

PERSONAL ACCIDENT INSURANCE SYSTEM FOR INSURANCE COMPANY

By

Mr. Pramote Thamasajarnun

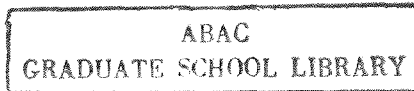
Final Report of the Three - Credit Course
CS 6998 System Development Project

Submitted in Partial Fulfillment
of the Requirements for the Degree of
Master of Science
in Computer Information Systems
Assumption University

November 1998

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Project Title : Personal Accident Insurance System
For Insurance Company
*The title has been changed according to the final approval the committees
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Academic Year : 1998


The Graduate School of Assumption University had approved this final report of the three-credit course, CS 6998 System Development Project, submitted in partial fulfillment of the requirements for the degree of Master of Science in Computer Information Systems.


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ABSTRACT

Personal Accident Insurance Policies became a large income for Phatra Insurance Company. Analyzing and developing a new system in order to eliminate unnecessary work flow, creating information control and reducing cost of policy forms are necessary before starting the operation. The scope of this project are Registration System, Underwriter System and Cashier System.

The existing system is too slow and expensive to upgrade system. Centralize and Proprietary system "VAX4000-400" with COBOL are not worth supporting the new system. The new system introduces application on PC-LAN base and decreases cost of policy forms, hardware, software, equipment and salary.

In Figure 3.2 on page 50, the break-even point can be met in 2.2 years and 2.25 million bahts is the Trade-Off point comparing tangible cost of existing system and cost of new system.

Easy Case, Office package are used to design Data flow, Structure Diagram, Screen-Report-Database respectively. Every screen design uses standard Icon, color, name field which are easy to use and understand. Testing should be done by testing data and testing environment by users. Direct Cut Over method is used in conversion system.

Web technology should be considered in further change design and carefully setting security and tuning server's operating system by professionals only.

ACKNOWLEDGEMENTS

This project is completed with the assistance of people who are involved in this job and who guided the researcher to design the system in the right way and meet their requirements. Many problems are discussed and solved by the officer of Phatra Insurance Company and the developer team.

At this opportunity, the writer would like to thank every one who gave their time, information, ideas and a lot of suggestions that are very useful for the researcher to develop this project

To the advisor Dr.Thotsapon Sotrakul who give a lot of suggestions that are very useful to complete this project, the author would like to thank for his advice, patience and understanding.

To fellow students with whom the writer worked throughout the period of the course on this project, home work and other activities which were involved, the author would like to thank them for their help and for the times he enjoyed the pleasure of working with them.

Thank you

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1. INTRODUCTION

1.1 Background of the Project

Phatra Insurance(Public) Co.,Ltd is an insurance company located at 252 Rachadaphisek Road Huaykwang Bangkok. This company has been established for 60 years since 1939. The main line of business of the company is Fire Insurance which is the second in range of market share in the Fire Insurance Industry of Thailand. The company's premium income for the latest year is 1,200 million Bahts. This year, the company's policy issued is increased to the production by 20 %. Now, the company's policy is geared to take the market share of Personal Accident Insurance.

Analysis and Design of computer system are required for the purpose of studying the existing computer system in the office and redesign a new one by using the application of my Master's Degree in Computer Information System.

The necessary steps are to analyze the existing , gathering and interpreting fact the business and the existing system, trying to solve problems and using the information to report to the management of the company with recommendations for improving their computer system.

In the normal process of system analysis and design as a computer systems analyst in the gathering and interpreting facts about the business, I would undertake interviews with members of the staff of the company who are undertaking the study.

The necessary things are experience in the insurance business , computer knowledge and interview message from the users to produce this project report.

This project report is to analyze functions which are performed by each department of the insurance company with a view to improving the overall procedure and method of the company. Also to analyze the relationships between departments, so that, the operation flow will be completed easily.

To support the operation of Personal Accident Insurance, this project report is committed to achieving a business goal, particularly in these significant areas :

1. Customer Service
2. Data integrity
3. Communications
4. Good image

Operation and service must be minimized to avoid problems for customers. The company has to develop their operation and service from old fashioned to new fashioned service, because of globalization and free trade market in the world that is coming soon. Otherwise the company may lose their customers to other insurance companies .

This project tries to design and improve the efficiency of operation of the company. That is a major review of the company's operating method and system.

1.2 Objectives of the Project

The main objective of the new system development is to build Personal Accident Insurance System to support the operation and service and replace the existing system and other sub systems of the user which can meet their requirements and enjoy the full benefit of the new system in the graphical user interface environment.

The following objectives are the expectations of the company .-

1. Study the existing system
2. Identify problems of the existing system and requirements which the existing system is not currently fulfilling.
3. Design the new system
 - Provide powerful and easy to operate system including the office package to enhance the quality of presentation and improved productivity
 - To reduce workload and save operation cost.
 - Flexible and expand or link to other applications
4. Provide additional Software and Hardware which are necessary for setting up and implementing the new system to achieve the objective.

The outcome from studying the system of Phatra Insurance company will be .-

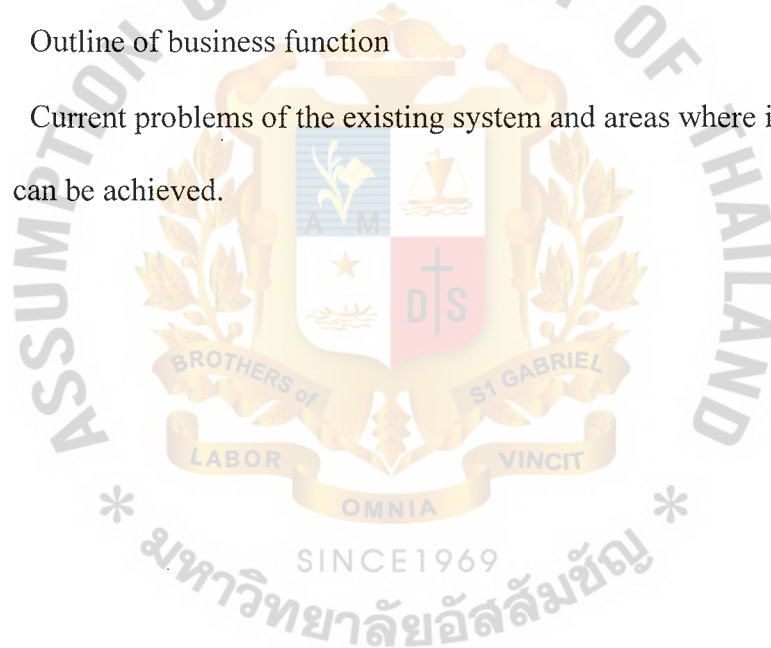
- a) Improved database and function processed by the different departments of the company which can be utilized by other departments.
- b) Improve the efficiency of the business by reducing the number of time to enter data to database system.
- c) Provide new functions to assist the company's day-to-day operation.
- d) Provide efficient storage system and facilities.
- e) Provide powerful and easy to operate office package such as word processing, spread sheet and presentation graphics to enhance the quality of output and improve productivity.
- f) Provide communication and integration of data.
- g) Examine Hardware needs and provide staff for the necessary tools that they need.

1.3 Scope

Before identifying the scope of the report, we should study all business operations of Phatra Insurance Co.,Ltd. and investigate undertaken and consideration would be made when determining what the computer system needs.

The project report include :

- Background of the existing system
- Details of the existing computer system
- Outline of business function
- Current problems of the existing system and areas where improvement can be achieved.



2. EXISTING SYSTEM

2.1 Background of the organization

Insurance is a service that is very important to everyone because insurance is a pool that people can transfer their risks. The function of insurance is to identify a particular risk and spread the costs of any losses that may occur over the whole pool of insured risks.

An insurance company is a specialist who is responsible to manage the pool of risk for the people who buy an insurance policy. Phatra Insurance co.,Ltd is an insurance company which is a professional in Non-Life Insurance for more than 60 years. The company has 4 lines of insurance business.

- Fire Insurance
- Marine Insurance
- Miscellaneous Insurance
- Motor Insurance

The main business line is Fire Insurance. Premiums of fire insurance are 70 percent of total income. Phatra Insurance has developed information technology system for many years and they plan to be the leader of technology in the insurance sector.

The restructuring of the management organization and administration as well as the introduction of new technology have enabled the staff to produce higher quality output

using a little time thus reducing costs and insurance risk. In 1998 the company will develop the technological resources to produce the quality of work and better service.

Organization chart of Phatra Insurance Company (as shown in Figure 2.1)

has 4 departments and 210 employees.

- Insurance Division
- Marketing Division
- Support Function Division
- Audit and Legal Office



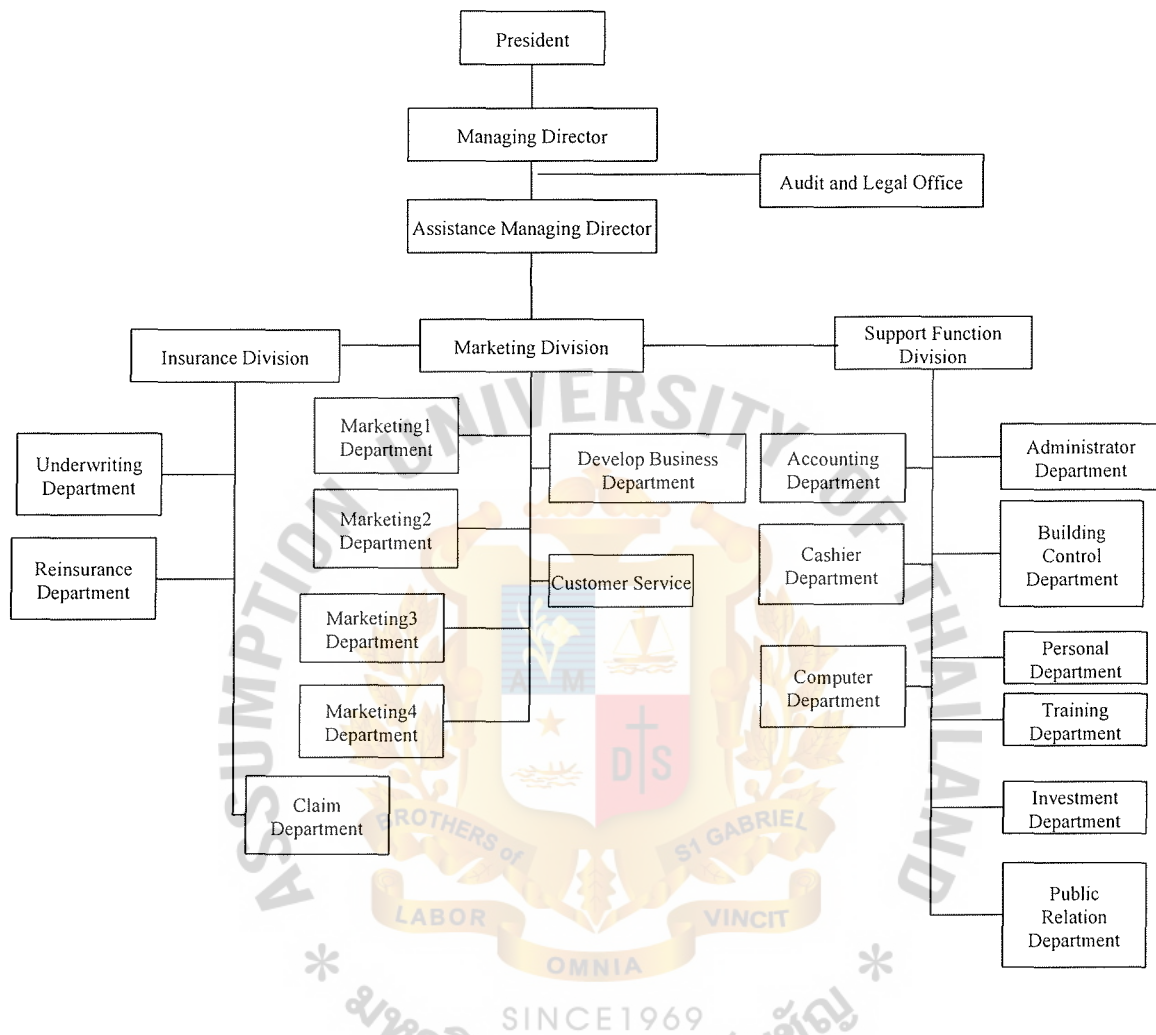


Figure 2.1. Organization Chart of Phatra Insurance (Public) Co.,Ltd.

2.2 Existing Business Functions

Phatra Insurance Company is the professional on Non-Life Insurance business. The major activity is to insure the customer's properties and life. Customer details are filled in the insurance proposal form and submitted from somewhere by the Broker Company or Individual Agent and then the operation to produce the insurance policies is started.

Method of Operation

After the company receive the proposals from Broker or Agent, they will consider and sign to underwrite the proposal by the underwriter and then produce a policy schedule and send it to the Broker or Agent. After that, the company may make reinsurance to one or more insurer company and retain some part of amount insured for company risk. Premium will be collected by Unpaid Premium List after the policy was sent to Agent. If some loss occurs, the customer who owns the policy will inform the office at Claim Department. The Claim's officer will go out to survey the disaster location which is covered by the policy. Claim payments would be paid after the settlement of loss was completed between the insurance company and customer.

Sometimes the surveyor company assists surveying the detail and estimate the loss amount for the insurance to make a decision.

We can divide business functions of each departments in a typical insurance company as follows.

- a) Personal

The functions include :

Personnel recruitment

Office records

Salary Management

b) Administration

This operation is general. The operations cover

- Office service stationery
- Machinery supply and maintenance
- Mail distribution
- Office maintenance

The staffs include

- 2 General assistants
- 1 Stationery assistant(Receptionist)
- 3 Messengers

c) Accounting

This function can be divided into sub groups as follow

- Accounting
 - Record the unpaid premium and keep all records that occur in the day into the ledger account
 - Inform the unpaid premium to Broker, Agent and customer

- Ledger Accounting Process
- Inform customer to cancel their policy when the unpaid premium are over due.

The Accounting Department has 6 employees :

- Accounting Manager
- Debtors Clerk
- 1 Creditor Clerk
- 1 General Clerk
- Finance
 - Premium Collection
 - Commission Payment
 - Other Income Collection
 - Other payments

The Finance Department has currently 7 employees

- Finance Manager
- Reception Clerk
- Payments Clerk

When the debit notes are produced and sent to Broker, 1 copy is sent to Accounting and the debtor record is created in the Account Receivable System. A debit note document

is created in triplicate with the origin and a copy one for Broker, one copy for Accounting .

From the time the debit note is sent to the customer, the Accounting takes over responsibility for premium collection

Premium is paid from customer to Broker and then Broker sent premium to the insurance company and sometimes deduct the commission out of the premium. The amount of commission depends on the type of insurance.

The Finance Department undertakes the month-end process to calculate the amount of income received during the month and the year to date.

d). Marketing

This function gives service to customers about policy or insurance information. We can briefly relate the function as follows :

- Registration of the new proposals



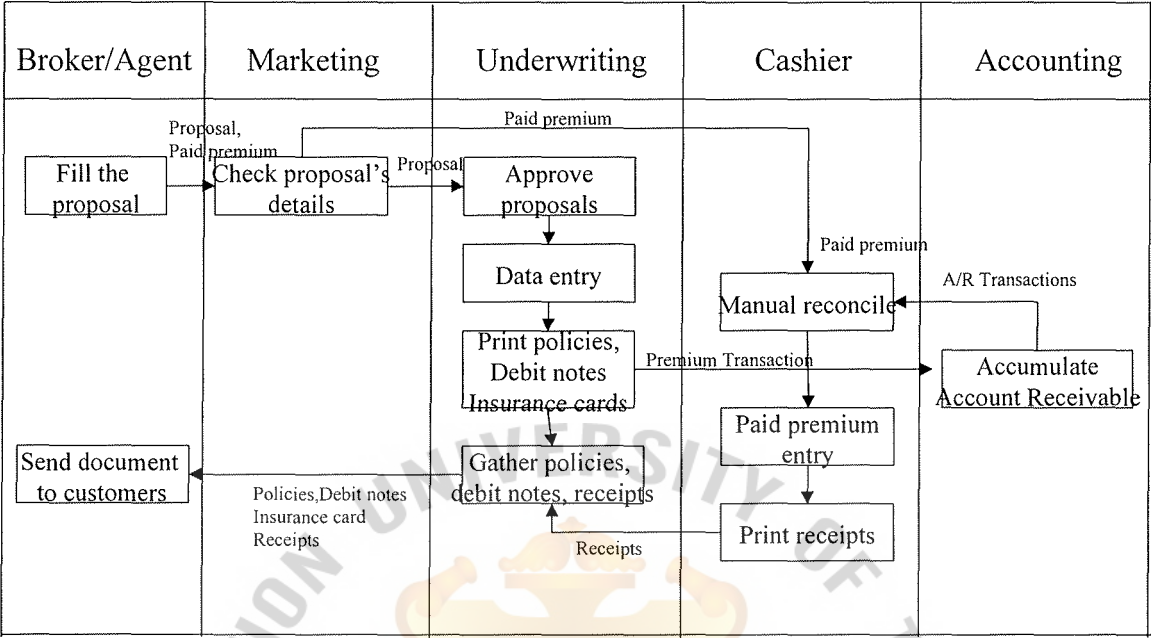


Figure 2.2. Insurance operation

Inform renewal of policies to underwriter from customer or broker

- Analyze production and create the new insurance product
- Prepare agent information
- Generate and send the renewal policy to brokers or customers

e). Underwriting

Underwriter is the person who is responsible to accept or reject the proposal. They evaluate and consider the risk of each proposal, key in proposal detail and forward some part of insured amount to other reinsurance company. The functions are as follows :

1. Consider the risk of each proposal to accept to insure or reject
2. Decision about retention amount
3. Enter the proposal detail
4. Negotiate with other reinsurance company to forward some part of amount insure

f). Policies Printing

After the proposal is completed from Underwriting, the proposal will be printed in detail into policy forms. This function is called the proposal that is ready to be printed and to assign the policy number to the proposal.

- Call the proposal that is ready to be printed as policies
- Find the condition attachment attach to policy
- Pack the policies and send to agents or customers

g). Claim

The claim function is directly concerned with customers when the insured properties are damaged. The action of this function are

1. Get the information about damaged properties from customers and contact to surveyor to survey the damage properties
2. Estimate loss and declare the information about damaged properties
3. Settle loss with customers.
4. Prepare payment document to cashier

2.3 Current Problems and Area for Improvement .

Almost all problems are occurred by the old computer system and the application that never improve to support the necessary features. There are many problems and they can be described as the following below.

Current Problems

- There is no registration system to keep customers' information. Manual registration is not useful for controlling and follow up on the application document. There is no customer database for Marketing Department.

- Take much time to issue insurance card, because there is no automatic system to check which customers should take the insurance card.
- Because of print policies by line printer , they have to change forms to pre-printed policy form before starting to print. The pre-printed forms are sometimes difficult to change and adjust at the suitable level; otherwise the printing cannot be straight forward.
- The policy form is often changed in its format schedule. The company always faces the trouble to stock the pre-printed form. Sometime the company has to throw away the old forms because they cannot be used by the new format.
- Payment for new proposal or renewal policies. Receipt is issued very late because no systematic method to inform cashier about policies issued automatically.
- Centralized computer system like Minicomputer VAX4000-400 is a burden to develop new application; Too slow to support user's requirement and too expensive whenever they increase the system power. Because of proprietary, it's difficult to make connection to other open systems and it's not flexible to be changed or appended to some software that are necessary to develop application.

Area for Improvement

Hardware

Because of Minicomputer VAX4000-400 with 50 users license that the company has used for 5 years, it's performance is very slow when responding to user especially on-line program that requires real time respond information.

There are 40 terminals attached to this system and located around the company's building. Sometimes, there are not enough officers who would like to use terminals but most of them are often busy.

To upgrade the system power, more memory and more hard disk space, the company must pay a lot of money to just only increase the power of system while client /Server system using PC base machine are cheaper than the old system by at lease 3 times hardware and software expense.

System Software

COBOL language is used for coding the application program. Low ability and flexibility is used for complex application system.

Programmer problem. Now a days, the people who graduate from university don't know COBOL language. They need to study and have training for along time before they can be assigned to write the application programs.

By using new development tools in Window 95 operation system such as Mail Merge , Microsoft Access, Microsoft Visual Basic and ODBC as middle ware, these software can help access data from any where, use interface and can help programmers to develop programs faster than the old software on mini computer.

Policy Printing

The company has to stock a lot of pre-printed forms for policy printing. It means a lot of expense will be incurred according to the amount of forms. If the company can eliminate stock expense of pre-printed forms, the cost of operation would be decreased, too.

Form Flow is one of the form package software that helps designers to rapidly design forms and fields to show details of documents. In form design area it can contain picture, graphic, character and computed field with high speed print out to laser printer (high speed laser printer like HP 4MV or HP 5Si are recommended)

The advantages of using Form Flow package

- High speed printing
- Flexibility - It can change the form to whatever you want
- Reduce company's expense
- It is not necessary to stock pre-printed forms any more.
- Not necessary to keep copies because we can use show up policy schedule through the form template
- Save operation time. No need to change forms at the printer before releasing spool file to print

Application Stage

When the application form reach the company at the Marketing Department, there is no registration system to keep customer's detail and also premium payment information. This information is important to remind the Account Department to issue receipt when policies were printed.

The Registration System is prepared to support this operation. This system is very useful for Marketing, Underwriting and for the Cashier. The Marketing Department will take in the customer detail for

- Customer service
- Produce some research for develop new product

- Create strategic planning in sale promotion.
- Underwriter need not key the customer details.
- Control the proposals input and policies output to make sure that no transaction loss is by way in operation.
- Paid premium form customer can forward to cashier early and correctly.

Inter Department

Inter-department communication are not smooth between the Marketing, Underwriting and Accounting because in the old days they communicate with each other manually by paper notes. It's too slow and may cause loss.

This problem can be solved by using new technology of communication system . It is very important and it should be approved for the following reasons.

1. The company would like to have a better service to customer. The One-Stop Service is the company's policy that need both hardware and networking support for coordination between departments in the company.
2. Internet technology. Because of globalization, the communication through the internet cannot be avoided. For example, a salesman is not necessary to go to the company just for submitting their proposal.

They can send their proposals by filling details into the form using
WEB technology.



3. PROPOSED SYSTEM

3.1 User Requirements

All the requirements come from gathering information, discussion, observation and interviewing the involved users. Then we summarized and analyzed all information required that users need to install in the new system.

Here are the summarized users' requirement that become the new feature of this system and scope of the new system.

Feather of the new system

- Proposal Registration

Benefit : To take customer profile for competitive advantage in insurance business.

- Automatic Work flow between Marketing, Underwriting and Cashier

Benefit : Increase efficiency of working process and reduce work load.

- Policies and related documents are issued by laser printer form

Benefit : Eliminate the cost of expense of reserving pre-printed form in stock.

- Various Database Connectivity by ODBC

Benefit : Require using Microsoft Office and other packages that are suitable for each operation.

- Proposal Controlling.

Benefit : To control proposal input and policy output to make sure that no proposals are lost.

Scope of the New system

The objective of the new system is to approve the working process between department and eliminate the cost of expense of company.

The scope of system design and development can be identified as follows .-

- Registration System
- Cashier paid premium acceptance and issued receipts
- Underwriter accepted the proposal
- Data entry , Policies and related documents issued
- Premium Account Receivable

3.2 System Design

The designer designs this system by considering the existing system, user's requirement, problems and company resources for highest useful to the company.

Following is the list that the designer considers :

1. Users' requirement
2. The suitable technology that can be applied
3. Reduce cost and operating expense
4. Increase efficiency and competitive in insurance business
5. Fast responsible and correctness
6. High security

So that, the new system can be redesigned and the characteristic result is described as below.

New system narration

Broker or Agent sent proposals to the company at Marketing department. After checking , the marketing staff will make a registration by entry to customers' detail into computer. Until the last proposal is finished, all the registered proposal will be summarized and will generate a Batch Number to control the registered proposal into two ways; the first way, by the first Batch Number and the second way by the second Batch Number. The Marketing staff will obtain the two summary slips. One for cashier

and one for underwriting. The slip for cashier is to commit the paid premium proposal including cash or cheques from Marketing and the slip for underwriter is to commit the proposal registered under the Batch Number.

After the cashier's office is submitted the slip from Marketing , he or she will check details from computer by Batch Number before accepting the slip. The underwriting officer will also do the same activities as the cashiers' office.

The Underwriting clerks will check the proposals and prove the detail. If any proposal is rejected, he or she will send the proposal back to the Marketing Department.

Otherwise he or she will enter the proposal details and approve the proposal by underwriter. After the proposals are approved, the proposal will be checked one by one whether it is "Cash before cover" or not and then reconcile the proposal with paid proposal transaction from Cashier. The completed reconcile proposal would prepare receipt after policies are issued.

The policy printing will print only the approved proposal and also "Cash before cover" case, too. The printing system will provide electronic form "Policy Schedule" whenever users order the system in the way to issue policy. Form will be printed continuously until end of transaction. Each policy will have one copy and one debit note.

The Underwriting's clerk will gather and send both policies and receipt to Agent or Broker. All the uncompleted reconcile proposals will be forwarded into Account Receivable System to make premium collection from Agent or Broker.

The policies are completed with the reconciliation by Cashier. The Cashier's officer will compute commission from paid premium , print commission-pay-slips and send the slips to Agent or Broker.

If any proposal needs to re-out sum insured, the underwriter will contact the re-insurer and make agreement to cover the re-out sum insured. After re-out agreement is completed, the underwriter will enter re-out detail into computer and then the Re-out Application will be printed and sent to Re-insurer company.

The new system's structure.

From the above system narration, the designer can provide the processes to cover the operation into sub systems that can be described by important characteristics, some parameters and working processes that are necessary to be done.

Here are 3 sub systems that are designed in this project development

- Registration Sysem
- Underwriting System
- Cashier System

Each sub system above has processes under them and each sub system can be described as below :

Registration System

This sub system is for making registration and summarizing proposal detail allocated to underwriting and cashier system.

Underwriting System

There are three processes working under this system

- Proposal Approval System
- Policies Issued
- Re-out Application Issued

Cashier System

There are three processes working under this system

- Premium Acceptance System
- Issued Receipt
- Commission Payment

Registration

Function :

- To keep customer details
- Summarize total proposal records to Underwriter
- Summarize total proposal payment to Cashier

Process :

To accept customer details by the following information

- Proposal Id
- Customer Name
- Customer Address
- Customer occupy
- Customer's income
- Premium paid by
- Cheque details

After the registration complete the system will summarize data by using some control detail as the following

- Batch No 1 (Control for Underwriter)
- Batch No 2 (Control for Cashier)
- Total Proposal Record
- Total Paid Premium

Proposal Appovement

Function :

- To make and approval summarized proposal from Registration system
- Checking “Cash Before Cover”
- Reconciliation of paid premium proposal

Process :

To make an approval of the summarized proposal from Registration System by using Batch No to retrieve summary information out to the screen.

Data need to set are.-

- Summarize Approve Flag
- Summarize Approve Date
- Summarize User Acceptance

When approved the Batch No , the system will keep all Proposal No which are under the Batch. Data which are kept in this step is

- Proposal No

The complete detail entry of proposal will be approved by underwriter. The Proposal No, one by one, will be called and show some detail needed to check to confirm. Data which are showed on the screen are .-

- Proposal No

- Customer Name

If the proposal has no problem, approved proposal can be made by pushing a button and some information will be kept into the proposal transaction. These are information that will be kept when approval occurs .-

- Underwrite Approve Flag
- Underwrite Approve Date
- Underwrite User ID

After each proposal was approved, this system will check “Cash Before Cover” to the proposal.

- If “Cash Before Cover”, then reconcile with paid premium proposal
 - If found then send this proposal to print policy and receipt
 - If not found, no action and this proposal will be appeared in error report
- If not “Cash Before Cover” then send the proposal to print policy and reconcile with paid premium proposal
 - If found then send the proposal to print receipt
 - If not found then no action about print receipt

If there is any re-out sum-insured, the underwriter will use Re-out Entry and print Re-out Application send to the Re-Insurer.

Premium Acceptance

Function :

- To accept paid premium proposal summarized from Registration system

Process :

Call Batch No for Money Summary to show summary detail on screen and check the detail with the Money Summary slip. If there is no problem then approve by push a button. The system will mark some detail back to the Payment Batch Control by

- Paid premium Approve Date
- Paid premium Approve User

Transfer the approve Proposal No into this system to reconcile with the underwriter approved proposal .

The complete reconcile proposal will be transferred into Premium

Settlement otherwise they will be transferred into Account Receivable.

Policies Issued

Function :

- Generate Policies' data to be printed
- Call the Form Flow Package running for print policies

Process :

This system received command from Proposal to be printed by the Proposal Approval System. The system generates data into format that are suitable for printing by form package. The policy details are retrieved from the Proposal Transaction which depends on the Proposal No from Proposal to be printed and output into 2 ways; one to print policies and the other one to print Debit Notes. After generate policy date, it will mark back the Print policy date to Proposal to be printed.

Issued Receipt

Function :

- Issued Receipt when premium transactions are settled.

Process :

Generate premium detail into format that is suitable for print receipt by form package and call the form package to print receipt.

Commission Payment

Function :

- Generate commission amount to pay to Agent or Broker

Process :

Premium transaction that are ready to pay commission. This system can be retrieved from the Premium Settlement day-by-day basis. Calculate commission and print commission slip.

Reout Application Issued

Function :

- Issue Re-out Application

Process :

Retrieve Re-out Transaction that are appended by underwriter. The Re-out Transaction together with Proposal Transaction will be formatted data into form that is provided for printing by form package



3.3 Hardware and Software Requirement

General requirement of the new system

System Environment

The application system will be designed to run in a client/server environment. The client/server concept is to link up server and workstation via the network. Data processing and analysis of information are handled by the server where the central database is maintained., while the processing of input and inquiry process are run locally on workstation that are built with self-content processor.

The client/server concept provides better utilization of system resources because the workload of data processing can be shared between server and workstation . Because of using PC base to establish the network, all hardware are scaleable and upgraded not only server machine but also workstations if we want more powerful hardware and feature.

Data will be kept on Oracle Database, which is the best one of the relational database management system and stored on the server. The application is built and run on the workstation by Microsoft Access, which uses Basic language basis to develop programs.

Microsoft Window 95 is selected for operating the system on the workstation side and Microsoft Window NT Version 4 as operating system of server.

The reason that we select the Microsoft Window NT Version 4 as operating system are

- Easy to operate and control
- Excellent network feature
- Security
- Not expensive
- Better support from Microsoft
- Easily to recruit the programmers
- Connect to other systems by using multi protocols.

Distributed Printing through out the network under both networks under both NT and Window 95 are available to provide total system improvement.

3.3.1 Hardware and Software specification

The suitable Hardware and Software are listed below

Hardware

There are 3 PC Server 105 PC Workstations and 2 serial printers and 2 Laser printers available in the office. For the new system that the existing hardware must support, the operation is not enough. So that, the hardware that would be purchased to add and replace are as follows :

The new system is designed based on Client/Server concept and sophisticated software. The first choice that should be considered is what software development to be used and what operating system can be run without any problems. If we get the answer about the software development, we can find the operating system and then the Hardware platform to be the last choice.

