



# SOFTWARE REQUIREMENT SPECIFICATION

|              |   |      |            |
|--------------|---|------|------------|
| PROJECT NAME | Micro Workflow System   | DATE | 10/04/2018 |
| TITLE        | HNBA Micro Workflow Development Apr-2018  |      |            |
| VER. NO.     | 1.1   |      |            |
| PREPARED BY  | Tharindu Athapattu  |      |            |
| SUMMARY      | This SRS outlines the requirement of HNBA Life Operations - MRP unit on developments requested to develop Micro Workflow system |      |            |
|              |   |      |            |
|              |   |      |            |

### Revision of History

| Version # | Release Date | Sections Changed | Change Description |
|-----------|--------------|------------------|--------------------|
| 1.0       | 15/03/2018   | All Sections     | Initial Version    |
| 1.1       | 10/04/2018   | 5.2.2            | Modified section   |
|           |              |                  |                    |
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# Software Requirements Specification

## 1. Introduction

This SRS is prepared to identify the business requirement and provide a view of the proposed solution to develop Workflow system for Micro insurance.

## 2. Definitions, Acronyms and Abbreviations

None

## 3. References

None

## 4. Business Requirement

This will be developed similar to existing MRP workflow and any modifications, exclusions or additions to current MRP workflow will be listed in section-5 of this SRS.

- MRP Unit has given following items as requirement.
  - Processes which doesn't need any change from MRP workflow
    - Pending master data management screen
    - Manage Box numbers and Add proposals
    - Job transfer screen
  - Processes need changes from MRP workflow
    - Job Assign screen
    - Main workflow screen
    - Benchmark reports
    - Pending and other system generated e-mails
  - Process which can be excluded
    - None
  - Process newly added to MCR
    - None
  - Common processes which does not need any changes
    - Bank e-mails
    - Banks
    - HNBA Branches
    - MRP Brokers
    - MRP Business parties
    - Medical Labs
    - Signing persons

## 5. Solution

### 5.1. Job Assign screen

#### 5.1.1 Need to generate job numbers in following format

**MCR/YEAR/Sequence no**

**Ex- MCR/2018/0001**

### 5.2. Main workflow screen

#### 5.2.1 Following fields should remove from main workflow screen.

- Courier Service
- Skip To Certificate Issued
- Re Insurer
- RI Ref No
- HNBA Ref No
- Loan Amount 2, 3
- Interest Rate 2, 3
- Term 2, 3
- TPPD market limit

#### 5.2.2 Following field should add to main workflow screen

- Beneficiary cover (Check box)
- New fields should display to enter Name, NIC and Address if user click on Beneficiary cover
- Separate cover note should generate for jobs with Beneficiary cover

## Cover note document format for Non beneficiary jobs

<<Date>>

The Manager  
<<Bank>> <<Branch>>

Dear Sir / Madam,

### **PROPOSAL FOR MICRO INSURANCE**

**PROPOSAL NUMBER :**

**LIFE ASSURED 1 :**

**LIFE ASSURED 2 :**

**SUM ASSURED :**

**REPAYMENT PERIOD :**

With reference to the above Proposal for Micro insurance, we wish to confirm the cover for the life of the above Assured with effect from -----

The following risks will be covered under the Policy;

- Natural or Accidental death.
- Total Permanent disability as a result of Bodily injury.

Kindly send us the single premium of ----- within 7 days of this letter in order for us to issue the Certificate of insurance.

If the Premium payment is not submitted within 07 days, the cover will be automatically ceased.

Thank you very much for approaching HNB Assurance Plc.

