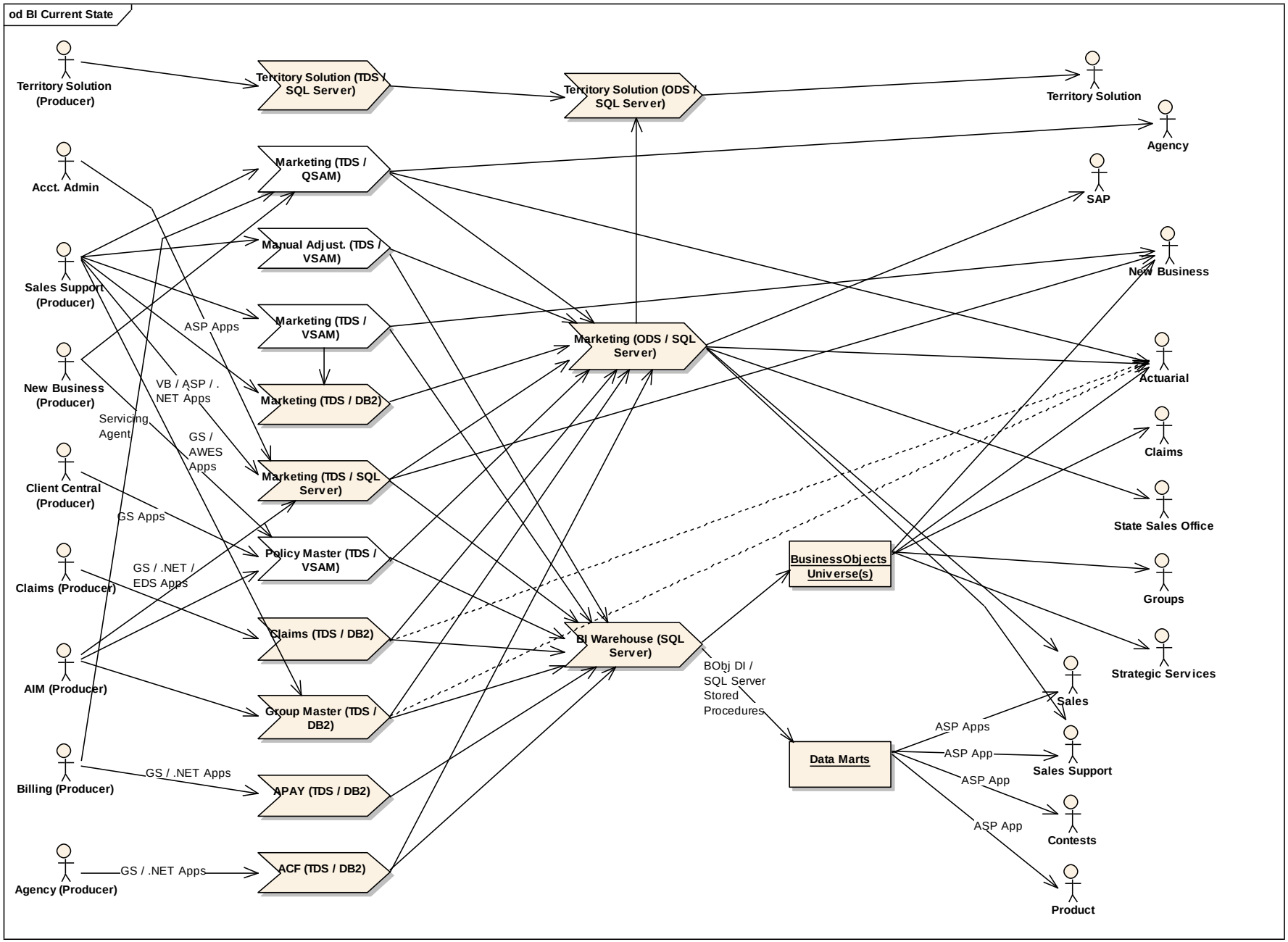
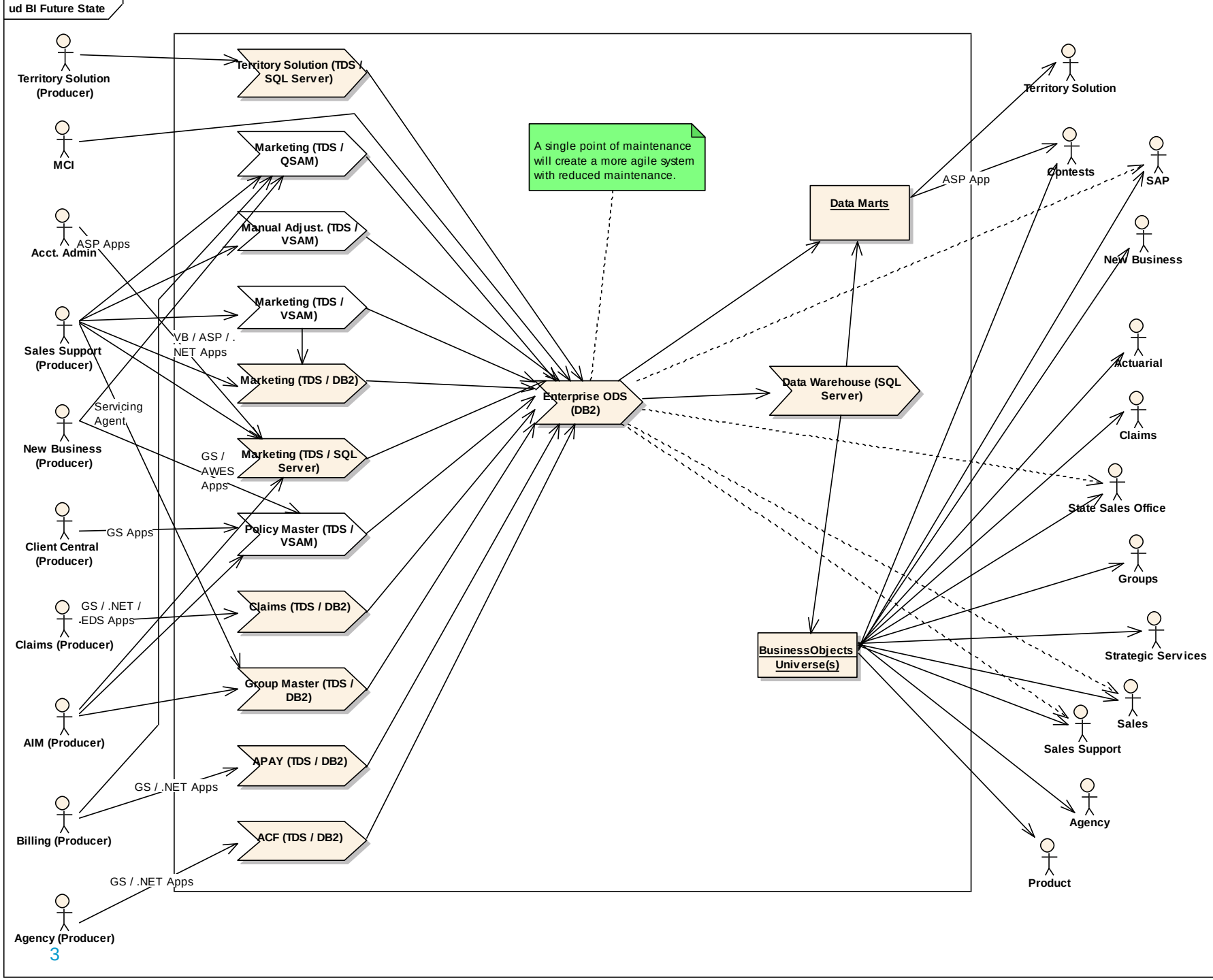
Enterprise Data Architecture

