**CSE213 CRA Report Template**

|  |  |  |
| --- | --- | --- |
| **Topic: Life Insurance Agency** | | |
| **ID:**  **2021030** | **Name:**  **Daiyan Mohammad Shams** | **User1: Policy Owner** |
| **User2: Executive Manager** |
| **ID:**  **20101350** | **Name:**  **Isfar Hafiz Khan** | **User3: Service Desk** |
| **User4: Staff** |
| **ID:**  **2030441** | **Name:**  **Tauhidul Islam** | **User5: Guest** |
| **User6: Admin** |
| **ID: 2121028** | **Name:**  **Rizwan Mohammad Chowdhury** | **User7: Agent** |
| **User8: User** |

**P.T.O**

**NOTE:**

* Download this this template from coordinated google classroom and create a google-docs file with the following **file name format**:
  + MS1\_topicKeyword\_id1\_id2\_id3\_id4
  + Ex: MS1\_ IRAS\_1234567\_2345678\_3456789\_4567890
* Now share the google-docs file among yourselves. All of you need to work on the same document.
* You must also upload the viewer share link of your google-docs file via the google form link given below, so that I can view your document anytime and check your progress: https://docs.google.com/forms/d/e/1FAIpQLSeWdo1AdCvGNpdKE8k07dvgu8tObsCVWmcNfi6pApnYT9J-hg/viewform?usp=pp\_url
* **Submit ONLY ONE FORM from EACH GROUP**
* **After discussing among yourselves, ONLY-ONE-OF-YOU from each group need to submit this form**
* Before coming to class on **5-March-23**, Sunday (**for sec 1 & 2**), the google docs file MUST be filled with all 8 user names and 64 goal descriptions. You can write the workflow of the goals afterwards.
* Before coming to class on **6-March-23**, Monday (**for sec 3 & 4**), the google docs file MUST be filled with all 8 user names and 64 goal descriptions. You can write the workflow of the goals afterwards.
* **By 9-March-23, Thursday, you MUST improvise this document by completing workflows for ALL 64 goals and submit it’s downloaded copy as DEADLINE-VERSION of MileStone-1 as classroom assignment.**
* **If you fail to submit deadline version of your MileStone-1 by 9-March-23, you will not get any mark for MileStone-1**

**Possible event type:**

* UIE - - user input to trigger event
* UID - - user input to be considered as data
* OP – display content (output)
* PC – prerequisite check
* VL – validation check
* VR – verification check
* DP – fetching data from file system and process it to get some calculated outcome (data processing)

|  |  |  |  |
| --- | --- | --- | --- |
| **User1 name:Policy Owner** | | | |
| **User-1, Goal-1** | **Description of Goal-1:** **Check policy status** | | event type |
| Workflow: | event-1 | **Login** | **VL** |
|  | event-2 | **Homepage appears** | **OP** |
|  | event-3 | **Click on “Policy Information” button** | **UIE** |
|  | … | **List of Policy Scene Appears** | **OP** |
|  | event-**n** | **Select the policy they want to check the status of from a list of their policies** | **UIE** |
|  | | | |
| **User-1, Goal-2** | **Description of Goal-2:Request policy changes** | |  |
| Workflow: | event-1 | **Identify the need for policy changes** | **DP** |
|  | event-2 | **Prepare a proposal outlining the changes** | **UID** |
|  | event-3 | **Consult with stakeholders for feedback** | **PC** |
|  | … | **Revise the proposal based on feedback** | **VR** |
|  | event-**n** | **…….** | **…….** |
|  | | | |
| **User-1, Goal-3** | **Description of Goal-3:** **Make Payment** | |  |
| Workflow: | event-1 | **Select a payment method** | **UIE** |
|  | event-2 | **Determine the amount due** | **DP** |
|  | event-3 | **Verify payment details** | **VR** |
|  | … | **Submit the payment** | **UID** |
|  | event-**n** | **Receive confirmation of payment** | **VR** |
|  | | | |
| **User-1, Goal-4** | **Description of Goal-4:** **Update Beneficiary Information** | |  |
| Workflow: | event-1 | **reason for the update** | **UID** |
|  | event-2 | **Verify the accuracy of the information** | **VR** |
|  | event-3 | **Determine the required documentation to support the update** | **PC** |
|  | … | **Attach the required documentation** | **UID** |
|  | event-**n** | **Complete the beneficiary update form** | **UID** |
|  | | | |