These are the items that the designer will use to consider.

- Total transaction in the Personal Accident Insurance can be predicted approximately for one year about 150,000 policies. Average transaction per month is 12,500 and per day is 500 transactions. All of these transaction excludes weekends.
- Use form package inserted the current pre-printed form
- Connectivity to the existing system ,flexibility of database and portability of software.
- Around Bahts 2,000,000 for budget.

Total transaction is not too much. The middle size transactions can be stored in high end PC Server with more power network equipment such as Ethernet Switching that appeared in the existing system.

The high reliability Database Management System should be considered. It is necessary even if it is expensive. The Oracle ,Sybase, Informix are the reliable DBMS which are considered.

Form package software such as Delina Form Flow is powerful and cheaper form of package that can be used with no problems. Microsoft Access and Visual Basic is used to program easily and faster than other languages. More over, this Basic Language is widely used in most packages which are run on Windows 95 and Window NT.

Middle ware is needed to connect various databases such as ODBC. The middle ware should be reserved if data have to be stored in other DBMS. It is easier to redirect without modifying program code in application software.

Laser printers are needed to be printed by form package. It's speed should not be less than 12 pages per minutes.

Table 3.1. Addition hardware use in new system

1	PC Server NetFRAME LV5000 Intel 300 MHz Pentium II Processor 128 MB RAM 6 GB Ultra-Wide SCSI-3 hard drive	2
4	PC Work Station Pentium 200 MHz 32 MB RAM Hard disk 2 GB	4
5	Lan card Ethernet 32 bits 10/100	6
6	Laser Printer HP 5Si	2

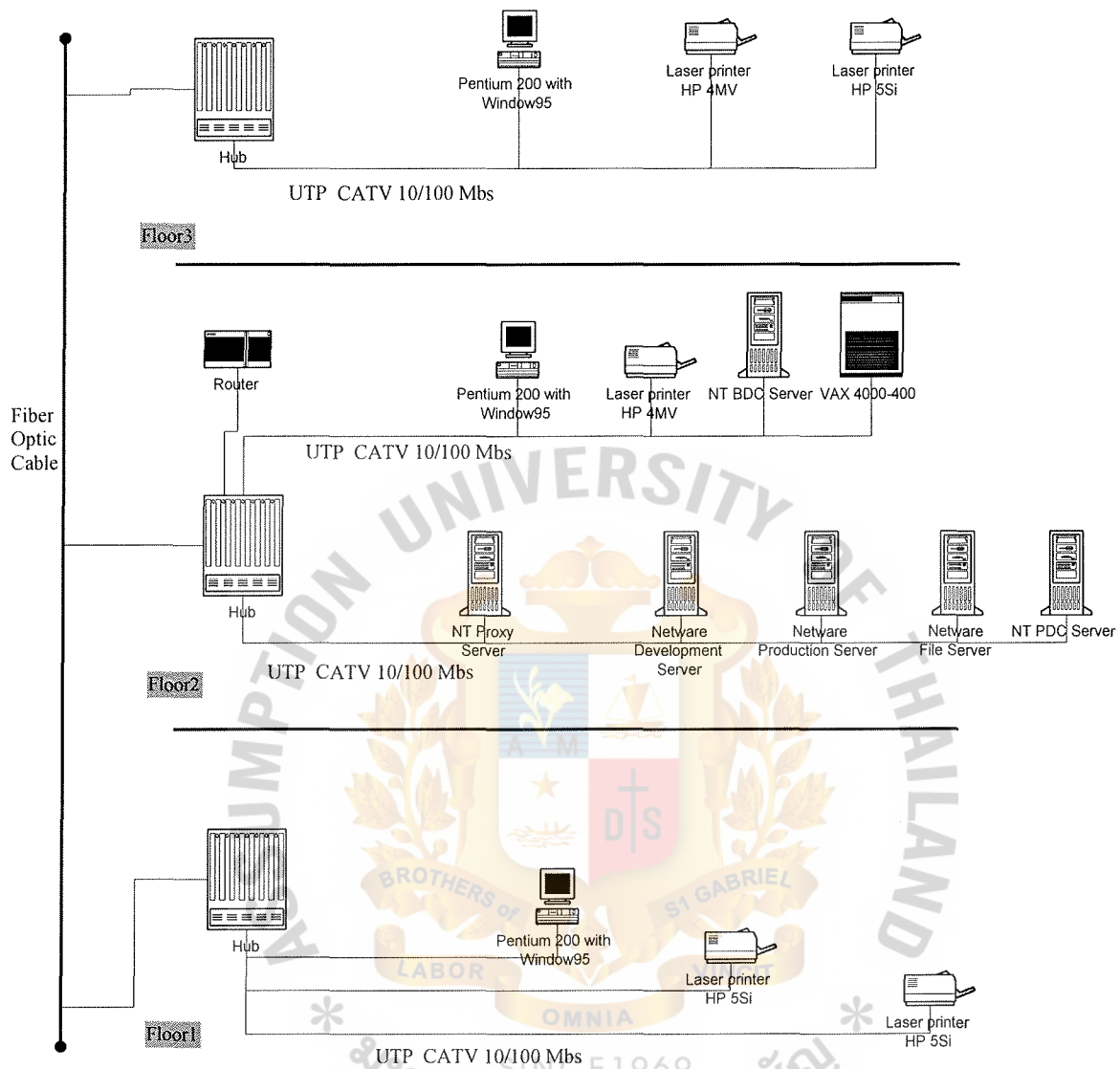


Figure 3.1. Hardware configuration of the Proposed System

Network devices after reconfiguration

Floor 1

1. SynOptic Lantis Hub 2814 8 Ports	1 Units
2. SynOptic Lantis Hub 2803 16 Ports	3 Units
3. Dec Server 90L+ 8 Ports	2 Units

Floor 2 (Computer center room)

1. Intel Ethernet switch 8 Ports	1 Units
2. Concentrator SynOptics Model 3000	1 Units
3. Lattis Net 3410 100 Base-T NMM	1 Units
4. LattisNet 3314A Ethernet NMM	1 Units
5. LattisNet 3304A 10Base-T	1 Units
6. LattisNet 3304A 10Base-F Host	1 Units
7. LattisNet 3328 ESE	1 Units
8. LattisNet 3405 12 Ports	1 Units
9. LattisNet 3308B 10Base-T Host 12 ports	5 Units
10. X LanBit GroupCom router	1 Units
11. Modem GVC 288/144	2 Units
12. FAX Modem E*Tech E288 MX V34	1 Units

Floor3

- | | |
|-------------------------------------|---------|
| 1. SynOptic Lantis Hub 2814 8 Ports | 1 Units |
| 2 SynOptic Lantis Hub 2803 16 Ports | 4 Units |
| 3. Dec Server 901+ 8 Ports | 1 Units |

Workstation

Floor 1 AcerMate 800 Pentium 166 35 Units

PCI Bus Hard Disk 500 MB

Vidio RAM 2 MB

Lan card 10 Mb

Floor 2 AcerMate 800 Pentium 166 30 Units

RAM 32 MB

PCI Bus Hard Disk 500 MB

Lan card 10 Mb/s

Vidio RAM 2 MB

Floor 3 AcerMate 800 Pentium 166 20 Units

RAM 32 MB

PCI Bus Hard Disk 500 MB

Vidio RAM 2 MB

Lan Card 10 Mb/s

AcerMate 800 Pentium 200 25 Units

RAM 32 MB

PCI Bus Hard Disk 2 GB

Vedio RAM 2 MB

Lan Card 10 Mb/s

Total 105 Units

Printer

Floor 1 Laser Printer HP 4MV 2 Units

Line Printer CiTOH CI 1000 1 Unit

Floor 2 Laser Printer HP 5Si 3 Units

Laser Printer HP 4MV 1 Units

Line Printer CiTOH CI 1000 1 Unit

Floor 3 Laser Printer HP 4MV 2 Units

UPS

Floor 1 Power Tech Advance System 2 Units

Floor 2 Power Tech Advance System 2 Units

Floor 3 Power Tech Advance System 3 Units

Total 7 Units

3.4 Security Control

Phatra Insurance is a middle sized insurance company. The company has a large size database and many application running on both client and server. The computer center is connected to internet provider to disseminate their information through internet by their own WEB site. Security should be able to protect from unauthorized persons both inside and outside the company. Data protection, Software protection and Hardware protection are carefully considered to choose methods to protect and must be sure that it is a hundred percent safe.

Hardware security protection issued

- Keep all servers in isolated area(room) and prohibit some officers
- Hardware Backup by reserving another machine that has the same specification as the server and ready to replace if the server is fail down.
- Provide Halon Gas for fire protection
- Shoud not install sprinkler in the server room.

Software security issue

- Separate the Development system from the Production System both hardware and software to make sure that software in the Production System are saved and no one can copy, modify and change without permission from System Administrator.
- Software Backup is to provide the people who are responsible to backup software periodically and has one original kept in the strong room.
- Virus protection. Do not allow to install any outside software without virus scanning and permission.
- The important applications should be periodically investigated that their versions are right as the original.
- Any users would like to attach to database, the Database Administrator should provide the password dialog for every new connection.

Data protection

- Provide default data encryption in every workstation and server before sending into the network.
- Set up security restriction to access Database by Database Management System and restrict users to access other resources in the server's machine Network Operating System.
- Periodically data backup and keep the backup media into safe at least once a week. The backup media should be more than one copy. Both Partially backup and Fully backup would be allowed.
- Announce the rule of using password. All password owners never let anyone know their password.
- Internet protection by using Firewall.

3.5 Cost/Benefit Analysis

3.5.1 Cost Analysis

Before the new system is implemented, the financial aspects should be considered by cost comparison between the existing system and the new system on the investment costs, implementation costs and annual operating costs.

Investment Cost : The new system is worth to invest because of Client/Server concept with PC LAN base. It can easily be expanded and change both hardware and software with high performance, security and reliability at the lower cost.

The criteria of choosing the hardware have been concluded after discussing all the above details with the management by explaining the requirement of the new application system, advantage and disadvantage of the existing system and the new system. Table of hardware configuration and software of the new system is shown at the next page.

Table 3.2. Cost of hardware and software of the new system

1	PC Server NetFRAME LV5000 Intel 300 MHz Pentium II Processor 128 MB RAM 6 GB Ultra-Wide SCSI-3 hard drive	2	120,000.00	240,000.00
4	PC Work Station Pentium 200 MHz 32 MB RAM Hard disk 2 GB	4	43,000.00	172,000.00
5	Lan card Ethernet 32 bits 10/100	6	5,000.00	30,000.00
6	Laser Printer HP 5Si	2	100,000.00	200,000.00
7	Software			746,000.00
			Total	

The total investment cost is Baht 1,388,000.

Implementation Cost : The cost incurred to install the proposed system and are one-time cost outlays. It includes the cost of development of system and the implementation cost of the new system.

Annual Operating Cost : There are the recurring costs, cost of operate the system and cost of hardware and software maintenance.

3.5.2 Benefits Analysis

Tangible benefits : Tangible benefits of this system accumulated in 5 years are as follows:-

Decrease the salary of employee : Baht 161,817

Decrease the investment cost of hardware and software : Baht 553,000

Decrease the office equipment cost : Baht 334,945

Total tangible benefits : Baht 1,049,762

Intangible Benefits :

- Good control information
- Speed up the operation
- Shortcut workflow
- Upgrade employee's knowledge
- Future expansion capabilities

3.5.3 Cost Comparision

The cost of the existing system is shown in Table 3.3. and the cost of the proposed system is given in Table 3.4. The difference of the system is shown by using break-even analysis which is shown in Figure 3.2. After two years the cost of the new system

would reach the break-even point and it will become more economical to operate than the current system.

Table 3.3. Cost of existing system

Personal						
Supervisor 15,000 x 15% increase	180,000	207,000	238,050	273,758	314,821	
Operator (10,000x1) x 15% increase	120,000	138,000	158,700	182,505	209,881	
Administrator (8,000 x 3) x 15% increase	72,000	82,800	95,220	109,503	125,928	
Hardware						
Minicomputer VAX Upgrade	0	0	0	0	0	
Hard Disk,Memory and Other equipments	50,000	0	250,000	0	50,000	
Hardware Maintenance 10% per year	365,200	370,200	370,200	395,200	395,200	
Software						
Upgrade Open VMS, COBOL, RDB,FMS	0	0	0	0	0	
Software Maintenance 15% per year	35,000	35,000	35,000	35,000	35,000	
Office Equipments						
Pre-printed form 100 Boxes x 10% increase	100,000	110,000	121,000	133,100	146,410	
Line Printer Overhead x 5% increase	28,800	30,240	31,752	33,340	35,007	
Other expense x 5 % increase	50,000	52,500	55,125	57,881	60,775	
Accumulative Cost	1,001,000	2,026,740	3,381,787	4,602,073	5,975,096	

Table 3.4. Cost of proposed system

Personal						
Supervisor 15,000 x 15% increase	180,000	207,000	238,050	273,758	314,821	
Operator (10,000x1) x 15% increase	120,000	138,000	158,700	182,505	209,881	
Administrator (8,000 x 2) x 15% increase	48,000	55,200	63,480	73,002	83,952	
Hardware						
File Server Net Fram LV5000 x 2	240,000	0	0	0	0	
PC Work Station 200 MHz 32MB RAM x 4	172,000					
Laser Printer HP 5Si full option x 2	200,000					
Other equipments	30,000	0	0	0	0	
Hardware Maintenance 10% per year	0	64,200	64,200	64,200	64,200	
Software						
Network Operating System NT V4 40 license	64,000	0	0	0	0	
Oracle DBMS 40 Users	122,000					
Client Operating System Window 95 40 users	280,000					
MS Office 97 20 users	30,000					
Personal Accident Insurance System(PA)	250,000					
DBMS & PA 15%		55,800	55,800	55,800	55,800	
Office Equipments						
A4 Cut Sheet 100 Sets x 10% increase	35,000	38,500	42,350	46,585	51,244	
Laser Printer Overhead x 5% increase	40,000	42,000	44,100	46,305	48,620	
Other expense x 5 % increase	50,000	52,500	55,125	57,881	60,775	
Accumulative Cost	1,861,000	2,514,200	3,236,005	4,036,041	4,925,334	

Table 3.5. Proposed system cost vs existing system cost

1	1,861,000	1,001,000	-860,000	258,000	258,000	1,603,000
2	2,514,200	2,026,740	-487,460	146,238	404,238	2,109,962
3	3,236,005	3,381,787	145,782	0	404,238	2,831,767
4	4,036,041	4,602,073	566,033	0	404,238	3,631,803
5	4,925,334	5,975,096	1,049,762	0	404,238	4,521,096
		Gross profit	414,116			

The cost Trade-Off Analysis based on the cost of existing system and Net proposed system. The cost trade-off analysis for existing system and proposed system shows as below.

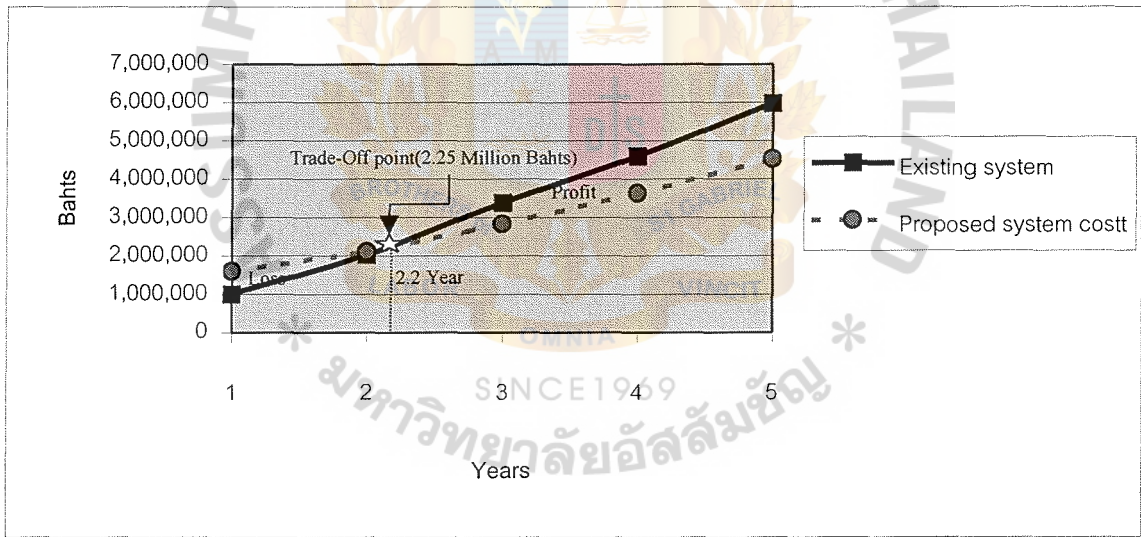


Figure 3.2. Proposed system cost vs existing system

3.5.4 Payback period

The payback period can be calculated into value of period by the standard formula

which is shown as below :-

$$\text{Payback period} = I / (1 - T)R$$

I = Investment

The net investment cost can be calculate from the accumulative cost of fifth year

Existing system cost	Bhts.	5,975,096
<u>Less</u> Propose system cost	Bhts.	<u>4,925,334</u>
		1,049,762
<u>Less</u> Accumulative of tax saving	Bhts.	<u>404,238</u>
Net Investment	Bhts.	<u>645,524</u>
T = Commercial tax	= 30%	
R = Benefit amount	= Bhts. 414,116	

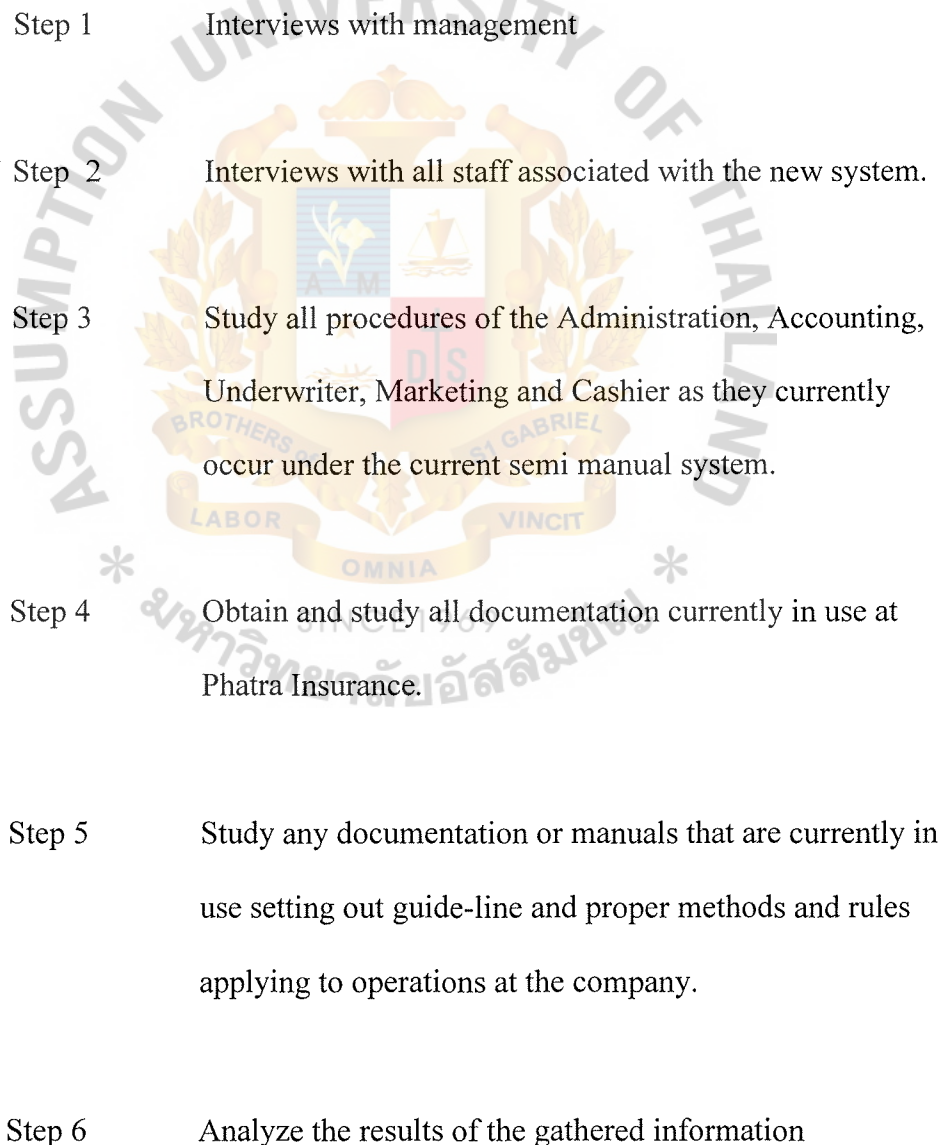
Replace the value into the formula :-

$$\begin{aligned}\text{Payback period} &= 645,524 / (1 - .30)414,116 \\ &= \mathbf{2.2 \text{ years}}\end{aligned}$$

4. PROJECT IMPLEMENTATION

4.1 Overview of Project Implementation Schedule

On the following pages we will detail the overall plan that we will follow in establishing what is needed to successfully develop a computer system for Phatra Insurance that will fulfill the requirements of the company for their computer system.

- 
- Step 1 Interviews with management
- Step 2 Interviews with all staff associated with the new system.
- Step 3 Study all procedures of the Administration, Accounting, Underwriter, Marketing and Cashier as they currently occur under the current semi manual system.
- Step 4 Obtain and study all documentation currently in use at Phatra Insurance.
- Step 5 Study any documentation or manuals that are currently in use setting out guide-line and proper methods and rules applying to operations at the company.
- Step 6 Analyze the results of the gathered information

- Step 7 Design the system
- Step 8 Implement the system
- Step 9 Oversee the implementation
- Step 10 Review the results of the new system
- Step 11 Make require adjustment

Step 1 Management Interview

Management will be asked questions relating to the future planning of Phatra Insurance to ensure that the future plans of the company can be taken into account when the design of the new sales systems company is undertaken.

If there are plans for rapid expansion or increased staffing levels in any area of the business, this could have a large bearing on the design of the system, the amount of the hardware needed and the type of equipment needed to fulfil those growth plans.

It would be wrong to purchase hardware with certain capabilities only to have to change it in the near future to changes in the business and the capability of that hardware to be inadequate for those changes.

Budget limitation will have a great impact on the degree of changes and features the computers system being designed can have.

Step 2 User Interview

Here are the people whose day to day operations are the most involved with the new system and have a lot of requirements for the new system.

A pre-set question will be asked of all users with them ranging in detail depending on the amount of actual involvement with the system with the most detailed questions being for those most involved.

The senior staff of the sales and underwriting department also need to be interviewed to ascertain what they are expecting out of the sales department in the future.

What particular management needs they have for the new system to assist in making their job easier and more efficient. For example, they may wish to have more reports to assist them in keeping up to date with the client premium and debts.

Step 3 Study all procedures of the Administration, Accounting, Underwriter, Marketing and Cashier as they currently occur under the current semi manual system.

The activities of these departments must be studied because the developer needs to understand their activity details much more than enough for the new system design.

This is to ensure that the efficiencies that can be achieved through computerize are fully used to advantage.

Step 4 Obtain and study all documentation current in use at Phatra Insurance.

Documentation will be studied to examine what documentation is required and what can be disposed of in the new system to minimize costs of documentation.

Stop 5 Study any documentation or manuals that are currently in use setting out guide-line and proper method and rules applied to operations at Phatra Insurance.

It is important that the computer system follows guide-lines set down in either the rules for the operation of Phatra Insurance and also in respect of legal requirements of the Insurance Department of Thailand.

Step 6 Analyze the results of the gathered information

All the information gathered from the interviews and the other investigations will be fully analyzed so that the system can be designed as close as possible to the needs of Phatra Insurance.

Step 7 Design the system.

The system will be designed following the completion and analysis of the information.

Further interviews may be necessary once the information has been studied if further clarification is needed by analysts.

Step 8 Implement the system

Hardware will be purchased, physical alterations to the premises and the system will be put into operation.

Step 10 Review the results of the new system

The results of the implementation and operation of the system will be reviewed for efficiency and costs advantage success.

Step 11 Make required adjustment.

An ongoing plan for maintenance of the system will be put into operation.

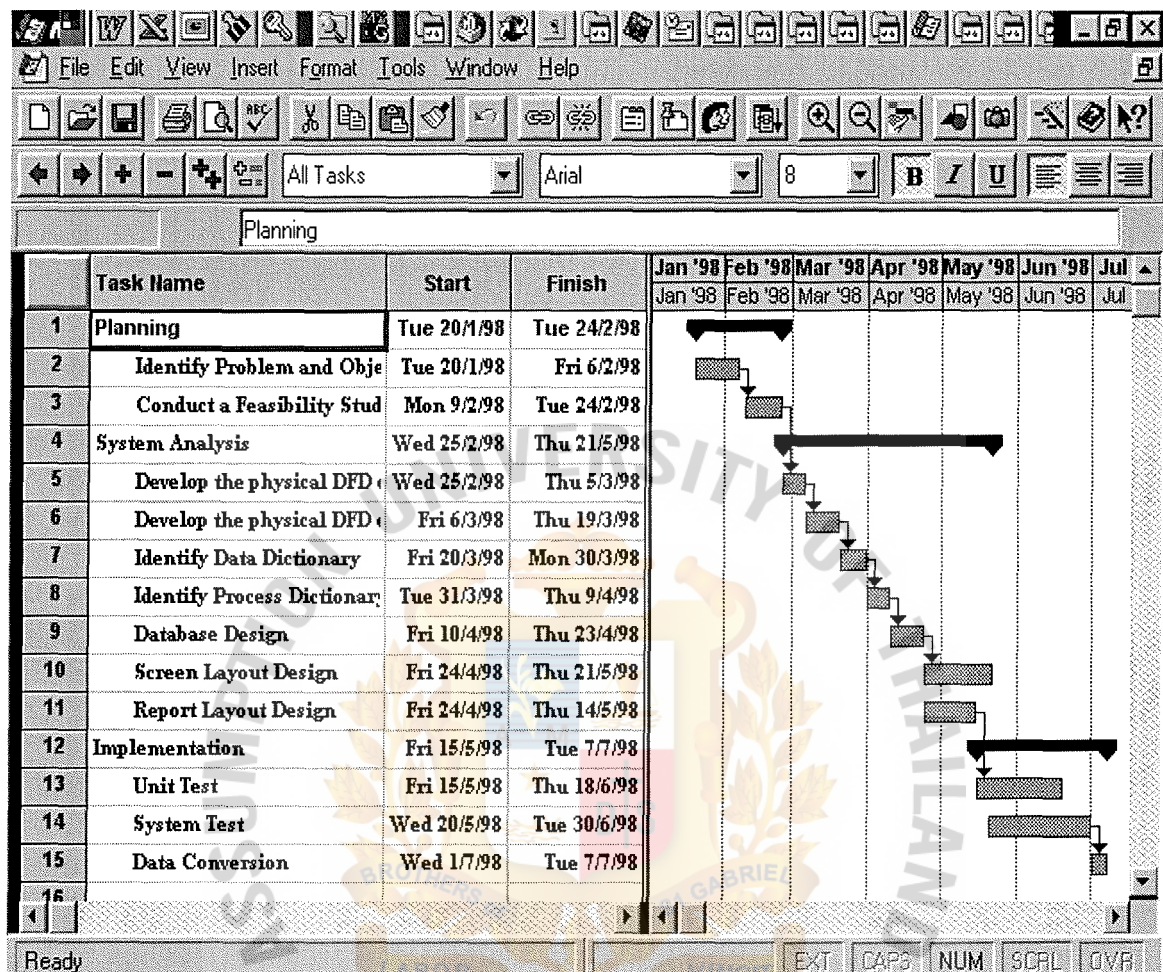


Figure 4.1. Project Schedule

4.1.1 System Implementation

Once the system has been complete and ready for operation, it is the time for implementing the system into operation and there are several steps which the implementation would follow

- Site Preparation
- Installation
- User Training
- Conversion from the existing system onto the new computerized system
- Post implementation review

All these steps are needed to follow to complete the implementation. Each step has a lot of details to discuss

The best implementation method must be selected to use in system implementation step carefully to ensure that transaction from the old system is complete and ready to start in the new system.

Timing of the implementation is also important. We should select a period of time to implement the new system and avoid busy periods or crisis periods such as the end of year or year end financial recording.

Try to make users feel convenient and build up a sense of acceptance with the new system, so that, running of the new computerized system would succeed. Otherwise , it can affect the success of the whole computerization process.

The new system must be implemented in time of schedule. Users who are resentful of having to undertake training and other new responsibilities related to the new computer at a time when they are under greatest stress of deadlines will not accept the new system and will always be looking to find fault in it.

Users who are at ease with the new computer will grow to accept it and learn more about it and have positive attitude towards the computer.

To achieve this easy training and transition for Phatra Insurance, it is envisaged that the new system will be brought into use during the months of June and July as those are the times which are suitable.

Site Preparation

The system engineer must present a list of specifications for the electrical wiring and outlets, Air condition needs, humidity control and space requirement. The site preparation should be completed prior to the arrival of the equipment.

The company's computer centre room has enough space to install the new hardware PC Server 2 units. Electrical power is enough for the additional machine. All of these

things cannot be estimated but the system engineer must present a solution to protect any problems that may occur. Time to complete the site preparation is about 1 week.

Installation

Hardware and Software

The computer system will arrive approximately 1 months after ordering hardware and 2 weeks to install hardware and software include testing both server site and client site. We already considered the time of ordering and installation into the Implementation schedule.

Installation is the first step when hardware and software are ready and make sure that site preparation has been made. After installation, we check all hardware and software components that is needed to install by using Installation Check-list. After the installation is finished, we start to test the hardware work normally. Operating System, Software package and Application Software would be tested to make sure that they are working well.

User Training

Training Methods suggest 2 methods to apply in User Training activity.

- Vendor and In-house Training

The vendor which is chosen must provide 2 level training for computer officers and operator. The two courses are.-

- Controlling and Operate Computer (Window NT) and Network
- Using Window95 on Client site

This training takes about 2 weeks time.

- In-House Training.

Select one or more computer officer who can train the users to learn about using the new application program. There are some important things that the trainer should prepare :

- Hand-on is briefly how to use application
- Case-study example that includes all frequently encountered situations that the system is able to handle and that the users should be able to handle.
- Sample data and individual transactions.

This training takes about 2 weeks time.

After the hardware and software installation are complete and ready to use, user Training would be started. There are two parts that the trainer have to train users.

1. How to use and control Window NT server and Network
2. How to use the new operating system (Window95)

3. How to use the new Personal Accident Insurance program

How to use and control Window NT server and Network

This course is concerned with the NT Operating System, How to install and operate?

How to config network and how to solve problems? Also preparing disk, maintain,

format disk and routine of maintenance system.

How to use the new operation system (Window 95)?

