

User Documentation: Welcome to vehicle Insurance management System

This documentation offers guidance on utilizing the available features

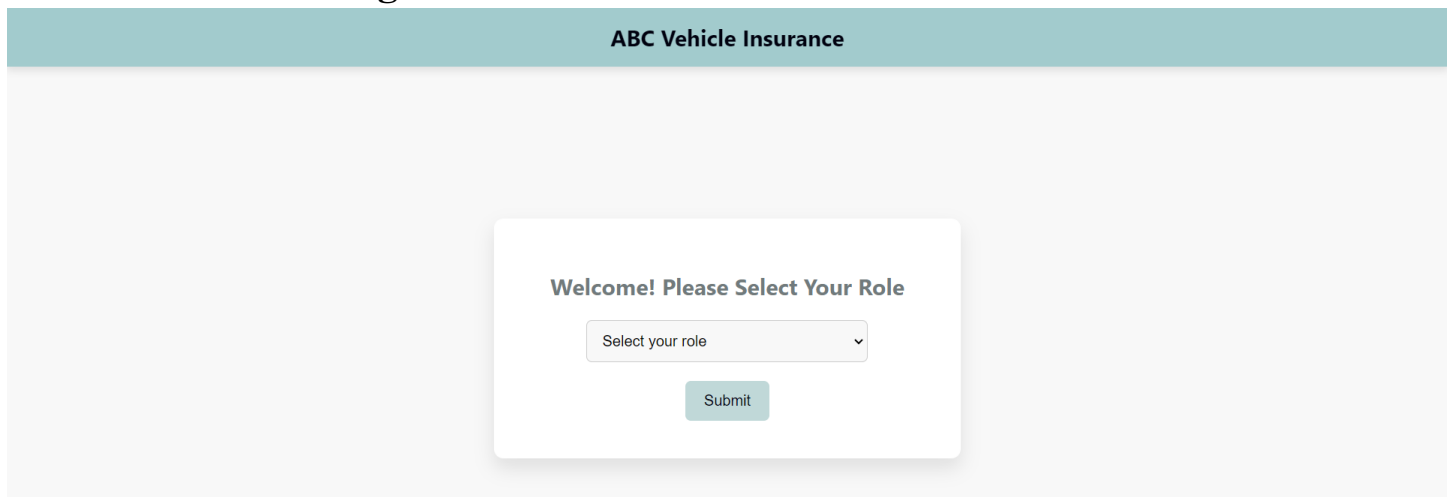
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1.Introduction

The Vehicle Insurance System is a dynamic web application designed to facilitate the management of vehicle insurance policies through a streamlined and user-friendly interface. The system is divided into two main roles: Admin and Underwriter, each with specific permissions and functionalities. This manual serves as a guide to navigate and utilize the system effectively, ensuring that all users can maximize the benefits of the application.

2.User Role Choosing



ABC Vehicle Insurance

Welcome! Please Select Your Role

Select your role ▼

Submit

Role choosing page

2.1.Admin (Super User)

The Admin role is responsible for managing underwriters, who are the primary users responsible for managing vehicle insurance policies. The Admin has full access to all functionalities related to underwriter management, including registration, updating passwords, and deletion.

2.2.Underwriter

The Underwriter role is focused on managing vehicle insurance policies. This includes registering new vehicles, renewing policies, updating policy details, and viewing policy information. Underwriters have specific access tailored to their responsibilities, ensuring that they can efficiently manage the policies under their control.

3.System Login

ABC Vehicle Insurance

Underwriter Login

User Name:

Password:

Login

ABC Vehicle Insurance

Underwriter Login

User Name:

Password:

Login

Steps to Login : Navigate to the Login Page: After choosing your role, you will be redirected to any of admin or underwriter login page then:

- Enter Your Credentials:
- User ID: Input your unique User ID provided by the Admin.
- Password: Input your password. Make sure to keep your password secure.
- Click the “Login” Button:
- After entering your credentials, click the “Login” button to access the system.

Login Outcomes

- Successful Login:

If your credentials are correct, you will be redirected to your respective dashboard:

Admin: You will see the Admin Dashboard with options to manage underwriters.

