

# **Motor Centralized Workflow**

## **– HNBAGI**

### **System updates**

System Modification Requirements Specification document

Date: 22-05-2016

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## 1. Revision History

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Date	Version	Description	Author
27/08/2015	1.0	Motor Centralized Workflow	Tharindu Athapattu - IT
22/05/2015	1.1	Motor Centralized Workflow & Quotation System	Tharindu Athapattu - IT

## 3.1. New Developments – Centralize Motor Workflow

### 3.1.1 New Reports

- Monthly job count report
- Certificate issue report
- Cover note issue report
- MR Approval History report with following columns

Date	Branch	Quote No.	Requested By	Recommended By	Approved By

### 3.1.2 Dashboards

- Display previous day balanced job counts in dashboards
- New Dashboards

Scrutinize		Process		Validate	
Complete	By Hand	Complete	By Hand	Complete	By Hand
JOB#	20	JOB#	20	JOB#	20
Time	90 min	Time	90 min	Time	90 min
4.5	3.9	4.5	3.9	4.5	3.9

Complete		By Hand	
JOB#	20	JOB#	10
Time	90 min	Time	39 min
4.5		3.9	

With-waiter		By Hand	
JOB#	20	JOB#	10
Time	90 min	Time	39 min
4.5		3.9	

Scrutinize		Process		Validate	
Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand
JOB#	20	JOB#	20	JOB#	20
Time	90 min	Time	90 min	Time	90 min
4.5	3.9	4.5	3.9	4.5	3.9
Total		Total		Total	
20		20		20	
5.5		5.5		5.5	

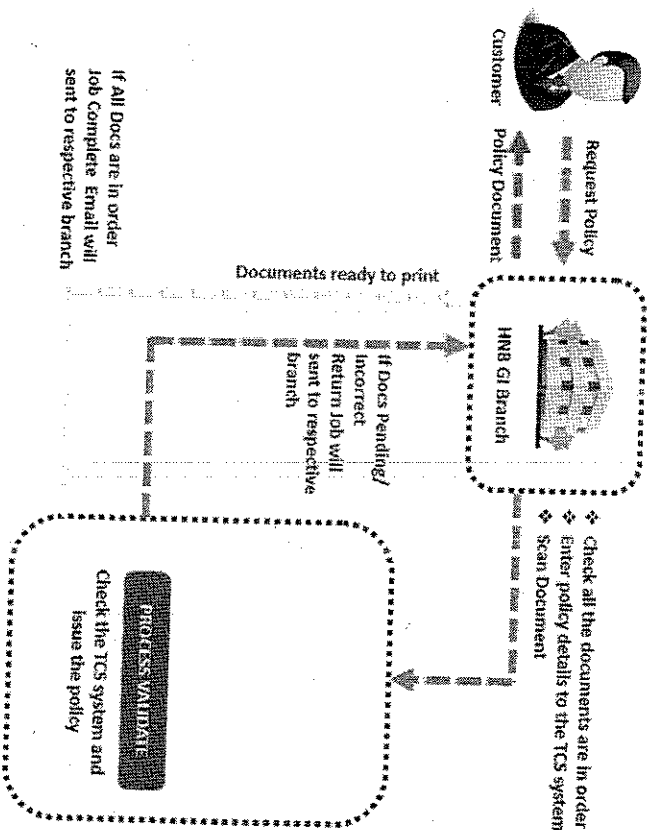
Scrutinize		Process		Validate	
Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand
JOB#	20	JOB#	20	JOB#	20
Time	90 min	Time	90 min	Time	90 min
4.5	3.9	4.5	3.9	4.5	3.9
Total		Total		Total	
20		20		20	
5.5		5.5		5.5	

Scrutinize		Process		Validate	
Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand
JOB#	20	JOB#	20	JOB#	20
Time	90 min	Time	90 min	Time	90 min
4.5	3.9	4.5	3.9	4.5	3.9
Total		Total		Total	
20		20		20	
6		6		6	

Scrutinize		Process		Validate	
Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand	Complete By Hand
JOB#	20	JOB#	20	JOB#	20
Time	90 min	Time	90 min	Time	90 min
4.5	3.9	4.5	3.9	4.5	3.9
Total		Total		Total	
20		20		20	
6.2		6.2		6.2	

### 3.1.3 New process flow for New Businesses in Centralized workflow

- New process flow should available to requested branches to add new businesses to TCS and scan the documents to the centralized workflow. Then head office Process Validators will validate the data and issue the policy.