For the users who have no experience to use the new system, Training will be provided basically :

- How to start the first step of computer operation from start up the computer, to logon
- How to control printer
- How to use the Ethernet Explorer
- How to use Email
- How to shut-down the computer
- To understand and know how to handle the error when the problems occur.

The good user interface to make users enjoy training and feel how easy it is to operate the new computerized system and it is hoped that the interface which is detailed in this report will achieve that objective.

Important knowledge such as avoiding loss of information while abnormally shutting the system down.

How to use the new application program?

The new application program is not difficult to use because they are developed under Windows operation system. The good graphic user interface is standardization.

A great deal of emphasis in training will be directed at transactions which will be the most regularly undertaken by involved department.

Marketing Department

- Register the new insurance application
- Summarize data and forward to other departments
- Changing data on the computer such as customer details
- Maintain all the parameter that the new system need.

Underwriting Department

- Approve the Proposal transactions from Registration
- Enter and correct Proposal data into computer system by Proposal
Enter program set
- Approve Proposal
- Print Policies and Debit notes and related documents
- Summarize report

Cashier Department

- Acceptance of the paid proposal premium from Registration System
- Control and verify the paid proposal premium
- Print Receipts for the policies, which their premiums are paid.
- Commission payment

The entire department of the trainer will train them how to change and adjust printer and how to maintain the parameter that is necessary to operate the application system.

Hands on are necessary for training because it assists the trainee to learn how to operate the computer and they can practice their skills and become familiar with its operation.

The Hands on must be easy to practice and understand relating to user manual which will be issued to all staff for them to study.

A reference guide to application system documentation should be easy reference by all users. The reasons is to reduce the workload for System Analyst and Programmers who are responsible for the application.

Conversion.

Normally there are four methods of handling the system conversion.

1. Parallel System. – The most secure method of converting from an old to new system is to run both systems in parallel.

Advantage – Most secure method of conversion.

Disadvantage - The system costs double

- If users prefer the old system, there is potential Resistance to change.

2. Direct Cut over - Convert from the old the new system abruptly, sometime over weekend and even overnight.

Advantage - No having a fall back system. (No double cost)

Disadvantage - Serious problems may arise.

3. Pilot Approach - A working version of system is implemented in one part of the organization, such as a single work area or department. The users in this area typically know that they are piloting a new system and that changes can be made to improve the

system. When the system is deemed complete, it is installed throughout the organization, either all at once (direct cutover method) or gradually (phase-in method).

Advantage - Providing a sound proving ground before full Implementation.

Disadvantage - If the implementation is not properly handled, users may develop the impression that the system continues to have problems and that it cannot be relied on

4. Phase-In Method. - This method is used when it is not possible to install a new system throughout the organization all at once. The conversion of files, training of personnel or arrival of equipment may force the staging of their implementation over a period of time, ranging from weeks to months. Some users will begin to take advantage of the new system before others.

Disadvantage - Long Phase-In period create difficulties for analysts.

Because of a little transaction about Personal Accident Insurance, it is the VAX System and not too much old applications. **The Direct Cut Over** is the most suitable method applied to the conversion phase. The other methods will make the company double costs or the develop team must provide a program to convert between old data format and new data format in processing the new system.

Conversion Plan

The conversion plan includes a description of all the activities that must occur to implement the new system and put it into operation.

- Create the team responsible for each activity.
- Create timetable indicating when each activity will occur.

Pre-implementation Stage

When the conversion is being planned, list of all the tasks should be assembled, including the following.

- List all files for conversion
- Identify all data required to build new files during conversion.
- List all new documents and procedures that go into use during conversion.
- Identify all controls to be used during conversion. Establish procedures for cross-checking the old and new systems.
- Assign responsibility for each activity
- Verify conversion schedules

Post-Implementation Review

It is proposed that after a running period of 1 month the users and analysts will meet to discuss the operation of the new system.

Of primary importance is the need to know whether the system has met its objectives and that it is giving the results that were required by Phatra Insurance and to also see that the promises made by the analysts were met.

The period of 1 month, operation will allow adequate time for all users to properly assess what the system is doing and whether some added refinement or changes need to be made.

Review Question

All the Review Questions are prepared for the analyst who wants to know if the performance level of users has improved and if the system is producing the result intended. If neither is happening one may question whether the system can be considered successful.

Both Event logging and Impact Evaluation methods are applied to use in Review Question.

A logging system can be used to record when problems occur with the system and this log can be reviewed and answer to problems found.

4.2 Test Plan and Result

It is planned that the testing of the new system will be done as part of the implementation process and it is proposed that it also be done on a parallel basis with the old system to ensure that should there be any serious problems with the new system, the old system will be able to continue the normal operations of the business should the new system meet any problems or not run according to plan.

This will also ensure that the operation and results of the new computer system can be compared with those of the old system to see that they match which will be a way of checking that the new system is operating correctly.

It is proposed that a selected number of new clients and existing clients will be chosen for the implementation testing and their data will be input into the new system database.

These clients will be chosen because their particular businesses will utilize most parts of the new system over a very short period which will assist in testing all facets of the new system in the 2.5 months that is expected that implementation of the new system will take.

The clients will be chosen from Marketing Department and input the clients' information into Database. All process of the new system will be done by Marketing Officer under the supervision of the system designer as this will allow each of the

brokers to become familiar with the new system and will form part of the training process for the Marketing officer who will use the new system.

The original project plan submitted showed an implementation period of just over a month with a period of 2 weeks to oversee the implementation of the system.

However, it has been decided to extend this period of implementation to 3 months as this will allow a better period of time to see that all facets of the system are operated correctly.

This was decided particularly as needed for the accounting procedure form and as it gives adequate time to cover the period from premium debiting, premium collection.

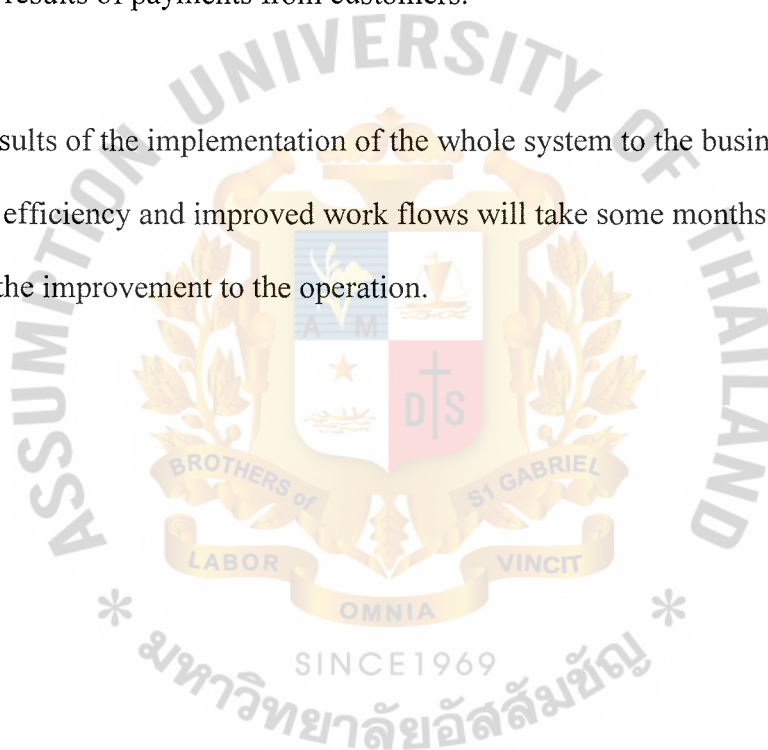
It also gives adequate time for the Accounting Department staff to become familiar with the new system and for client statements and balance as shown by the new system against those shown by the old system to ensure that they are correct.

Results

As the checking process will be done on a continuous basis as the implementation proceeds, we believe that the results will be evident from very early periods in the process.

Certainly, the results of the day to day operations will become evident in a very short time, with the results of payments from customers.

The overall results of the implementation of the whole system to the business as a whole in the form of efficiency and improved work flows will take some months before the real extent of the improvement to the operation.



5. CONCLUSION

This project is designed and depends on new technology in both hardware and software. The company can take some benefits after implementing the new system by reducing cost of Salary, Investment and Office Equipment around 1 million baht within 5 years (on page 47)

Break-even point's at 2.2 years in the chart of figure 3.2 page 50 and the net investment (on page 51) is only Bht. 645,524 but the net benefit is Bht. 694,119 (including Tax Saving)

Maximize the efficiency of process. Policies and receipt can be issued within 1 day instead of 2-3 days in the existing work flow (page 13), so that company can give better service to customers and reduce work loads.

All designs are made from small program package of the Microsoft Access. Database System to store data depends on the company's budget, the real number of transactions and knowledge of employees.

Most high-grade hardware about network(Hub and Router) are expensive. The executive can choose the lower grade hardware with intensive testing. But the high-grade hardware is more reliable than the lower one. The decision can be made depending on budget and awareness of problems.

6. RECOMMENDATION

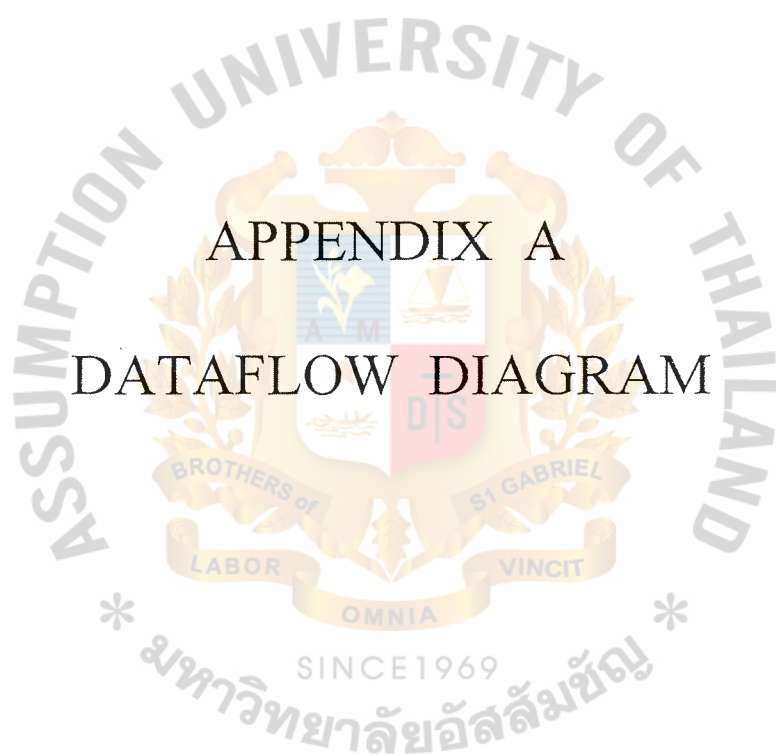
The new and suitable computer technology can be applied for re-engineering the insurance process but we should make a serious consideration about the implementation of a new computer system which is needed.

- Improve the local computer service by providing a local service or use a service company for supporting computer supply and on going service of local computer.
- Improve the communication between departments by using electronic mail and database system to help them share information. If any parts of the data were changed by any user, all the involved users would be notified automatically when they retrieve data from the computer system.
- Documentation should be of better quality and be efficient for authorized user to make a decision.
- The back office 'Account Receivable Management' (premium collection) should be developed in the next step to control the unpaid premiums.
- Train more technical staffs to solve the complicated problem of Client/Server system in the future.

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2. Yourdon E., Modern Structured Analysis. Prentice-Hall, 1989
3. Kendall K.E., Kendall J.E. System Analysis and Design (2nd Edition) Prentice-Hall, 1992
4. Fitzgerald J., Fitzgerald A., Fundamentals of system Analysis; Using Structured





APPENDIX A

DATAFLOW DIAGRAM

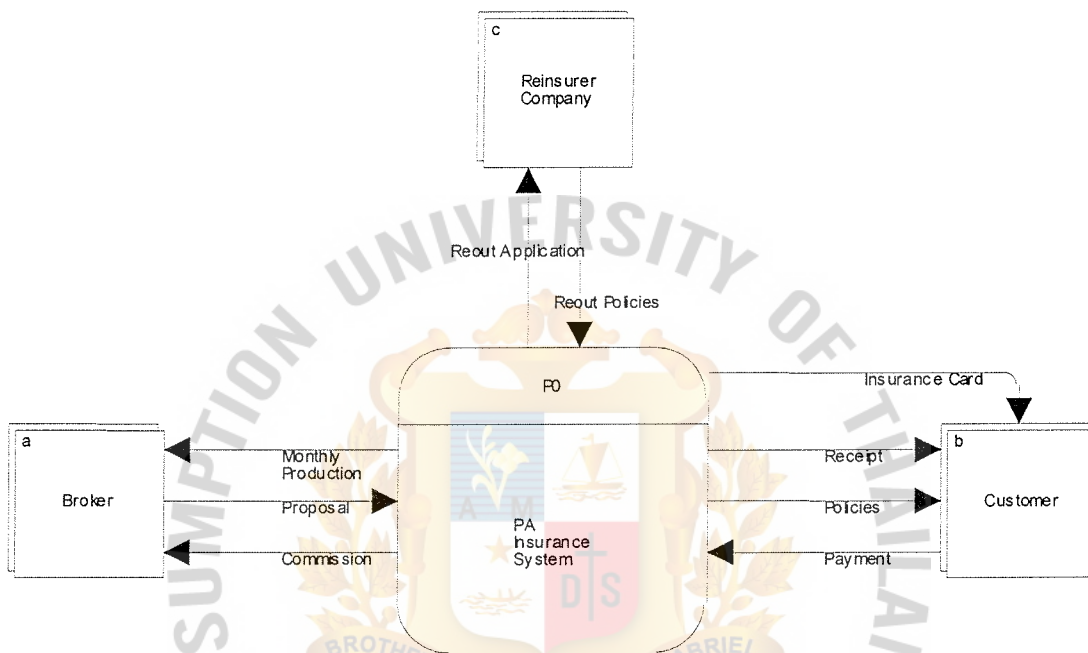


Figure A.1. Context Diagram (Propose System)

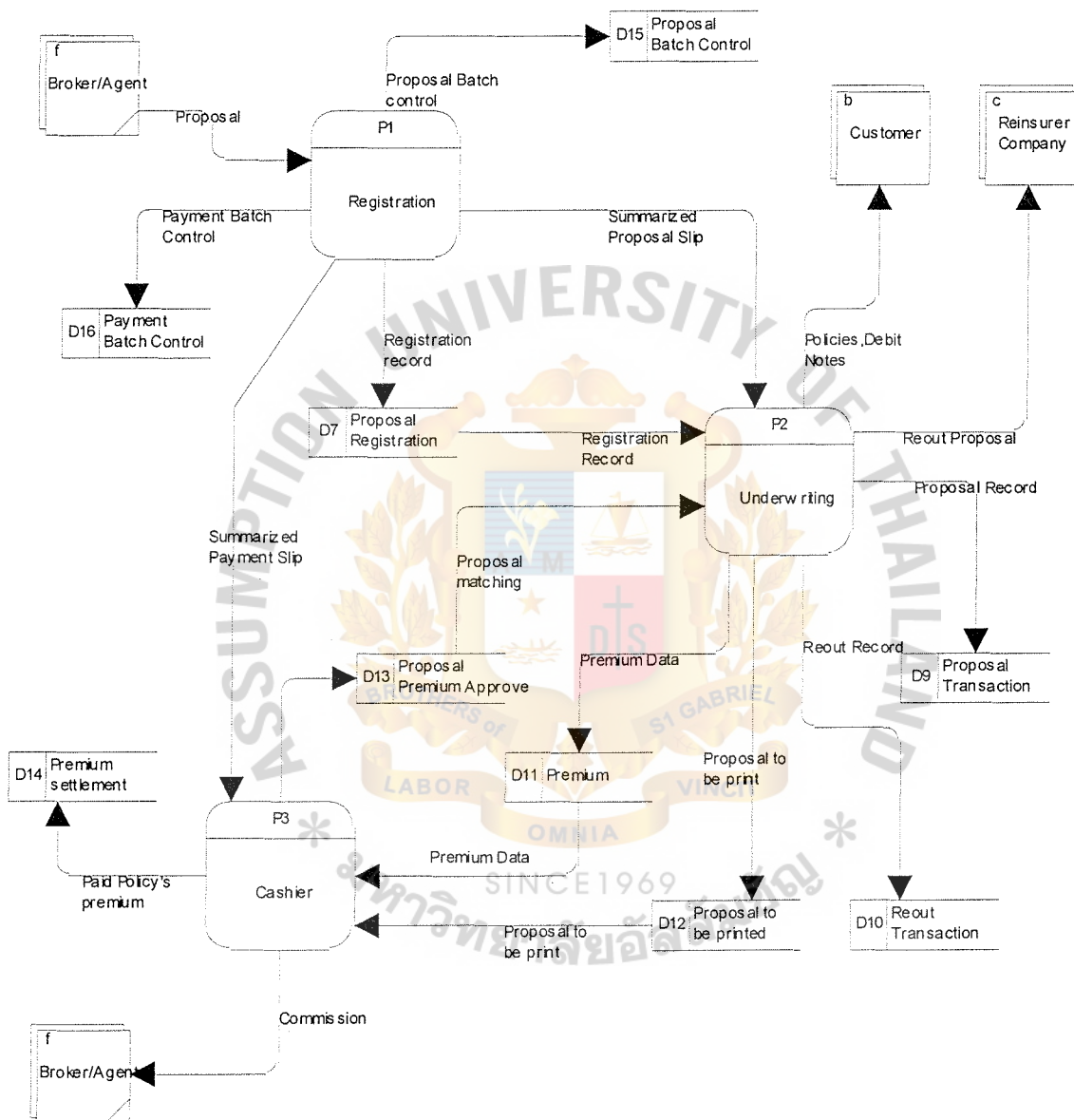


Figure A.2. Level 1 PA Insurance System

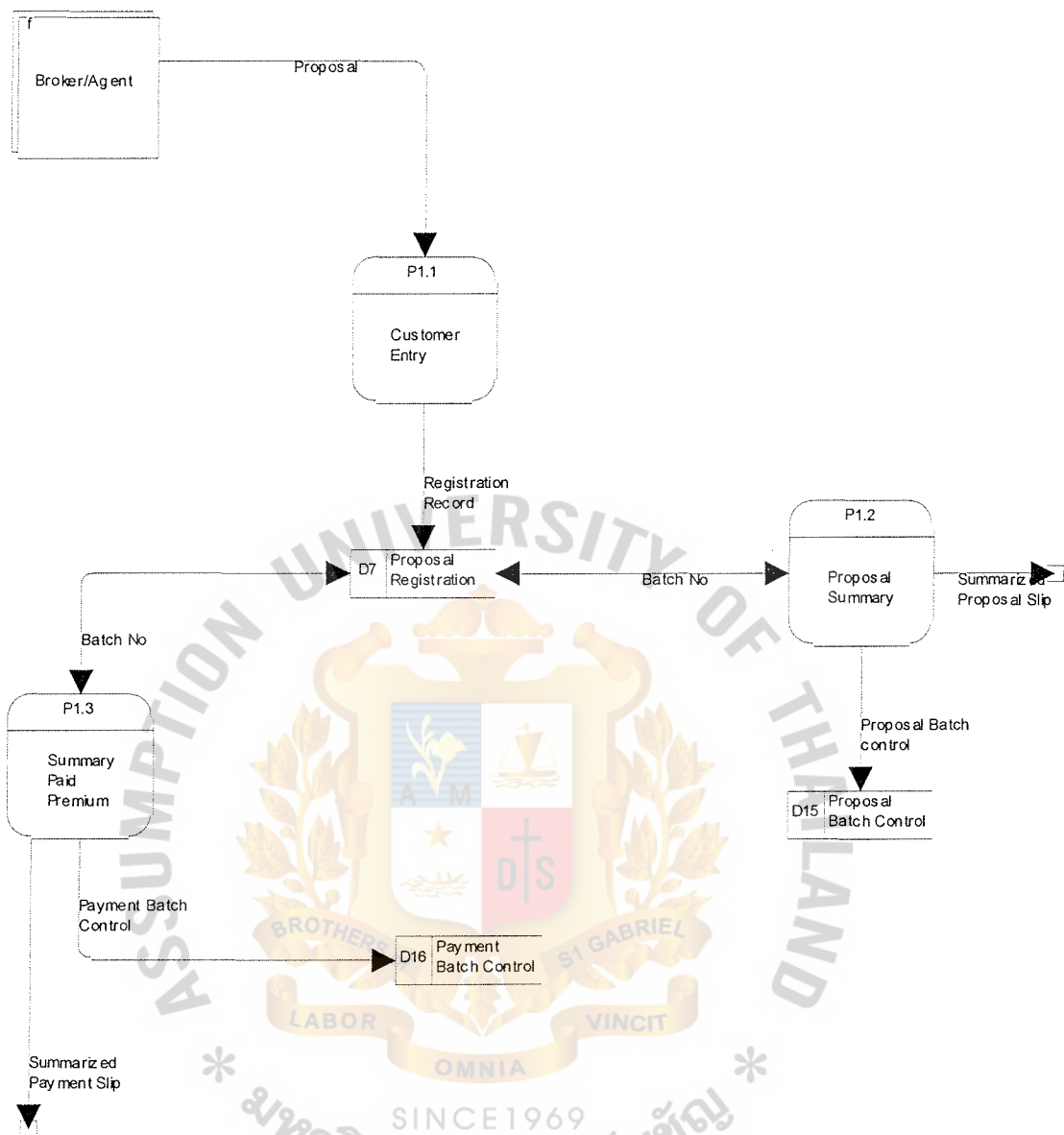


Figure A.3. Level2 Registration

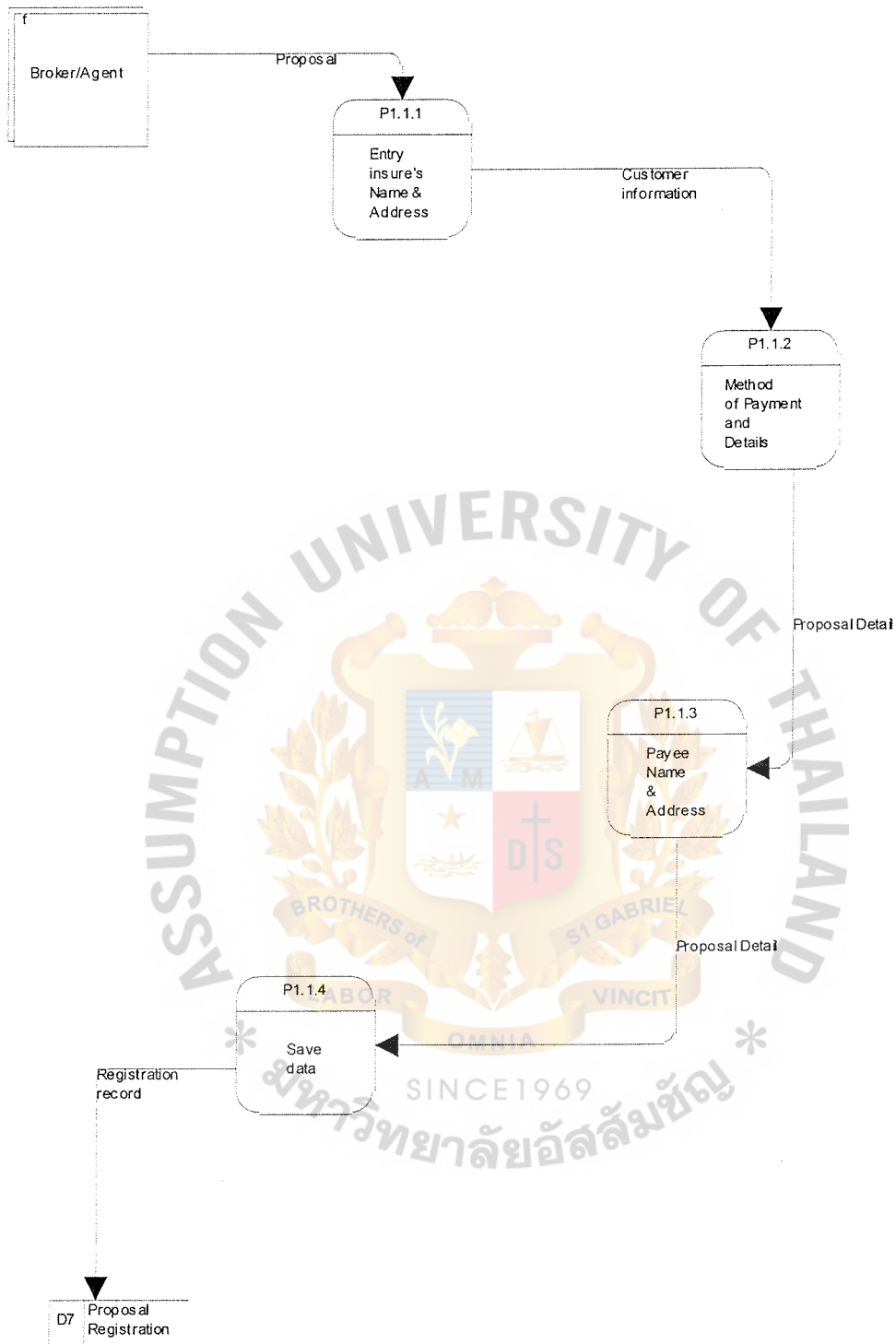


Figure A.4. Level 3 Customer Entry

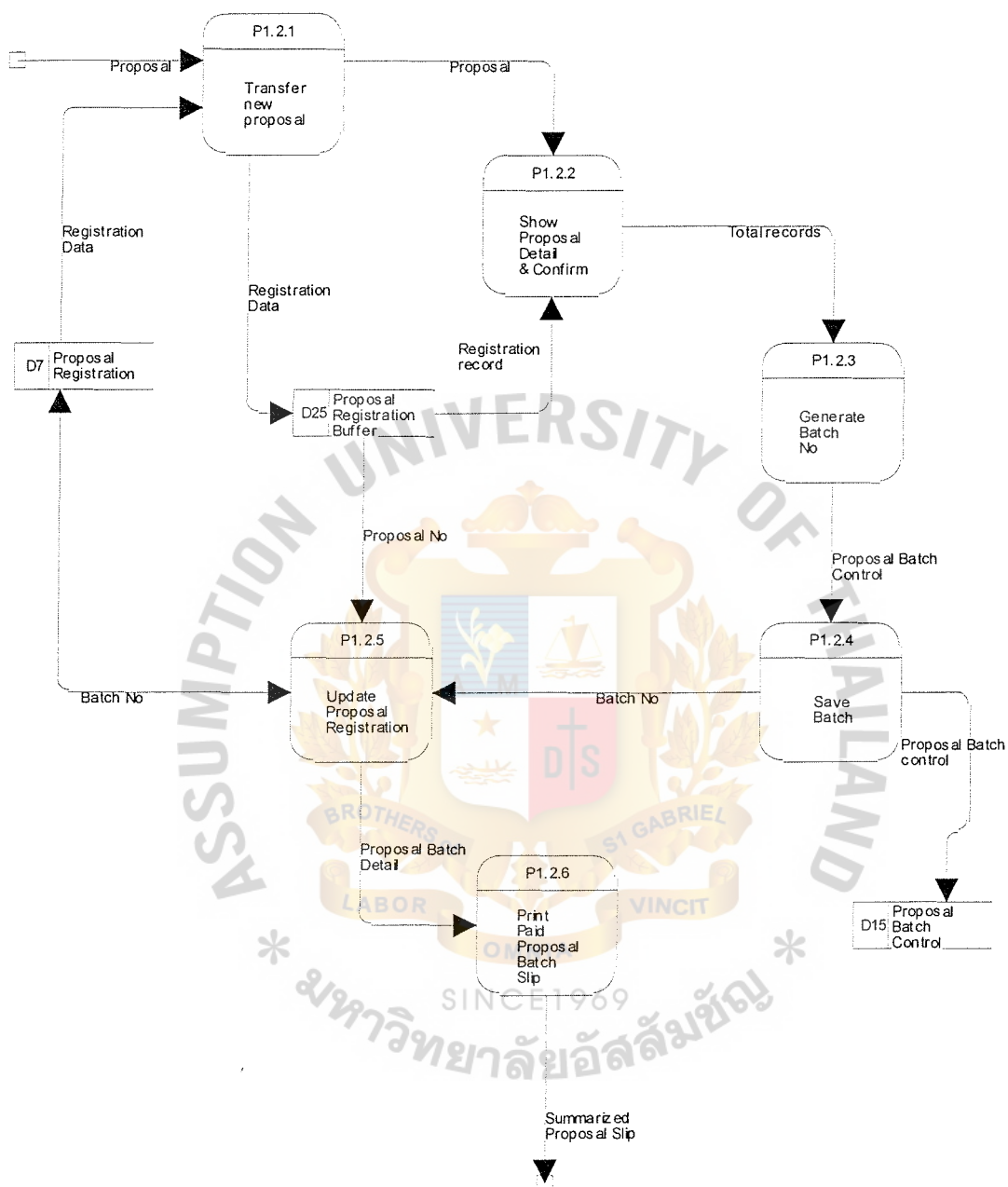
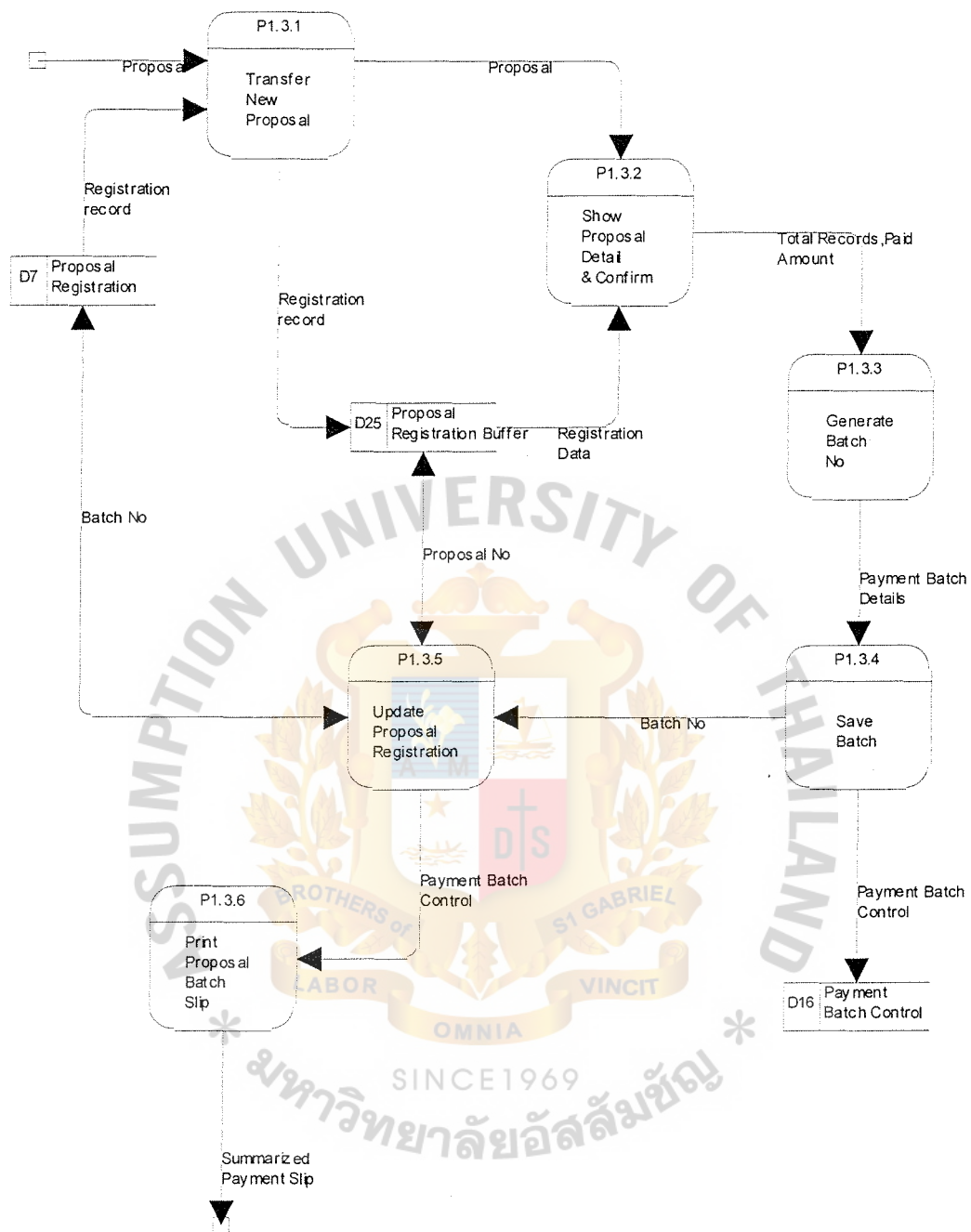