Project Support Material


od BI Current State
Territory Solution (Producer)
Acct. Admin
Sales Support (Producer)
New Business (Producer)
Client Central (Producer)
Claims (Producer)
AIM (Producer)
Billing (Producer)
Agency (Producer)
Territory Solution (TDS / SQL Server)
Marketing (TDS / QSAM)
Manual Adjust. (TDS / VSAM)
Marketing (TDS / VSAM)
Marketing (TDS / DB2)
Marketing (TDS / SQL Server)
Policy Master (TDS / VSAM)
Claims (TDS / DB2)
Group Master (TDS / DB2)
APAY (TDS / DB2)
ACF (TDS / DB2)
Territory Solution (ODS / SQL Server)
Marketing (ODS / SQL Server)
BI Warehouse (SQL Server)
ASP Apps
VB / ASP / .NET Apps
Servicing Agent
GS / AWES Apps
GS Apps
GS / .NET / EDS Apps
GS / .NET Apps
GS / .NET Apps
BusinessObjects Universe(s)
BObj DI / SQL Server Stored Procedures
Data Marts
ASP Apps
ASP App
ASP App
ASP App
Territory Solution
Agency
SAP
New Business
Actuarial
Claims
State Sales Office
Groups
Strategic Services
Sales
Sales Support
Contests
Product


