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Knowledge Management

KM Portal

Project Report

KM Portal for Life Insurance

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Introduction

Knowledge management portals provides a single point of access to the tacit and explicit knowledge that supports members of the institutions or organizations in all aspects of their learning, teaching, working, research and other activities. Abbreviated as KM portals they provide views on domain specific information in the World Wide Web, thus facilitating their users to find relevant, domain specific information. The main goal of the KM portal within an organization is to improve the capacity of individuals to act successfully towards the goals of the organization by better exploitation of the information resources of the organization and its resources.

Insurance companies require knowledge management heavily for their continued growth. KM has become a critical tool that helps set price policies, determine risks, improve customer service and control costs. In fact, KM for insurance is crucial for both the front-line insurance companies and their reinsurance partners. A KM portal is required so that a company remains competitive in its field. In addition to supporting the company's operations and customer service a KM portal offers a robust system to satisfy auditors who want to see the tightest controls available for computing loan loss reserves. To show this we have implemented a KM portal for a life insurance company which can then be scaled as needed.

Problem Statement: Constructing a portal for a Life Insurance Company

What makes a KM portal useful and why is it required in the Life Insurance sector?

We have kept this problem statement in mind while building our KM portal. healthcare costs are escalating and knowledge management for insurance is helping contain healthcare costs since the portal focuses on the core data and the true drivers of escalating expenses. With accurate data the life insurance company can construct new health plans or update old ones, including co-pays, employee premiums and group discounts. The KM portal in the company aims to provide exceptional customer service and better profitability overall.

Maybe more than any other industry the insurance provider sector is constantly seeking ways to reduce paperwork. A KM portal for the company reduces the massive collections of paper applications and claims while improving efficiencies. Even such tasks such as scheduling equipment deliveries becomes streamlined as coverage is confirmed through the system. The benefits of the KM portal span the entire insurance value chain by increasing customer satisfaction with self-service options, established FAQs and agents equipped with accurate data to provide the best solutions.

Requirements Specification

The requirements specification of KM Portal :

1. Insurance portal must be able to create multiple knowledge repositories.
2. Repositories must be populated with re-usable knowledge submissions.
3. Ability for all employees and users to contribute knowledge into the repositories.
4. Ability for employees and users to download knowledge from repositories.
5. Quick, robust and accurate search and retrieval capability.
6. Access control – Capability to provide restricted access to certain groups of people. In our project, access control is guaranteed by maintaining different databases for different groups of users.
7. Capability to provide links to external contents/websites.
8. Capability to post ideas/ questions for experts.
9. Capability to interface with other users whenever required.

Design

The design of the KM portal that we have developed is easy to use and offers a variety of services to both the employees of the company and the users that are interested in availing the services of the company. The layout of the company website is explained below for a detailed insight.

As we enter the website, we are presented with the homepage of the company which shows us the company's many features and offers a basic video tour of the goal of the company. The user can browse through the details at his leisure. This homepage offers the base for any person that visits the website whether he be user or employee.

Once in the Homepage there are two options one can choose to avail the services of the portal. User Registration is the tab that one has to click if he wishes to know the details of the policy for future purchase. Employee Registration is a tab set up for the agents and the employees of the company.

In User Registration, after going through a basic login page, the user is taken to a User Dashboard where the user can search a policy based on a keyword and then see the result which will be a

document in a new page. In addition to this the User page also has the option to filter the policies offered, in terms of the various criteria such as the policy duration, cost and so on, under the Filter Policies tab. There is also a FAQ page answering the commonly asked questions that a user might have regarding the details of the insurances policies offered by the company. For any additional doubts or queries the user can go to the Forums tab where we have set up the option of posting any query by simply typing the topic name followed by the query in the text box provided. This query can then be answered by any other user or employee thus enabling open Knowledge Transfer within the company without any hindrances.