| **User-1, Goal-5** | **Description of Goal-5:** **Access policy loans** | |  |
| Workflow: | event-1 | **Review policy contract for loan eligibility and terms** | **PC** |
|  | event-2 | **Complete loan application** | **UID** |
|  | event-3 | **Submit application and required documentation** | **UID** |
|  | … | **Receive loan approval or denial notification** | **VR** |
|  | event-**n** | **Accept loan terms and receive funds** | **OP** |
|  | | | |
| **User-1, Goal-6** | **Description of Goal-6:** **Track investment performance** | |  |
| Workflow: | event-1 | **investment goals and objectives** | **UID** |
|  | event-2 | **Determine the appropriate investment strategy** | **UID** |
|  | event-3 | **Select suitable investment options** | **UIE** |
|  | … | **Monitor investment performance regularly** | **OP** |
|  | event-**n** | **Maintain accurate records of investment performance and transactions** | **DP** |
|  | | | |
| **User-1, Goal-7** | **Description of Goal-7:** **Schedule appointments with Agents** | |  |
| Workflow: | event-1 | **purpose of the appointment** | **UID** |
|  | event-2 | **check the agent's availability and schedule** | **OP** |
|  | event-3 | **Contact the agent to request an appointment** | **UIE** |
|  | … | **Confirm the appointment details** | **VR** |
|  | event-**n** | **Follow up with the agent as needed after the appointment** | **OP** |
|  | | | |
| **User-1, Goal-8** | **Description of Goal-8:** **Submit a claim** | |  |
| Workflow: | event-1 | **Determine the type of claim and policy or coverage that applies** | **UID** |
|  | event-2 | **Gather documentation to support the claim** | **DP** |
|  | event-3 | **Complete the claim form accurately and completely** | **UID** |
|  | … | **Receive confirmation** | **VR** |
|  | event-**n** | **Receive notification of claim approval or denial.** | **OP** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-2 name:** Executive Manager | | | |
| **User-2, Goal-1** | **Description of Goal-1:** **Set performance metrics** | | event type |
| Workflow: | event-1 | **Visit login page** | **Vl** |
|  | event-2 | **Enter valid login credentials** | **OP** |
|  | event-3 | **Press login button** | **UIE** |
|  | … | **Enters the user page** | **OP** |
|  | event-**n** | **Click set performance metrics button to set and check** | **UIE** |
|  | | | |
| **User-2, Goal-2** | **Description of Goal-2:** **Promote, demote, transfer and fire employees** | |  |
| Workflow: | event-1 | **Enter the employee management page** | **UID** |
|  | event-2 | **Select employee from the list** | **VL** |
|  | event-3 | **Check employee performance** | **UIE** |
|  | … | **Identify performance issues** | **UIE** |
|  | event-**n** | **Select action for the employee based on the performance and confirm by clicking confirm** | **OP** |
|  | | | |
| **User-2, Goal-3** | **Description of Goal-3:Monitor business performance** | |  |
| Workflow: | event-1 | **Enter the dashboard page by clicking dashboard** | **UID** |
|  | event-2 | **Click performance status** | **VR** |
|  | event-3 | **Check performance analysis** | **UIE** |
|  | … | **Analyze trends and improvement by checking charts** | **VL** |
|  | event-**n** | **Review and adjust by submitting report** | **OP** |
|  | | | |
| **User-2, Goal-4** | **Description of Goal-4:** **Track key performance indicators** | |  |
| Workflow: | event-1 | **Click performance indicators button to enter the page** | **UID** |
|  | event-2 | **Check the data sources from the list** | **OP** |
|  | event-3 | **Track the performance indicator selecting a key** | **UIE** |
|  | … | **update the data to ensure accuracy by clicking update button** | **UID** |
|  | event-**n** | **Finally establish targets or benchmarks by submitting a final form.** | **VR** |
|  | | | |
| **User-2, Goal-5** | **Description of Goal-5:** **executing the strategic vision** | |  |
| Workflow: | event-1 | **First enter the page by selecting your user type.** | **VR** |
|  | event-2 | **Check and message about strategic vision to all stakeholders by clicking send message** | **UID** |
