COEPD Live Project - Waterfall Deliverables -Part 1

Document 1: Business Case Document Template

**Project Initiation:** The Agent on Boarding project was initiated to address the inefficiencies and inaccuracies of the current manual prospect data entry system. By creating a secure, user-friendly portal, the project aims to streamline the process, reduce errors, and provide remote access, ultimately enhancing the overall efficiency and satisfaction to Relationship managers and Agents.

**Current Problems:** The current system is manual, time-consuming, and prone to errors, leading to significant inefficiencies for operation team. Generating comprehensive and timely reports is challenging, and the lack of remote access further complicates the process. These issues result in frustration and decreased productivity for Relationship managers.

**Problem Solution:** Implementing Agency On Boarding, a secure, user-friendly entry portal, will address the current inefficiencies. The portal will:

* Automate Entry: Streamline the process, reducing the time RM’s spend on data entry.
* Enhance Accuracy: Minimize errors with automated checks and validations.
* Improve Reporting: Provide easy access to comprehensive and timely reports.
* Enable Remote Access: Allow RM’s to enter and manage from any location, increasing flexibility and convenience.

**Required Resources:** The successful implementation of the project will require resources including:

1. **Human Resources**

* Project Manager: Oversees the project.
* Business Analyst: Gathers and analyzes requirements.
* Developers: Build the portal.
* UI/UX Designers: Design user interfaces.
* Testers: Ensure functionality and reliability.
* IT Support: Handle deployment and support.
* Trainers: Provide user training.

2. **Technical Resources**

* Development Tools
* Design Tools
* Testing Tools
* Hosting Infrastructure: Servers, database systems.
* Security Tools: Data protection software.

3. **Financial Resources**

* Budget: For salaries, software licenses, hardware, and training

4. **Physical Resources**

* Workspace: Offices or remote setups.
* Hardware: Computers, servers, networking equipment.

5. **Documentation and Training Materials**

* User Manuals: Guides for portal use.
* Training Programs: Structured training sessions.

**Organizational Change:**

1. **Process Changes**
* Digital Entry: RM’S transition to using Agency on Boarding for data entry.
* Automated Reporting: Reports and data analysis are generated automatically.

2. **Training and Support**

* User Training: Comprehensive training for RM’s.
* Ongoing Support: Dedicated support team for user assistance.

3. **Roles and Responsibilities**

* New Roles: Potential creation of Agency on Boarding Administrators.
* Adjusted Roles: operations team and staff incorporate portal usage into daily tasks.

4. **Communication and Collaboration**

* Enhanced Communication: Improved channels between operations team and staff.
* Stakeholder Involvement: Increased involvement in planning and rollout.

 5. **Technology Integration**

* IT Infrastructure: Upgrading to support Agency on Boarding.
* Data Management: New protocols for data entry, storage, and security.

**ROI Timeframe:**

The expected ROI timeframe for Agency on Boarding is approximately 12-24 months, with tangible benefits and cost savings becoming evident within the first year and full ROI realized by the end of the second year.

Stakeholder Identification:

1. **Primary Stakeholders**
* Relationship Managers: Main users of the portal, responsible for entering valid information.
* IT Staff: Manage technical aspects, including deployment, integration, and support.
1. **Secondary Stakeholders**
* IT Team: Indirect beneficiaries who will experience more timely and accurate reporting.
1. **Tertiary Stakeholders**
* Head of Agency: Oversight and approval of the project's budget and alignment with onboarding standards.
* Vendors: Third-party providers involved in software development, security, and maintenance.
1. **Project Team**
* Project Manager: Leads the project, ensuring it stays on schedule and within budget.
* Business Analyst: Gathers requirements and ensures they meet stakeholders' needs.
* Developers: Design and build the Agency On Boarding portal.
* UI/UX Designers: Create an intuitive and user-friendly interface.
* Testers: Ensure the portal is functional and free of defects.
* Trainers: Develop and deliver training programs for end-users.