Figure A.5. Level 3 Proposal Summary



Dataflow Diagram Level 3 of Summary Paid Premium

Figure A.6. Level 3 Summary Paid Premium

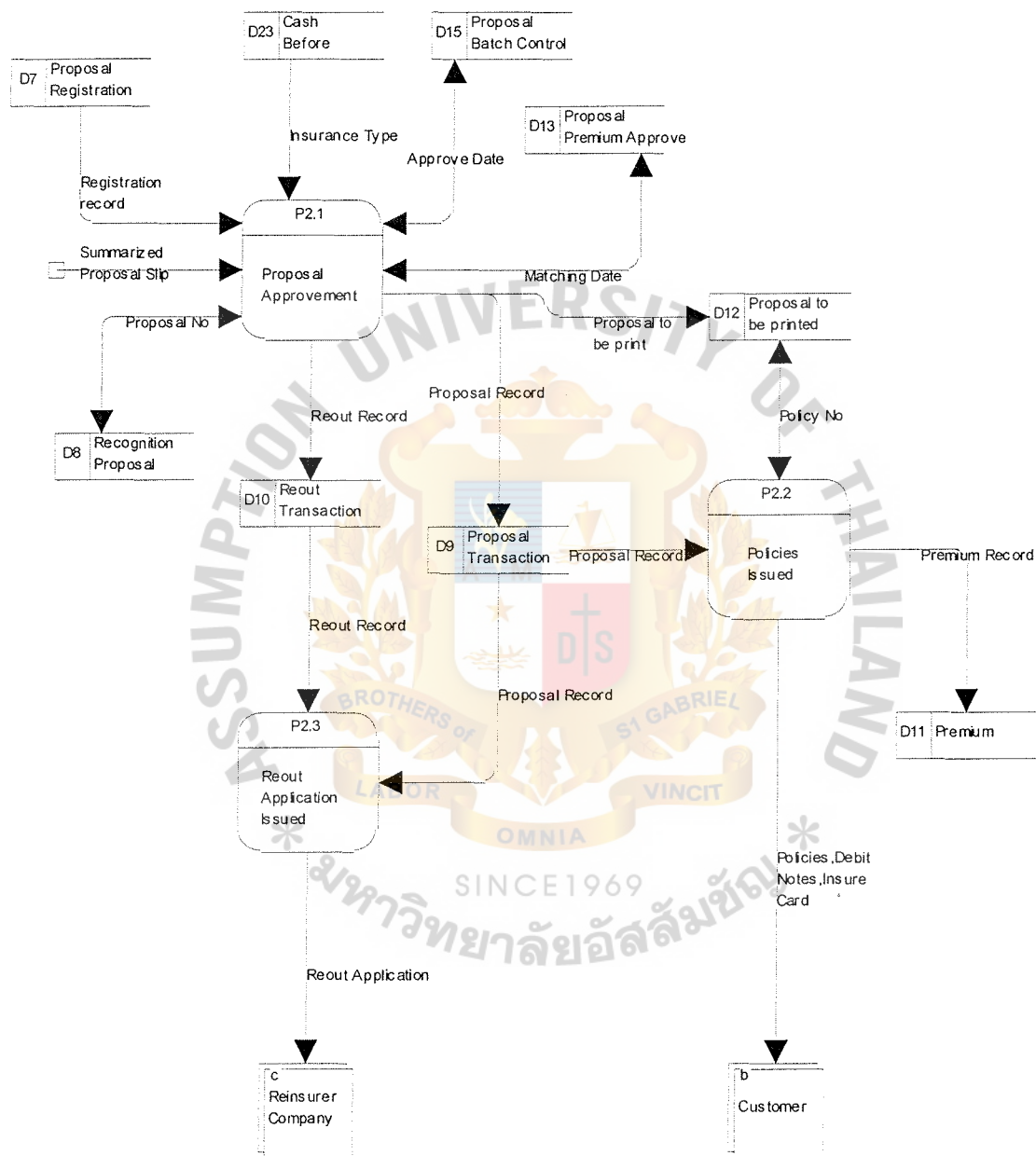


Figure A.7. Level 2 Underwriting

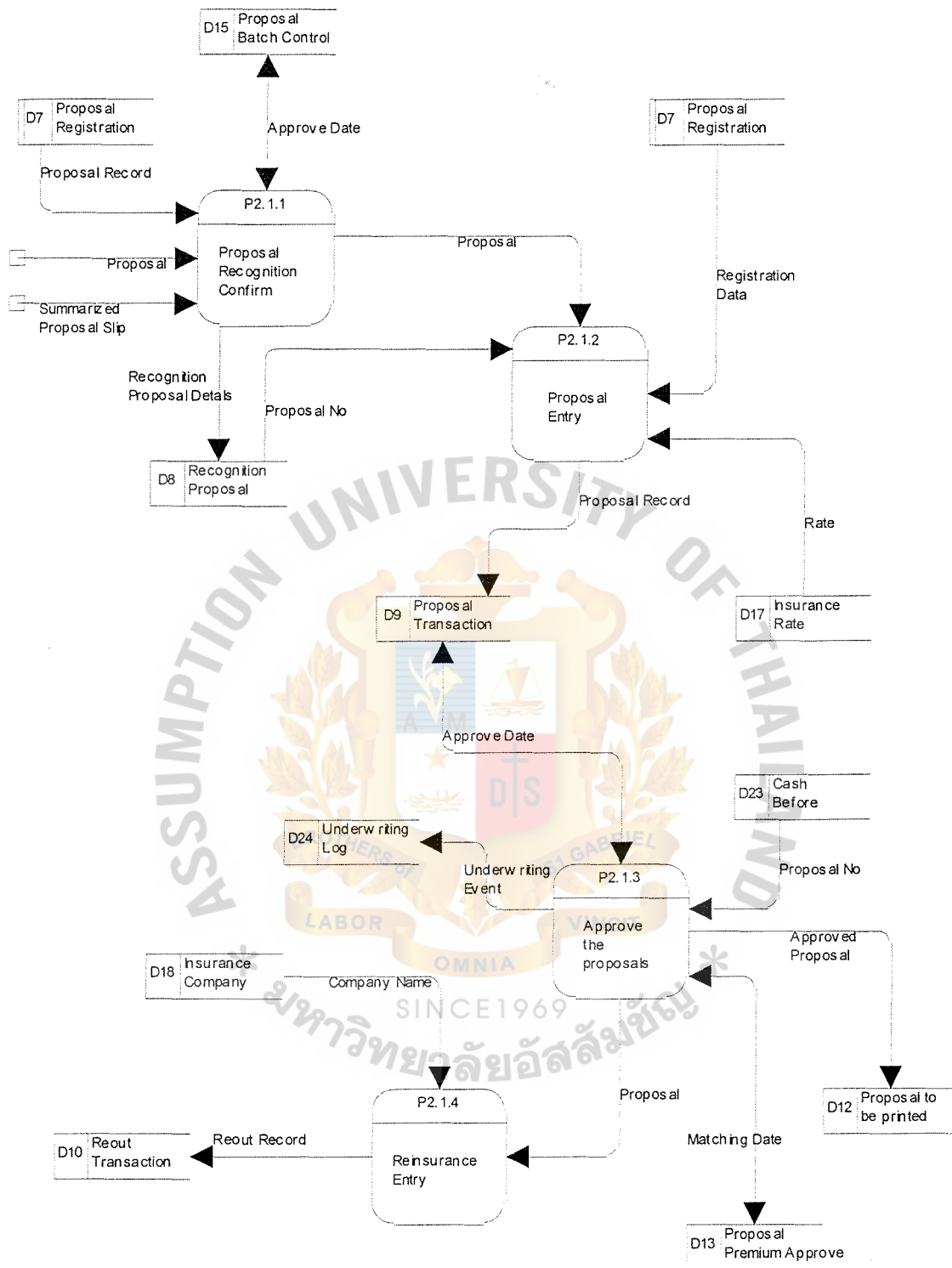


Figure A.8. Level 3 Proposal

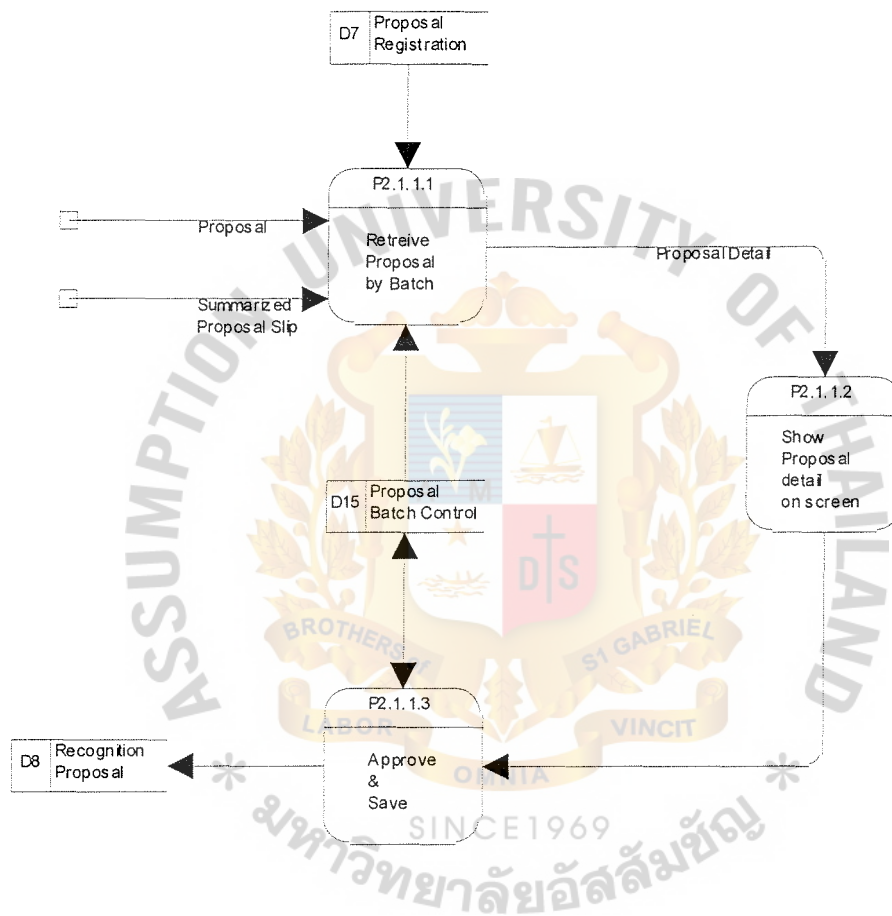


Figure A.9. Level 4 Proposal Recognition Confirm

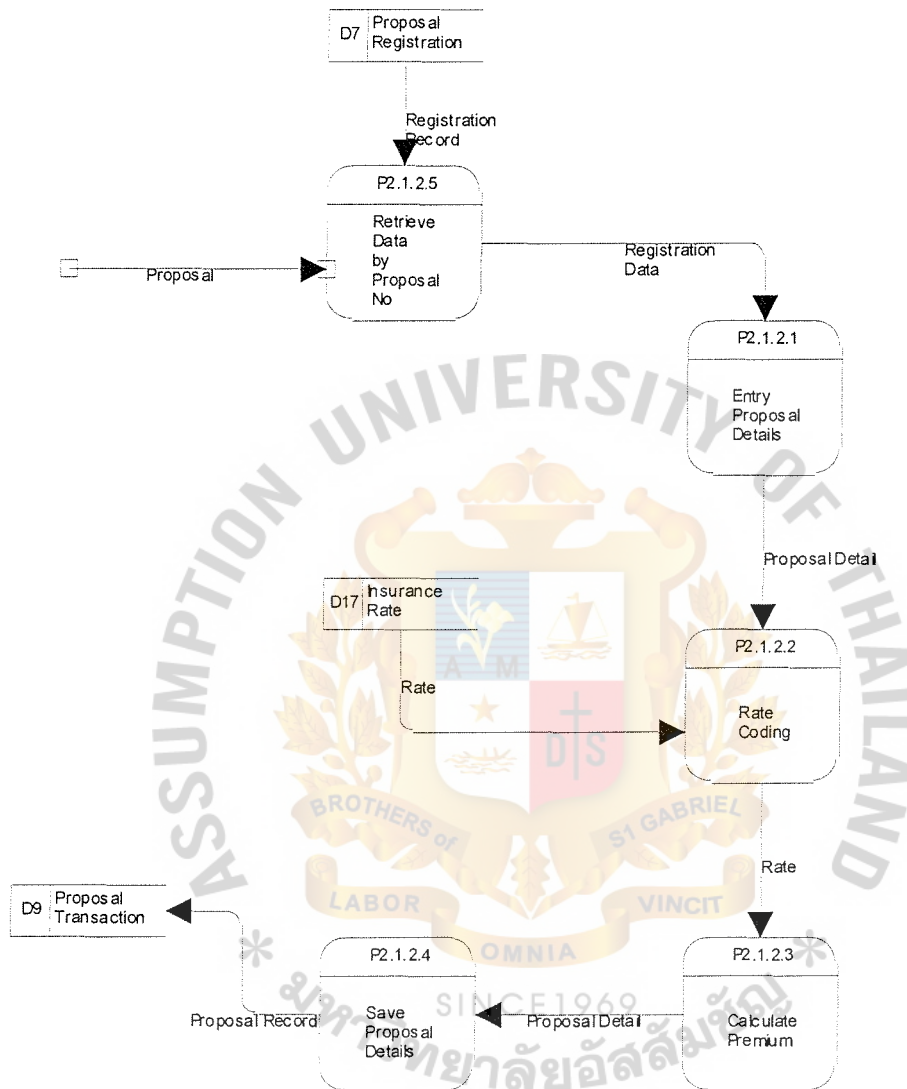


Figure A.10. Level 3 Proposal Entry

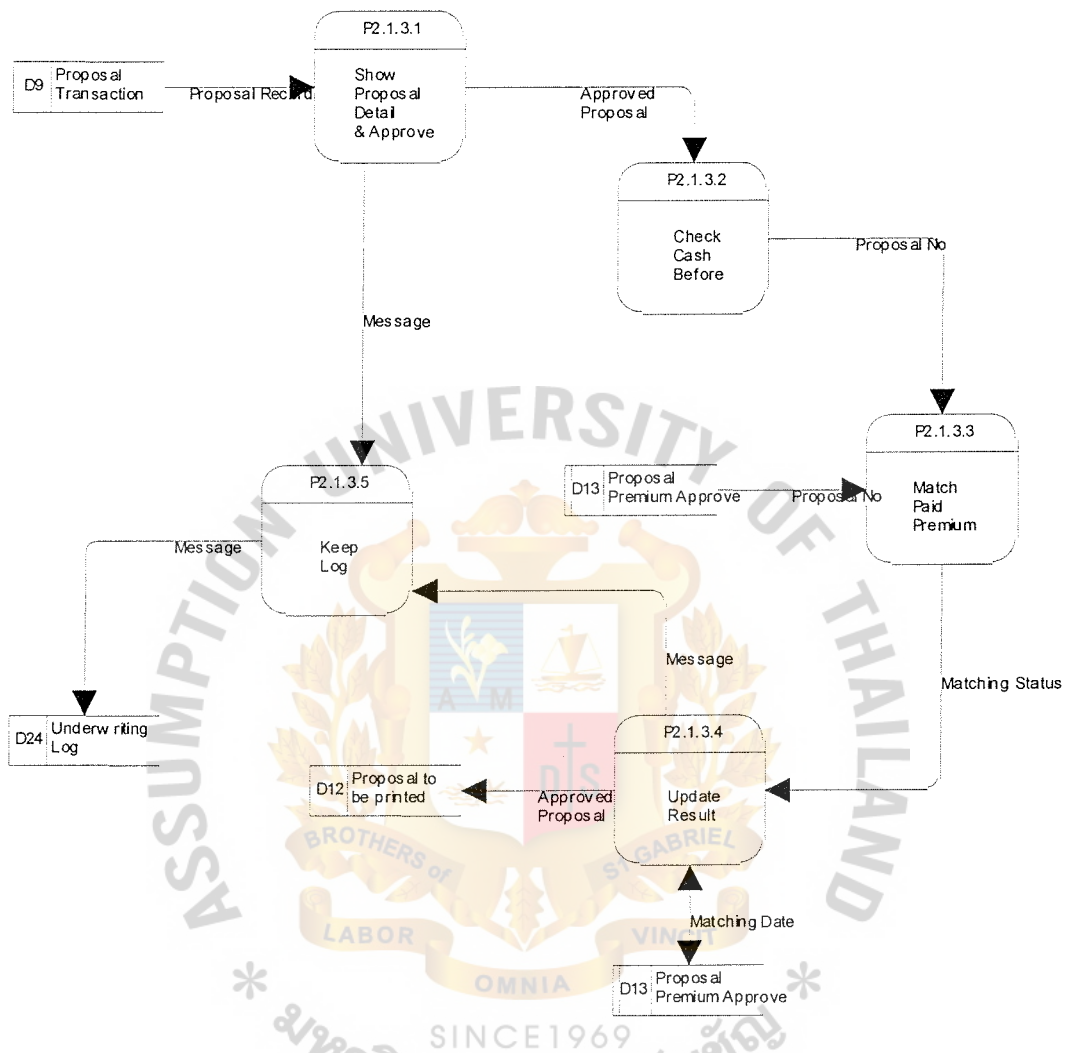


Figure A.11. Level 4 Approve the proposals

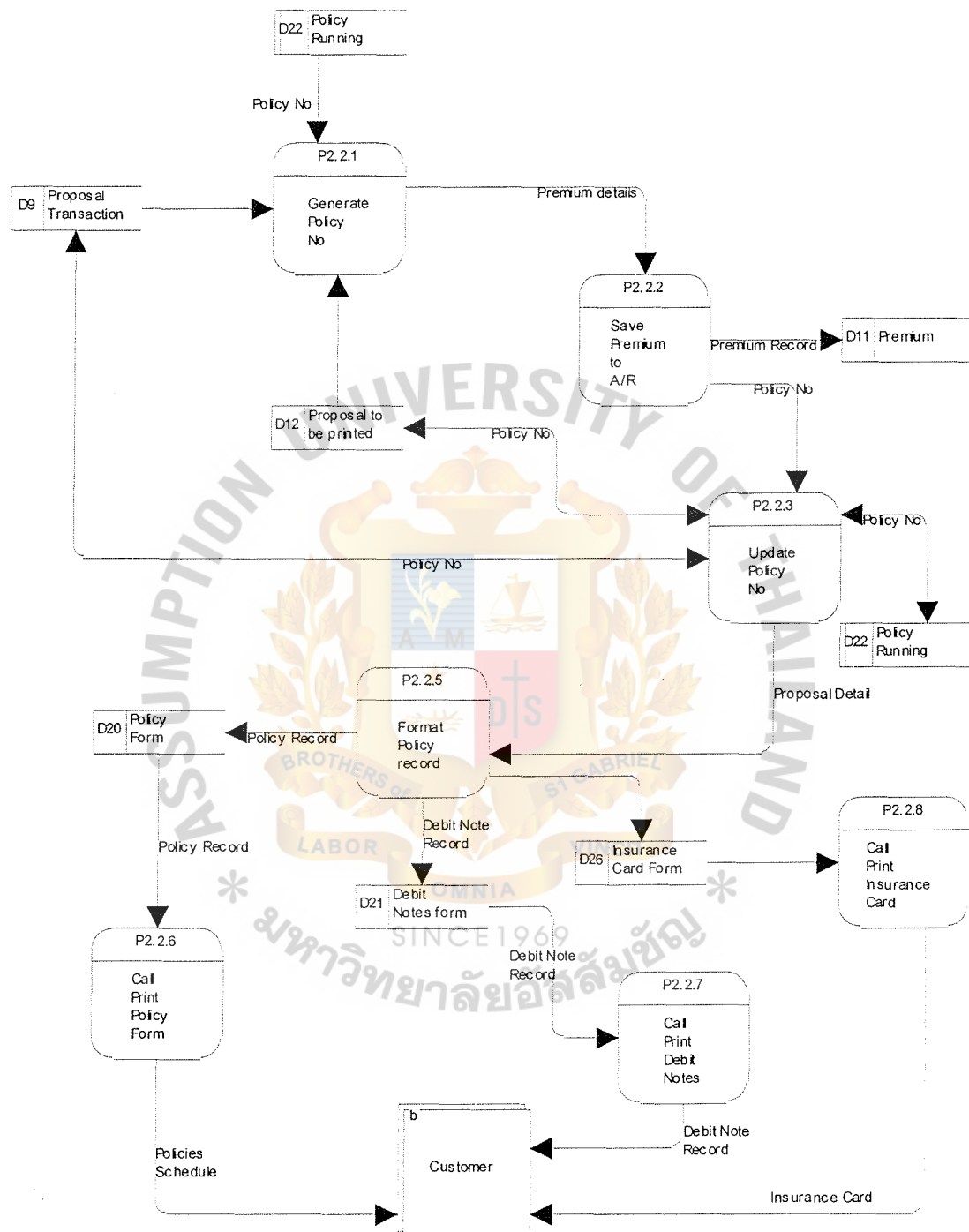


Figure A.12. Level 2 Policies Issued

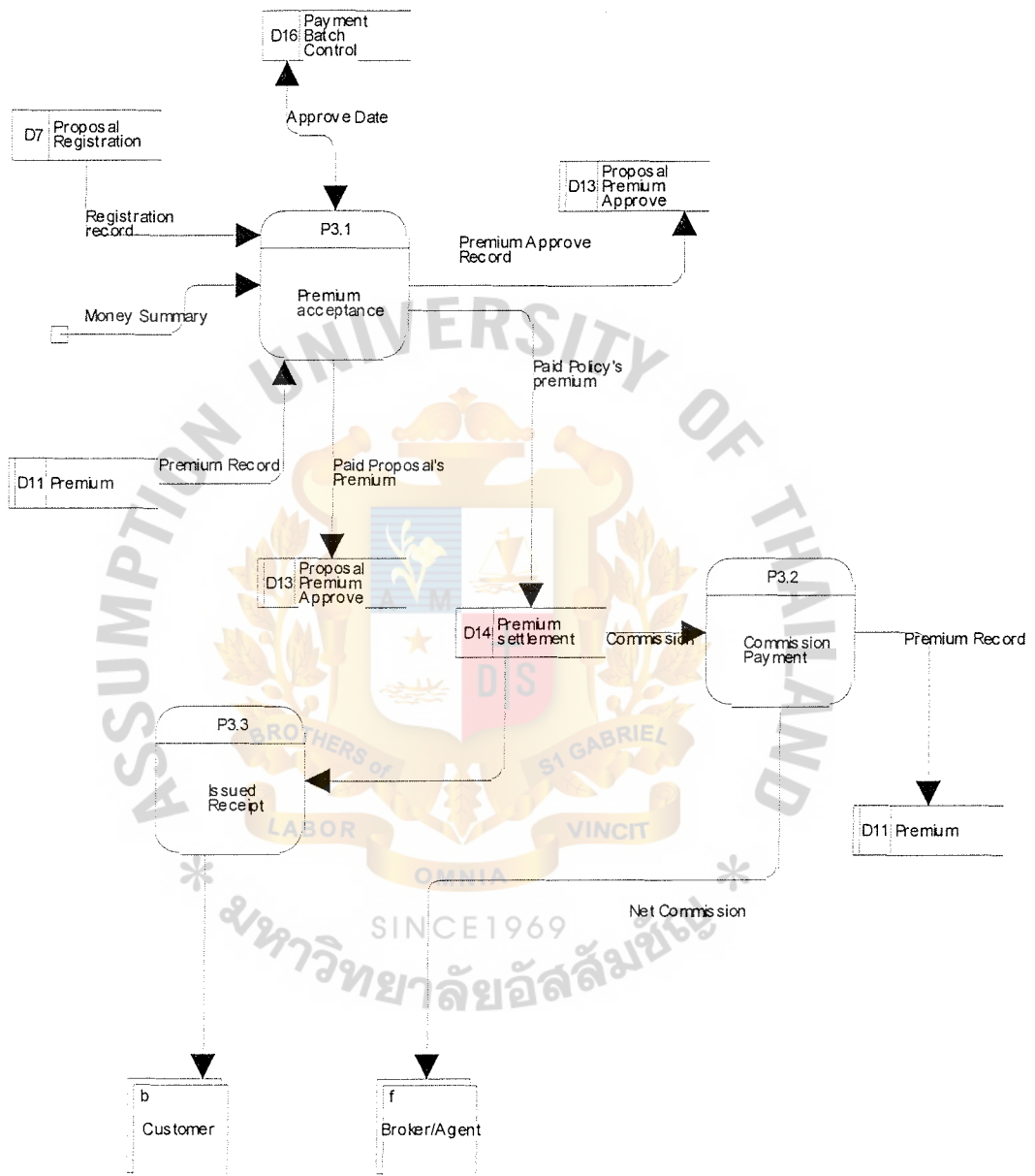


Figure A.13. Level 2 Cashier

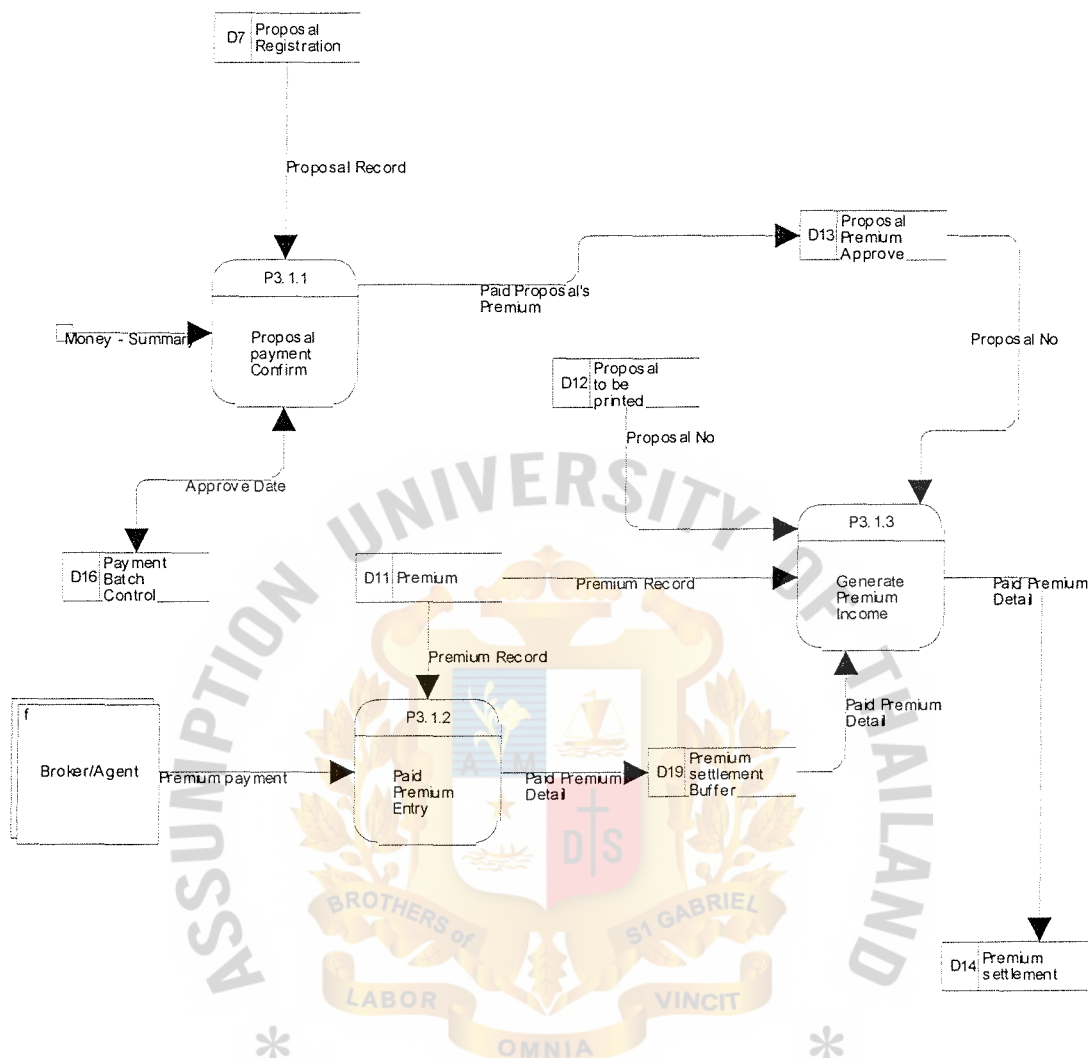


Figure A.14. Level 3 Premium Acceptance

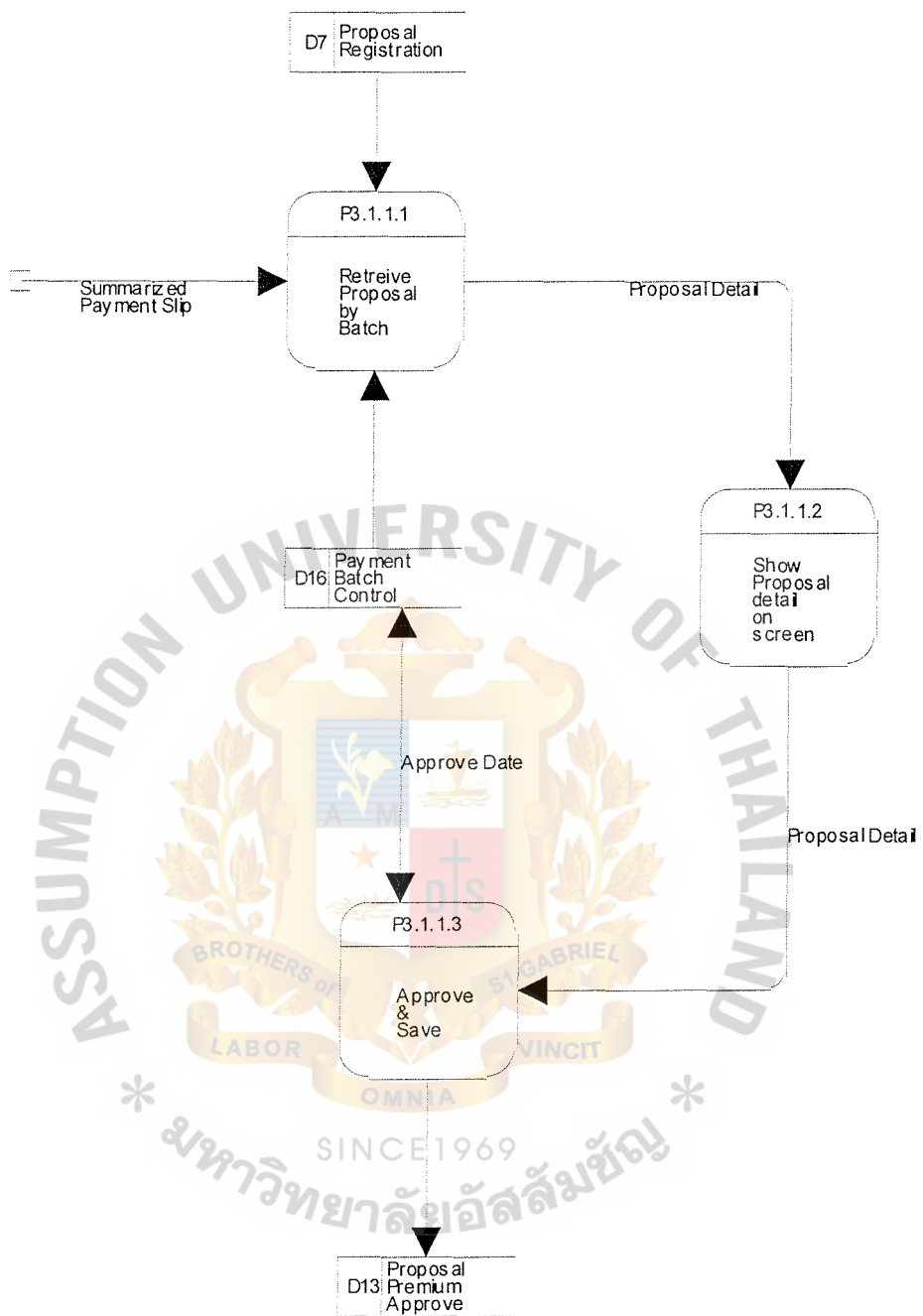


Figure A.15. Level 4 Proposal Payment Confirm

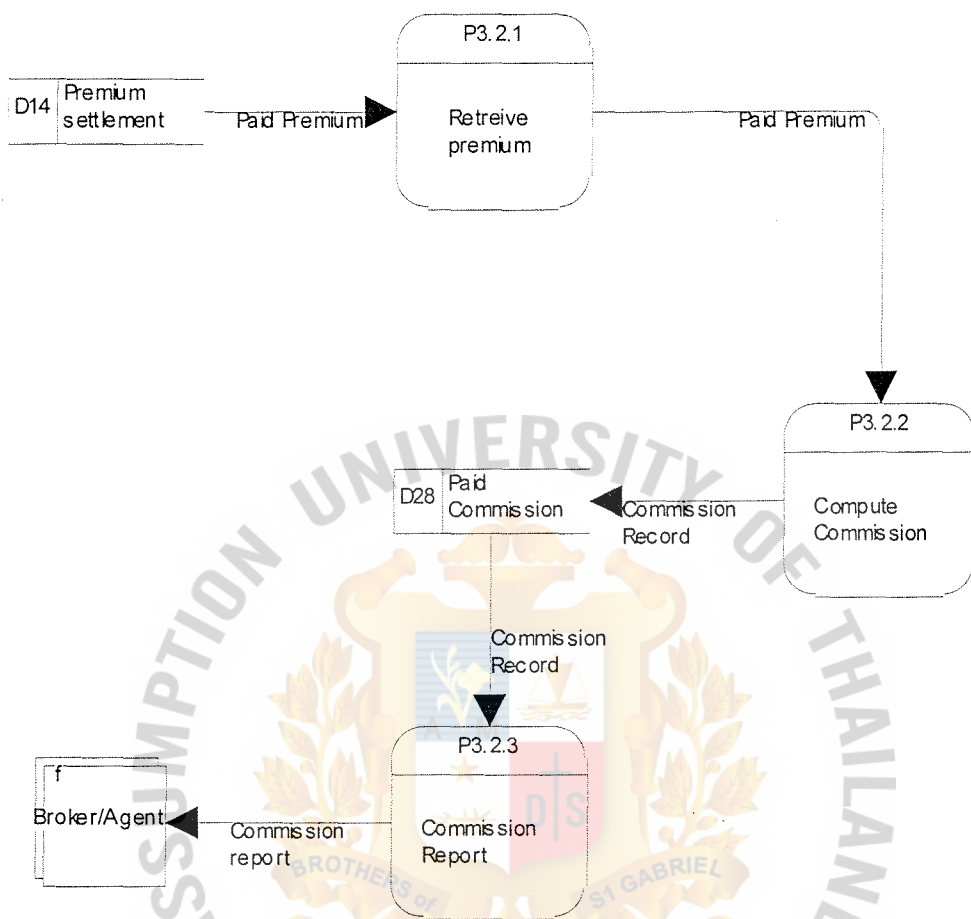


Figure A.16. Level 3 Commission Payment

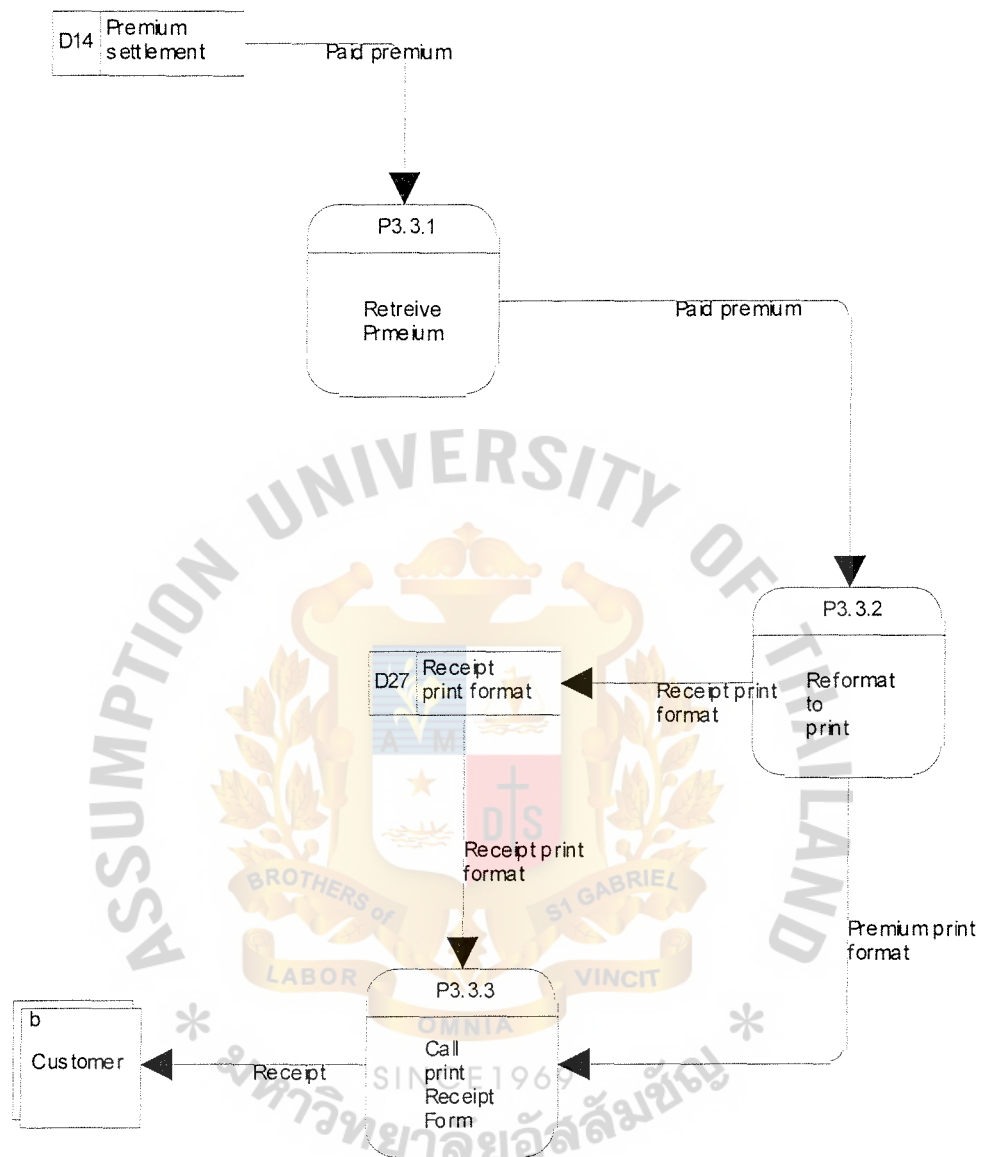
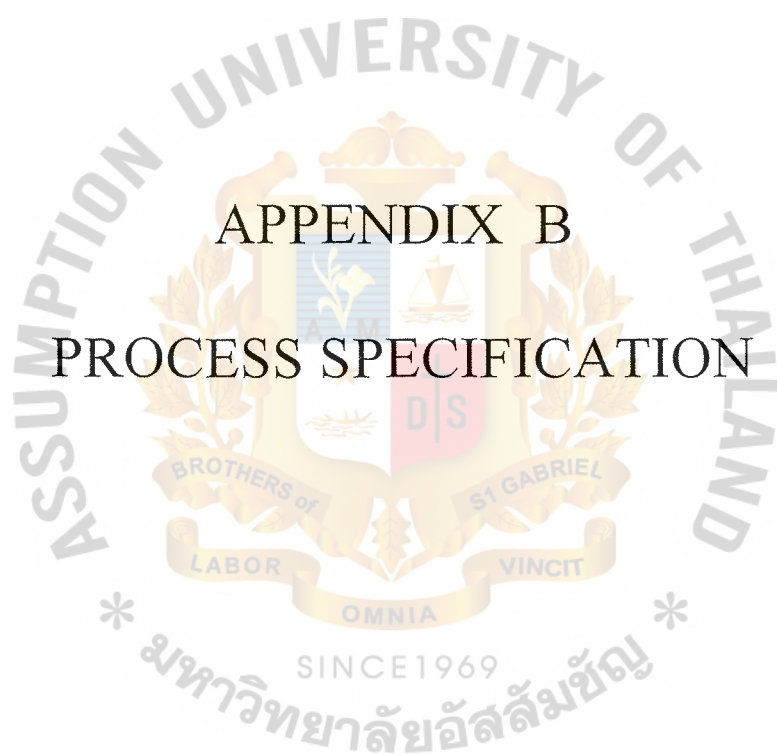


Figure A.17. Level 3 Issued Receipt



APPENDIX B

PROCESS SPECIFICATION

APPENDIX B PROCESS SPECIFICATION

There are 3 main processes for the application system and each main process has sub processes under the main.

Process ID	Process Name	Function
P1	Registration	Control registration for proposals
P1.1	Customer Entry	Entry customer information
P1.2	Proposal Summary	Summarize the proposal in a Slip
P1.3	Summary Paid Premium	Summarize the paid premium in a Slip
P2	Underwriting	Control Approve and Policies issued
P2.1	Proposal Approvement	Accept and entry the registered proposals
P2.2	Policies Issued	Print Policies and related documents
P2.3	Reout Application issued	Print Reout Proposal to reinsurer
P3	Cashier	Control premium and commission
P3.1	Premium Acceptance	Accept paid premium for proposals
P3.2	Commission Payment	Calculate commission and pay to agent
P3.3	Issued Receipt	Print receipts for the paid premium

Figure B.1. Main Processes Specification

Process Id : P1.1

Process Name : Customer Entry

Function :

- To keep customer details

Input :

- Proposal forms

Source :

- from Broker or Agent

Process :

To accept customer details by the following information

- Proposal Id
- Customer Name
- Customer Address
- Customer occupy
- Customer's income
- Premium paid by
- Cheque details

Then keep the information into Proposal Registration.

Output :

- Proposal Registration

Destination :

- NT Server

Process Id : P1.2

Process Name : Proposal Summary

Function : Summary the Proposal in a Slip

Input :

- Proposal Registration

Process :

Count the registered proposal data which are never count, automatic create a Batch No for each cession, display the proposal detail on the screen with the total of record count and paid premium at the bottom of screen. Data to be displayed are.-

- Batch No - display on the screen header
- Proposal No
- Insured name
- Register Date
- Paid premium

The visible detail can be approved by the way on the screen by one click. Then create data about cession with Batch No store into Proposal Batch Control.

Output :

- Proposal Batch Control

Destination :

- NT Server

Process Id : P1.3

Process Name : Summary Paid Premium

Function :

- Summarize the paid premium in a Slip

Input :

- Proposal Registration

Source :

- NT Server

Process :

Count the registered proposal data which are never count and has value of paid premium. Then automatic create a Batch No for each session, display the proposal detail on the screen with the total of record count and paid premium at the bottom of screen. Data to be displayed are.-

- Batch No - display on the screen header
- Proposal No
- Insured name
- Register Date
- Paid premium

The visible detail can be approved by the way on the screen by one click. Then create data about session with Batch No store into Proposal Batch Control.

Output :

- Proposal Batch Control

Destination :

- NT Server

Process Id : P2.1

Process Name : Proposal Approval

Function :

- To make and approval summarized proposal from Registration system
- Checking “Cash Before Cover”
- Reconciliation of paid premium proposal

Input :

- Proposal Summary
- Registered Proposal
- Proposal Premium Approve

Process :

To make an approval the summarized proposal from Registration System by using Batch No to retrieve summary information out to the screen. Data need to setting are.-

- Summarize Approve Flag
- Summarize Approve Date
- Summarize User Acceptance

When approve the Batch No , the system will keep all Proposal No which are under the Batch. Data which are kept in this step is

- Proposal No

The complete detail entry of proposal will be approve by underwriter.

The Proposal No one by one will be called and show some detail need to check for confirm. Data which are showed on the screen are .-