The Employee Registration tab is for all the people working in the company to know some of the internal details regarding the company and its growth. After going through a login page similar to that of the Users tab the employee enters an employee dashboard where he/she can see the benefits and services offered by the company to its agents. Once in the employee has many options. An agent selling the policy can see the details of the policies under the search policy tab. It offers the details of the policy based on a simple search of the policy name. To update any information regarding an already existing policy an employee can avail the update-suggestion tab where the employee can share his knowledge about a particular policy through an update field offered. Additionally, an employee can also see the details of policy sold based on area under the policy count tab.

Similar to the User forum any additional doubts or queries can be posted to the Forums tab. This query can then be answered by any other employee thus furthering Knowledge Transfer. A set of videos is offered for further references

Implementation

The implementation is mainly done by using a database for the policies and also keeping track of all the registered members of the website in tables. All requests done are sent in the form of a Database query which then fetches the information from the appropriate tables.

The tables used are named as follows

1. policies-area: This table keeps track of the number of policies sold per area by a particular agent. This knowledge can be used by the employees of the company to then sell the appropriate number of policies in areas that have a shortage.
2. policy-info: Stores the information about the policies currently offered by the company. This is then presented to the user when he makes a request using a data base query that come from the portal. This has a field called suggestions which is used by the Employers to make any updates. This done using an update query to the table.
3. types-policy: This table stores the different types of policies offered by the company.

The Implementation of the forums is done using php where the content that the user types in the query field is uploaded directly.

WordPress is used to implement the layout of the pages and give it the aesthetic finish that is easy on the eye. It has a variety of options like the wonder slider and so on that really helps in implementing the images used in the website.

Conclusion

Overall, the KM portal developed aims to provide the services offered by the company in a simple and easy to use manner to both the agents/employees and the customers. We can track customer/employee queries through the forums and also get an idea about the customer satisfaction. The KM portal also enables Knowledge transfer through the forums. Through its design the portal aims to provide a full experience for anyone looking for an insight into the policies of the company.

References

1. For references regarding WordPress:
<http://www.developer.wordpress.org/reference/>
2. For all queries regarding HTML, PHP and Java Script:
<http://www.w3schools.com/>
3. For additional coding reference:
<http://www.geeksforgeeks.org/>
4. For Knowledge Management part and building portal :
<http://www.licindia.in/>

Appendices

Tools and Technologies

1.WordPress: We used this technology since it is free to install, deploy and upgrade. There are many plugins and templates that offer a flexible and simple interface which reduces development costs and deployment time.During the development of the portal WordPress enabled us to customize highly through its many extensions.

2.Bootstrap: Used along with the WordPress software it offers an easy framework for designing the layouts of the portal. Bootstrap is also highly compatible with all modern browsers and mobiles phones.

3.SQL: We used this to communicate to with a database and the SQL statement are used to perform tasks such as update data on a database, or retrieve data from the database. All the tables mentioned in the implementation