Admin Dashboard


RegistrationSearchUpdateDeleteView UnderwritersView VehiclesLogout


Total Underwriters

4


Total Vehicles

11





CarBlogsIndia



What You Can Do

As an administrator of the Vehicle Insurance Management System, you have access to a wide range of functionalities that allow you to efficiently manage and oversee all operations within the system. Here are the key tasks you can perform:

- **Underwriter Registration:** Add new underwriters to the system by providing their details. This ensures that only authorized personnel can manage vehicle insurance policies.
- **Search Underwriters:** Quickly find underwriters by their ID. This feature allows you to easily retrieve and view the information of registered underwriters.
- **Update Underwriter Password:** Maintain security by updating passwords for underwriters. This helps in keeping the system secure and up to date.
- **Delete Underwriters:** Remove underwriters from the system if they are no longer associated with your organization. This keeps the database clean and relevant.
- **View All Underwriters:** View a complete list of all underwriters registered in the system. This gives you a quick overview of the team managing vehicle insurance policies.
- **View All Vehicles:** Access a comprehensive list of all vehicles insured under the system. This is essential for tracking and managing vehicle policies.
- **Logout:** Securely log out from the admin dashboard to ensure that the system remains protected when not in use.

With these functionalities, you have the tools needed to manage underwriters and vehicles efficiently, ensuring that the system runs smoothly and securely.

Developed by Group 27 | © 2024 Insurance Management System

For ILP training batch 27th June.

Admin Landing page

Underwriter: You will see the Underwriter Dashboard with options to manage vehicle policies.

The screenshot displays the 'Underwriter Dashboard' with a dark blue header bar containing the text 'Welcome to Insurance Policy Management'. On the left, there is a vertical 'Underwriter Menu' with buttons for 'Create Insurance', 'Renew Policy', 'Change Policy Type', 'View Policy', and 'Logout'. The main content area is titled 'Renew Policy' and features a 'Policy ID:' label above a text input field. Below the input field is a teal button labeled 'Renew Policy'.

Underwriter Landing Page

- Failed Login:

If your credentials are incorrect, you will receive an error message indicating that your User ID or Password is invalid. Please try again or contact the Admin if you continue to experience issues.

The screenshot shows the 'ABC Vehicle Insurance' login interface. At the top, a teal header bar displays 'ABC Vehicle Insurance'. Below it, a white login card contains a red error message 'Invalid Credentials!!'. The card is titled 'Underwriter Login' and includes fields for 'User Name:' (containing 'trial') and 'Password:' (containing dots). A 'Login' button is positioned at the bottom of the card.

Invalid Login

4.Admin Functionalities

4.1.Register Underwriter

Description: The Admin can register new underwriters in the system, providing them with access to manage vehicle insurance policies.

Steps to Register Underwriter

- Navigate to " Admin Dashboard ":
- From the Admin Dashboard, click on the "Registration" option.
- Fill in the Required Details:
- Name: Enter the full name of the underwriter.
- Date of Birth: Input the date of birth in the format YYYY-MM-DD.
- Joining Date: (auto captured)
- Password: Set a secure password for the underwriter.
- Click "Register": After filling in the details, click "Register" to add the new underwriter to the system.

Outcome

Successful Registration:

A message will confirm that the underwriter has been registered successfully.

Welcome to Insurance Policy Management

Admin Menu

Registration

Search

Update

Delete

View Underwriters

View Vehicles

Logout

Register New Underwriter

Creation Success with ID: 7

Underwriter Name:

Date of Birth:

dd - mm - yyyy

Joining Date:

20 - 08 - 2024

Password:

Register Underwriter

Failed Registration:

If any input fields are incorrect or missing, an error message will prompt you to correct the errors.

Welcome to Insurance Policy Management

Admin Menu

Registration

Search

Update

Delete

View Underwriters

View Vehicles

Logout

Register New Underwriter

Underwriter Name:
12345
Must contain only letters and spaces.

Date of Birth:
01 - 01 - 2024
Underwriter must be between 18 and 60 years old.

Joining Date:
20 - 08 - 2024

Password:
.....
Password must be 8 to 30 characters long and contain alphanumeric and atleast a special character.

Register Underwriter

4.2.Search Underwriter

Description : This feature allows the Admin to search for an underwriter by their unique ID.

Steps to Search Underwriter

- Go to "Search ": From the Admin Dashboard, select the "Search Underwriter" option.
- Enter the Underwriter ID: Input the ID of the underwriter you wish to search for.
- Click "Search": Click the "Search" button to retrieve the underwriter's details.

Outcome

Underwriter Found:

If the underwriter exists in the system, their details will be displayed, including their name, date of birth, joining date, and password.

Welcome to Insurance Policy Management

Admin Menu

Registration

Search

Update

Delete

View Underwriters

View Vehicles

Logout

Search Underwriter by ID

Underwriter ID:
2

Search Underwriter

Underwriter ID: 2

Name: avinash

Date of Birth: 2010-10-10

Joining Date: 2024-08-04

Password: Avinash123

Underwriter Not Found: If the underwriter does not exist, an error message will inform you that no such underwriter exists with the provided ID.

