Requirements For Organization / User Setup

What Is Required?

1. CDGI has many companies (different user groups) dealing with wide category range – Bus / Train / Taxi / Private Bus / Private Cars (CDGI will confirm on the number of categories)
2. Under each of these category, there will be Company Names (or Organizations) attached to it
3. There will be different user groups from different organizations using the system to process Claims and there must be a restriction on what they can see (means those in Taxi Category cannot see anything from the Bus or Train Category unless the System Admin allows) (this is done when the user is first created)

Changes Required

1. Under Organization Country – Change the Label to Organization.
2. Change Organization Country Details to Organization Details.
3. Change Organization Country Name to Organization Name.
4. Include a new dropdown field next to Organization Name – Organization Type. These will house the Categories confirmed by CDGI.

*[India ebix feedback]: Do you want to assign one organization to only one organization type?*

*[Singapore ebix feedback]: Yes.*

1. Change Insurer Type to Organization Type.

*[India ebix feedback]: point 4 and 5 contradicting.*

*[Singapore ebix feedback]: Under the current Organization Screen, there is this Insurer Type Label which I think is wrong.*

1. Under User Admin > User > Add New. Include a new field that displays all the Categories as checkboxes.

*[India ebix feedback]: Please provide new field name and all categories names.*

*[Singapore ebix feedback]: Label: Organization Category. Category Names: Bus / Train / Taxi / Private Cars / Private Bus / Rental Vehicles (note that these categories may be changed).*

1. When the checkbox is checked – this means that this user can create Claims for that particular Organization.
2. Under New Claims Registration, move the Organization Field to below of IP No and make it mandatory.
3. Under the Organization Dropdown it will display the list of Organization Names that the user is allowed (e.g. if User is allowed to work with Taxi and Train, those organizations tagged with Taxi and Train will be displayed).
4. System will refresh the layout according to the Organization that is chosen. If it is a Taxi Organization that is chosen, the rest of the tabs will show the layout belonging to the Taxi Organization.