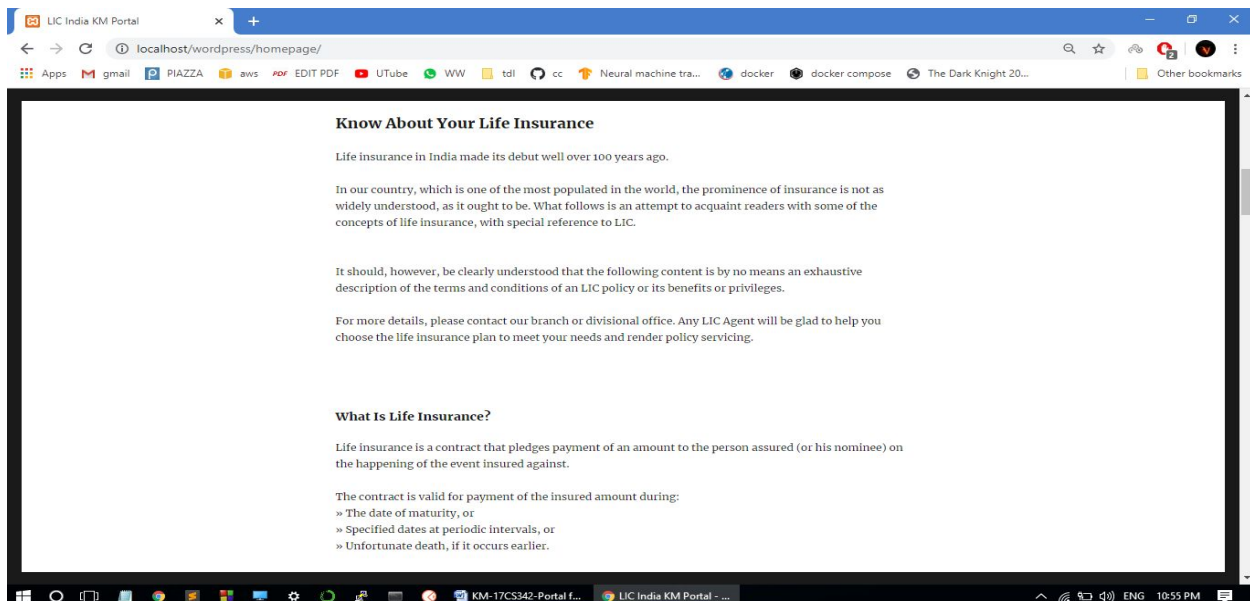
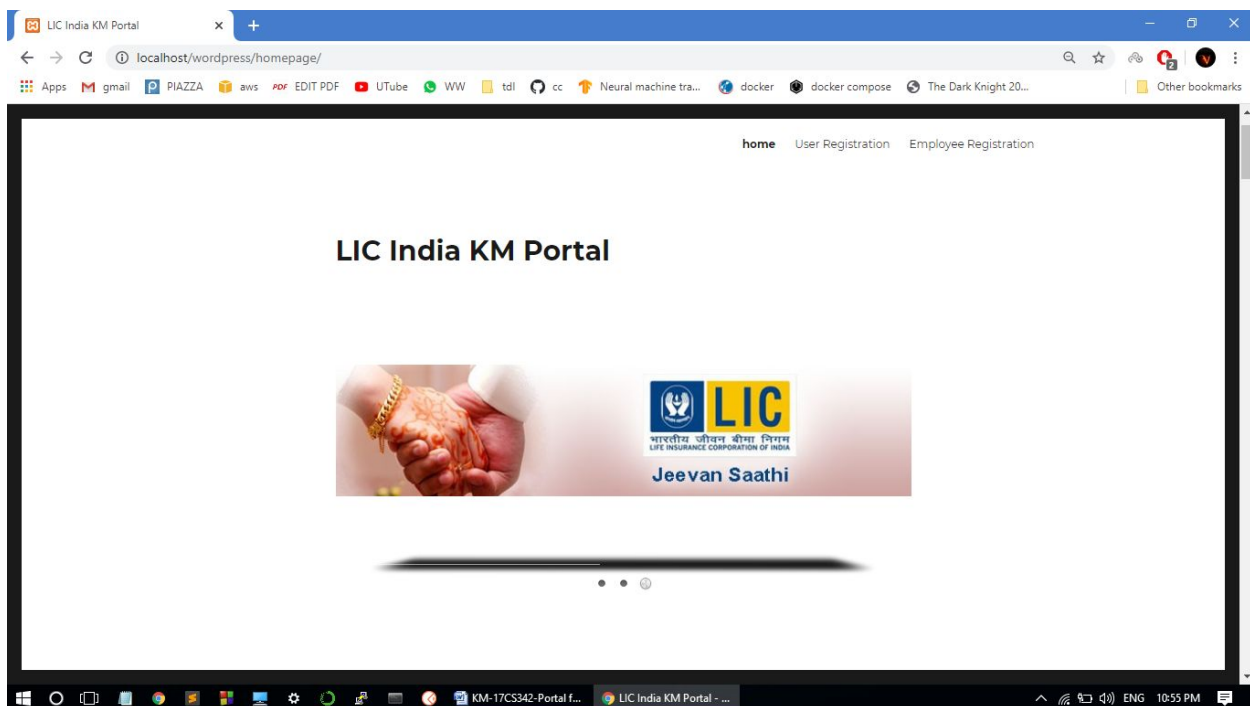
4.HTML, CSS, JavaScript, PHP: These are the basic tools used to develop the website. Php mainly does the server-side processing, transactions, plus interfaces between HTML and