The screenshot shows a web application interface with a dark blue header bar containing the text "Welcome to Insurance Policy Management". On the left is a grey sidebar with the title "Admin Menu" and a list of links: "Registration", "Search", "Update", "Delete", "View Underwriters", "View Vehicles", and "Logout". The main content area has a light grey background and is titled "Search Underwriter by ID". It contains a form with a label "Underwriter ID:" followed by a text input field containing the number "1". Below the input field is a blue button labeled "Search Underwriter". Underneath the button is a white box with a red border containing the message "No underwriter found with the provided ID."

4.3.Update Underwriter Password

Description : This feature allows the Admin to update the password of an existing underwriter.

Steps to Update Password

- **Select "Update Underwriter Password":** From the Admin Dashboard, click on "Update"
- **Enter Underwriter ID and New Password:** Input the ID of the underwriter whose password needs to be updated. Enter the new password in the appropriate field.
- **Click "Update":** Click "Update" to save the new password.

Outcome

Successful Update:

A message will confirm that the underwriter's password has been updated successfully.

The screenshot shows the same web application interface as before, but the main content area is titled "Update Underwriter Password". The form has two input fields: "Underwriter ID:" with the value "2" and "New Password:" with a masked password "*****". Below these fields is a blue button labeled "Update Password". Underneath the button is a white box with a red border containing the message "Password updated successfully."

Failed Update:

If the ID does not exist, or there is another issue, an error message will prompt you to check the input and try again.

The screenshot shows the same web application interface, but the "New Password:" field now contains the same masked password "*****" as the "Underwriter ID:" field. Below the "Update Password" button is a white box with a red border containing the message "The new password is the same as the old password."

4.4.Delete Underwriter

Description: The Admin can delete an underwriter from the system if they are no longer needed.

Steps to Delete Underwriter

- Go to "Delete Underwriter": From the Admin Dashboard, select the "Delete Underwriter" option.
- Enter Underwriter ID: Input the ID of the underwriter you wish to delete.
- Click "Delete": Click the "Delete" button to remove the underwriter from the system.

Outcome

Successful Deletion:

A message will confirm that the underwriter has been deleted.

Welcome to Insurance Policy Management

Admin Menu

Registration

Search

Update

Delete

Delete Underwriter by ID

Underwriter ID:

6

Delete Underwriter

Successfully Deleted details for underwriter id: 6

Failed Deletion: If the underwriter ID does not exist, an error message will indicate that no such underwriter exists.

Welcome to Insurance Policy Management

Admin Menu

Registration

Search

Update

Delete

Delete Underwriter by ID

Underwriter ID:

100000

Delete Underwriter

No underwriter found with the provided ID.

4.5.View All Underwriters

Description: The Admin can view a list of all registered underwriters in the system.

Steps to View All Underwriters

Select "View All Underwriters": From the Admin Dashboard, click on "View Underwriters"

View the List: A list of all underwriters will be displayed, showing their ID, name, date of birth, joining date, and password.

Admin Menu

- Registration
- Search
- Update
- Delete
- View Underwriters
- View Vehicles
- Logout

Welcome to Insurance Policy Management

View All Underwriters

Total Underwriters: 3

ID	Name	Date of Birth	Joining Date	Password
2	avinash	2010-10-10	2024-08-04	Avinash123@
3	under	2000-12-12	2024-08-04	Avinash123@
7	trial data	2000-12-12	2024-08-20	Avinash123@

5.Underwriter Functionalities

5.1 Register Vehicle

Description: Underwriters can register a new vehicle in the system and associate it with an insurance policy.

Steps to Register Vehicle

- Navigate to "Manage Vehicle Insurance": From the Underwriter Dashboard, click on "Manage Vehicle Insurance."
- Select "Register Vehicle": Click on the "Register Vehicle" option.
- Fill in Vehicle Details:
 - Policy Number: Input the unique policy number.
 - Vehicle Number: Enter the vehicle’s registration number (max 10 characters).
 - Vehicle Type: Select the type of vehicle (e.g., Car, Bike, Truck).
 - Model Name: Input the model name of the vehicle.
 - Engine Number: Enter the vehicle’s engine number.
 - Chassis Number: Input the chassis number.
 - Mobile Number: Enter the policyholder's mobile number.
 - Policy Type: Select the policy type (e.g., Full Insurance, Third Party).
 - Policy Amount: Input the policy amount.
 - Start Date: auto captured
 - End Date: auto captured

- Underwriter ID: The system will automatically fill in your ID. Click "Register":
- Click the "Register" button to save the vehicle information.