Document 2: **Business Analyst Approach Strategy**

1. **Project Initiation:**
* Understand the project objectives, scope, and constraints.
* Identify key stakeholders and establish communication channels.
* Conduct a preliminary assessment of business needs and requirements.
1. **Elicitation Techniques:**

  **Interviews**

* Conduct one-on-one interviews with RM’s, administrators, and IT staff to gather detailed requirements and insights.

**Surveys and Questionnaires**

* Distribute surveys to a larger group of stakeholders, including RM’s and head of Agency, to collect quantitative data on needs and expectations.

**Focus Groups**

* Organize focus group sessions with Agency team and administrators to discuss challenges and potential solutions collaboratively.

**Workshops**

Facilitate workshops with key stakeholders to brainstorm ideas, define requirements, and prioritize features.

**Observation**

Observe RM’s during data entry process to understand their workflows, pain points, and areas for improvement.

**Document Analysis**

Review existing documentation, such as policies, current systems, and workflow diagrams, to understand the current state and identify gaps.

**Prototyping**

Develop and present prototypes of the Agency On Boarding portal to stakeholders for feedback and refinement of requirements.

**Brainstorming**

Conduct brainstorming sessions with the project team and stakeholders to generate ideas and identify innovative solutions.

1. **Stakeholder Analysis using RACI/ILS:**
* Identify stakeholders and their roles using RACI (Responsible, Accountable, Consulted, Informed) or ILS (Influencer, Leader, Supporter) matrices.
* Determine each stakeholder's level of involvement and expectations regarding the project.
* Need to use this analysis to allocate responsibilities, manage expectations, and ensure effective communication.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Stakeholder | Responsible (R) | Accountable(A) | Consulted(C) | Informed (I) |
| Vendors | R |  |  | I |
| Project Manager | R | A |  |  |
| Business Analyst | R |  |  |  |
| UI/UX Designers | R |  |  |  |
| Testers | R |  |  |  |
| Trainers | R |  |  |  |
| IT Staff | R |  | C | I |

1. **Documents to Write:**
* Business Requirements Document (BRD)
* Functional Requirements Specification (FRS)
* Use Case Documents
* User Stories
* Test Plan
* User Acceptance Testing (UAT) Plan
* Training Materials
* Project Management Plan
1. **Document Sign-off Process:**
* Share draft documents with stakeholders for review and feedback.
* Incorporate feedback and revisions as necessary.
* Obtain formal sign-off from stakeholders indicating their acceptance of the documents. Maintain version control to track changes and updates.
1. **Client Approvals:**
* Present finalized documents to the client for approval.
* Provide explanations and clarifications as needed to ensure understanding.
* Obtain formal approval from the client through signed agreements or email confirmation.
1. **Communication Channels:**
* Establish regular meetings with stakeholders to discuss project progress, issues, and updates.
* Utilize email, project management software, and collaboration tools for asynchronous communication.
* Maintain an open-door policy for stakeholders to raise concerns or provide feedback.
1. **Change Request Handling:**
* Establish a formal change management process to capture, assess, and prioritize change requests.
* Evaluate the impact of proposed changes on scope, timeline, and budget.
* Obtain approval from the Change Control Board before implementing changes.
1. **Progress Reporting to Stakeholders:**
* Provide regular updates on project milestones, deliverables, and risks.
* Use status reports, dashboards, and presentations to communicate progress effectively.
* Highlight achievements, challenges, and upcoming tasks to keep stakeholders informed.
1. **UAT - Client Project Acceptance:**
* Coordinate User Acceptance Testing (UAT) with the client to validate that the software meets requirements.
* Provide clear instructions and test cases for the client to execute during UAT.
* Obtain sign-off on the UAT - Client Project Acceptance Form once the client confirms satisfaction with the software functionality.