KM Portal for Life Insurance

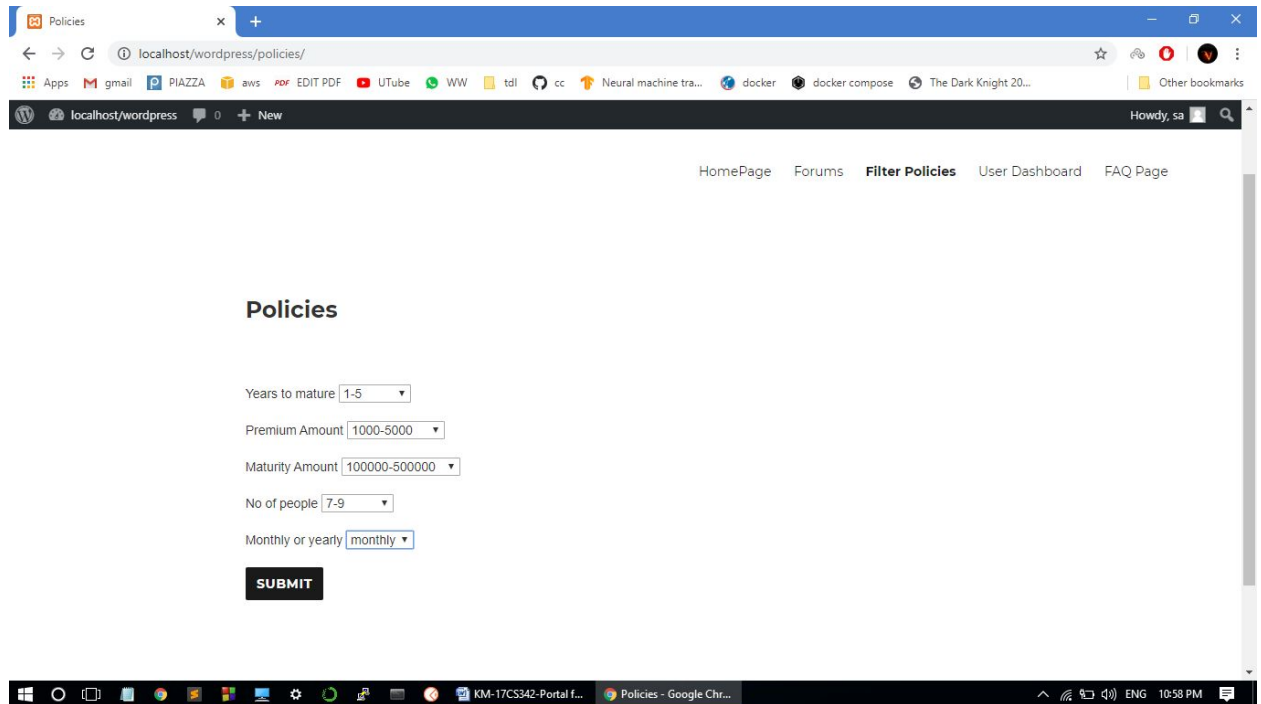
SQL. We used HTML to structure the pages and CSS to handle the visuals. All the dynamic elements of the portal are done using JavaScript