Outcome

Successful Registration:

A success message will confirm that the vehicle has been registered in the system.

The screenshot shows a web interface for creating new vehicle insurance. On the left is a sidebar menu with options: 'Create Insurance', 'Renew Policy', 'Change Policy Type', 'View Policy', and 'Logout'. The main area is titled 'Create New Vehicle Insurance' and displays a green success message: 'Creation Success with ID: 32'. Below the message are input fields for: Vehicle Number (MH 01 Zz 0123), Vehicle Type (2-wheeler), Customer Name (Avinash Chhetri), Engine Number (10000), Chassis Number (111234), Phone Number (1234567890), Insurance Type (Full Insurance), and From Date (20-08-2024). A blue 'Create Insurance' button is at the bottom.

Failed Registration:

If any fields are incorrect or missing, an error message will prompt you to correct the input.

The screenshot shows the same 'Create New Vehicle Insurance' form, but with error messages. The Vehicle Number field shows 'Invalid format. Must be like 'AN 01 Z 0123''. The Phone Number field shows 'Must be exactly 10 digit number.' The other fields are filled with the same data as in the successful registration screenshot.

5.2.Renew Vehicle Policy

Description : Underwriters can renew an existing vehicle policy by updating the policy's end date.

Steps to Renew Policy

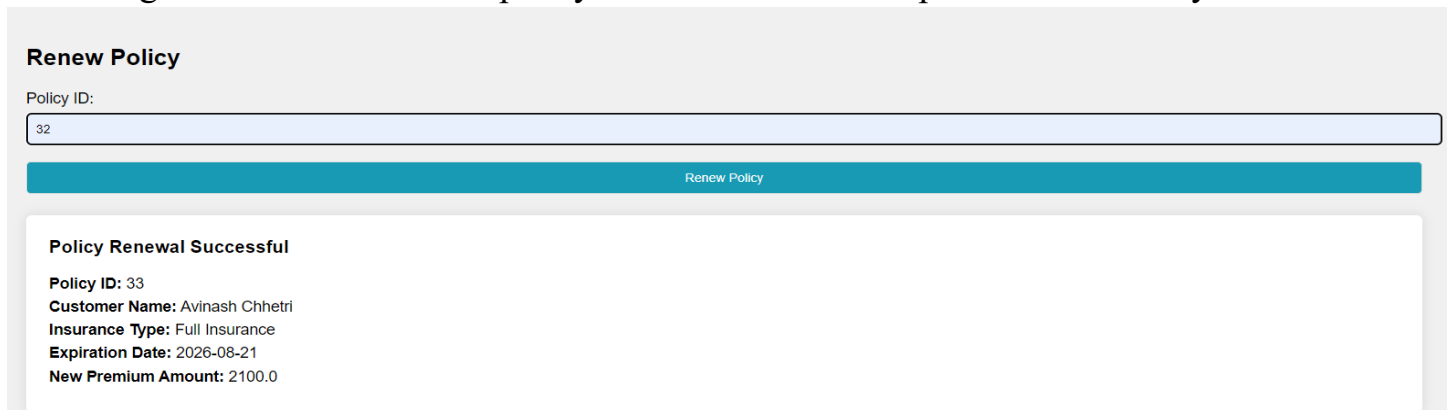
Select "Renew Policy": From the "Manage Vehicle Insurance" section, click on "Renew Policy."

- Enter Policy Number: Input the Policy Number for the policy you wish to renew.
- Click "Renew": Click "Renew" to update the policy's end date and premium amount.

Outcome

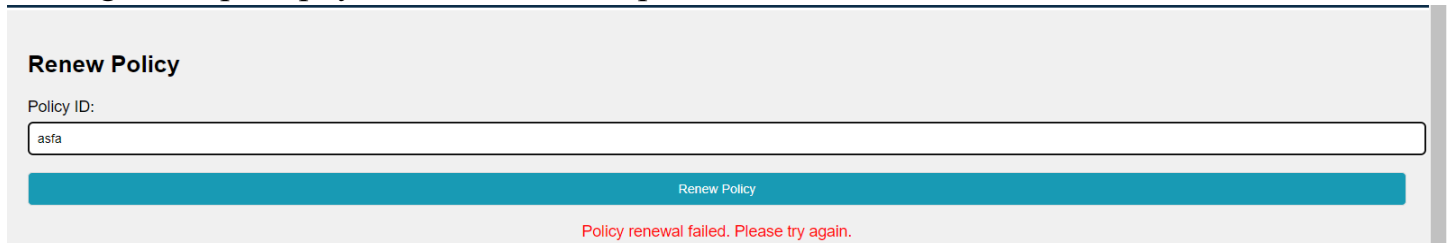
Successful Renewal:

A message will confirm that the policy's end date has been updated successfully.