**Document 3- Functional Specifications**

|  |  |
| --- | --- |
| Project Name | Agent onboarding Software Application |
| Customer Name | Universal Sompo |
| Project Version | 1.0 |
| Project Sponsor | Universal Sompo |
| Project Manager | Himani |
| Project Initiation Date | 01/06/2024 |

**Functional Requirement Specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| Req ID | Req Name | Req Description | Priority |
| FR0001 | User Authentication and Authorization | The system shall provide secure login functionality for Front sales team, and Agents. | 10 |
| FR0002 | Role-Based Access Control | The system shall allow role-based access control, restricting functionalities based on user roles. | 9 |
| FR0003 | Error Handling | The system shall provide error messages and prompts for invalid data entries | 9 |
| FR0004 | Data Encryption | The system shall encrypt sensitive data to ensure confidentiality. | 10 |
| FR0005 | Audit Trail | The system shall maintain an audit trail of all changes made. | 9 |
| FR0006 | User-Friendly Interface | The system shall provide a user- friendly interface for entering, viewing, and managing data | 10 |
| FR0007 | Multi-Device Accessibility | The system shall be accessible via multiple devices, including desktops, tablets, and smartphones. | 8 |
| FR0008 | Notifications | The system shall send notifications to agents and sales team for pending tasks or deadlines. | 7 |
| FR0009 | Alerts | The system shall alert users of any discrepancies or errors | 8 |

|  |  |  |  |
| --- | --- | --- | --- |
| FR00010 | AIS Integration | The system shall integrate with the existing agent information system (AIS) for seamless data exchange | 9 |
| FR00011 | API Support | The system shall support API integration for future scalability. | 9 |
| FR00012 | Help Section | The system shall include a help section with user guides and FAQs. | 8 |
| FR00013 | Technical Support | The system shall provide access to technical support for troubleshooting. | 8 |
| FR00014 | Compliance | The system shall comply with relevant data protection and privacy regulations. | 10 |
| FR00015 | Compliance Reporting | The system shall generate compliance reports for regulatory bodies. | 9 |
| FR00016 | Training Material Access | The system shall provide access to training materials for users. | 7 |
| FR00017 | User Feedback | The system shall allow users to provide feedback on the portal's functionality. | 8 |
| FR00018 | Auto Logout | The system shall automatically log out users if the portal is open for a long time and is not active. | 10 |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Req ID | Req Name | Req Description | Design | D1 | T1 | D2 | T2 | UAT | Priority |
| FR0001 | User Authentication and Authorization | The system shall provide secure login functionality for Front sales team, administrators, and Agents. | Yes | Completed | Completed | Yes | Yes | Pending | 10 |
| FR0002 | Role-Based Access Control | The system shall allow role-based access control, restricting functionalities based on user roles. | Yes | Completed | Completed | Yes | Yes | Pending | 9 |
| FR0003 | Error Handling | The system shall provide error message and prompts for invalid data entries. | Yes | Pending | Pending | Yes | Pending | Pending | 9 |
| FR0004 | Data Encryption | The system shall encrypt sensitive data to ensure confidentiality. | Yes | Completed | Completed | Yes | Yes | Pending | 10 |
| FR0005 | Audit Trail | The system shall maintain an audit trail of all changes made. | Yes | Completed | Completed | Yes | Yes | Pending | 9 |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| FR0006 | User-Friendly Interface | The system shall provide a user- friendly interface for entering, viewing, and managing data | Yes | Completed | Completed | Yes | Yes | Pending | 10 |
| FR0007 | Multi-Device Accessibility | The system shall be accessible via multiple devices, including desktops, tablets, and smartphones. | Yes | Completed | Pending | Yes | Pending | Pending | 8 |
| FR0008 | Notifications | The system shall send notifications to agents and sales team for pending tasks or deadlines. | Yes | Pending | Pending | Yes | Pending | Pending | 7 |
| FR0009 | Alerts | The system shall alert users of any discrepancies or errors | Yes | Pending | Pending | Yes | Pending | Pending | 7 |
| FR00010 | AIS Integration | The system shall integrate with the existing agent information system (AIS) for seamless data exchange | Yes | Completed | Pending | Yes | Pending | Pending | 9 |
| FR00011 | API Support | The system shall support API integration for future scalability. | Yes | Completed | Completed | Yes | Yes | Pending | 10 |
| FR00012 | Help Section | The system shall include a help section with user guides and FAQs. | Yes | Pending | Pending | Yes | Pending | Pending | 7 |
| FR00013 | Technical Support | The system shall provide access to technical support for troubleshooting. | Yes | Completed | Pending | Yes | Pending | Pending | 8 |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| FR00014 | Compliance | The system shall comply with relevant data protection and privacy regulations. | Yes | Completed | Completed | Yes | Yes | Pending | 9 |
| FR00015 | Compliance Reporting | The system shall generate compliance reports for regulatory bodies. | Yes | Completed | Pending | Yes | Pending | Pending | 9 |
| FR00016 | Training Material Access | The system shall provide access to training materials for users. | Yes | Pending | Pending | Yes | Pending | Pending | 7 |
| FR00017 | User Feedback | The system shall allow users to provide feedback on the portal's functionality. | Yes | Completed | Pending | Yes | Pending | Pending | 8 |
| FR00018 | Auto Logout | The system shall automatically log out users if the portal is open for a long time and is not active. | Yes | Completed | Completed | Yes | Yes | Pending | 10 |