- Proposal No
- Customer Name

If the proposal has no problem, approve proposal can be made by push a botton and some information will be kept into the proposal transaction. These are information that will be kept when approval occurs .-

- Underwrite Approve Flag
- Underwrite Approve Date
- Underwrite User ID

After each proposal was approved, this system will check “Cash Befor Cover” to the proposal.

- If “Cash Before Cover” then reconcile with paid premium proposal
- If found then send this proposal to print policy and receipt
- If not found, no action and this proposal will be appeared in error report
- If not “Cash Before Cover” then send the proposal to print policy and reconcile with paid premium proposal
- If found then send the proposal to print receipt
- If not found then no action about print receipt

If have any re-out sum-insured the underwriter will use Re-out Entry and print Re-out Application send to the Re-Insurer.

Output :

- Recognition Proposal
- Proposal Batch Control
- Proposal to be printed
- Proposal Transaction
- Re-out Application Issued System

Destination :

- Policies Issued System
- Issued Receipt System
- Premium Acceptance System
- Reout Application Issued System

.....

Process ID : P2.2

Process Name : Policies Issued

Function :

- Generate Policies' data to be printed
- Call the Form Flow Package running for print policies

Input :

- Proposal Transaction
- Proposal to be printed

Process :

This system receive command from Proposal to be print by the Proposal Approvement System. The system generate data into format that are suitable for print by form package. The policy details are retrieved from the Proposal Transaction depend on the Proposal No from Proposal to be printed and output into 2 way . One for print policies and the another one for print Debit Notes. After generate policy date, it will mark back the Print policy date to Proposal to be printed.

Output :

- Proposal to be printed
- Policies Schedule
- Debit Notes

Destination :

Customer

.....

Process ID : P2.3

Process Name : Reout Application Issued

Function :

- Issue Re-out Application

Input :

- Re-out Transaction
- Proposal Transaction

Destination :

- Underwriter

Process :

Retrieve Re-out Transaction that are appended by underwriter. The Re-out Transaction together with Proposal Transaction will be formatted data into form that is provided for printing by form package

Output :

Re-out Application

Destination :

Re-insurer Company

Process ID : P3.1

Process Name : Premium Acceptance

Function :

- To accept paid premium proposal summarized from Registration system

Input :

- Payment Batch Control
- Money Summary
- Proposal Registration

Source :

- Marketing Department

Process :

Call Batch No for Money Summary to show summary detail on screen and check the detail with the Money Summary slip. If has no problem then approve by push a button. The system will mark some detail back to the Payment Batch Control by

- Paid premium Approve Date
- Paid premium Approve User

Transfer the approve Proposal No into this system for reconcile with the underwriter approved proposal .

The complete reconcile proposal will be transfer into Premium Settlement otherwise they will be transferred into Account Receivable.

Output :

- Payment Batch Control
- Proposal Premium Approve
- Premium Settlement
- Account Receivable

Destination :

- Premium Acceptance System
- Accounting Department

Process ID : P3.2

Process Name : Commission Payment

Function :

- Generate commission amount to pay to Agent or Broker

Process :

Premium transaction that are ready to paid commission. This system can retrieve from the Premium Settlement day-by-day basis. Calculate commission and print commission slip.

Output :

- Commission Slip

Destination :

- Broker/Agent

Process ID : P3.3

Process Name : Issued Receipt

Function :

- Issued Receipt when premium transactions are settled.

Input :

- Premium Settlement that are already booked
- Premium Details

Source :

- Policies Issued
- Premium Acceptance

Process :

Generate premium detail into format that suitable for print receipt by
form package and call the form package to print receipt.

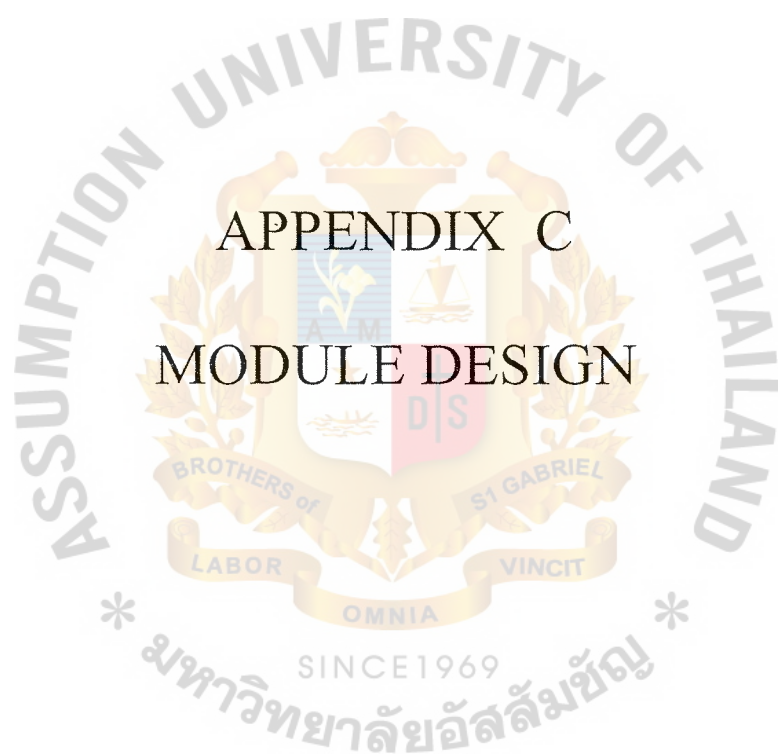
Output :

- Receipt

Destination :

- Customer





APPENDIX C

MODULE DESIGN

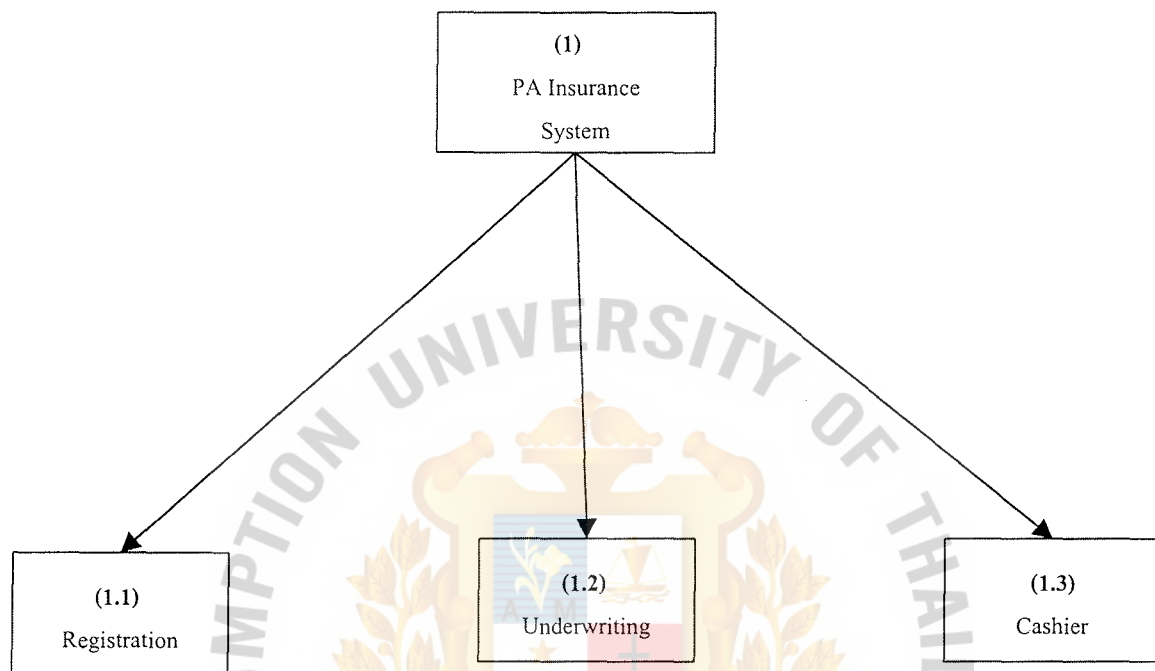


Figure C.1. Module (Proposal Insurance System)

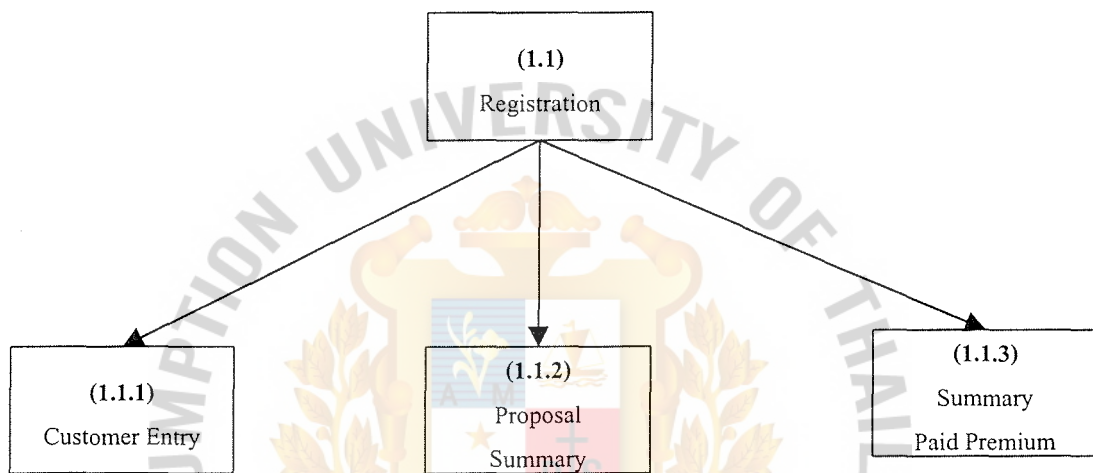


Figure C.2. Module (Registration)

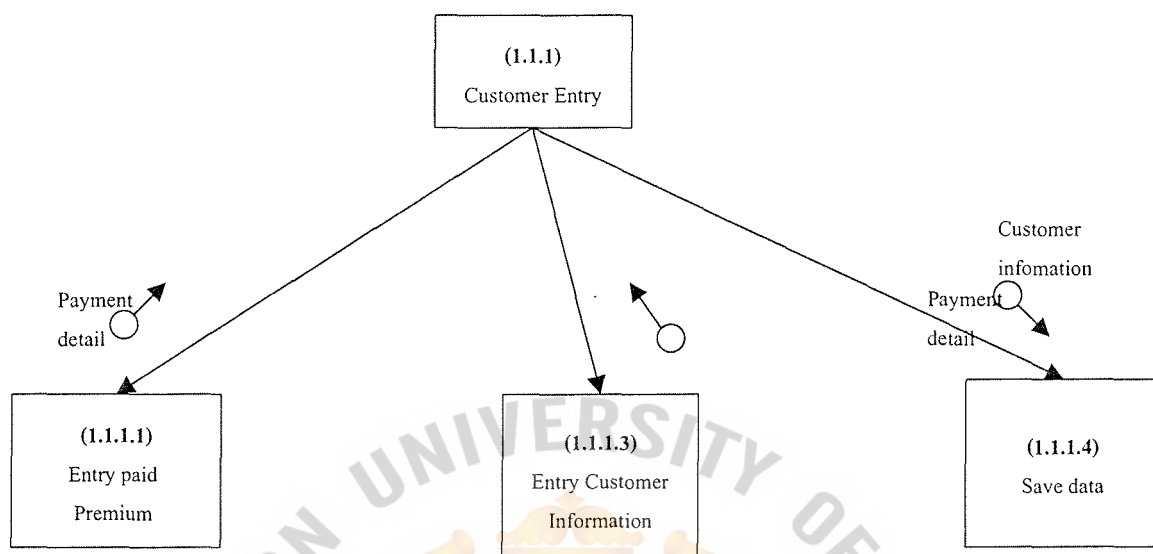


Figure C.3. Module (Customer Entry)

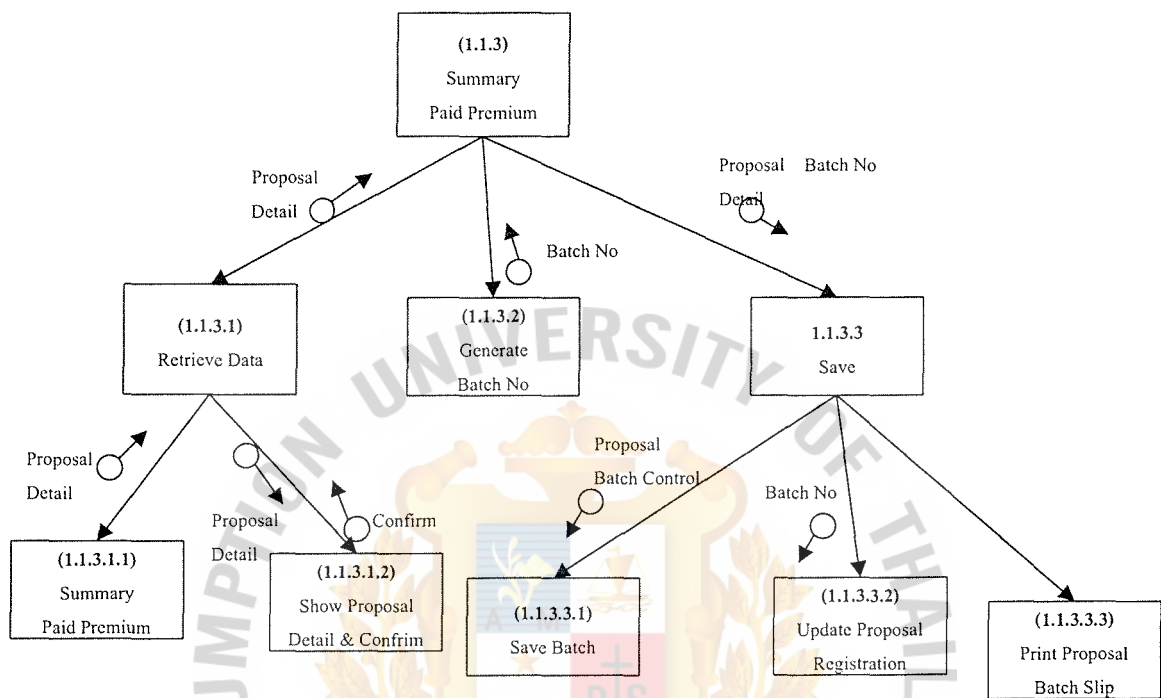


Figure C.4. Module (Summary Paid Premium

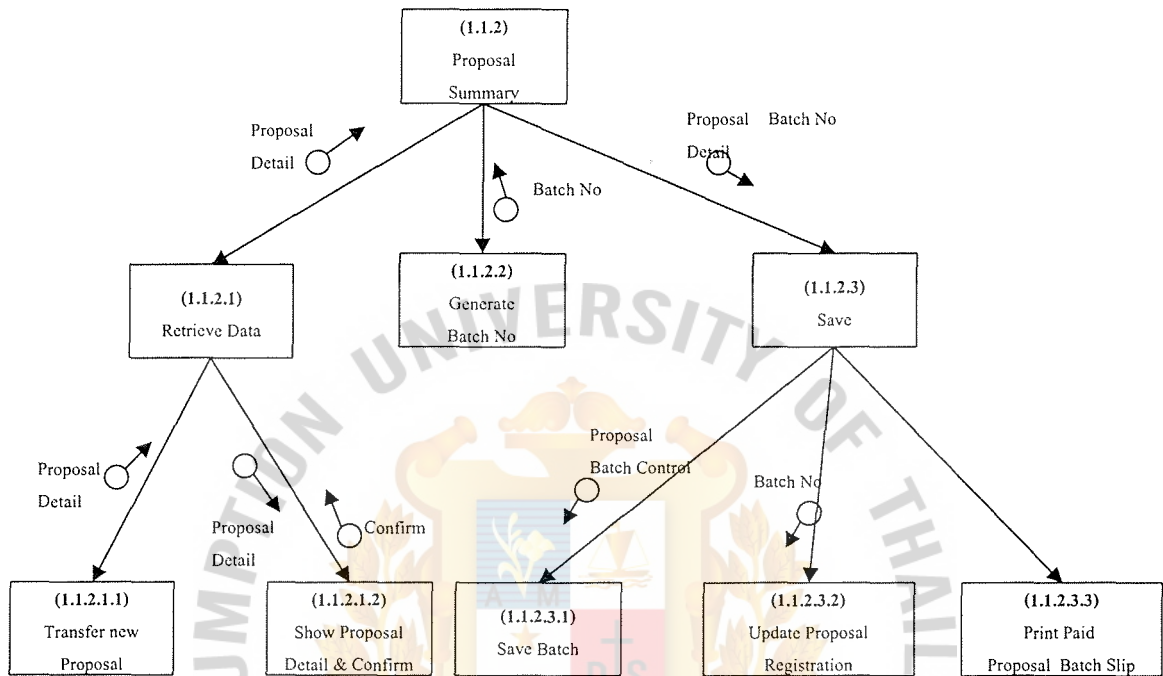


Figure C.5. Module(Proposal Summary)