The screenshot shows a web interface for renewing a policy. At the top, there's a header "Renew Policy". Below it, a "Policy ID:" label is followed by a text input field containing the number "32". A blue button labeled "Renew Policy" is positioned below the input field. The main content area is a white box with a light gray border, containing the text "Policy Renewal Successful". Below this, the following details are listed: "Policy ID: 33", "Customer Name: Avinash Chhetri", "Insurance Type: Full Insurance", "Expiration Date: 2026-08-21", and "New Premium Amount: 2100.0".

Failed Renewal: If the Policy Number is incorrect, or the renewal cannot be processed, an error message will prompt you to correct the input.



The screenshot shows a web interface for renewing a policy. At the top, there's a header "Renew Policy". Below it, a "Policy ID:" label is followed by a text input field containing the text "asfa". A blue button labeled "Renew Policy" is positioned below the input field. Below the button, a red error message is displayed: "Policy renewal failed. Please try again."

5.3 Update Policy

Description: Underwriters can update certain details of an existing policy, such as changing the policy type.

Steps to Update Policy

- Navigate to "Update Policy": From the "Manage Vehicle Insurance" section, click on "Update Policy."
- Enter Policy ID: Input the ID of the policy you wish to update.
- Update Policy Details:
 - If the policy type is Third Party, the system will restrict you from changing it to Full Insurance.
 - If the policy type is Full Insurance, you can change it to Third Party if needed.
- Modify any other necessary details as allowed by the system. Click "Update":
- Click the "Update" button to save the changes.

Outcome

Successful Update:

A success message will confirm that the policy has been updated.

Update Policy

Policy ID:

Update Policy

Policy Update Successful

Policy ID: 34

Customer Name: Avinash Chhetri

New Insurance Type: Full Insurance

Expiration Date: 2025-08-20

New Premium Amount: 5000.0

Failed Update:

If the policy cannot be updated due to restrictions or incorrect input, an error message will prompt you to correct the input.

Update Policy

Policy ID:

Update Policy

No policy found with the given ID for this underwriter.

5.4 View Policy

Description

Underwriters can view the details of a specific policy using the Vehicle Number or Policy ID.

Steps to View Policy

Select "View Policy":

From the "Manage Vehicle Insurance" section, click on "View Policy."

Enter Vehicle Number or Policy ID:

Input either the Vehicle Number or the Policy ID.

Click "View Policy":

Click the "View Policy" button to retrieve the policy details.

Outcome

Policy Found:

The system will display the policy details, including the vehicle information, policy type, amount, and dates.

View Policy

Policy ID:

34

View Policy

Policy Details

Policy No: 34

Vehicle No: MH 01 Z 0123

Vehicle Type: 2-wheeler

Customer Name: Avinash Chhetri

Engine No: 10000

Chassis No: 111234

Phone No: 1234567890

Insurance Type: Full Insurance

Premium Amount: 5000.00

From Date: 2024-08-20

To Date: 2025-08-20

Registered By(Underwriter ID): 2

Policy Not Found:

If the policy does not exist, an error message will inform you that no such policy exists.

View Policy

Policy ID:

View Policy

No data found for the given policy ID.

6.Logging Out

Steps to Logout

Click on the "Logout" Button:

The "Logout" button is located at the top right corner of the page.

Session Termination:

Clicking "Logout" will end your session, and you will be redirected to the login page.

Confirmation:

Ensure that you have successfully logged out, especially if you are using a shared or public computer.

Welcome! Please Select Your Role

Select your role

Submit

7.Troubleshooting

Common Issues and Solutions

7.1.Forgot Password

Solution: Contact the Admin to reset your password. Only the Admin can update user passwords.

7.2Error Messages During Input

Solution: Carefully read the on-screen error messages and correct the inputs as instructed.

7.3. Common issues include:

7.3.1.Incorrect date format.

7.3.2.Exceeding character limits (e.g., for Vehicle Number, phone number etc).

7.3.3.Mandatory fields left blank.

7.3.4.Underwriter not between age of 18-60.

7.3.5.Insecure password input.