ud BI Future State
Territory Solution (Producer)
MCI
Acct. Admin
Sales Support (Producer)
New Business (Producer)
Client Central (Producer)
Claims (Producer)
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Policy Master (TDS / VSAM)
Claims (TDS / DB2)
Group Master (TDS / DB2)
APAY (TDS / DB2)
ACF (TDS / DB2)
A single point of maintenance will create a more agile system with reduced maintenance.
Enterprise ODS (DB2)
Data Marts
Data Warehouse (SQL Server)
BusinessObjects Universe(s)
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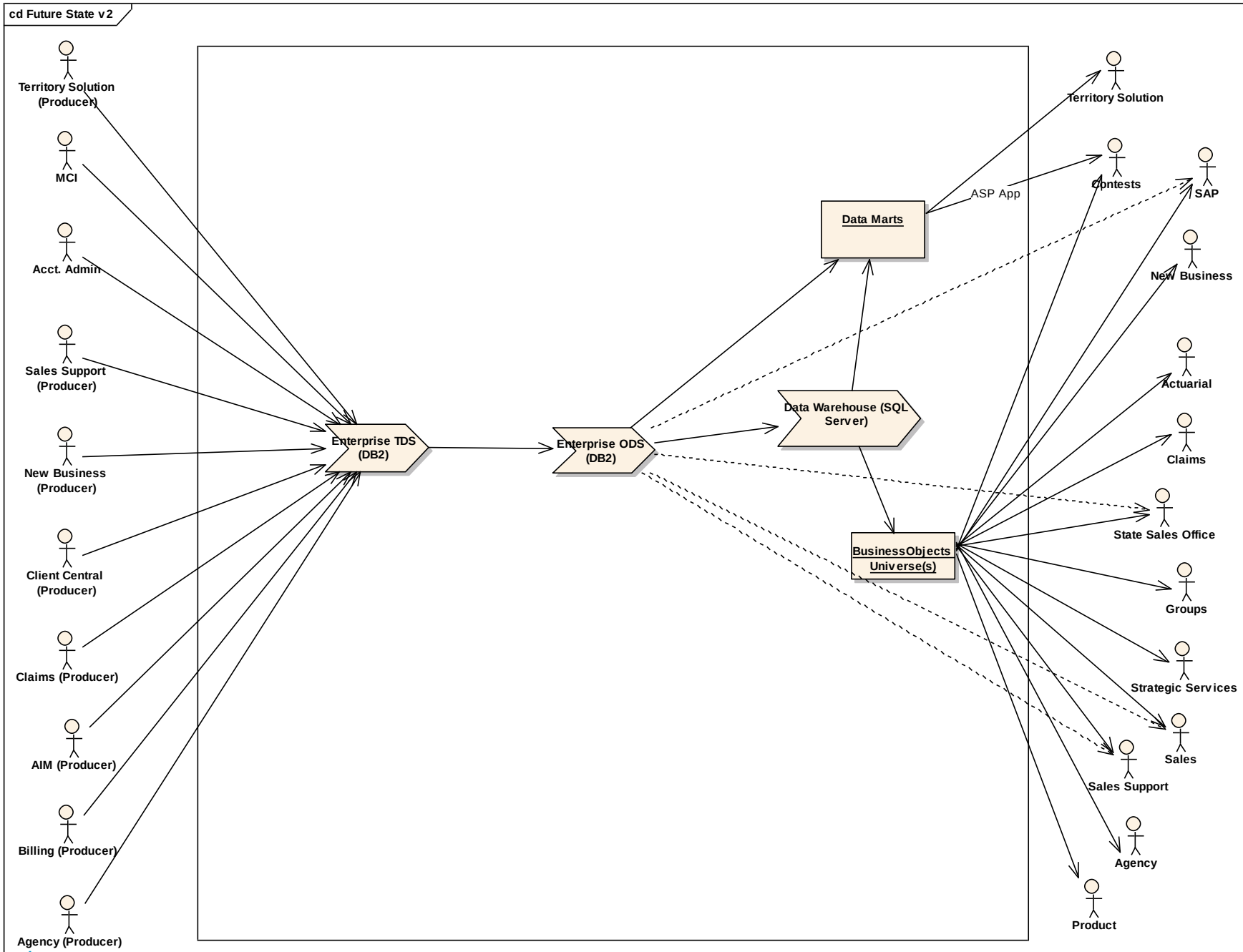
cd Future State v2
Territory Solution (Producer)
MCI
Acct. Admin
Sales Support (Producer)
New Business (Producer)
Client Central (Producer)
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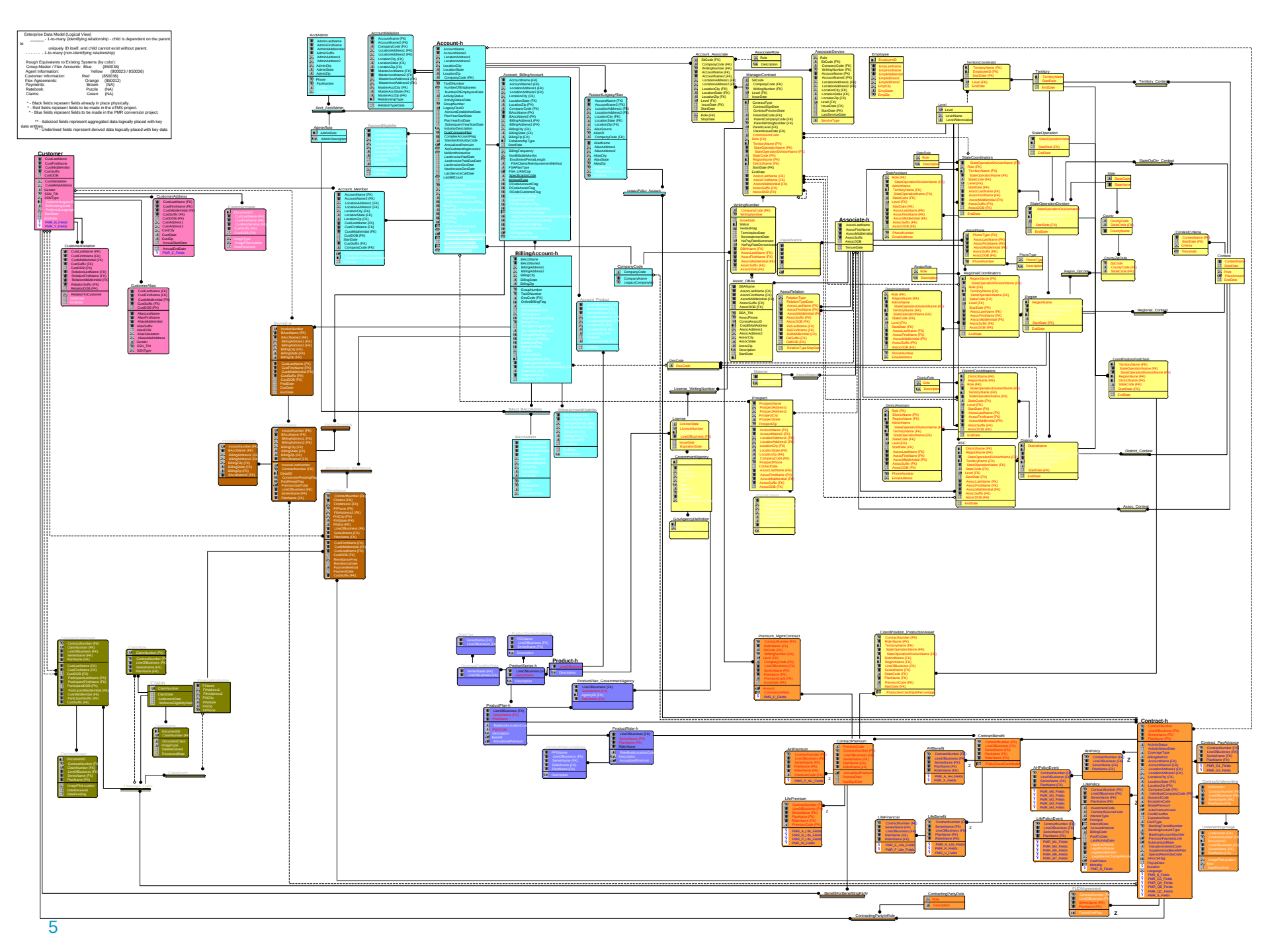
Enterprise Data Model (Logical View)
_____ - 1-to-many (identifying relationship - child is dependent on the parent to
uniquely ID itself, and child cannot exist without parent.
- - - - - - - 1-to-many (non-identifying relationship)
Rough Equivalents to Existing Systems (by color):
Group Master / Flex Accounts: Blue (850036)
Agent Information: Yellow (900023 / 850036)
Customer Information: Red (850036)
Flex Agreements: Orange (850012)
Payments: Brown (NA)
Ratebook: Purple (NA)
Claims: Green (NA)
* - Black fields represent fields already in place physically.
* - Red fields represent fields to be made in the eTMS project.
* - Blue fields represent fields to be made in the PMR conversion project.
** - Italicized fields represent aggregated data logically placed with key data entities.
*** - Underlined fields represent derived data logically placed with key data
Customer
Account-h
Account_BillingAccount
BillingAccount-h
Associate-h
Product-h
Contract-h