**HNB ASSURANCE PLC**

-----

Authorized Signatory

## Cover note document format for beneficiary jobs

<<Date>>

The Manager  
<<Bank>> <<Branch>>

Dear Sir / Madam,

### **PROPOSAL FOR MICRO INSURANCE**

**PROPOSAL NUMBER :**

**LIFE ASSURED 1 :**

**LIFE ASSURED 2 :**

**SUM ASSURED :**

**REPAYMENT PERIOD :**

**NAME OF BENEFICIARY :**

With reference to the above Proposal for Micro insurance, we wish to confirm the cover for the life of the above Assured with effect from -----

The following risks will be covered under the Policy;

- Natural or Accidental death.
- Total Permanent disability as a result of Bodily injury.
- Payment of Sum Assured to the Beneficiary in the event of death of the Assured.

Kindly send us the single premium of ----- within 7 days of this letter in order for us to issue the Certificate of insurance.

If the Premium payment is not submitted within 07 days, the cover will be automatically ceased. Thank you very much for approaching HNB Assurance Plc.

**HNB ASSURANCE PLC**

Authorized Signatory

### 5.2.3 Modified design of main workflow screen

Job Number:   
Policy:   
Medical/Non-Medical:   
Status:   
Sum Insured:   
Life Insured 1:   
NIC1:   
Age:   
Life assured covers: ☐ Natural or accidental death  
☐ Total permanent disability due to accident or sickness  
☐ Beneficiary Cover  
Name:   
NIC:   
Address:   
Bank Code:   
Branch:   
Medical:   
Premium:   
Loan Amount 1:   
Interest Rate 1:   
Fixed Interest Term:   
Addition to AWPLR:   
Full Term:   
Approved User:   
☐ PPI  
☐ Scanned  
☐ Pregnancy Clause  
Remarks:   
Proposal:   
Commencement Date:   
Life Insured 2:   
NIC2:   
Age:   
Life assured covers: ☐ Natural or accidental death  
☐ Total permanent disability due to accident or sickness  
☐ Beneficiary Cover  
Name:   
NIC:   
Address:   
Agent Code:   
Assurance Code:   
Broker Code:   
Currency:   
Term 1:   
Interest rate type:   
Assigned User:   
Other Policies:   
Alter Save Followup Pendencies Documents Manage Medical Payments Open Blackboard

### 5.3. Pendencies master data management screen

Front end of the pendencies master data management is same as MRP, But need separate pendencies.

### 5.4. Manage Box numbers and Add proposals

Need to manage box numbers for Micro. This should not conflict with MRP box numbers. Box number can be entered in any format.

### 5.5. Job transfer screen

Micro workflow needs job transfer facility which is same as MRP.

### 5.6. Benchmark reports

#### 5.6.1 Micro workflow user performance should be monitored using benchmark reports.

Micro need same reports as MRP in same format except

- Re Insurance Confirmation Report
- All Pending Cleared

#### 5.6.2 All the benchmark times as same as MRP

### 5.7 Pendencies and other system generated e-mails

All the e-mails generated from MRP workflow should generate from the Micro workflow too in same format. But all the texts mentioning MRP must change as MCR.



## 5.8 Common screens

Following screens and their particular data are common for both MRP and MCR.

- Bank e-mails
- Banks
- HNBA Branches
- MRP Brokers
- MRP Business parties
- Medical Labs
- Signing persons

## 6. Scope of Work

| Activity                               | Responsibility |
|--|----------------|
| Requirement analysis                   | IT/MRP         |
| SRS confirmation                       | MRP            |
| Software Development                   | IT             |
| User Acceptance Testing & confirmation | MRP            |
| Live deployment                        | IT             |

## 7. Assumptions

N/A

## 8. Constraints/Limitations

N/A

## 9. Deliverables

New workflow system for Micro business process of MRP department which connected and update data with Micro system.

## 10. Unresolved Issues

N/A

## 11. Acceptance

| # | Name & Designation                                    | Date | Signature |
|---|---|------|-----------|
| 1 | Venuri Ekanayake<br>Junior Executive - MRP Department |      |           |
| 2 | Anuradha Ranasinghe - Manager-MRP                     |      |           |
| 3 | Dinesh Udawatta - Chief Technical<br>Officer, HNBA    |      |           |