**Document 5- BRD Template**

Agency On Boarding -

 AOB 1

 Version 1.0

Himani

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1. **Document Revisions**

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| --- | --- | --- | --- | --- | --- |
| Revision Number | Date | Author | Description of Changes | Reviewer | Approval Date |
| 0.1 | 14/06/24 | Himani | Initial draft of the project documentation | XYZ | 14/06/24 |
| 0.2 | 20/06/24 | Himani | Added project objectives and success criteria | XYZ | 21/06/24 |
| 0.3 | 25/06/24 | Himani | Included stakeholder analysis and elicitation techniques | XYZ | 26/06/24 |
| 0.4 | 30/06/24 | Himani | Completed functional requirements and requirement traceability matrix | XYZ | 01/06/24 |
| 0.5 | 05/07/24 | Himani | Updated priority and status in requirement traceability matrix | XYZ | 06/06/24 |
| 0.6 | 15/07/24 | Himani | Added Detailed Business Requirements | XYZ | 16/06/24 |
| 0.7 | 20/07/24 | Himani | Incorporated Appendices and finalized document | XYZ | 21/06/24 |
| 0.8 | 25/07/24 | Himani | Final review and formatting adjustments | XYZ | 26/06/24 |

1. **Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Signature | Date |
| Project Sponsor | Bhaskar Sharma | Signature | 15/06/24 |
| Business Owner | Dinesh Bhat | Signature | 15/06/24 |
| Project Manager | HimaniS | Signature | 15/06/24 |
| Business Analyst | Venkatesh | Signature | 16/06/24 |
| Technical Lead | Periswamy | Signature | 16/06/24 |
| Quality Assurance Lead | Priya J | Signature | 17/06/24 |
| Stakeholder Representative | Adithya | Signature | 18/06/24 |
| IT Department Head | Golaka | Signature | 18/06/24 |

1. **RASCI Chart for This Document**

Codes Used in RASCI Chart:

●R: Responsible

●A: Accountable

●C: Consulted

●I: Informed

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Stakeholder | Responsible (R) | Accountable(A) | Consulted(C) | Informed (I) |
| IT Staff | R |  | C | I |
| Vendors | R |  |  | I |
| Project Manager | R | A |  |  |
| Business Analyst | R |  |  |  |
| UI/UX Designers | R |  |  |  |
| Testers | R |  | C |  |
| Trainers | R |  |  |  |

**RASCI Chart**

* Project Manager is Accountable and has ultimate authority (Authorize) for any changes to the document.