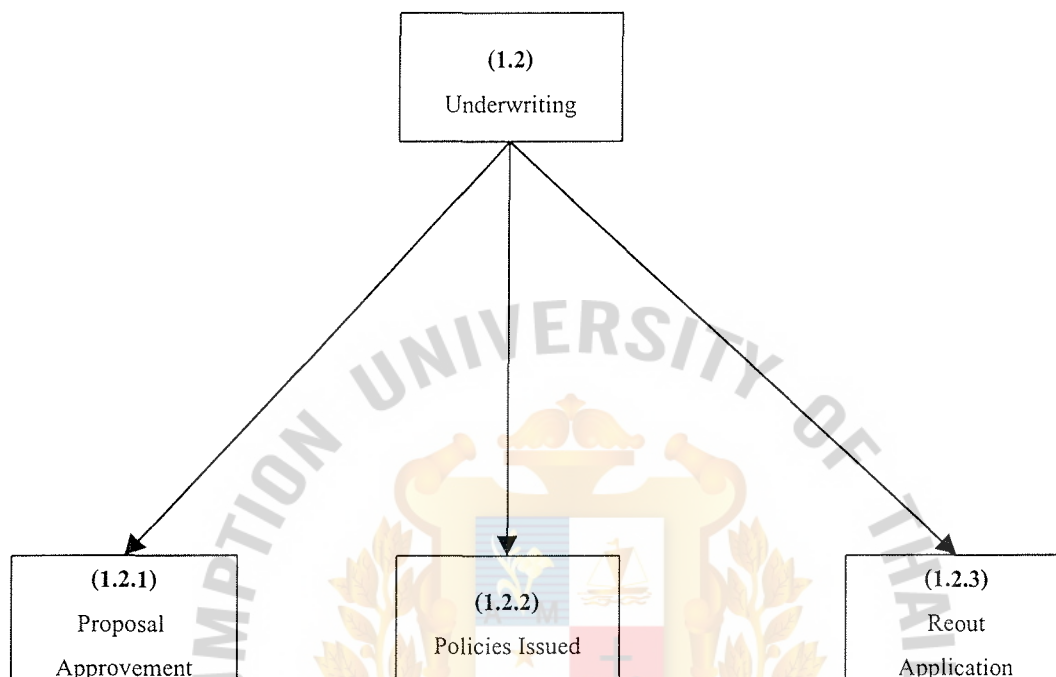


Figure C.6. Module (Underwriting)

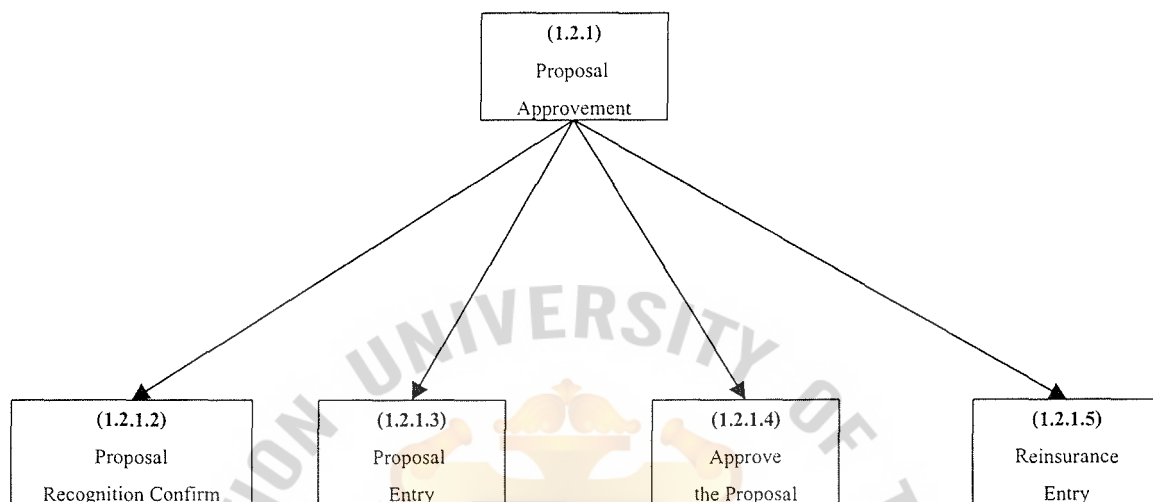


Figure C.7. Module (Proposal Approvement)

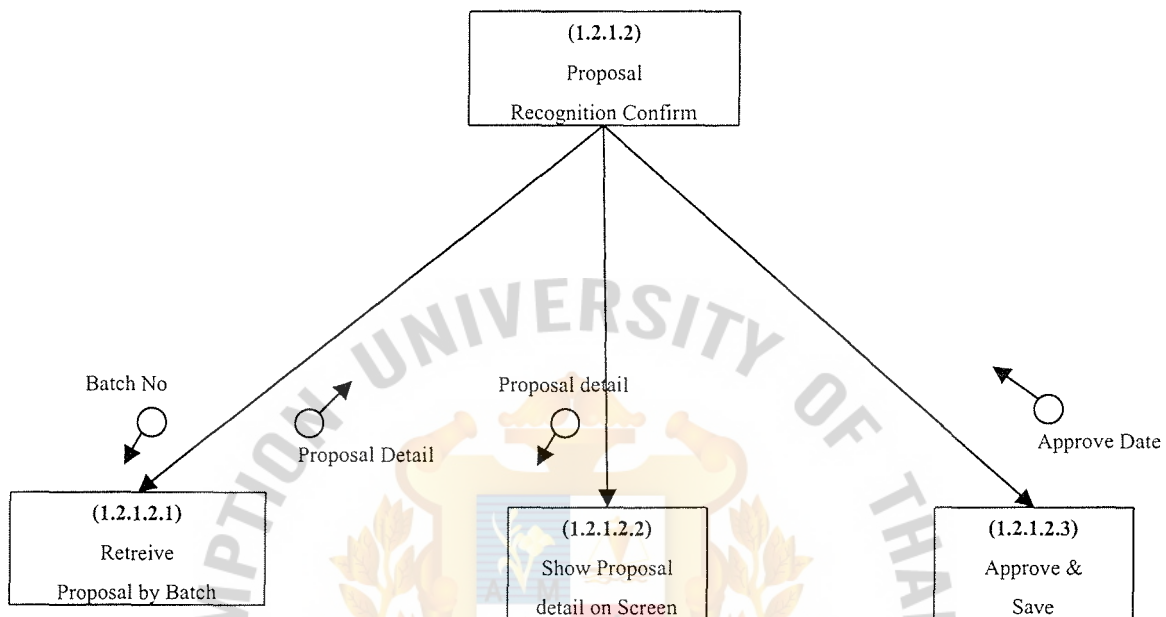


Figure C.8. Module (Proposal Recognition Confirm

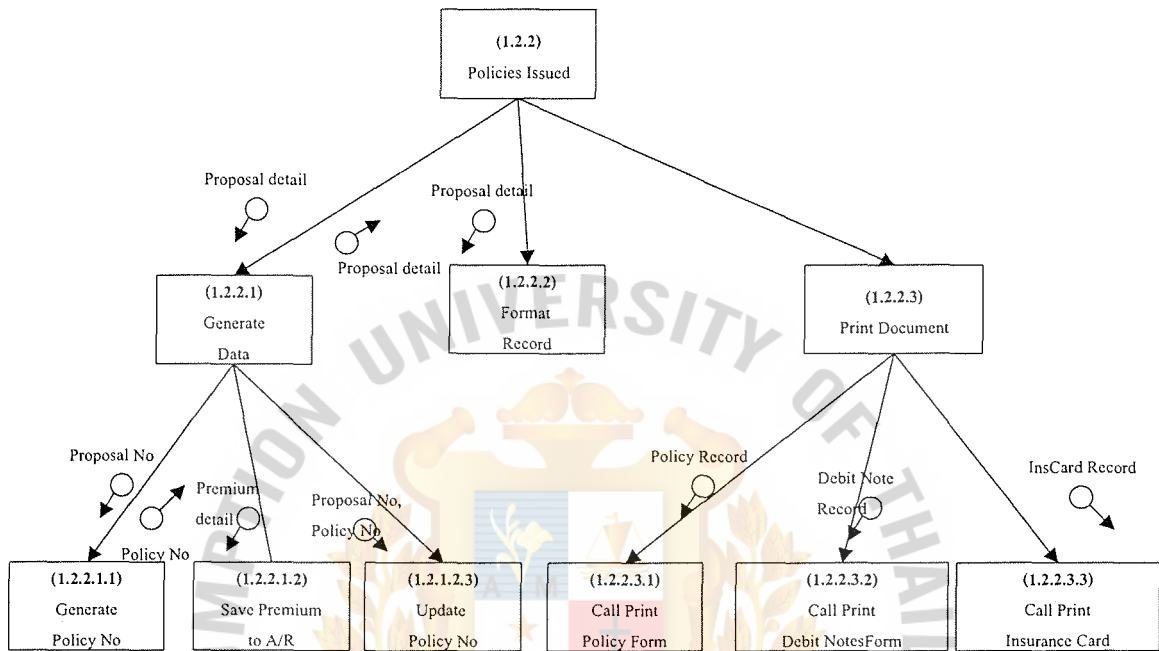
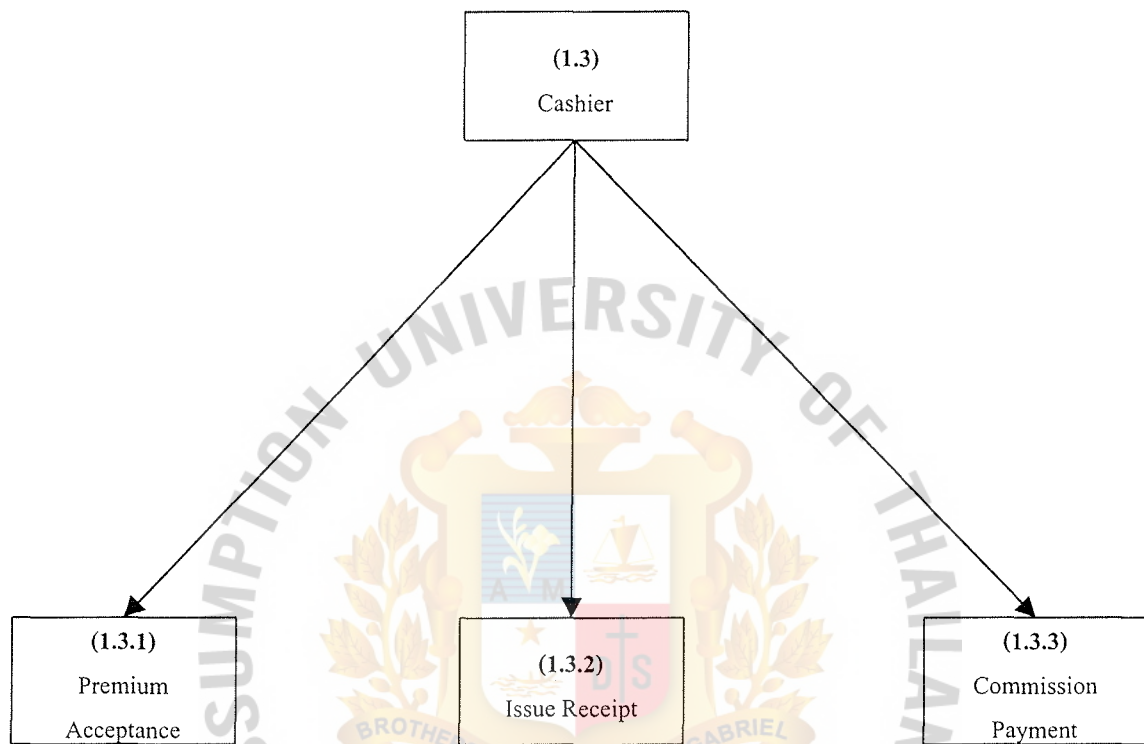


Figure C.10. Module (Policy Issued)



* Figure C.11. Module (Cashier) *

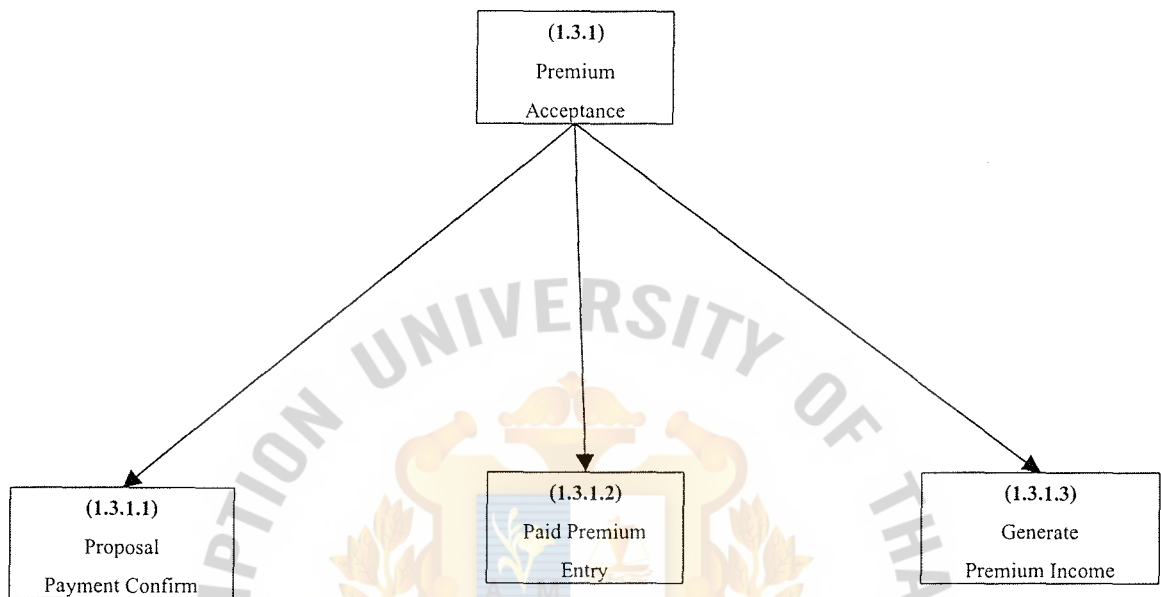


Figure C.12. Module (Premium Acceptance)

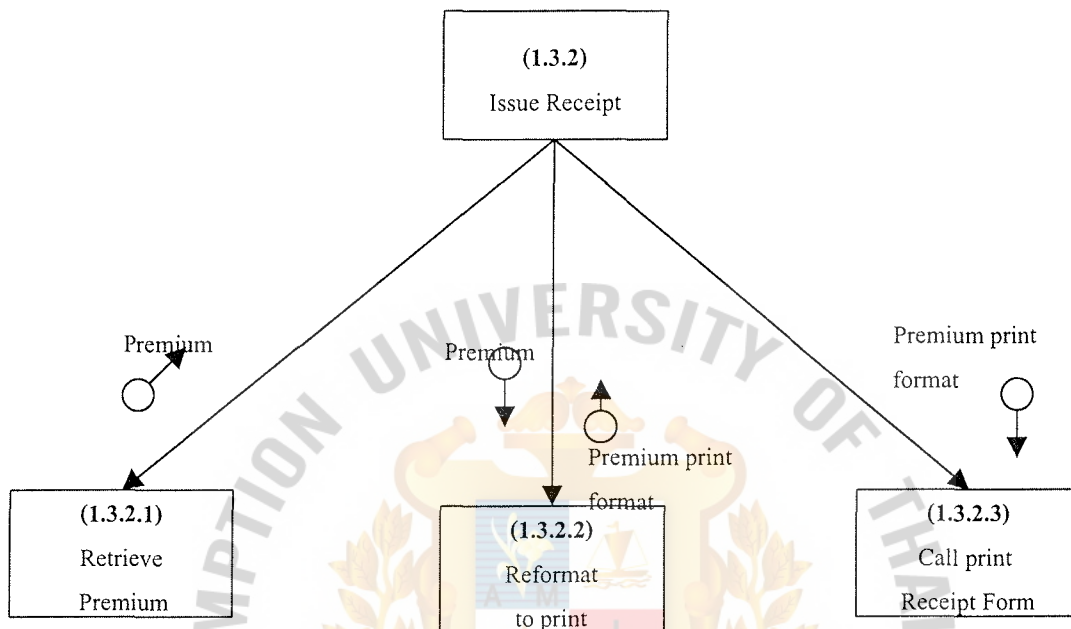


Figure C.13. Module (Issue Receipt)

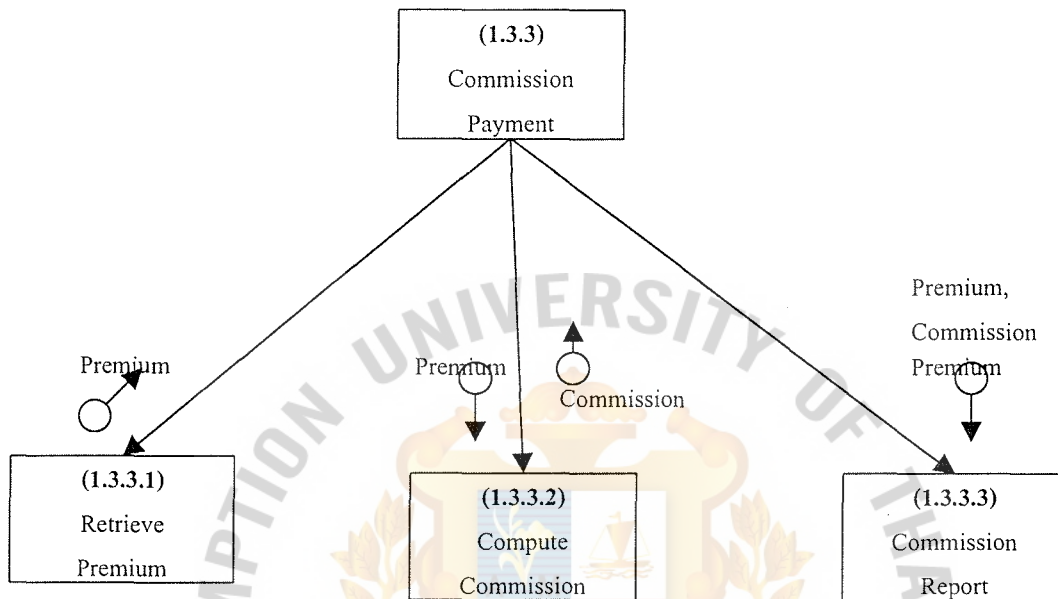


Figure C.14. Module (Commission Payment)



APPENDIX D

MODULE SPECIFICATION

APPENDIX D MODULE SPECIFICATION

No : 1
Id : PA1
Name : PA Insurance System
Function : Control Menu
Input Parameter : MenuNo
Returns : CallStatus
Begin
 Do until quit from menu
 Case of MenuNo
 When MenuNo = 1.1 Call PA1.1
 When MenuNo = 1.2 Call PA1.2
 When MenuNo = 1.3 Call PA1.3
 Default display error "Please select the right choice"
 EndCase
End

No : 1.1
Id : PA1.1
Name : Registration
Input Parameter : MenuNo
Function : Control Menu
Returns : CallStatus
Begin
 Do until quit from menu
 Case of MenuNo
 When MenuNo = 1.1.1 Call PA1.1.1
 When MenuNo = 1.1.2 Call PA1.1.2
 When MenuNo = 1.1.3 Call PA1.1.3
 Default display error "Please select the right choice"
 EndCase
 CallStatus = 0
 Return Callstatus
End

No : 1.1.1
Id : PA1.1.1
Name : Customer Entry
Function : Control Screen Entry
Input Parameter : -
Returns : CallStatus
Begin
 Open EntryScreen then start
 Do until exit from screen
 Initial Screen

Call PA1.1.1.1
Call PA1.1.1.3
Call PA1.1.1.4
EndCase
CallStatus = 0
Return CallStatus
End

No : 1.1.1.1
Id : PA1.1.1.1
Name : Entry Name Insure & Address
Function : Entry Name Insure & Address
Input Parameter : -
Returns : CallStatus
Begin
Initial Screen PA1.1.1
Call Function PA1.1.1.1
Call Function A1.1.1.2
Call Function PA1.1.1.3
Call Function PA1.1.1.4
CallStatus = 0
Return CallStatus

End

No : 1.1.1.1
Id : PA1.1.1.1
Name : Entry paid Premium
Function : Accept paid Premium detail
Input Parameter : -
Returns : Payment detail
Begin
Accept Payment detail
Return Payment detail

End

No : 1.1.1.3
Id : PA1.1.1.3
Name : Entry Customer Information
Function : Accept Customer Information
Input Parameter : -
Returns : Customer Information
Begin
Accept Customer Information
Field Province from Table 'Province'
Field Discri from Table 'District'
Field Nationality from Table 'Nationality'
Field Occupy Code from Table 'Occupy'

Return Customer Information
End

No : 1.1.1.4
Id : PA1.1.1.4
Name : Save data
Function : Write data to Proposal Registration
Input Parameter : Payment detail, Customer Information
Returns :
Begin
 Match field form Payment detail and Customer Information to Proposal
Registration
 Write to Proposal Registration
End

No : 1.1.3
Id : PA1.1.3
Name : Summary Paid Premium
Function : Summarize the proposal and print Summarize Paid Proposal Slip which
are paid Premium.
Input Parameter :-
Return :-
Begin
 Call Function PA1.1.3.1
 Call Function PA1.1.3.2
 Call Function PA1.1.3.3
End

No : 1.1.3.1
Id : PA1.1.3.1
Name : Retrieve Data
Function : Retrieve data of paid premium proposal and show on the screen
Input Parameter :
Return : Proposal Detail
Begin
 Call Function PA1.1.3.1.1
 Call Function PA1.1.3.1.2 with (Proposal Detail)
 Return Proposal Detail
End

No : 1.1.3.1.1
Id : PA1.1.3.1.1
Name : Retrieve Proposal Data
Function : Retrieve data of paid premium proposal
Return : Proposal Detail
Begin
 Accept BatchNo

Read data from Proposal Registration by BatchNo and only field
BatchPropCashier are null:
Return Proposal Detail
End

No : 1.1.3.1.2
Id : PA1.1.3.1.2
Name : Show Proposal Detail & Confirm
Function : Show the paid premium proposal on the screen and Accept
Input Parameter : Proposal Detail
Return : Confirm
Begin
Display on the screen with ProposalNo, Customer.Name ,RegisterDate and
PaidAmt
Sum PaidAmt and display at the right bottom of screen
If Summarize button is clicked then set Cofirm = 'Y'
Endif
Return Confirm
End

Id : PA1.1.3.2
Name : Generate Batch No
Function : Generate Batch No form date and time
Input Parameter :
Return : BatchNo
Begin
Set BatchNo = Now()
Return BatchNo
End

No : 1.1.3.3
Id : PA1.1.3.3
Name : Save
Function : Save Batch data and the acceptance Proposal No
Input Parameter :
Return : -
Begin
Call Function PA1.1.3.3.1 with(ProposalNo, Batch Control)
Call Function PA1.1.3.3.2 with(BatchNo)
Call Function PA1.1.3.3.3
End

No : 1.1.3.3.1
Name : Save Batch
Function : Save Batch data
Input Parameter : ProposalNo, Batch Control
Return : -
Begin

Write data into Payment Batch Control by Proposal No and Batch Control

End

No : 1.1.3.3.2
Id : PA1.1.3.3.2
Name : Update Proposal Registration
Function : Keep BatchNo back to Table Proposal Registration
Input Parameter : BatchNo
Return : -
Begin

Update field BatchPropCashier = BatchNo in Table Proposal Registration

End

No : 1.1.3.3.3
Id : PA1.1.3.3.3
Name : Print Proposal Batch Slip
Function : Print summary detail
Return : -
Begin
Retrieve data from Proposal Registration by BatchPropCashier = BatchNo
Compute TotalRecord, sum(PaidAmt)
Print TotalRecord and sum(PaidAmt) out to Laser Printer

End

No : 1.1.2
Id : PA1.1.2
Name : Proposal Summary
Function : Summarize the latest registered proposal and print Summarize Proposal Slip and then print Summarized Proposal Slip
Input Parameter :
Return :
Begin
Call Function PA1.1.2.1
Call Function PA1.1.2.2
Call Function PA1.1.2.3 with (Proposal Detail,BatchNo)

End

No : 1.1.2.1
Id : PA1.1.2.1
Function : Retrieve data of registered proposal and show on the screen
Input Parameter :
Return :
Begin
Call Function PA1.1.2.1.1
Call Function PA1.1.2.1.2 with (Proposal Detail)

End

No : 1.1.2.1.1
Id : PA1.1.2.1.1
Name : Retrieve Proposal Data
Function : Retrieve data of paid premium proposal
Input Parameter : Proposal Detail
Return :
Begin
 Read data from Proposal Registration by BatchNo and only field
 BatchPropUnd are null:
 Return Proposal Detail

End

No : 1.1.2.1.2
Id : PA1.1.2.1.2
Name : Show Proposal Detail & Confirm
Function : Show the registered proposal on the screen and Accept
Input Parameter : Propodal Detail
Return : Confirm
Begin
 Display on the screen with ProposalNo, Customer.Name ,RegisterDate and
 PaidAmt
 Sum PaidAmt and display at the right bottom of screen
 If Summarize then
 set Cofirm = 'Y'
 Endif
 Return Confirm

End

No : 1.1.2.2
Id : PA1.1.2.2
Name : Generate Batch No
Function : Generate Batch No form date and time
Input Parameter :
Return : BatchNo
Begin
 Set BatchNo = Now()
 Return BatchNo

End

No : 1.1.2.3
Id : PA1.1.2.3
Name : Save
Function : Save Batch data and the Proposal No
Input Parameter :
Return :
Begin
 Call Function PA1.1.2.3.1 with(ProposalNo, Batch Control)
 Call Function PA1.1.2.3.2 with(BatchNo)

Call Function PA1.1.2.3.3

End

No : 1.1.2.3.1
Id : PA1.1.2.3.1
Name : Save Batch
Function : Save Batch data
Input Parameter : ProposalNo, Batch Control
Return : -
Begin

Write data into Payment Batch Control by Proposal No and Batch Control

End

No : 1.1.2.3.2
Name : Update Proposal Registration
Function : Keep BatchNo back to Table Proposal Registration
Input Parameter : BatchNo
Return : -
Begin

Update field BatchPropUnd = BatchNo in Table Proposal Registration

End

No : 1.1.2.3.3
Id : PA1.1.2.3.3
Name : Print Paid Proposal Batch Slip
Function : Print summary detail
Input Parameter : BatchNo
Return : -
Begin

Retrieve data from Proposal Registration by BatchPropUnd = BatchNo

Compute TotalRecord, sum(PaidAmt)

Print TotalRecord and sum(PaidAmt) out to Laser Printer*

End

No : 1.2
Id : PA1.2
Name : Underwriting
Input Parameter : MenuNo
Return :
Begin

Do until quit from menu

Case of MenuNo

When MenuNo = 1.2.1 Call PA1.2.1

When MenuNo = 1.2.2 Call PA1.2.2

When MenuNo = 1.2.3 Call PA1.2.3

Default display error "Please select the right choice"

EndCase

End

No : 1.2.1
Id : PA1.2.1
Name : Proposal Approvement
Function : Show proposal detail by Batch No and Accept
Input Parameter : MenuNo
Return :
Begin
 Do until quit from menu
 Case of MenuNo
 When MenuNo = 1.2.1.2 Call PA1.2.1.2
 When MenuNo = 1.2.1.3 Call PA1.2.1.3
 When MenuNo = 1.2.1.4 Call PA1.2.1.4
 When MenuNo = 1.2.1.5 Call pa1.2.1.5
 Default display error "Please select the right choice"
 EndCase
End

No : 1.2.2
Id : PA1.2.2
Name : Policies Issued
Function : Print Policies,Debit Notes, Insurance Card
Input Parameter : Proposal Detail
Return :
Begin
 Call Function PA1.2.2.1 with (Proposal Detail)
 Call Function PA1.2.2.2 with (Proposal Detail)
 Call Function PA1.2.2.3
End

No : 1.2.3
Id : PA1.2.3
Name : Reout Application
Function : Print Reout Application
Input Parameter :
Begin
 Do until ReoutTransaction.EOF
 Read ReoutTransaction
 Reformat ReoutTransaction.Record into Temp
 Write temp
 Loop
 Close temp
 Start FormFlow using ReoutForm
End

No : 1.2.1.2
Id : PA1.2.1.2
Name : Proposal Recognition Confirm

Function : Show Proposal detail by Batch No and Accept
Input Parameter :
Return :
Begin

Call Function PA1.2.1.2.1
Call Function PA1.2.1.2.2 with (Proposal Detail)
Call Function PA1.2.1.2.3

End

Id : PA1.2.1.3
Name : Proposal Entry
Function : Accept data that are entered from Proposal
Input Parameter :
Return :
Begin

End

No : 1.2.1.4
Id : PA1.2.1.4
Name : Approve the Proposal
Function : Select proposal by Proposal No and Approve or Reject
Input Parameter :
Return :
Begin

End

No : 1.2.1.5
Id : PA1.2.1.5
Name : Reinsurenace Entry
Function : Accept the reinsurance details
Input Parameter : PolicyNo,ProposalNo
Return :
Begin

Accept Re_Code, ReAmt, Premium
Set PolicyNo,ProposalNo,SysDate
Insert into ReoutTransaction

End

No : 1.2.1.2.1
Id : PA1.2.1.2.1
Name : Retreive Proposal by Batch
Function : Accept Batch No and retrieve proposal detail
Input Parameter :
Return :

Begin
Accept BatchNo
Read data from Proposal Registration by field BatchPropUnd = BatchNo
Return Proposal Detail

End

No : 1.2.1.2.2
Id : PA1.2.1.2.2
Name : Show Proposal detail on screen
Function : Show Proposal detail on screen
Input Parameter : Proposal Detail
Return : Confirm

Begin
Display on the screen with ProposalNo, Customer.Name ,RegisterDate and
PaidAmt
Sum PaidAmt and display at the right bottom of screen
If Accept button is clicked then set Cofirm = 'Y'
Endif
Return Confirm

End

No : 1.2.1.2.3
Id : PA1.2.1.2.3
Name : Approve & Save
Function : Save Proposal No into Recognition Proposal and Approve Date and User
Id back to

The Proposal Batch Control
Input Parameter : BatchNo
Return :
Begin
Set ApproveDate = Now()
Update Table Proposal Batch Control with ApproveDate
Keep all ProposalNo within BatchNo into Table Recognition Proposal

End

No : 1.2.1.3
Id : PA1.2.1.3
Name : Proposal Entry
Function : Control screen to accept data form Proposal
Input Parameter :
Return :

Begin
Call Function PA1.2.1.3.1.
Call Function PA1.2.1.3.2 with (Proposal Detail)
Call Function PA1.2.1.3.3 with (Proposal Detail)

