## Vision and Scope Document

### Business Requirements

#### Background, Business Opportunity, and Customer Need

The staff that handles the whole process of accommodating the Insurance Applicants is having a hard time at the registration of applicants, tracking payments and monitoring the expiry of insurance because every work is done manually. Response emails are being received and checked at the yahoo mail, getting information from the applicants are usually by phone calls and every detail is written in a piece of paper. This manual way of getting information can have occurrences that the written information by the Registration Officer is incorrect. As what they said in our meeting, most applicants are accommodated through phone calls and everything will be taken care of by the Registration Officer. The Registration Officer encodes all the personal information, insurance requirements and he sorts the files by insurance and he emails all the applicants’ documents in all Insurance Companies that offers the type of insurance that the applicants are applying for. Forestall Insurance Agency Corp. is a newly established company. That's why they immediately agreed that we can make a system for them. The system will be very helpful for their company; they need a way that is paperless and not time consuming, we proposed that the system can help them with the registration of the applicants, the Registration Officer will click register and then choose the type of insurance and he can now input the applicant’s details in the system, the system can also help them monitor and track applicants and their insurances.

#### . Business Objectives and Success Criteria

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| --- | --- |
| BO1: | To make a system that can help them store information in an organized and systematic way. |
| BO:2 | To make the employees work productively. |
| BO:3 | To track Insurance Payments |
| BO:4 | To monitor Insurance expiry |
| BO:5 | The system provides a search engine in the system. Users can easily search specific insurance policy or applicant |
| BO:6 | No more paper works; Users will not use paper anymore. |
| SC-1 | Making a user-friendly, accurate and reliable system in giving information to the users to avoid mistakes and conflicts. |
| SC-2 | In a month, The employees will be familiar and more effective with their jobs. |

#### Business Risks

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| --- | --- |
| RI:1 | If there’s no internet connection, employees can’t access the system. |
| RI:2 | Brownout: The system is down. |
| RI:3 | If the computer malfunctions. |
| RI:4 | If there are viruses in the computer. |

### Vision of the Solution

#### Vision Statement

The staff of the Insurance Company needed a system that will help them with their major business problems: registration of new applicants, tracking and monitoring their applicants and their insurance. The *Forestall Insurance Agency Corp. AMRTS* is a web-based system that will provide automated registration of new applicants in the system; it can track payments and every transaction done by the applicant with the Insurance Company, monitoring all updates and the expiry of insurance.

The system will minimize mistakes and help the user to encode everything in an automated way. This system will be more accurate and reliable when it comes to storing information; it will store all the data in the system and can be helpful in many forms. The company's current way of accepting applications is by asking their personal information, type of insurance they are applying for and the worker will just write it all in a piece of paper. Having this manual application, there are tendencies that the person's handwriting/penmanship is unreadable and it can cause problems or conflicts between the company and the clients if the information is incorrect. These things will be bad for the business so the system will be the solution for their business problems. Our system will provide these following solutions: registration of applicants, track their insurance payments and transactions, monitor the expiry of insurance and provide a search engine for easy searching.

#### Major Features

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| --- | --- |
| FE – 1: | Fast and easy Registration of applicants |
| FE – 2: | Search engine for easy access of records |
| FE – 3: | Validity of the insurance policy can be seen easily |
| FE – 4: | Easy approving and denying of Applications as long as there’s an internet connection. |
| FE – 5: | Organize applicant’s information |
| FE – 6: | Easy tracking of Insurance payments |

#### Assumptions and Dependencies

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| --- | --- |
| AS – 1: | Applicants may apply but they may be denied due to lack of requirements. |
|  |  |
| DE – 3: | The company vicinity must have an internet connection to access the system. |

### 4. Business Context

#### 4.1 Stakeholder Profiles

| Stakeholder | Major Value | Attitudes | Major Interests | Constraints |
| --- | --- | --- | --- | --- |
| 1. Registration Officer | Registers new applied applicants to the system | Have a good communication skill | Availability of applicants | Should be able to use the system |
| 1. Verification Officer | Verify records of the approved applicants | Have patience and a good character | Availability of updated records | Should be able to use the system |
| 1. Monitoring Officer | Monitors records of the approved applicants | Have patience and a good character | Availability of updated records | Should be able to use the system |
| 1. Chief Executive Officer | Approves applicants that was being recorded in the system | Have a wise decision and a good moral character | Availability of newly applied applicants | N/A |
| 1. Insurance Company | Gives policy for the applicants | Have a knowledge and a wise decision | Availability of applicants |  |
| 1. Applicants | Applies insurances | Have a good manners | Availability of choices of insurances | N/A |