|  | event-3 | **Create a comprehensive report and analysis and schedule it for publication** | **OP** |
|  | … | **Allocate necessary resources, such as finances and personnel, to support the plan from the business data page** | **VL** |
|  | event-**n** | **Publish the notice to all employees from the notice board page** | **UIE** |
|  | | | |
| **User-2, Goal-6** | **Description of Goal-6:** **Ensuring regulatory compliance** | |  |
| Workflow: | event-1 | **Enter the required page from the navigation bar** | **UIE** |
|  | event-2 | **Generate and finalize policies and procedures from the rules and regulations page.** | **OP** |
|  | event-3 | **Monitor and report systems outflow and inflow from the analysis page** | **UID** |
|  | … | **Keep records and documentation in the database** | **VL** |
|  | event-**n** | **Conduct third-party audits and assessments by notifying the higher authorities.** | **VR** |
|  | | | |
| **User-2, Goal-7** | **Description of Goal-7:** **Oversee system design and implementation** | |  |
| Workflow: | event-1 | **Enter the system settings page** | **UID** |
|  | event-2 | **Check the company stakeholder list** | **UIE** |
|  | event-3 | **Check and test the system by clicking test system button** | **VR** |
|  | … | **Monitor the result after testing by clicking view report** | **VL** |
|  | event-**n** | **Check the report for improvement or optimization** | **OP** |
|  | | | |
| **User-2, Goal-8** | **Description of Goal-8:** **Manage the application system team** | |  |
| Workflow: | event-1 | **Enter the team page** | **UIE** |
|  | event-2 | **Select team field** | **UID** |
|  | event-3 | **Check the team member list by clicking view members** | **VR** |
|  | … | **Assign tasks and goals for each member by clicking assign task** | **VL** |
|  | event-**n** | **After clicking assign task fill the form to confirm the task for each members then click confirm** | **OP** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-3 name:**Service Desk | | | |
| **User-3, Goal-1** | **Description of Goal-1:** **Customer can launch complain** | | event type |
| Workflow: | event-1 | **Open menu** | **…….op** |
|  | event-2 | **Complain option** | **…….uie** |
|  | event-3 | **Type in the complain** | **…….uie** |
|  | … |  | **…….** |
|  | event-**n** | **submit** | **…….uie** |
|  | | | |
| **User-3, Goal-2** | **Description of Goal-2:** **…….Provide Information about policy such as coverage details, deductibles, premiums** | |  |
| Workflow: | event-1 | Select Option for see Information | **…….op** |
|  | event-2 | **See Policy for coverage details** | **…….op** |
|  | event-3 | **See details for deductibles** | **…….op** |
|  | … |  | **…….** |
|  | event-**n** | **See Details on paying premium** | **…….op** |
|  | | | |
| **User-3, Goal-3** | **Description of Goal-3:** **FAQ(Frequenty Asked Question)** | |  |
| Workflow: | event-1 | **See Option for FAQs** | **…….op** |
|  | event-2 | **See All FAQS** | **…….op** |
|  | event-3 | **Submit a Question** | **…….op** |
|  | … | **…….** | **…….** |
|  | event-**n** | exit | **…….vr** |
|  | | | |
| **User-3, Goal-4** | **Description of Goal-4:** **Billing Inquiries such as asnwering questions about payment schedules, payment options and premium amounts** | |  |
| Workflow: | event-1 | **See option for Billing Inquiry** | **…….op** |
|  | event-2 | **Schedule an date for payment** | **…….uie** |
|  | event-3 | **Select mode of payment** | **…….op** |
|  | … | **…….** | **…….** |
|  | event-**n** | **Auto Premium Calculator** | **……. dp** |
|  | | | |
| **User-3, Goal-5** | **Description of Goal-5:** **Payment Method options** | |  |
| Workflow: | event-1 | **Select Payment Method to change** | **…….op** |
|  | event-2 | **Change existing account information** | **…….vr** |
|  | event-3 | **Add/Remove Card Details** | **……. op** |
|  | … | **…….** | **…….** |
|  | event-**n** | **Exit** | **…….op** |
|  | | | |
| **User-3, Goal-6** | **Description of Goal-6:Diverting the call to specific employees** | |  |
| Workflow: | event-1 | **Option to choose whom to call when someone calls the Service Desk** | **…….op** |