Cases Supporting Account Design Decisions

Account (n..n) BillingAccount

WalMart, Columbus uses 3 PO boxes for FSA, Life and A&H invoices.

WalMart, Columbus uses 3 PO boxes for FSA, Life and A&H invoices for salaried / hourly employees.

Keith's Garage can use 1 address for all company business. Cliff's Garage and Scott's Dry Cleaners pays Keith's Garage a fee to do their company paperwork.

ccount (n..n) Account

he Archdiocese of Orlando has St. Jude's Church and St. Mary's Church as members and fellow company participants.

t. Jude's Church uses the Archdiocese of Orlando as its GroupMaster master and Pepsi Co. as its Flex Master.

ccount (n..n) AccountAdmin

/alMart, Columbus uses 3 administrators for FSA, Life and A&H invoices.

particular administrator is an FSA expert and services multiple accounts.

ccount (1..n) AccountMember

eith's Garage has multiple employees.

hannon, currently employed at Keith's Garage, previously worked at (where he purchased / maintains policies) Gary's Trucking Co.

hannon works at Keith's Garage and moonlights at Gary's Trucking Co.

eeping a 13 month history on records to allow Shannon, currently employed at Keith's Garage, previously worked at (where he purchased / maintains policies) ary's Trucking Co., quits Keith's Garage and returns to Gary's Trucking Co retaining his original policies.

ccountAlias

s GroupMaster Columbus, GroupMaster New York, and Flex information is consolidated into the Account table. A decision / data survival tree is applied in the TL / data cleansing layer. Original entries, in their original state, is recorded in the AccountAlias table for manual review in the APB system.

