10)	Alphanumeric	No	
Employer	Text(10)	Alphanumeric	No	
Hint Question	Text(50)	Alphanumeric	Yes	
Hint Answer	Text(50)	Alphanumeric	Yes	
Password	Text(15)	Alphanumeric	Yes	

5.2 Table 2 – Policy Info

Field Name	Field Type	Data Type	Mandatory	Possible Values
Policy Id	Text(50)	Alphanumeric	Yes	
Policy	Text(50)	AlphaNumeric	Yes	

Name				
Policy type	Text(10)	AlphaNumeric	Yes	
Duration of years	Text(2)	Numeric	Yes	
Company	Text(50)	AlphaNumeric		
Initial Deposit	Text(10)	Numeric	Yes	
User type	Text(10)	Alphanumeric	Yes	
Term amount	Text(15)	Numeric	Yes	
Interest	Text(2)	Numeric	Yes	

6.0 Terms and conditions

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7.0 Change Log

Version Number	Changes Made			
V1.0.0	Initial baseline created on <dd-Mon-yy> by <Name of Author>			
Vx.y.z	<Please refer the configuration control tool / change item status form if the details of changes are maintained separately. If not, the template given below needs to be followed>			
	Section No.	Changed By	Effective Date	Changes Effectuated