|  | event-2 | **Show all extensions** | **…….op** |
|  | event-3 | Talk to Urgent Officer | **…….vl** |
|  | … | **…….** | **…….** |
|  | event-**n** | Exit | **…….op** |
|  | | | |
| **User-3, Goal-7** | **Description of Goal-7:** **Policy Changes: When a policyholder needs to make changes to their policy such as adding or removing coverage** | |  |
| Workflow: | event-1 | **…….Option to make changes to your coverage** | **…….op** |
|  | event-2 | **……. Add Coverage** | **…….uie** |
|  | event-3 | **……. Remove Coverage** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **…….Exit** | **…….op** |
|  | | | |
| **User-3, Goal-8** | **Description of Goal-8:** **Provide a list of Options at the beginning to the users so that they can choose from respective category** | |  |
| Workflow: | event-1 | **……. Provide a list of options for user** | **…….op** |
|  | event-2 | **……. Add/Remove Coverage** | **…….op** |
|  | event-3 | **……. FAQ’s and etc** | **…….op** |
|  | … | **……. Basically all the above options presented** | **…….op** |
|  | event-**n** | **…….Information Portal** | **…….op** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-4 name:** Staff | | | |
| **User-4, Goal-1** | **Description of Goal-1:Launch a Complain** | | event type |
| Workflow: | event-1 | **……. Option to launch a complain** | **…….op** |
|  | event-2 | **……. Submit Complain** | **…….uie** |
|  | event-3 | **……. Launch another complain** | **……. Uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Call Customer Service** | **…….uie** |
|  | | | |
| **User-4, Goal-2** | **Description of Goal-2:Apply for leave** | |  |
| Workflow: | event-1 | **……. Option to apply for leave** | **…….op** |
|  | event-2 | **……. Write in application** | **…….uie** |
|  | event-3 | **……. Submit Application** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Leave** | **……. op** |
|  | | | |
| **User-4, Goal-3** | **Description of Goal-3: Submit Application for Memodandum** | |  |
| Workflow: | event-1 | **……. Option for Memorandum** | **…….op** |
|  | event-2 | **……. Compose a letter specifying the equipments or items needed** | **…….uie** |
|  | event-3 | **……. Submit application** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Exit** | **…….op** |
|  | | | |
| **User-4, Goal-4** | **Description of Goal-4:View Procurement details** | |  |
| Workflow: | event-1 | **……. Option to view Procurement Details** | **…….op** |
|  | event-2 | **……. See the list of procurement** | **…….op** |
|  | event-3 | **……. Add/Remove Equipments** | **…….vr** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Exit** | **…….op** |
|  | | | |
| **User-4, Goal-5** | **Description of Goal-5:Check schedule for the week** | |  |
| Workflow: | event-1 | **……. Option to check Schedule** | **…….op** |
|  | event-2 | **……. See upcoming Events** | **…….op** |
|  | event-3 | **……. Add a reminder** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Exit** | **…….op** |
|  | | | |
| **User-4, Goal-6** | **Description of Goal-6: Pay Miniature Bills** | |  |
| Workflow: | event-1 | **……. Option to pay bills** | **…….op** |
|  | event-2 | **……. See option to pay bill** | **…….op** |
|  | event-3 | **……. Print statement** | **…….vr** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Exit** | **…….op** |
|  | | | |
| **User-4, Goal-7** | **Description of Goal-7: Room booking for managers** | |  |
| Workflow: | event-1 | **……. Option to book room** | **…….op** |
|  | event-2 | **……. View Schedule** | **…….uie** |
|  | event-3 | **……. Book Room and set time** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **……. Exit** | **…….op** |
|  | | | |
| **User-4, Goal-8** | **Description of Goal-8:Schedule a work break** | |  |
| Workflow: | event-1 | **……. Option to choose work break** | **…….op** |
|  | event-2 | **……. Set time and duration** | **…….uie** |
|  | event-3 | **……. Cancel event** | **…….uie** |
|  | … | **…….** | **…….** |
|  | event-**n** | **…….Exit** | **…….op** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-5 name:** **Guest** | | | |