Snapshots of the working portal

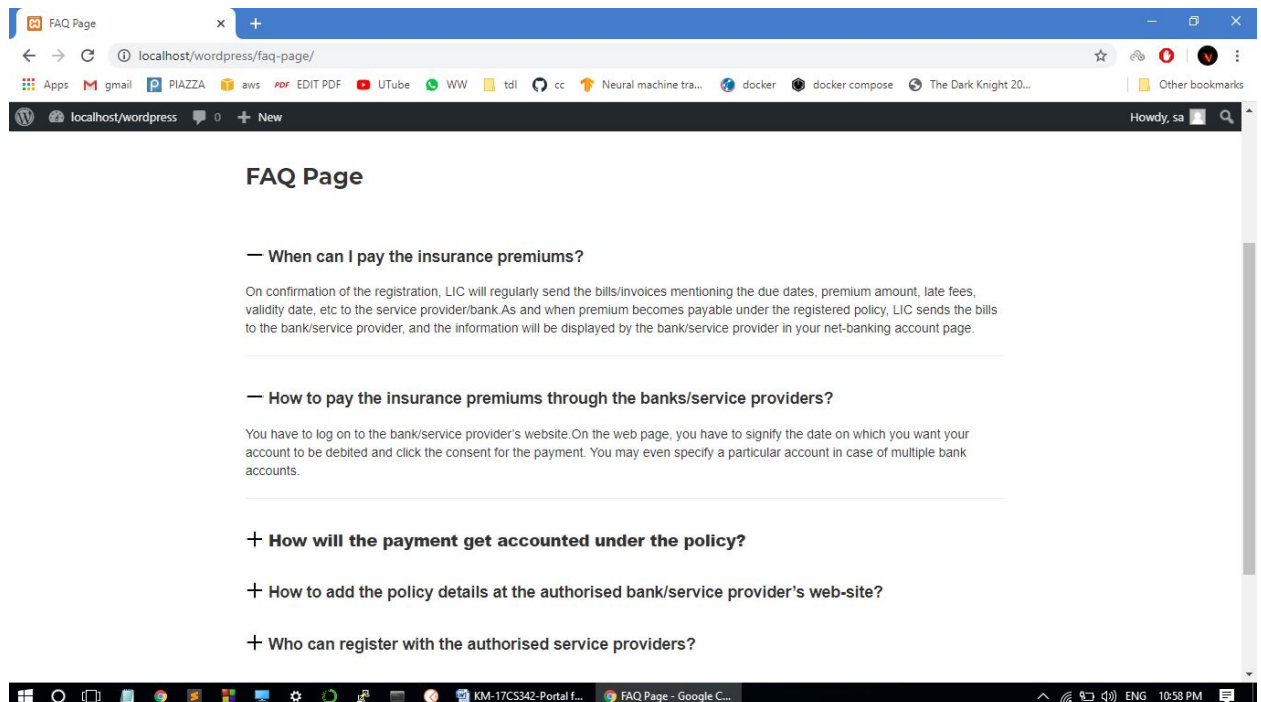
1. Homepage



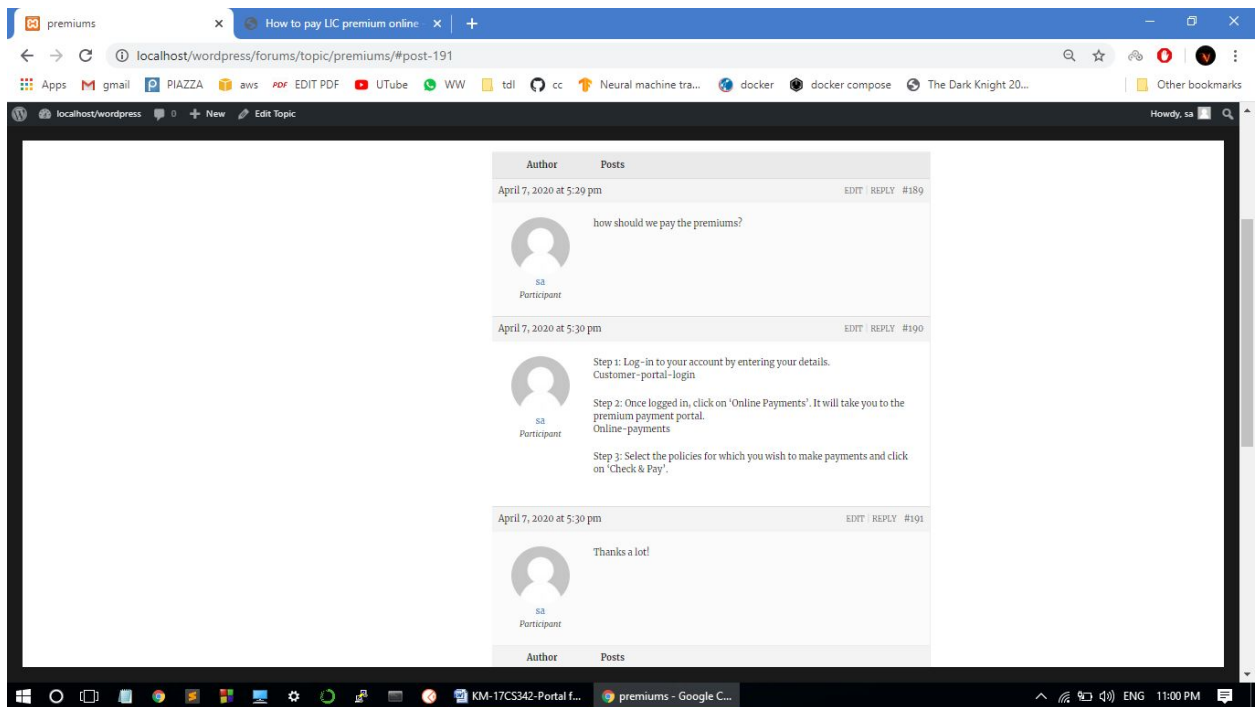
2. Filter policies



3. FAQ Page of users



4. Forums of users



5. Search policy with result

search-policy

Policy name

jeevan saathi

SUBMIT

Proudly powered by WordPress

Search results:

POLICY NAME	MATURITY BENEFITS	DEATH BENEFITS	PLAN PARAMETERS	USP	ADDITIONAL BENEFITS	IT BENEFITS	FOR WHOM	SUGGESTIONS
jeevan saathi	Sum assured plus Vested bonus + FAB	on the death of one of the members ; Basic SA is payable; Further premia waived ; Surviving s	Min. Age at entry : 20 years; Max. Age at entry 50 yrs Max; maturity age : 70 yrs Min; Term :	Life cover on two lives at a very low cost; Premium Waiver benefit inbuilt	This plan is designedfor working couples; Policies under this plan will be on the lives of h		Just Married; Young Couples; Married Couples with Children	nice policy

POLICY NAME	MATURITY BENEFITS	DEATH BENEFITS	PLAN PARAMETERS	USP	ADDITIONAL BENEFITS	IT BENEFITS	FOR WHOM	SUGGESTIONS
jeevan saathi	Sum assured plus Vested bonus + FAB	on the death of one of the members ; Basic SA is payable; Further premia waived ; Surviving s	Min. Age at entry : 20 years; Max. Age at entry 50 yrs Max; maturity age : 70 yrs Min; Term :	Life cover on two lives at a very low cost; Premium Waiver benefit inbuilt	This plan is designedfor working couples; Policies under this plan will be on the lives of h		Just Married; Young Couples; Married Couples with Children	nice policy

localhost/wordpress/...

6. Update suggestions with result

KM Portal for Life Insurance

The screenshot shows a web browser window with the URL `localhost/wordpress/update-suggestions/`. The page has a navigation bar with links: Videos for further references, Policy count, search-policy, **update-suggestions**, Employee Dashboard, and Forums. The main heading is 'update-suggestions'. Below it, there is a 'Policy name' field containing 'jeevan saathi' and a 'Suggestions' field containing 'This is a with-profit plan and participates in the profits of the Corporation's life insurance business.'. A 'SUBMIT' button is located below the suggestions field. The browser's taskbar at the bottom shows various open applications and the system clock at 11:03 PM.

Videos for further references Policy count search-policy **update-suggestions** Employee Dashboard Forums

update-suggestions

Policy name
jeevan saathi

Suggestions
This is a with-profit plan and participates in the profits of the Corporation's life insurance business.