● IT staff, Vendors Project Manager, Business Analyst UI/UX Designers, Testers, Trainers are Responsible for their respective roles.

● Project Manager is Responsible for Authorizing the document and informs all stakeholders.

● Project Manager is Accountable for the document.

● IT Staff and Tester are consulted during the document process.

* 1. **Business Goals**

The primary goals of AOB are to streamline the Agent Onboarding entry process for agents, ensuring efficiency and accuracy. By providing robust reporting tools and ensuring regulatory compliance, the portal enhances data integrity and security. AOB aims to improve user accessibility across devices and integrate seamlessly with existing systems. Additionally, the portal is designed to be scalable for future growth, ultimately enhancing user satisfaction through reliable performance and responsive support.

* 1. **Business Objectives**

**Streamline Agent on boarding**: Halve the time Rm’s & operation team spend on inputting and managing Manual Entry.

**Enhance Data Accuracy:** Reduce data entry errors by 75% through automated validation. **Facilitate Reporting:** Enable quick generation of detailed performance reports.

**Ensure Compliance:** Maintain educational and data protection regulation compliance.

**Increase Accessibility:** Achieve 90% user satisfaction for multi-device functionality.

**Integrate Systems:** Seamlessly connect with the RM’s.

**Improve Satisfaction:** Reach at least 85% user satisfaction with intuitive and efficient design. **Support Scalability:** Handle double the user load and data volume over five years without performance issues.

* 1. **Business Rules**

**Role-Based Access Control:** Users can access only the functionalities and data relevant to their roles (e.g., RM’s & Agents).

**Data Validation:** All data entries must pass automated validation checks to ensure they are within acceptable ranges before being saved.

**Automatic Logout:** Users will be automatically logged out after a specified period of inactivity to maintain security.

* 1. **Background**

In many organizations, the process of entering, managing, and reporting prospect data is often time- consuming and prone to errors due to manual handling and disparate systems. RM’s and Operation’s team spend significant amounts of time on administrative tasks, detracting from their primary focus on Revenue generation. Additionally, maintaining data accuracy and data protection standards pose ongoing challenges. To address these issues, the Agency On Boarding project aims to develop a comprehensive and user-friendly portal that streamlines the data entry process, ensures data integrity, and enhances overall efficiency for RM’s and administrators. This project will integrate seamlessly with existing systems and support future scalability, ultimately improving user satisfaction and operational effectiveness within organization.

* 1. **Project Objective**

**Build a Responsive UI:** Develop a responsive and user-friendly interface that works seamlessly across desktops, tablets, and smartphones.

**Implement Secure Authentication:** Integrate secure user authentication and role-based access control to protect user data and ensure proper authorization.

**Ensure Robust Data Validation:** Create and incorporate automated data validation processes to ensure the accuracy and integrity of prospect data entry.

**Develop Comprehensive Reporting Tools:** Implement tools for generating customizable reports on performance.

**Facilitate Integration:** Achieve seamless integration with the existing Information System

to enable smooth data exchange and reduce redundancy.

**Optimize Performance and Scalability:** Design the system to handle increased data volumes and user loads without compromising performance, ensuring scalability for future growth.

**Implement Automated Logout:** Develop functionality to automatically log out users after a specified period of inactivity to enhance security.

**Provide API Support:** Develop APIs to allow for future scalability and integration with additional tools and systems.

**Conduct Thorough Testing:** Ensure rigorous testing (unit, integration, system, and user acceptance testing) to deliver a high-quality, bug-free product.