- Gene's Auto Parts, located in New Jersey, has GroupMaster Columbus information for Life products, GroupMaster New York information for A&H products, and Flex information for an FSA account. After consolidation into the Account table, 3 three records exist in the AccountAlias table with each original record.
- A duplicate GroupMaster Columbus entry for Gene's Auto Parts was detected and is consolidated into the Account table and 1 record is placed in the AccountAlias table with the duplicate GroupMaster Columbus entry.

ccount (CompanyCode as part of the logical primary key)

here IS a legitimate reason for:

wo XYZ Corp.'s at 123 Main St., Albany, NY 12345 if one is a Columbus-based group and one is a NY-based group.

here is NOT a legitimate reason for:

wo XYZ Corp.'s at 123 Main St., Albany, NY 12345 if they are BOTH Columbus-based groups or BOTH are NY-based groups.

Cases Supporting Associate Design Decisions

Account (n..n) ManagerContract

One company Associate, using a particular SitCode (aka. ManagerContract) of a particular writing number, sells to and services many Accounts.

One Account can have an Original Servicing Associate, Servicing Associate, and Assisting Associate, Broker, etc.

Associate (1..n) ManagerContract

One company Associate has many Writing Number authorized through an Insurance license granted by a particular US State DOI.

Each of a company Associate's many Writing Numbers has many SitCodes (aka. ManagerContracts) that the Associate maintains and uses to write new business. An Associate's SitCode0 represents that Associate's formal reporting chain within the company (i.e. that Associate's DSC, RSC, etc.). All other SitCodes represent 'side deals' that Associate makes on write business outside that Associate's SitCode0's jurisdiction.

- Keith is an Associate with Cliff / Rob / David / Gerald as is official DSC / RSC / SSC / TD. David's state operation is the state of GA. Keith makes a side deal with Jim, in AL, to write business in AL where Keith is licensed to sell. Keith creates a SitCodeA for himself with Jim / Ken / Pat / Gerald as uplines.

Associate Commissions vs. Production Credit

All Contract Premiums that an Associate sold/maintains is accounted for, by the company, in two distinct manners:

- Commissions: This accounting allows for the correct issuance of commission checks to the Associates and up-lines for the policies that they have sold or are maintaining. These premiums relate to the writing Associate's SitCode chain.
- Production Credit: This accounting allows for the correct scoring of contests for the Associates for the policies that they have sold or are maintaining. These premiums relate to the writing Associate's geographical hierarchy.

Associate (n..n) Associate

Associate Broker

Associate Recruiter

Cases Supporting Contract Design Decisions

Contract (1..n, 1..n) ContractPremium

One Contract has multiple benefits and each benefit has multiple Premiums.

- Year 1: John sells Keith, a bachelor, a company policy with no other options.
- Year 2: John moves to a new area, Luis takes over John's area and Keith gets married. Luis sells Keith a company policy for Keith's new wife on his existing policy.
- Year 3: Luis moves to a new area, Adi takes over Luis' area and Keith has twins. Adi sells Keith a company policy for Keith's new children on his existing policy.

Cases Supporting Customer Design Decisions

Customer (n..n) Customer

Daddy Warbucks gets a health insurance policy for his son and family. He sets up his trust fund to fund the policy. He also gets the dread disease rider, but for his son only.

Customer (n..n) Contract

Daddy Warbucks gets a health insurance policy for his son and family, so he is the policy owner. He sets up his trust fund to fund the policy, so the trust is the policy payer.

Daddy also has a life policy for himself.

Customer (n..n) ContractBenefit

Daddy Warbucks' health insurance policy for his son and family, so the son and family are the beneficiaries of the policy.

His son also carries the company's accident insurance for him and his family.

Customer (n..n) Account

Dana's Dry Cleaning has many employees, including Keith.

Keith can work at Dana's Dry Cleaning and moonlight at Scott's Garage.

Customer (n..n) Associate

Walt, a long-standing sales associate of the company, passes away bequeathing his commissions to his wife and son.

Dave, another long-standing company sales associate and friend of Walt's family, also passes away bequeathing his commissions to Walt's son.