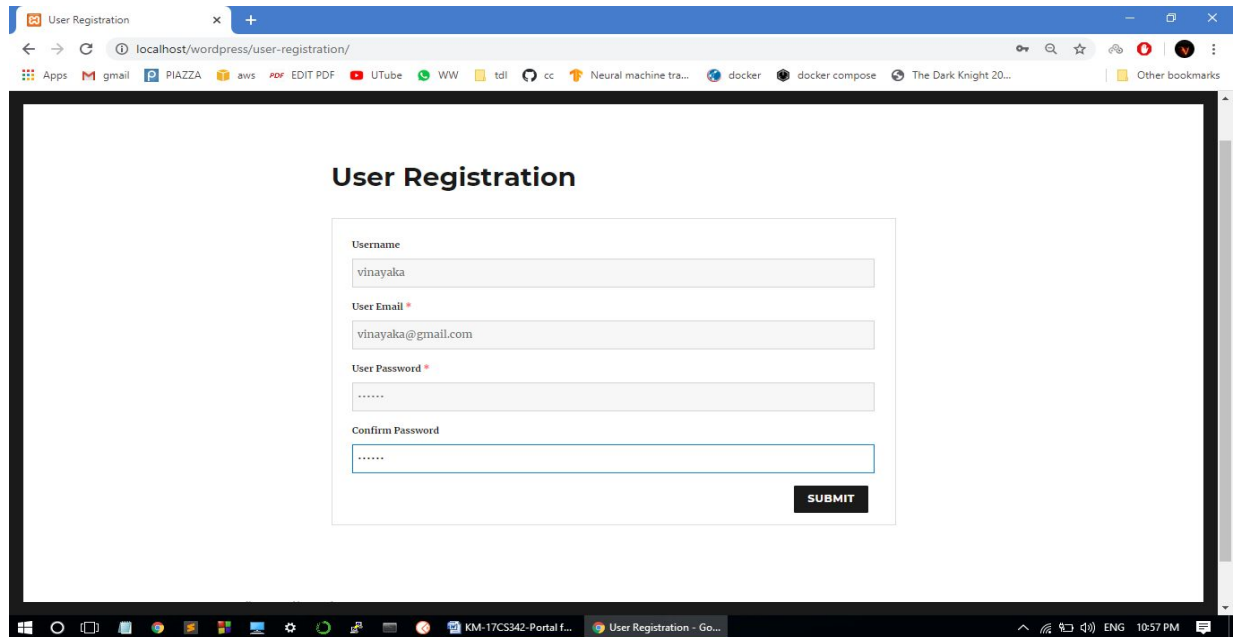
SUBMIT

The screenshot shows a web browser window with the URL `localhost/wordpress/files/search-policy.php`. The page displays search results for the policy 'jeevan saathi'. The results are presented in a table with columns: POLICY NAME, MATURITY BENEFITS, DEATH BENEFITS, PLAN PARAMETERS, USP, ADDITIONAL BENEFITS, IT BENEFITS, FOR WHOM, and SUGGESTIONS. The table contains one row of data for the 'jeevan saathi' policy. The browser's taskbar at the bottom shows various open applications and the system clock at 11:02 PM.

Search results:

POLICY NAME	MATURITY BENEFITS	DEATH BENEFITS	PLAN PARAMETERS	USP	ADDITIONAL BENEFITS	IT BENEFITS	FOR WHOM	SUGGESTIONS
jeevan saathi	Sum assured plus Vested bonus + FAB	on the death of one of the members ; Basic SA is payable; Further premia waived ; Surviving s	Min. Age at entry : 20 years; Max. Age at entry 50 yrs Max; maturity age : 70 yrs Min; Term :	Life cover on two lives at a very low cost; Premium Waiver benefit inbuilt	This plan is designedfor working couples; Policies under this plan will be on the lives of h		Just Married; Young Couples; Married Couples with Children	nice policy