**Enable Multi-Language Support:** Incorporate support for multiple languages to cater to a diverse user base.

* 1. **Project Scope**

The project scope outlines the boundaries and deliverables of the Agency On Boarding project. It defines what features and functionalities will be included in the final product and what aspects are considered out of scope. The project scope encompasses both the in-scope functionality that will be developed as part of the project and the out-of-scope functionality that will not be addressed.

* + 1. **In Scope Functionality**

**User Authentication and Authorization:** Secure login and role-based access control.

**Prospect Data Entry and Management:** Functions for entering, updating, and managing Prospect Data.

**Data Validation:** Automated checks to ensure Data accuracy.

**Reporting Tools:** Customizable performance and reports.

**User Interface (UI):** Responsive design for desktops, tablets, and smartphones.

Security Measures: Data encryption, audit trails, and automatic logout. Multi-Language Support: Support for multiple languages. Training and Support: User guides, training materials, and technical support. Scalability: Design for increased data volumes and user loads.

**Security Measures:** Data encryption, audit trails, and automatic logout.

**Multi-Language Support:** Support for multiple languages.

**Training and Support:** User guides, training materials, and technical support.

**Scalability:** Design for increased data volumes and user loads.

**API Development:** APIs for future integrations with other tools.

* + 1. **Out Scope Functionality**

**Hardware Procurement:** No hardware for end-users.

**Legacy System Overhaul:** No major upgrades to existing systems.

**Extended Customization:** No customizations outside predefined features.

1. **Assumptions**

1. **Technical proficiency:** Assuming agents know how to navigate basic computer applications.

2. **Product knowledge:** Assuming agents have a deep understanding of the company's products or services without providing comprehensive training on key features and benefits.

**3. Enhanced customer experience:**

4. **Company culture understanding:**

6. **Constraints**

1. **Budget:** Project must stay within the allocated budget.

2. **Timeline:** Project must be completed within 1 year

3. **Scope constraints:** Defined project features and functionalities

4. **Quality constraints:** standards and expectations for the final product

5. **Resource constraints:** available personnel and equipment

6. **Risk constraints:** social, political, cultural etc.

7**.Risks**

**Technological Risks**

* **Integration Challenges:** Difficulty in integrating AOB with existing Manual Entry systems.

• **Scalability:** Ensuring that the portal can handle large volumes of data and users simultaneously.

* **Data Security:** Protecting sensitive prospect information from breaches and unauthorized access.

• **Reliability and Uptime:** Ensuring the system is robust and consistently available.

• **Technology Obsolescence:** The chosen technology stack becoming outdated quickly

**Skill Risk**

* **Technical Expertise:** Availability of skilled developers and IT staff proficient in the required technologies.
* **Training and Support:** Ensuring Rm’s and operation team can effectively use the new system.
* **Project Management:** Ensuring the project managers have the necessary experience in managing large-scale IT projects.

**Political Risk**

* **Policy Changes:** Changes in IRDAI policies or regulations that could affect the implementation or use of AOB.
* **Stakeholder Support:** Gaining and maintaining support from all stakeholders.
* **Regulatory Compliance:** Ensuring the portal complies with all relevant local, state, and federal regulations regarding data privacy and standards.

**Business Risk**

* **Cost Overruns:** The project exceeding budget due to unforeseen issues or scope changes.
* **Market Acceptance:** RM’s and operation team might be resistant to change, affecting the adoption rate. Return on Investment (ROI): The project may not deliver the expected financial benefits or improvements in efficiency.
* **Vendor Dependence:** Over-reliance on third-party vendors for critical components, which could lead to delays or additional costs.

**Requirements Risk**

* **Changing Requirements:** Evolving needs from stakeholders leading to scope creep and potential delays.
* **Incomplete Requirements:** Initial requirements may not fully capture the needs of all users, leading to rework.
* **Requirement Conflicts:** Different stakeholders might have conflicting requirements, complicating the development process.