| **User-5, Goal-1** | **Description of Goal-1:** **View Available Policies** | | event type |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Policies button in the dashboard.** | **UIE** |
|  | event-3 | **Select the type of policies from the combo box.** | **UIE, DP** |
|  | event-4 | **Available policies are displayed on the dashboard.** | **OP** |
|  | | | |
| **User-5, Goal-2** | **Description of Goal-2:** **View Company Profile** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Company Profile button in the dashboard.** | **UIE** |
|  | event-3 | **Company Profile information is displayed on the dashboard.** | **OP** |
|  | | | |
| **User-5, Goal-3** | **Description of Goal-3:** **Contact with Company** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Contact button in the dashboard.** | **UIE** |
|  | event-3 | **Company Address, Phone number and Email is displayed.** | **OP** |
|  | | | |
| **User-5, Goal-4** | **Description of Goal-4:** **Read Terms and Conditions** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Read Terms and Conditions button in the dashboard.** | **UIE** |
|  | event-3 | **Terms and Conditions are displayed on the dashboard.** | **OP** |
|  | | | |
| **User-5, Goal-5** | **Description of Goal-5:** **Post Comments** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Comments Button from the dashboard.** | **UIE** |
|  | event-3 | **TextField for Comment and Post button is displayed.** | **OP** |
|  | event-4 | **Enter Comment and Click Post button.** | **UIE, UID** |
|  | event-5 | **The Comment is displayed in the Comment Section.** | **OP** |
|  | | | |
| **User-5, Goal-6** | **Description of Goal-6:** **Create Account** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click the Create Account button in the dashboard.** | **UIE** |
|  | event-3 | **TextField for Email, Password, Confirm Password and Create Account button is displayed.** | **OP** |
|  | event-4 | **Enter Email, Password, Confirm Password and Click Create Account button.** | **UIE, UID** |
|  | event-5 | **A User (User - 8) dashboard is displayed.** | **OP** |
|  | | | |
| **User-5, Goal-7** | **Description of Goal-7:** **Rate the Software** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click Rate this Software button in the dashboard.** | **UIE** |
|  | event-3 | **Radio buttons of 1, 2, 3, 4, 5 and Rate button are displayed.** | **OP** |
|  | event-4 | **Click on a Radio button and then Click on the Rate button.** | **UIE, UID** |
|  | event-5 | **Return to the dashboard.** | **OP** |
|  | | | |
| **User-5, Goal-8** | **Description of Goal-8:** **Report the Software** | |  |
| Workflow: | event-1 | **Click the Guest button at the login scene to enter as a guest.** | **UIE** |
|  | event-2 | **Click on the Report button in the dashboard.** | **UIE** |
|  | event-3 | **TextField for Reason and Report button is displayed.** | **OP** |
|  | event-4 | **Enter Reason and Click Report button.** | **UIE, UID** |
|  | event-5 | **Return to the dashboard.** | **OP** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-6 name:** **Admin** | | | |
| **User-6, Goal-1** | **Description of Goal-1:** **Login** | | event type |
| Workflow: | event-1 | **TextField for Username, Password and Login button is displayed.** | **OP** |
|  | event-2 | **Enter Username, Password and Click Login button.** | **UIE, UID** |
|  | event-3 | **Validation and Verification Check of the Username and Password.** | **VL, VR** |
|  | event-4 | **If validated and verified, then display the Admin dashboard.**  **If not, then display the Login Error Message.** | **DP, OP** |
|  | | | |
| **User-6, Goal-2** | **Description of Goal-2:** **Update Policy Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the Update Policy button.** | **UIE** |
|  | event-3 | **Enter the Changes in fields and Click Update button.** | **UIE, UID** |
|  | event-4 | **Policy Information is displayed.** | **OP** |
|  | | | |
| **User-6, Goal-3** | **Description of Goal-3:** **View User Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the View User Information button.** | **UIE** |
|  | event-3 | **All Users are displayed.** | **OP** |
|  | event-4 | **Click the View information button of a User.** | **UIE** |