7. User Registration

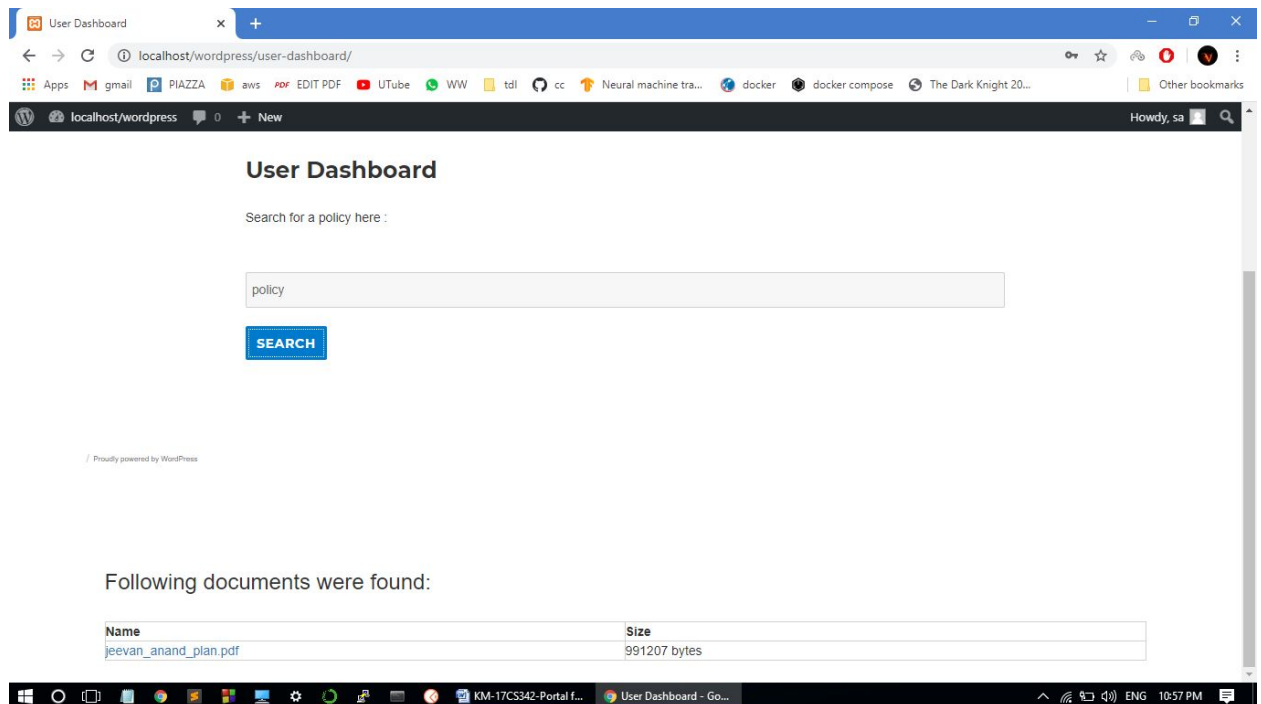


The screenshot shows a web browser window with the title "User Registration". The address bar shows the URL "localhost/wordpress/user-registration/". The page content includes a form with the following fields:

- Username:** A text input field containing the value "vinayaka".
- User Email *:** A text input field containing the value "vinayaka@gmail.com".
- User Password *:** A password input field with masked characters ".....".
- Confirm Password:** A password input field with masked characters ".....".

A black "SUBMIT" button is located at the bottom right of the form. The browser's taskbar at the bottom shows several open applications, including "KM-17CS342-Portal f..." and "User Registration - Go...". The system clock in the bottom right corner indicates the time is 10:57 PM.

8. User Dashboard (Searching documents)



The screenshot shows a web browser window with the title "User Dashboard". The address bar shows the URL "localhost/wordpress/user-dashboard/". The page content includes a search bar with the text "Search for a policy here :". Below the search bar is a text input field containing the value "policy". A blue "SEARCH" button is located below the input field. Below the search bar, there is a section titled "Following documents were found:" which contains a table with the following data:

Name	Size
jeevan_anand_plan.pdf	991207 bytes

The browser's taskbar at the bottom shows several open applications, including "KM-17CS342-Portal f..." and "User Dashboard - Go...". The system clock in the bottom right corner indicates the time is 10:57 PM.