#### BRANCH :-

New Screen for upload systemized new business

Systemized New Business Upload

Quotation Number

TCS Quote No

SYSTEMIZED NEW JOB NUMBER

Remarks

Search

Search

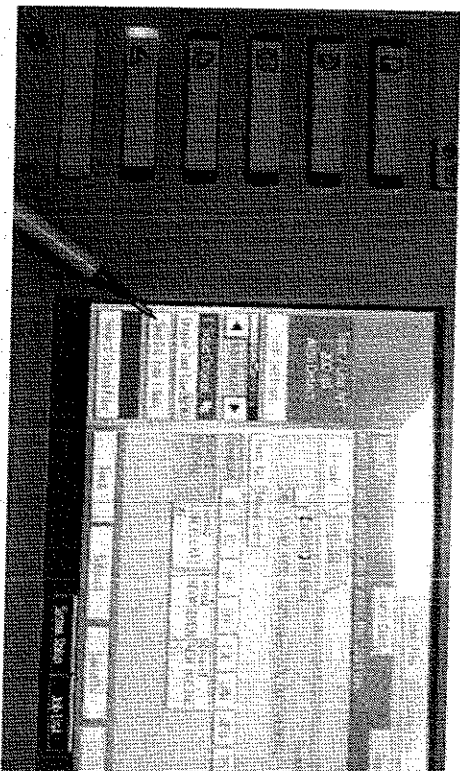
Add New

Save

Cancel

**BRANCH :-**

New Screen folder in Scanner for upload systemized new business



- Document scan under the new JOB number and select the new folder "systemized new business"

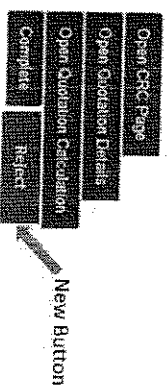
**HEAD OFFICE:-**

New "reject" facility for Validators.

Process Validation Commands

Remarks

ICS Policy No



- If Docs Pending/ Incorrect Reject JOB will return to respective branch

**HEAD OFFICE:**

### Validators screen in QuikInfo

add "systemized new business" to the below mention dropdown.

Updated Proposal Details		
<b>Queued Proposals</b>	All	
	All	
	New	
	Renewed	
	Expired/revoked	
	Federated network defaults	
	Cancellation	
	All Withheld Cancellations	
	12/15/2013 17:37	
	1714-03-1002	
	1714-03-1788	
	1714-03-2001	
	1714-03-2001-46	

Updated Proposal Details		
	12/15/2013 17:37	
	1714-03-1002	
	1714-03-1788	
	1714-03-2001	
	1714-03-2001-46	

## 3.2 New Developments – Quotation System

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### 3.2.1 Pro-rata quotation calculation

- Display the requested branch in MR Rate approve screen

### 3.2.2 Page to view MR approval history

- Develop new page to display MR approval history



## 4.1 System Modifications – Centralize Motor Workflow

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### 4.1.1 Display Document of New Business in Renewal

- Documents related to new business job entry level should display in the workflow at Renewal level.

### 4.1.2 Modify process Endorsement process

- Add new field as "Is Certificate Conversion" in endorsement form. Then user who create job can tick this if endorsement is just for certificate conversion.
- These kind of jobs should skip the Processing part of the workflow.

### 4.1.3 Blacklisted Policies

- Add new screen to enter vehicle number and policy numbers of blacklisted policies.
- Then scrutinize user should see that particular policy is blacklisted when he/she validate the vehicle number.

## 4.2 System Modifications – Quotation System

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### 4.2.1 Display branch in MR approve screen

- Display the requested branch in MR Rate approve screen

### 4.2.2 Don't update user name if quotation viewed

- Don't update user name of quotation when it's viewed.
- Update separate log table for users who viewed the quotation

### 4.2.3 Update the stamp duty of quotation calculation

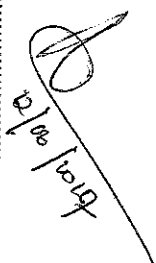
### 4.2.4 Add new wordings for rent vehicles in quotation sheet

### 4.2.5 Update rate chart for cranes

## 5. Approval



Recommended  
Ruchira Arivarathne  
Assistant Manager – Motor



Recommended  
Hazana Caffoor  
Senior Manager – Motor



Approved  
Sithumina Jayasundara  
CTO - HNB GI