|  | event-5 | **User Information is displayed.** | **OP** |
|  | | | |
| **User-6, Goal-4** | **Description of Goal-4:** **View Agent Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the View Agent Information button.** | **UIE** |
|  | event-3 | **All Agents are displayed.** | **OP** |
|  | event-4 | **Click the View information button of an Agent.** | **UIE** |
|  | event-5 | **Agent Information is displayed.** | **OP** |
|  | | | |
| **User-6, Goal-5** | **Description of Goal-5:** **Update User Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the Update User Information button.** | **UIE** |
|  | event-3 | **All Users are displayed.** | **OP** |
|  | event-4 | **Click the Update information button of a User.** | **UIE** |
|  | event-5 | **Enter the Changes in fields and Click Update button.** | **UIE, UID** |
|  | event-6 | **User Information is displayed.** | **OP** |
|  | | | |
| **User-6, Goal-6** | **Description of Goal-6:** **Update Agent Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the Update Agent Information button.** | **UIE** |
|  | event-3 | **All Agents are displayed.** | **OP** |
|  | event-4 | **Click the Update information button of an Agent.** | **UIE** |
|  | event-5 | **Enter the Changes in fields and Click Update button.** | **UIE, UID** |
|  | event-6 | **Agent Information is displayed.** | **OP** |
|  | | | |
| **User-6, Goal-7** | **Description of Goal-7:** **Reply to comments** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the Comments Button from the dashboard.** | **UIE** |
|  | event-3 | **All Comments are displayed.** | **OP** |
|  | event-4 | **Click the Reply button of a comment.** | **UIE** |
|  | event-5 | **TextField for Reply and Post button is displayed.** | **OP** |
|  | event-6 | **Enter Reply and Click Post button.** | **UIE, UID** |
|  | event-7 | **The Comment and Reply is displayed in the Comment Section.** | **OP** |
|  | | | |
| **User-6, Goal-8** | **Description of Goal-8:** **Update Admin Information** | |  |
| Workflow: | event-1 | **Login** | **UID, VL, VR** |
|  | event-2 | **Click the Update Admin Information button.** | **UIE** |
|  | event-3 | **Enter the Changes in fields and Click Update button.** | **UIE, UID** |
|  | event-4 | **Admin Information is displayed.** | **OP** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-7 name:** **Agent** | | | |
| **User-7, Goal-1** | **Description of Goal-1:** **Agent can view the manager details** | | event type |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “View Manager Details”** | **UIE** |
|  | event -4 | **Details are shown** | **OP, DP** |
|  | event-5 | **Click on necessary detail** | **UIE, OP** |
|  | | | |
| **User-7, Goal-2** | **Description of Goal-2:** **Agent can view the customer details** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “View Customer Details”** | **UIE** |
|  | event -4 | **Details are shown** | **OP, DP** |
|  | event-5 | **Click on necessary detail** | **UIE, OP** |
|  | | | |
| **User-7, Goal-3** | **Description of Goal-3:** **Agent can view the customer policy details** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “View Customer Policy”** | **UIE** |
|  | event -4 | **Policy details are shown** | **OP, DP** |
|  | event-5 | **Click on necessary detail** | **UIE, OP** |
|  | | | |
| **User-7, Goal-4** | **Description of Goal-4:** **Agent can export the customer details** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Export Customer Details”** | **UIE** |
|  | event -4 | **Customer Details are exported** | **DP** |
|  | | | |
| **User-7, Goal-5** | **Description of Goal-5:** **Agent can export customer policies** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Export Customer Policy Details”** | **UIE** |
|  | event -4 | **Customer Policy Details are exported** | **DP** |
|  | | | |
| **User-7, Goal-6** | **Description of Goal-6:** **Agent can add new customers** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Customer”** | **UIE** |
|  | event -4 | **Details are shown** | **OP, DP** |
|  | event-5 | **Click on “Add New Customer”** | **UIE, OP** |