End

No : 1.2.1.3.1
Id : PA1.2.1.3.1
Name : Entry Mode
Function : Retrieve data prepare for enter proposal detail
Input Parameter :
Return :
Begin
 Call Function PA1.2.1.3.1.1 with (ProposalNo)
 Call Function PA1.2.1.3.1.2 with (Proposal Detail)
End

No : 1.2.1.3.1.1
Id : PA1.2.1.3.1.1
Name : Retrieve data by Proposal No
Function : Retrieve data from Proposal Transaction
Input Parameter : ProposalNo
Return : Proposal Detail
Begin
 Retrieve Proposal Detail from Proposal Transaction by Proposal No.
 Return Proposal Detail
End

No : 1.2.1.3.1.2
Id : PA1.2.1.3.1.2
Name : Enter Proposal Detail
Function : Control the screen to enter the proposal detail
Input Parameter : Proposal Detail
Return : Proposal Detail
Begin
 Accept data from entry screen into Proposal Detail data can be matched field by
 field between the fields on the screen and Proposal Detail
 Return Proposal Detail
End

No : 1.2.1.3.2.1
Id : PA1.2.1.3.2.1
Name : Rate Coding
Function : Code Rate to proposal transaction
Input Parameter :
Return : Rate
Begin
 Rate = .0020
 Return Rate
End

No : 1.2.1.3.2.1.2
Id : PA1.2.1.3.2.2
Name : Calculate Premium

Function : Compute premium to proposal transaction

Input Parameter : Proposal Detail, Rate

Return : Premium,Tax,Stamp

Begin

Compute Premium = InsuredAmt * Rate

Compute Tax = Premium * .0033

Compute Stamp = premium * .004

Return (Premium,Tax,Stamp)

End

No : 1.2.1.3.3

Id : PA1.2.1.3.3

Name : Save Proposal Detail

Function : Save data to Proposal Transaction

Input Parameter : Proposal Detail, Premium,Tax,Stamp

Return :

Begin

Write data from Proposal Detail into Proposal Transaction and Premium

End

No : 1.2.2

Id : PA1.2.2

Name : Policy Issued

Function : Control the programs to Issued policies

Input Parameter :

Return :

Begin

Call Function PA1.2.2.1 with(Policy Detail)

Call Function PA1.2.2.2 with (Policy Detail)

Call Function Pa1.2.2.3

End

No : 1.2.2.1

Id : PA1.2.2.1

Name : Generate Data

Function : Control to generate Policy No, Sent premium to A/R, Update Policy No back

Input Parameter :

Return : PolicyNo

Begin

Call Function PA1.2.2.1.1

Call Function PA1.2.2.1.2 with (Policy Detail)

Call Function PA1.2.2.1.3 with (ProposalNo, PolicyNo)

End

No : 1.2.2.1.1

Id : PA1.2.2.1.1

Name :

Function : Generate Policy No

Input Parameter :

Return : PolicyNo

Begin

Read LastPolicyNo from Table PolicyRunning

Add 1 to LastPolicyNo

Update Table PolicyRunning

Set PolicyNo = LastPolicyNo

Return PolicyNo

End

No : 1.2.2.1.2

Id : PA1.2.2.1.2

Name :

Function : Save Premium to A/R

Input Parameter : Policy Detail

Return :

Begin

Premium.seq = 0

Premium.PolicyNo = PolicyNo

Premium.Premium = Premium

Premium.Tax = Tax

Premium.Stamp = Stamp

Premium.Sysdate = Date()

Write data into Premium

End

No : 1.2.2.1.3

Id : PA1.2.1.3

Name : Update Policy No

Function : Update policy No. to Proposal to be print and Proposal Transaction

Input Parameter : ProposalNo, PolicyNo

Return :

Begin

Read Proposal to be printed by PolicyNO

Update Proposal to be Print with PolicyNo

Read Proposal Transactino by PolicyNo

Update Proposal Transaction with PolicyNo

End

No : 1.2.2.2

Id : PA1.2.2

Name : Format Record

Function : Reformat the Proposal Detail and save to Temporary file

Input Parameter : Policy Detail

Return :

Begin

End

No : 1.3
Id : PA1.3
Name : Cashier
Function : Menu Control
Input Parameter : MenuNo
Return :
Begin

Case of MenuNo

When MenuNo = 1.3.1 Call PA1.3.1

When MenuNo = 1.3.2 Call PA1.3.2

When MenuNo = 1.3.3 Call PA1.3.3

Default display error "Please select the right choice"

EndCase

CallStatus = 0

Return Callstatus

End

No : 1.3.1
Id : PA1.3.1
Name : Premium Acceptance
Function : Menu Control
Input Parameter : MenuNo
Return : CallStatus
Begin

Do until quit from menu

Case of MenuNo

When MenuNo = 1.3.1.1 Call PA1.3.1.1

When MenuNo = 1.3.1.2 Call PA1.3.1.2

When MenuNo = 1.3.1.3 Call PA1.3.1.3

Default display error "Please select the right choice"

EndCase

CallStatus = 0

Return Callstatus

End

No : 1.3.2
Id : PA1.3.2
Name : Issued Receipt
Function : Issured Receipt form the paid premium
Input Parameter : MenuNo
Return : CallStatus
Begin

Do until quit from menu

Case of MenuNo

When MenuNo = 1.3.2.1 Call PA1.3.2.1

When MenuNo = 1.3.2.2 Call PA1.3.2.2

When MenuNo = 1.3.2.3 Call PA1.3.2.3
 Default display error "Please select the right choice"
 EndCase
 CallStatus = 0
 Return Callstatus
 End

No : 1.3.3
 Id : PA1.3.3
 Name : Commission Payment
 Function : To generate commission and print Commission Report
 Input Parameter : MenuNo
 Return : CallStatus
 Begin
 Do until quit from menu
 Case of MenuNo
 When MenuNo = 1.3.3.1 Call PA1.3.3.1
 When MenuNo = 1.3.3.2 Call PA1.3.3.2
 When MenuNo = 1.3.3.3 Call PA1.3.3.3
 Default display error "Please select the right choice"

No : 1.3.1.1
 Id : PA1.3.1.1
 Name : Proposal Payment Confirm
 Function : Accept the paid premium from registration
 Input Parameter : -
 Retrun : -
 Begen
 Call Function PA1.3.1.1.1
 Call Function PA1.3.1.1.2 with (Proposal Detail)
 Call function PA1.3.1.1.3 with (Proposal Detail)
 End

No : 1.3.1.1.1
 Id : PA1.3.1.1.1
 Name : Retreieve Proposal By Batch
 Function : Select data from Registration By Batch
 Input Parameter : -
 Retrun : Proposal Detail
 Begen
 Accept BatchNO
 Read Proposal Registration by BatchPropCashier = BatchNo

Return Proposal Detail
End

No : 1.3.1.1.2
Id : PA1.3.1.1.2
Name : Show Proposal Detial on screen
Function : Accept the paid premium from registration
Input Parameter : - Proposal Detail
Retrun : -
Begen
Display Proposal Detial on Screen(PA1.3.1)
End

No : 1.3.1.1.3
Id : PA1.3.1.1.3
Name : Approve & Save
Function : Accept the paid premium list and save data into cashier
Input Parameter : - Proposal Detail
Retrun : -
Begen
Get Accept bottom
If Accept then
Update Payment Batch Control set AcceptDate = Date(),
UID_Accept = CurrentUserID
Write Proposal Premium Approve set
ProposalPremiumApprove.ProposalID =
ProposalId
Else
If Close then CloseScreen
Else
If Delete then Delete the current line from Proposal Detail
Endif
Endif
Endif
End

No : 1.3.1.2
Id : PA1.3.1.2
Name : Paid Premium Entry
Function : Entry the paid Proposal
Input Parameter :
Return :
Begin
Do until Close Form
Accept PolicyNo
Read Premium by PolicyNo

```

                Display InitName+FirstName+LastName, Premium
            Loop
        End
    
```

```

No      :      1.3.1.3
Id      :      PA1.3.1.3
Name    :      Generate Premium Income
Function:      Create Premium Income from Paid Premium
Input Parameter :
Return  :
Begin
    Read ProposalToBePrint by PolPrintDate = ToDay
    Do until ProposalToBePrint.EOF
        Read Premium by Premium.ProposalNo =
ProposalToBePrint.ProposalNo
        If Found then
            Write PremiumSettlement from Prmeium
        Endif
        Read next ProposalToBePrint
    Loop
    Read PaidPremiumEntry by PaidPremiumEntry.SysDate = ToDay
    Do until PaidPremiumEntry.EOF
        Write PremiumSettlrment from PremiumSettlrmentBuffer
        Read next PremiumSettlrmentBuffer
    Loop
End
    
```

```

No      :      1.3.2.1
Id      :      PA1.3.2.1
Name    :      Retreive Premium
Function:      Retreive Paid premium from Premium Settlement
Input Parameter :
Return  : PremiumSettlrmentRecord
Begin
    Read PremiumSettlement by PremiumSettlement.SysDate = Today
    Do until PremiumSettlement.EOF
        Set PremiumSettlementRecord
        Read next PremiumSettlement
    Loop
    Return PremiumSettlementRecord
End
    
```

```

No      :      1.3.2.2
Id      :      PA1.3.2.2
Name    :      Reformat to print
Function:      Reformat the retreive data into temporary file for print receipt
    
```

Input Parameter : PremiumSettlementRecord
 Return : RecriptPrintFormatRecord
 Begin
 Reformat PremiumSettlementRecord into RecriptPrintFormatRecord
 Write all RecriptPrintFormatRecord into ReceiptPrintFormat
 End

No : 1.3.2.3
 Id : PA1.3.2.3
 Name : Call Print Receipt Form
 Function : Call the Receipt Form to print Receipt
 Input Parameter :
 Return :
 Begin
 Run FormFlow using Receipt Form
 End

No : 1.3.3.1
 Id : PA1.3.3.1
 Name : Retreive Premium
 Function : Retreive Premium by Date form Premium Settlement
 Input Parameter :
 Return :
 Begin
 Read PremiumSettlrment by PremiumSettlrment.SysDate = Today
 Do until PremiumSettlement.EOF
 Set PremiumSettlrmentRecord
 Read next PrmeiumSettlrment
 Loop
 End

No : 1.3.3.2
 Id : PA1.3.3.2
 Name : Compute Commission
 Function : Calculate Commission
 Input Parameter : PremiumSettlementRecord
 Return : CommissionRecord
 Begin
 Write PaidCommission set
 PaidCommission.PolicyNo = PolicyNo
 PaidCommission.Commission = PremiumSettlement.Premium
 *.18
 PaidCommission.Tax = PaidCommission.Commission * .10
 End

No : 1.3.3.3
Id : PA1.3.3.3
Name : Commission Report
Function : Print Commission Report
Input Parameter :
Return :
Begin
 Read PaidCommission
 Do until PaidCommission.EOF
 Move CommissionRecord into relate field in Commission Report
 Print
 Read next PaidCommission
 Loop
End





APPENDIX E

INPUT DESIGN

Phatra Insurance Registration Entry PA1.1.1 16/7/98 15:19:51

File Edit View Insert Format Records Tools Window Help

Proposal Customer

Proposal No: 980001 Register Date: 27/6/98

Paid Amount: 1,890.00

Paid By: Cash

Cheque No:

Cheque Date:

Form View NUM

Figure E.1. Screen (Registration Entry) Page 1

Phatra Insurance Registration Entry PA1.1.1 16/7/98 15:19:51

Proposal Customer

Customer Id	: 3800001	Birth Date	: 18/6/70
Initial Name	: Mr.	Height	: 155.00
First Name	: Kiat	Weight	: 40.00
Middle Name	:	Nationality	: Thai
Last Name	: Somboon	Occupy Code	: Clerk
Address line 1	: 1140 Rach	Position	: 452
Address line 2	:	Job Description	: 542
Province	: Kamchanaburi	Employer Name	: 621
Distric	: Mung		

Form View NUM

Figure E.2. Screen (Registration Entry) Page 2

Phatra Insurance **Proposal Entry** PA1.2.1.3
2/7/98 15:22:48

Save [Navigation Icons]

1. The Proposer 2. Beneficiary/3.Period/4.Sum Insured Insuring Agreement 5. Include coverage Page481 12, [Navigation Icons]

ProposalNo: 8840001 PolicyNo: 0/73/98/000001 Agent Code: A001

Initial First Name Middle Name Last Name

Name : [Text Box]

Address [Text Box]

District Province: Issued At Amphur Province

Government Identify Card No : [Text Box]

Age Date of Birth Height Weight Nationality

Present Occupation : Position :

Job description :

Employer's Name : Employer's Business

Employer's Address

Form View [Buttons] NUM

Figure E.3. Screen (Proposal Entry) Page

Phatra Insurance **Proposal Entry** PA1.2.1.3 2/7/98 15:22:48

Save [Navigation Icons]

1. The Proposer 2. Beneficiary/3.Period/4.Sum Insured Insuring Agreement 5. Include coverage Page481 12, [Navigation Icons]

2. Name : [Text Box] Relationship to the Proposer : [Text Box]

Address : [Text Box]

3. Period of Insurance required From [Text Box] To: [Text Box]

4. SumInsured Require : [Text Box] Bahts

Form View [Navigation Icons] NUM

Figure E.4. Screen (Proposal Entry) Page 2

Phatra Insurance Proposal Entry PA1.2.1.3 2/7/98 15:22:48

Save [Navigation Icons]

1. The Proposer 2. Beneficiary/3.Period/4.Sum Insured Insuring Agreement 5. Include coverage Page481 12

Insuring Agreement	Sum Insured	Deductible	Premium
1. Loss of Life			0.00
2. Dismemberment and Loss of Sight	0		0.00
Dismemberment Loss of sight Finger Toe	0		0.00
3. Permanent Disability	0		0.00
4. Total Temp Disability 0 Weeks	0	0	0
5. Partial Temp Disability 0 Weeks			
6. Medical Expenses Each Accident	0	0	0.00
Additional Premium			
Premium Discount			
Net Premium			

Record: 14 of 2

Form View NUM

Figure E.5. Screen (Proposal Entry) Page 3

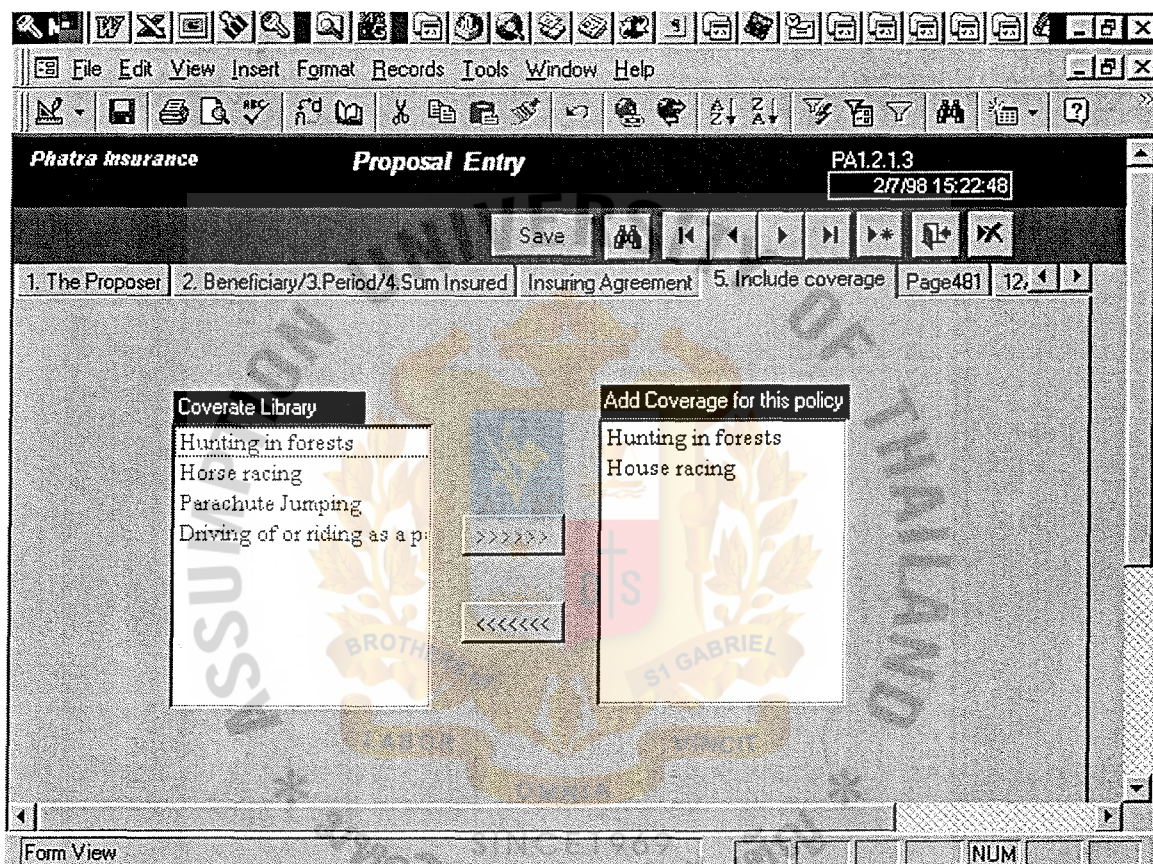


Figure E.6. Screen (Proposal Entry) Page 4

Phatra Insurance **Proposal Entry** PA1.2.1.3 2/7/98 15:26:47

Save [Navigation Icons]

2. Beneficiary/3. Period/4. Sum Insured | Insuring Agreement | 5. Include coverage 6/7/8/9/10/11 12/13/14/15/16

6. Do you require coverage for Murder or Assault ? ☒ Yes ☐ No

7. Do you have or have proposed for personal accident insurance or life insurance with the Company or any other company ☒ Yes ☐ No

8. Have You ever been declined life insurance or personal Accident insurance ☒ Yes ☐ No

9. In the past two years, have you ever received compensation under your personal accident insurance? ☒ Yes ☐ No

Company

Type of Injury

Amount of Compensation

10. At present how much is your total income Salary per year Other per year

11. Do you drive or ride as passenger on motorcycle ? ☒ No ☐ Occasionally ☐ Regularly

Form View [Buttons] NUM

Figure E.7. Screen (Proposal Entry) Page 5

Phatra Insurance **Proposal Entry** PA1.2.1.3
2/7/98 15:28:47

Save [Navigation Buttons]

Insuring Agreement | 5. Include coverage | 6/7/8/9/10/11 | 12/13/14/15/16

12. Do you take or consume alcoholic drink?..... ☐ No ☒ Occasionally ☐ Regularly

13. Do you have or have you ever been treated for

Epilepsy.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Heart disease.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Abnormal blood pressure.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Diabetes.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Arthritis.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Cancer.....	<input type="radio"/> No	<input checked="" type="radio"/> Yes

14. Do you have defects in eyesight or hearing?..... ☐ No ☒ Yes

15. Do you have any disabled part of your body ?..... ☐ No ☒ Yes

16. Have you ever been addicted to drugs ?..... ☐ No ☒ Yes

Form View [NUM]

Figure E.8. Screen (Proposal Entry) Page 6

Phatra Insurance Premium Receive Entry PA1.3.1.2 16/7/98 15:18:36

Agent Code: A001 Mr. Twatchai Chonburi

Serial No	PolicyNo	Seq	InsureName	Premium	Tax	Stemp
1	0709800000	0	Mr. Surat Pksek	2,000.00	20.00	4.00
2	0709800000	0	Mr. Suratin Sukjai	1,000.00	15.00	3.00
*(AutoNumber)		0		0.00	0.00	0.00

Record: 1 of 2

Form View

Figure E.9. Screen (Premium Receive Entry)

Phatra Insurance Policies Issued PA1.2.2 27/98 15:32:48

☒ Policy ☒ Debit Notes ☒ Insurance Card

Print

	Proposal No	Insure Name
▶	9800001	Mr. Thai Sukdee
	9800002	Mr. Witsanu Tebthai
	9800003	Mrs. Sumalee Tongthai
*		

Form View

Figure E.10. Screen (Policies Issued)

Phatra Insurance **Issued Receipt** PA1.3.2 2/7/98 15:34:01

Print

Proposal No	Insure Name	Premium
9800001	Mr.Thai Sukdee	1000
9800002	Mr.Witsanu Tebthai	5000
9800003	Mrs.Sumalee Tongthai	2500
*		0

Form View

Figure E.11. Screen (Issued Receipt)

Phatra Insurance Commission Payment PA1.3.3
2/7/98 15:34:51

Agent Code : A001 Mr.Kim Prasertsri

Serial No	PolicyNo	Seq	InsureName	Premium	Commission
1	0709800000	0	Mr.Surat Pksek	2,000.00	360.00
2	0709800000	0	Mr.Suratin Sukjai	1,000.00	180.00
*	(AutoNumber)	0		0.00	0.00

Total 540

Record: 1 of 2

Form View

Figure E.12. Screen (Commission Payment)

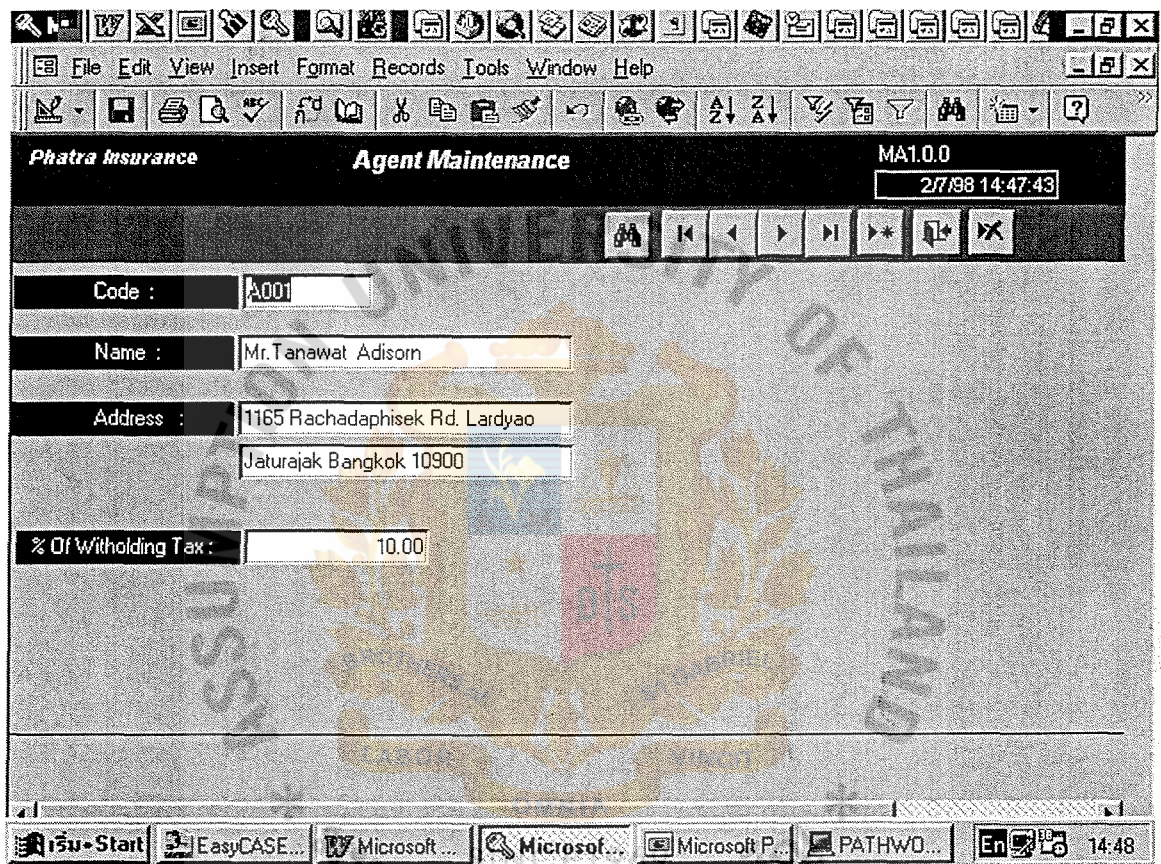


Figure E.13. Screen (Agent Maintenance)

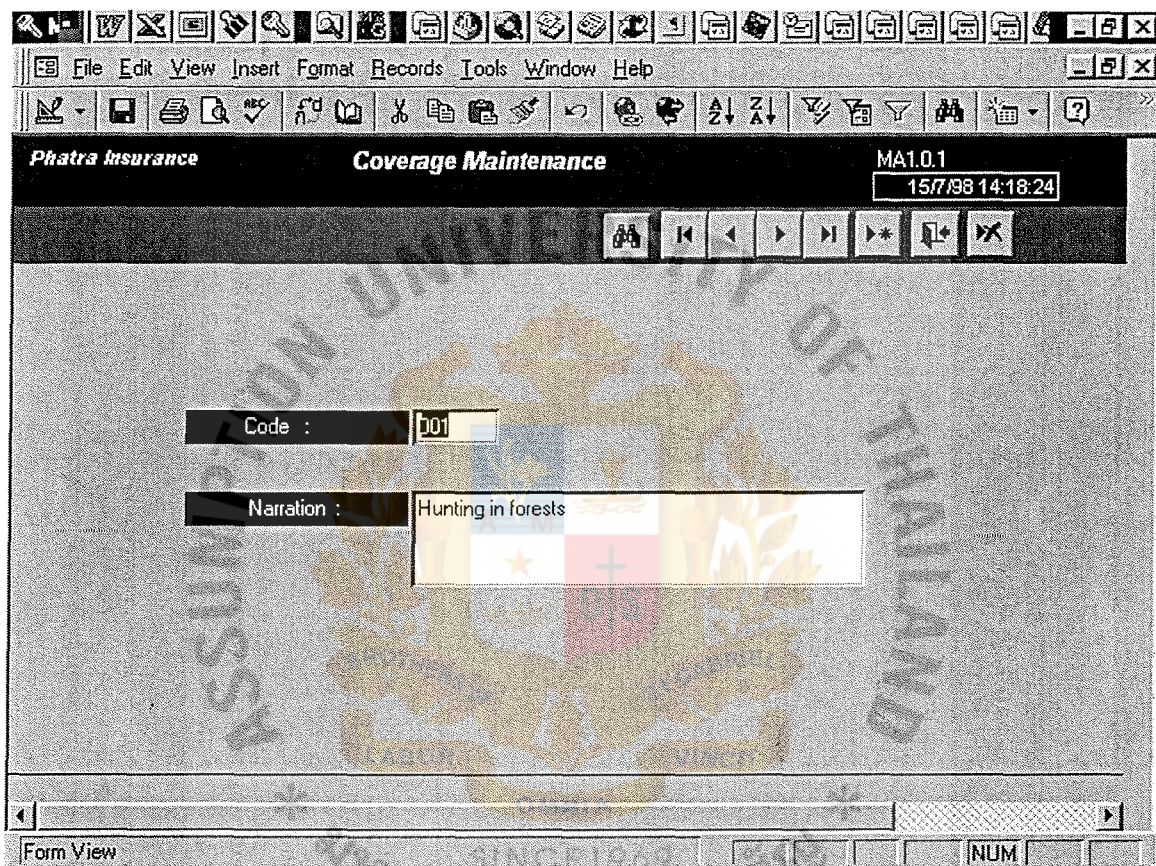


Figure E.14. Screen (Coverage Maintenance)

Phatra Insurance **District and Province Maintenance** MA1.0.2
 2/7/98 15:02:14

Province: 01 Province Name: Karnchanaburi

District entry

District Code	District Name
01	Mung
02	Srisawat
03	Kwanoi

Form View NUM

Figure E.15. Screen (District and Province Maintenance)

Phatra Insurance **Employer Maintenance** MA1.0.3
27/98 15:04:05

Employer Name : Angsana Trading Co., Ltd.