**Other Risks**

* **Project Timeline:** Unanticipated delays extending the project timeline.
* **User Adoption:** Resistance from RM’s and agency head in adopting the new system, leading to underutilization.
* **Maintenance and Support:** Ensuring ongoing support and maintenance post-launch to address bugs, updates, and user issues.
* **Competition:** Competitors releasing similar or superior products, affecting Agency On Boarding's market position.
* **Cultural Barriers:** Differences in technology usage and acceptance across different regions.

**8. Business Process Overview**

8.1. **Legacy System (AS-IS**)

The legacy system for prospect data entry is characterized by manual processes, basic digital tools, and significant inefficiencies. This system poses several challenges, including data inconsistency, limited accessibility, security risks, and scalability issues. A transition to a modern, integrated system like Agency On Boarding aims to address these challenges by automating and streamlining the entire process, thereby improving efficiency, accuracy, and accessibility for all stakeholders.

* **Manual Data Entry:** RM’s record prospect data on paper or in basic spreadsheets.
* **Data Aggregation:** Prospect data are manually aggregated by Relationship managers.
* **Report Generation:** Generation of report is often done manually or using basic software tools.
* **Communication:** Reports are communicated to Prospect Agent via printed documents or basic RM and agent meetings.

 **8.2. Proposed Recommendations (TO-BE)**

To address the challenges identified in the legacy system and improve employee management processes, the proposed recommendations (TO-BE) include implementing enhancements and solutions aimed at streamlining operations and maximizing efficiency. Key recommendations include:

* **Automated Data Entry:** Implement digital data forms for Rm’s to input Prospect data directly into the Agency On Boarding system, reducing manual errors.
* **Integrated Database:** Centralize all information and data in a unified database, allowing real-time access and updates.
* **Automated Report Generation:** Utilize Agency On Boarding's capabilities to automatically generate report and performance analytics.
* **Regular Security Audits:** Conduct regular security assessments and audits to identify and mitigate potential vulnerabilities.
* **Mobile Access:** Develop a mobile-friendly version of Agency on Boarding to enable access from smartphones and tablets.
* **Cloud-Based Solution:** Deploy Agency on Boarding on a scalable cloud platform to handle varying loads and ensure high availability.
* **Performance Monitoring:** Implement performance monitoring tools to track system performance and address bottlenecks proactively.
* Load Testing: Conduct regular load testing to ensure the system can handle peak usage times without degradation in performance.
* **Training and Support:** Provide comprehensive training and support resources to ensure smooth adoption of the new system and maximize its benefits across the organization.
* **Feature Enhancements:** Regularly update the system with new features and improvements based on evolving user needs and technological advancements.

**9.Business Requirements:**

|  |  |  |  |
| --- | --- | --- | --- |
| Req ID | Req Name | Req Description | Priority |
| BR0001 | User Authentication and Authorization | The system shall provide secure login functionality for RM’s, and Agents. | 10 |
| BR0002 | Role-Based Access Control | The system shall allow role-based access control, restricting functionalities based on user roles. | 9 |
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| BR00018 | Auto Logout | The system shall automatically log out users if the portal is open for a long time and is not active. | 10 |

**10.Appendices**

* 1. **List of Acronyms**

UAT-User Acceptance Testing

BRD- Business Requirement Document

BR- Business Requirement

AIS- Agent Information System

UI- User interference

RM’s- Relationship Manager’s

* 1. **Glossary of Terms**

API (Application Programming Interface)

Agent Information System (AIS):A software application for organization to manage prospect agent data.

Agency On Boarding: The name of the project and the portal developed for RM’s And Agents.

Data Validation: Procedures implemented to ensure the accuracy, consistency, and quality of data entered the system.

User Role: A set of permissions that define what actions a user can perform within the system.

* 1. Related Documents
* Functional Specifications
* Technical Design Document
* This Business Requirements Document (BRD) provides a comprehensive overview of the objectives, scope, requirements, and other relevant aspects of the Agency on Boarding project.
* Stakeholder Analysis