|  | event-6 | **Fill necessary details** | **UID** |
|  | event-7 | **Verify the Customer** | **VR** |
|  | event-8 | **Click on “Done”** | **UIE. DP** |
|  | | | |
| **User-7, Goal-7** | **Description of Goal-7:** **Agent can add new policy for customer** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Customer Policy”** | **UIE** |
|  | event -4 | **Details are shown** | **OP, DP** |
|  | event-5 | **Click on “Add New Policy”** | **UIE, OP** |
|  | event-6 | **Fill necessary details** | **UID** |
|  | event-7 | **Verify the Policy** | **VR** |
|  | event-8 | **Click on “Done”** | **UIE. DP** |
|  | | | |
| **User-7, Goal-8** | **Description of Goal-8:** **Agent can logout** | |  |
| Workflow: | event-1 | **When Logged In** | **…….** |
|  | event-2 | **Click on “Logout”** | **UIE** |
|  | event-3 | **Page is redirected to Login Page** | **OP** |

|  |  |  |  |
| --- | --- | --- | --- |
| **User-8 name:** **User** | | | |
| **User-8, Goal-1** | **Description of Goal-1:** **User can register an agent for their dedicated task** | | event type |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Register an agent”** | **UIE** |
|  | event -4 | **List of Agents is shown** | **OP, DP** |
|  | event-5 | **Click on the dedicated agent for details** | **UIE, OP** |
|  | event-6 | **After checking details click “Register”** | **UIE** |
|  | event-7 | **Fill necessary data and verify user** | **UID, VR** |
|  | | | |
| **User-8, Goal-2** | **Description of Goal-2:** **User can submit an online claim for their insurance** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Claim Insurance”** | **UIE** |
|  | event-4 | **User data field is shown** | **OP** |
|  | event-5 | **Fill the necessary data and verify user** | **UID, VR** |
|  | event-6 | **Validity check is done** | **VL** |
|  | event-7 | **Necessary Documents are uploaded** | **UID** |
|  | event-8 | **Click on “Claim”** | **UIE** |
|  | | | |
| **User-8, Goal-3** | **Description of Goal-3:** **User can choose/view available health plan insurance** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Health Insurance Plan” to view details** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary Health Plan** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Done”** | **UIE** |
|  | | | |
| **User-8, Goal-4** | **Description of Goal-4:** **User can choose/view available education plan** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Education Plan”** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary Education Plan** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Done”** | **UIE** |
|  | | | |
| **User-8, Goal-5** | **Description of Goal-5:** **User can view forms library for additional support** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Forms” to view details** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary forms** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Done”** | **UIE** |
|  | | | |
| **User-8, Goal-6** | **Description of Goal-6:** **User can choose/view available retirement plan insurance** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Retirement Plans” to view details** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary Retirement Plan** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Done”** | **UIE** |
|  | | | |
| **User-8, Goal-7** | **Description of Goal-7:** **User can choose/view available savings plan insurance** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Savings Plans” to view details** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary Savings Plan** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Done”** | **UIE** |
|  | | | |
| **User-8, Goal-8** | **Description of Goal-8:** **User can choose to contact the agency directly** | |  |
| Workflow: | event-1 | **Login** | **…….** |
|  | event-2 | **Homepage** | **OP** |
|  | event-3 | **Click on “Contact Us” to view details** | **UIE** |
|  | event-4 | **Details are shown** | **OP** |
|  | event-5 | **Click on the necessary Contact details** | **UIE** |
|  | event-6 | **Fill the necessary details** | **UID** |
|  | event-7 | **Click on “Submit”** | **UIE** |