Business : Consumer Sale

Employer Address : 441 Ramkhamhang Rd. Huamarg Bangkok

Form View NUM

Figure E.16. Screen (Employer Maintenance)

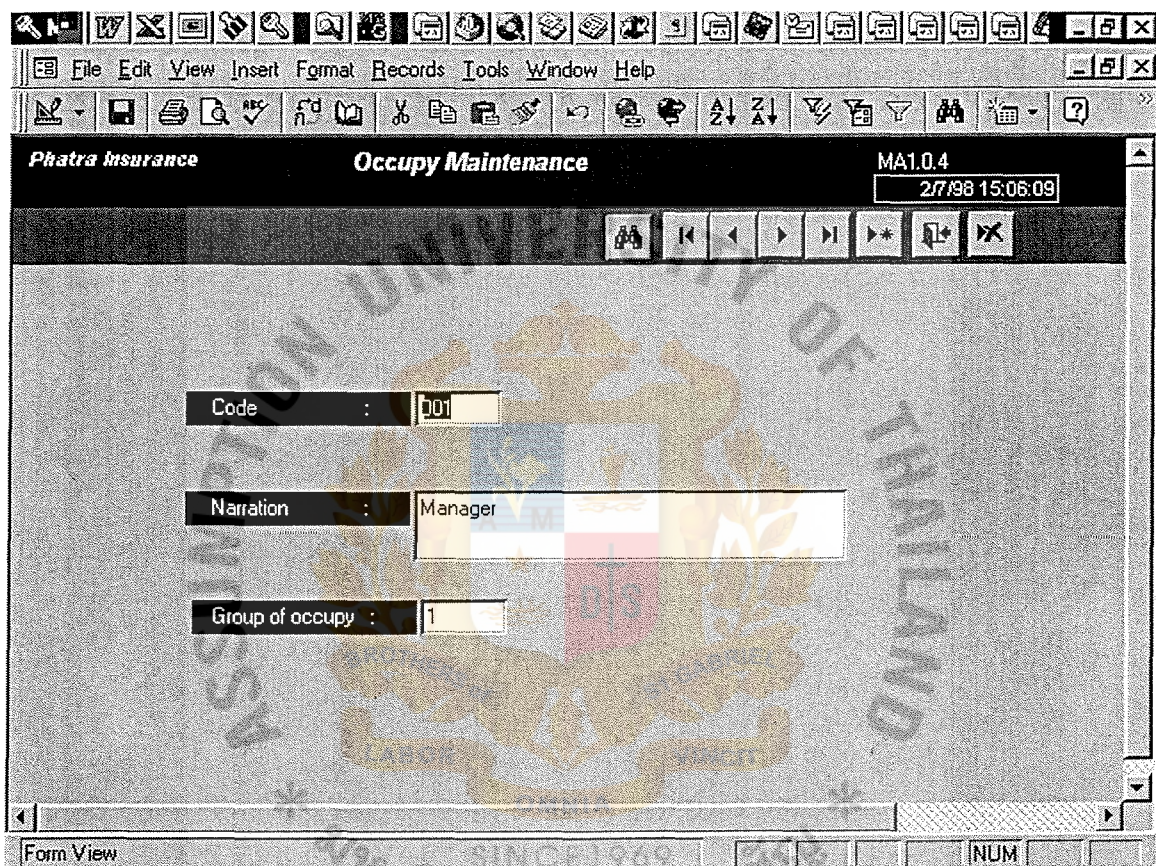


Figure E.17. Screen (Occupy Maintenance)



APPENDIX F

OUTPUT DESIGN

Phatra Insurance **Enquiry Policy Details** PA1.2.1.3
2/7/98 17:02:10

Select Policy No : Save

ProposalNo: 8840001 PolicyNo: 0/73/98/000001 Agent Code: A001

Initial First Name Middle Name Last Name
Name :

Address

District Province: Issued At Amphur Province

Government Identify Card No :

Age Date of Birth Height Weight Nationality

Present Occupation : Position :

Job description :

Employer's Name : Employer's Business

Employer's Address

Form View NUM

Figure F.1. Screen(Enquiry Policy Details)

Phatra Insurance Policy Enquiry EN1.0.2 27/98 17:28:36

Insured Name Tanasak

Policy No.	Insured Name	Amount Insure	Date From	Date To	
0/73/98/000001	Tanasak	50000	15/6/98	15/6/99	Show Detail
0/73/98000050	Tanasak	1000000	25/6/98	25/6/99	Show Detail
0/73/98/000052	Tanasak	500000	21/5/98	21/5/99	Show Detail
*	Tanasak	0			Show Detail

Record: 1 of 3

Form View NUM

Figure F.2. Screen(Policy Enquiry by Insured Name)

Phatra Insurance Policy Enquiry EN1.0.2
2/7/98 17:31:36

Agent Code : A001 Mr.Prakob Chainuwat

Policy No.	Insured Name	Amount Insure	Date From	DateTo	
0/73/98/000001	Mr.Tanasak	50000	15/6/98	15/6/99	Show Detail
0/73/98/000052	Mr.Tanasak	500000	21/5/98	21/5/99	Show Detail
0/73/98000050	Mr.Tanasak	1000000	25/6/98	25/6/99	Show Detail
*	Mr.Tanasak	0			Show Detail

Record: 14 of 3

Form View

Figure F.3. Screen(Policy Enquiry by Agent Code)

Phatra Insurance Policy Summary EN1.03 2/7/98 17:46:51

Agent / Broker	Total Policies :	Total Sum Insu	Total Premium
Mr.Tanawat Adisorn	500	40,000,000	10,000.00
Mr.Chaikit Jaroenvit			

Record: 1 of 1

Form View

Figure F.4. Screen(Policy Summary by Agent/Broker)

Phatra Insurance Policy Summary EN1.0.3 2/7/98 17:50:54

Policy Issued Date	Total Policies :	Total Sum Insu	Total Premium
15/06/1998	500	40,000,000	10,000.00
16/06/1998			
17/06/1998			
18/06/1998			

Record: 1 of 1

Form View

Figure F.5. Screen(Policy Summary by policy issued date)

Phatra Insurance **Summarize Paid Premium** PA1.1.3
7/11/98 11:51:30

Batch No : 7/11/98 11:51:30 Summarize

ProposalNo	custname	RegisterDate	PaidAmt
980001	Mr.Kiat Somboon	27/6/98	1,890.00
980002		23/6/98	1,000.00
*			

Total: Records 2890

Record: 1 of 2

Form View

Figure F.6. Screen(Summarize Paid Premium)

Phatra Insurance

Proposals Summary

PA1.1.2
7/11/98 11:54:23

Batch No : 7/11/98 11:54:23

Summarize

ProposalNo	custname	RegisterDate	PaidAmt
▶ 980001	Mr.Kiat Somboon	27/6/98	1,890.00
980002		23/6/98	1,000.00
*			

Total : Records 2890

Record: 1 of 2

Form View

Figure F.7. Screen(Proposals Summary)

Phatra Insurance **Proposal Appovement** PA1.2.1
7/11/98 11:56:19

Batch No : 7/11/98 11:56:19 Accept

ProposalNo	custname	RegisterDate	PaidAmt
980001	Mr.Kiat Somboon	27/6/98	1,890.00
980002		23/6/98	1,000.00
*			

Total: Records 2890

Record: 1 of 2

Form View

Figure F.8. Screen(Proposals Appovement)

Phatra Insurance Premium Acceptance PA1.3.1
7/11/98 11:58:32

Batch No : 7/11/98 11:58:32 Accept


ProposalNo	custname	RegisterDate	PaidAmt
980001	Mr.Kiat Somboon	27/6/98	1,890.00
980002		23/6/98	1,000.00
*			

Total : Records 2890

Record: 1 of 2

Form View

Figure F.9. Screen(Premium Acceptance)


บริษัท ภัทรประกันภัย จำกัด (มหาชน)
PHATRA INSURANCE PUBLIC COMPANY LIMITED.
 252 ถนนรัชดาภิเษก แขวงจตุจักร เขตจตุจักร กรุงเทพฯ 10320 โทร. 2760064
 252 RACHADAPHISEK RD. JUDYAKHAT, BANGKOK 10320 TEL. 2760064
 ทะเบียนเลขที่ บมจ. 377

เลขที่
 วันที่


Registration No. Bor Mor Jor.377 วันที่

ใบเสร็จรับเงินเบี้ยประกันภัย

เลขประจำตัวผู้เสียภาษี 3 010 48186

ได้รับเงินจาก		เบี้ยประกัน		บาท
		ภาษี		บาท
		อากร		บาท
		รวม		บาท
กรมธรรม์เลขที่				
เริ่ม	สิ้นสุด			
ถัดมา	ประเภท			
ทุนประกัน				

กรุณาเขียนเช็คติดพร้อม จ่ายในนาม บริษัท ภัทรประกันภัย จำกัด(มหาชน)
 เจ้าหนี้และผู้โอนอำนาจ


 ผู้รับเงิน

ใบเสร็จรับเงินฉบับนี้จะตั้ง- มีลายเซ็นผู้มีมอบอำนาจและผู้รับเงินจึงจะสมบูรณ์

Figure F.11. Premium Receipt

[illegible]

Registration No. Bor Mor Jor.377 จันทน์

ใบแจ้งหนี้ค้าขายประกัน

เลขประจำตัวผู้เสียภาษี 3 1010 48186

ได้รับแจ้งจาก	ได้แก่	บาท
กรมธรรม์เลขที่	ภาษี	บาท
	อากร	บาท
	รวม	บาท
เริ่ม	สิ้นสุด	กรมธรรม์เลขที่
อัตรา	ประเภท	กรมธรรม์เลขที่
ทุนประกัน		กรมธรรม์เลขที่

ใบเสร็จรับเงินฉบับนี้จะต้องมีลายเซ็นผู้มอบอำนาจและผู้รับเงินจึงจะสมบูรณ์

Figure F.12. Debit Note.



บริษัท ภัทรประกันภัย จำกัด (มหาชน)
PHATRA INSURANCE PUBLIC COMPANY LIMITED

คำแนะนำ

บัตรส่วนลด

เลขที่บัตร กรมธรรม์เลข
ชื่อผู้ถือบัตร
บัตรหมดอายุ ผู้มอบบัตร *Dr. วัณ*

หมายเหตุ บัตรนี้ใช้เป็นส่วนลดค่ารักษาพยาบาลเท่านั้น ไม่สามารถไถ่เงิน
เครดิตได้

เมื่อเข้ารับการรักษาในโรงพยาบาลที่ระบุ
กรุณาแสดงบัตรนี้ทุกครั้งเพื่อใช้เป็นส่วนลด
ค่ารักษาพยาบาล



บริษัท ภัทรประกันภัย จำกัด (มหาชน)
PHATRA INSURANCE PUBLIC COMPANY LIMITED.
252 ถนนราชดำเนินนอก แขวงวังใหม่ เขตปทุมวัน กรุงเทพฯ 10320 โทร. 02-2762030-7 โทรสาร : 02-2762064
252 RACHADAPHISEK RD. HUAYKWANG BANGKOK 10320 TEL : 2762030-7 FAX : 2762064

คำแนะนำ

บัตรส่วนลด

เลขที่บัตร กรมธรรม์เลข
ชื่อผู้ถือบัตร
บัตรหมดอายุ ผู้มอบบัตร *Dr. วัณ*

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คำแนะนำ

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คำแนะนำ

บัตรส่วนลด

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ชื่อผู้ถือบัตร
บัตรหมดอายุ ผู้มอบบัตร *Dr. วัณ*

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เครดิตได้

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ค่ารักษาพยาบาล



บริษัท ภัทรประกันภัย จำกัด (มหาชน)
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252 RACHADAPHISEK RD. HUAYKWANG BANGKOK 10320 TEL : 2762030-7 FAX : 2762064

Figure F.13. Insurance Card

To Underwriting Manager

From Marketing Department

I would like to send you the latest registered Proposals with the summarized the transaction as at
xx/xx/xxxx ; xx:xx:xx.

Batch No : xx/xx/xxxx ;xx:xx:xx

Total of Registered Proposal : z,zzz

Total of Sum Insured Amount : z,zzz,zzz,zzz Bahts

Please sign your name below and send me back the original one

Thank you

.....
(Underwriting Manager)

.....
(Marketing Manager)

Figure F.14. Report(Proposal Batch Slip for

To Financial Manager
From Marketing Department

I would like to send you the summarized the transaction which their premium are paid and registered at xx/xx/xxxx ; xx:xx:xx.

Batch No : xx/xx/xxxx ;xx:xx:xx
Total of Registered Proposal : z,zzz
Total of Sum Insured Amount : z,zzz,zzz,zzz Bahts

Please sign your name below and send me back the original one
Thank you

.....
(Underwriting Manager)

.....
(Marketing Manager)

Figure F.15. Report(Proposal Batch Slip for Cashier)

Report : RP1.0.4

Between xx/xx/xxxx-xx/xx/xxxx

Date : xx/xx/xxxx ; xx:xx

Agent : xxxxxxx : xxxxxxxxxxxxxxxxxxxxxxxxx

Policy No.	Effective date From- to	Insured Name	Amount Insured	Premium
xxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
...
...
...
...
...
...
...
...
xxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
Agent total zz,zzzz records			Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99

Figure F.16. Report(Production Summary)

Report : RP1.0.5

Between xx/xx/xxxx-xx/xx/xxxx

Date : xx/xx/xxxx ; xx:xx

Agent : xxxxxxx : xxxxxxxxxxxxxxxxxxxxxxxxx

Policy No.	Payment date	Insured Name	Premium	Commission
xxxxxxxxxxxxxx	xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	z.,zzz,zzz.99	zz,zzz,zzz.99
xxxxxxxxxxxxxx	xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	z.,zzz,zzz.99	zz,zzz,zzz.99
xxxxxxxxxxxxxx	xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	z.,zzz,zzz.99	zz,zzz,zzz.99
xxxxxxxxxxxxxx	xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	z.,zzz,zzz.99	zz,zzz,zzz.99
...
...
...
...
...
...
...
...
xxxxxxxxxxxxxx	xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	z.,zzz,zzz.99	zz,zzz,zzz.99
Agent total			zz,zzzz records	zz,zzz,zzz.99
			Less Tax zzz %	zz,zzz,zzz.99
			Net Commission	zz,zzz,zzz.99

Figure F.17. Report(Commission Report)

Report : RP1.0.5

Between xx/xx/xxxx-xx/xx/xxxx

Date : xx/xx/xxxx;xx:xx

Agent : xxxxxxx : xxxxxxxxxxxxxxxxxxxxxxxxx

Policy No.	Effective date From- to	Insured Name	Amount Insured	Premium
------------	----------------------------	--------------	-------------------	---------

Insurance Type : xx xxxxxxxxxxxxxxxxxxxxxxxxx

xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	<u>Z.,ZZZ,ZZZ</u>	<u>ZZ,ZZZ,ZZZ.99</u>

Sub total zz,zzz records

Z.,ZZZ,ZZZ. ZZ,ZZZ,ZZZ.99

Insurance Type : xx xxxxxxxxxxxxxxxxxxxxxxxxx

xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	<u>Z.,ZZZ,ZZZ</u>	<u>ZZ,ZZZ,ZZZ.99</u>

Sub total zz,zzz records

Z.,ZZZ,ZZZ. ZZ,ZZZ,ZZZ.99

Insurance Type : xx xxxxxxxxxxxxxxxxxxxxxxxxx

xxxxxxxxxxxxxx	xx/xx/xxxx-xx/xx/xxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Z.,ZZZ,ZZZ	ZZ,ZZZ,ZZZ.99
----------------	-----------------------	--------------------------------	------------	---------------

...

...

Sub total zz,zzz records

Z.,ZZZ,ZZZ. ZZ,ZZZ,ZZZ.99

Grand total for Agent zz,zzz records

Z.,ZZZ,ZZZ ZZ,ZZZ,ZZZ.99

Agent total zz,zzzz records

Z.,ZZZ,ZZZ ZZ,ZZZ,ZZZ.99

Figure F.18. Report(Production Summary by Insurance Type)

APPENDIX G

DATABASE DESIGN



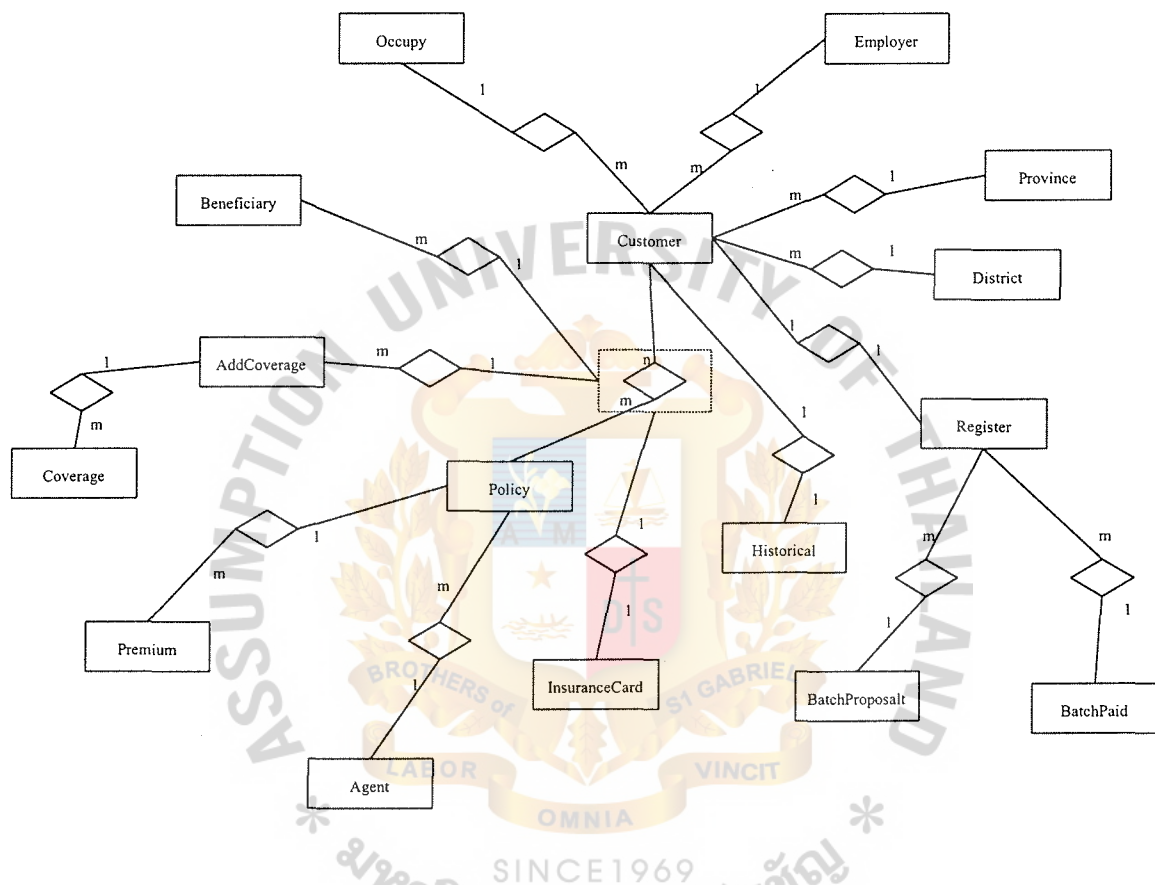


Figure G.1. ER Diagram for Personal Accident Insurance

Columns

Name	Type	Size
PolicyNo	Text	15
CustId	Text	15
AddCoverCode	Text	5

Table Indexes

Name	Number of Fields
CoverageAddCoverage	1
Fields:	AddCoverCode, Ascending
Primary	3
Fields:	PolicyNo, Ascending
	CustId, Ascending
	AddCoverCode, Ascending

Columns

Name	Type	Size
AgentCode	Text	10
AgentName	Text	50
AgentAddr1	Text	50
AgentAddr2	Text	50
AgentTax	Number (Double)	8

Table Indexes

Name	Number of Fields
Primary	1
Fields:	AgentCode, Ascending

Columns

Name	Type	Size
BatchPropCashier	Text	20
TotalProp	Number (Integer)	2
TotalPaidPrem	Number (Double)	8
SysDate	Date/Time	8
UID_Create	Text	20
AcceptDate	Date/Time	8
UID_Accept	Text	20

Table Indexes

Name	Number of Fields
Primary	1

Fields: BatchPropCashier, Ascending

Columns

Name	Type	Size
BatchPropUndw	Text	20
TotalProp	Number (Integer)	2
SysDate	Date/Time	8
UID_Create	Text	20
AcceptDate	Date/Time	8
UID_Accept	Text	20

Table Indexes

Name	Number of Fields
Primary	1
Fields:	BatchPropUndw, Ascending

Columns

Name	Type	Size
PolicyNo	Text	15
CustId	Text	15
Seq	Number (Byte)	1
Bnf_Name	Text	50
Bnf_Address	Text	60
Relation	Text	50
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
BeneficiaryPolicyNo	1
Fields:	PolicyNo, Ascending
Primary	3
Fields:	PolicyNo, Ascending CustId, Ascending Seq, Ascending

Columns

Name	Type	Size
AddCoverCode	Text	5
Narration	Text	50

Table Indexes

Name	Number of Fields
Primary	1
Fields:	AddCoverCode, Ascending

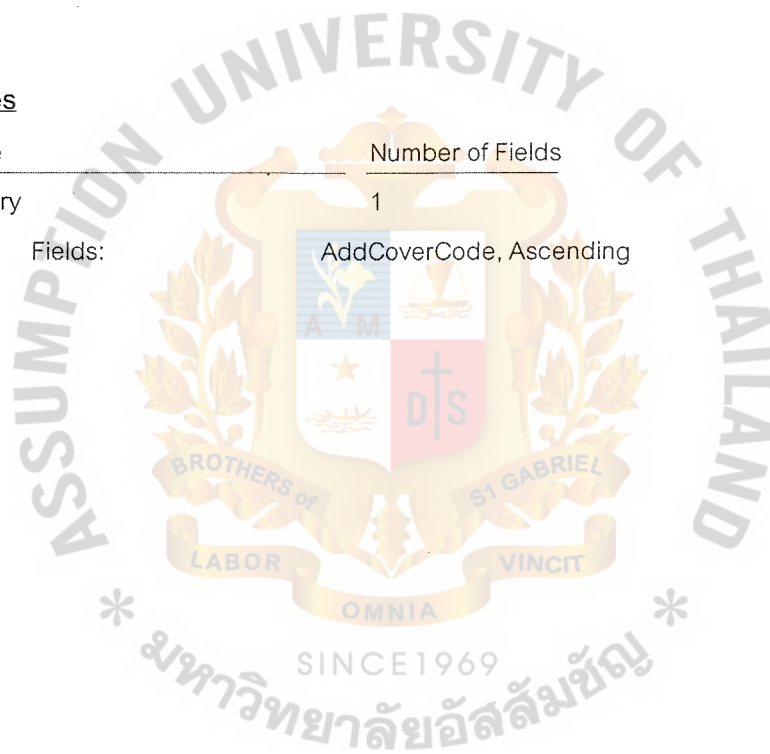


Table Indexes

Name	Number of Fields
DistrictCustomer	2
Fields:	Province, Ascending
	District, Ascending
IdCardType	1
Fields:	IdCardType, Ascending
OccupancyCustomer	1
Fields:	Occupancy_Code, Ascending
Primary	1
Fields:	CustId, Ascending
ProvinceCustomer	1
Fields:	Province, Ascending
Secondary_1	1
Fields:	EmployerName, Ascending



Columns

Name	Type	Size
CustId	Text	15
InitName	Text	10
FirstName	Text	30
MidName	Text	10
LastName	Text	30
BirthDate	Date/Time	8
Height	Number (Double)	8
Weight	Number (Double)	8
Nationality	Text	30
Addr1	Text	50
Addr2	Text	50
District	Text	2
Province	Text	2
IdCardType	Text	1
IdCardNo	Text	15
IdCardIssued	Text	50
Occupancy_Code	Text	30
Position	Text	20
JobDesc	Text	50
EmployerName	Text	30
SysDate	Date/Time	8

Columns

Name	Type	Size
Province	Text	2
Distric	Text	2
DistricName	Text	30

Table Indexes

Name	Number of Fields
PrimaryKey	2
Fields:	Province, Ascending Distric, Ascending
ProvinceDistric	1
Fields:	Province, Ascending

Columns

Name	Type	Size
EmployerName	Text	30
Business	Text	50
EmployerAddr	Text	80

Table Indexes

Name	Number of Fields
Primary	1
Fields:	EmployerName, Ascending



Columns

Name	Type	Size
CardType	Text	1
CardNo	Number (Long)	4
EffectDate	Date/Time	8
DueDate	Date/Time	8
TreatAmt	Number (Long)	4
PolicyNo	Text	15
CustNo	Text	15
SysDate	Date/Time	8

Table Indexes

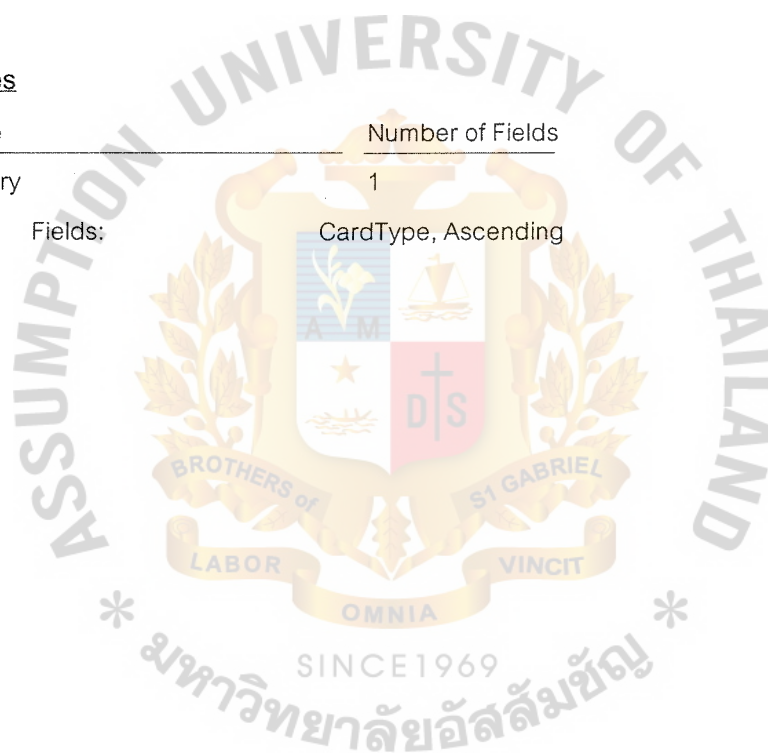
Name	Number of Fields
Primary	2
Fields:	CardType, Ascending CardNo, Ascending
Secondary_1	2
Fields:	PolicyNo, Ascending CustNo, Ascending

Columns

Name	Type	Size
CardType	Text	1
Narration	Text	50

Table Indexes

Name	Number of Fields
Primary	1
Fields:	CardType, Ascending



Columns

Name	Type	Size
Occupy_Code	Text	5
Narration	Text	50
Occupy_Group	Text	5
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
Primary	1
Fields:	Occupy_Code, Ascending

CustomerPA_BasicCover	1
Fields:	CusId, Ascending
PA_BasicCoverPolicyNo	1
Fields:	PolicyNo, Ascending
Primary	2
Fields:	PolicyNo, Ascending
	CusId, Ascending



Columns

Name	Type	Size
PolicyNo	Text	15
CusId	Text	15
Item1_InsureAmt	Number (Long)	4
Item1_Prem	Number (Double)	8
Item2_InsureAmt	Number (Long)	4
Item21_Prem	Number (Double)	8
Item22_InsureAmt	Number (Long)	4
Item22_Prem	Number (Double)	8
Item3_InsureAmt	Number (Long)	4
Item3_Prem	Number (Double)	8
Item4_Period	Number (Integer)	2
Item4_InsureAmt	Number (Long)	4
Item4_SelfInsureAmt	Number (Long)	4
Item4_Prem	Number (Double)	8
Item5_Period	Number (Integer)	2
Item6_InsureAmt	Number (Long)	4
Item6_SelfInsure	Number (Long)	4
Item6_Prem	Number (Double)	8
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
------	------------------

Table Indexes

Name	Number of Fields
Primary	1
Fields:	CustId, Ascending



Columns

Name	Type	Size
CustId	Text	15
Item6_YN	Yes/No	1
Item7_YN	Yes/No	1
Item8_YN	Yes/No	1
Item9_YN	Yes/No	1
Item9_Company	Text	30
Item9_TypeInj	Text	30
Item9_AmtComps	Number (Long)	4
Item10_Salary	Number (Long)	4
Item10_Other	Number (Long)	4
Item11_NOR	Text	1
Item12_NOR	Text	1
Item131_YN	Yes/No	1
Item132_YN	Yes/No	1
Item133_YN	Yes/No	1
Item134_YN	Yes/No	1
Item135_YN	Yes/No	1
Item136_YN	Yes/No	1
Item14_YN	Yes/No	1
Item15_YN	Yes/No	1
Item16_YN	Yes/No	1
SysDate	Date/Time	8

Columns

Name	Type	Size
PaidBy	Text	1
Narration	Text	30
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
Primary	1
Fields:	PaidBy, Ascending



Columns

Name	Type	Size
ProposalNo	Text	15
PolicyNo	Text	15
AgentCode	Text	10
EffectDate	Date/Time	8
DueDate	Date/Time	8
InsureAmt	Number (Long)	4
AgreeDate	Date/Time	8
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
AgentPolicyHeader	1
Fields:	AgentCode, Ascending
PrimaryKey	1
Fields:	PolicyNo, Ascending

Columns

Name	Type	Size
Province	Text	2
ProvinceName	Text	30

Table Indexes

Name	Number of Fields
PrimaryKey	1
Fields:	Province, Ascending



Columns

Name	Type	Size
PremSerialNo	Number (Long)	4
PolicyNo	Text	15
Seq	Number (Byte)	1
Premium	Number (Double)	8
Tax	Number (Double)	8
Stemp	Number (Double)	8
SysDate	Date/Time	8

Table Indexes

Name	Number of Fields
PolicyHeaderPremium	1
Fields:	PolicyNo, Ascending
Primary	1
Fields:	PremSerialNo, Ascending
Secondary_1	1
Fields:	PolicyNo, Ascending

Fields:	BatchPropCashier, Ascending
Secondary_4	1
Fields:	PaidBy, Ascending



Columns

Name	Type	Size
ProposalNo	Text	15
CustId	Text	15
RegisterDate	Date/Time	8
UserId	Text	20
PaidBy	Text	30
ChqNo	Text	15
ChqDate	Date/Time	8
PaidAmt	Number (Double)	8
SysDate	Date/Time	8
BatchPropUndw	Text	20
BatchPropCashier	Text	20

Table Indexes

Name	Number of Fields
CustomerRegistration	1
Fields:	CustId, Ascending
Primary	1
Fields:	ProposalNo, Ascending
Secondary_1	1
Fields:	CustId, Ascending
Secondary_2	1
Fields:	BatchPropUndw, Ascending
Secondary_3	1

APPENDIX H

DATA DICTIONARY



Record Name	BNF1 Component Name	BNF2	Primary	Key Details FK/AK/IE	Key Link
InsuranceCard					
	+ EffectDate		N		
	+ DueDate		N		
	+ TreatAme		N		
	+ PolicyNo		Y	FK	
	+ CustID		Y	FK	
	+ SysDate		N		
InsuranceCardType					
	= CardType		Y		
	+ Narration		N		
Occupancy					
	= Occupy_code		Y		
	+ Narration		N		
	+ Occupy_Group		N		
	+ SysDate		N		
PA_BasicCover					
	= PolicyNo		N		
	+ CustID		N		
	+ Item1_InsureAmt		N		
	+ Item1_prem		N		
	+ Item2_InsureAmt		N		
	+ Item22_prem		N		
	+ Item3_InsureAmt		N		
	+ Item3_Prem		N		
	+ Item4_Period		N		
	+ Item4_InsureAmt		N		
	+ Item4_SelfInsureAmt		N		
	+ Item4_Prem		N		
	+ Item5_Period		N		
	+ Item6_InsureAmt		N		
	+ Item6_SelfInsure		N		
	+ Item6_prem		N		
	+ SysDate		N		
PA_Historical					
	= CustID		Y		
	+ Item6_YN		N		
	+ Item7_YN		N		
	+ Item8_YN		N		
	+ Item9_YN		N		
	+ Item9_Company		N		
	+ Item9_TypeInj		N		
	+ Item9_AmtComps		N		
	+ Item10_Salary		N		
	+ Item10_Other		N		
	+ Item11_NOR		N		
	+ Item12_NOR		N		
	+ Item131_YN		N		
	+ Item132_YN		N		
	+ Item133_YN		N		
	+ Item134_YN		N		
	+ Item135_YN		N		
	+ Item136_YN		N		
	+ Item14_YN		N		
	+ Item15_YN		N		
	+ Item16_YN		N		
	+ SysDate		N		
Payment Batch Control					
	= BatchPropCashier		Y		
	+ TotalProp		N		
	+ SysDate		N		
	+ UID_Create		N		
	+ AcceptDate		N		
	+ UID_accept		N		
PaymentType					
	= PaidBy		Y		
	+ Narration		N		
	+ SysDate		N		
PolicyHeader					
	= PolicyNo		Y		

Record Name		Key Details		
BNF1	Component Name	BNF2	Primary FK/AK/IE	Key Link
PolicyHeader				
+	ProposalNo		Y	FK
+	AgentCode		Y	FK
+	EffectDate		N	
+	DueDate		N	
+	InsureAmt		N	
+	AgreeDate		N	
+	SysDate		N	
Premium				
=	PremSerialNo		Y	
+	Seq		Y	
+	PolicyNo		Y	
+	Premium		N	
+	Tax		N	
+	Stamp		N	
+	SysDate		N	
Proposal Batch Control				
=	BatchPropUndw		Y	
+	TotalProp		N	
+	SysDate		N	
+	UID_Create		N	
+	AcceptDate		N	
+	UID_accept		N	
Proposal Registration				
=	ProposalNo		N	
+	CustID		Y	FK
+	RegisterDate		N	
+	UID_Register		N	
+	PaidBy		F	FK
+	ChqNo		N	
+	ChqDate		N	
+	PaidAmt		N	
+	SysDate		N	
+	BatchPropUndw		F	FK
+	BatchPropCashier		F	FK
Proposal to be Printed				
=	ProposalNo		N	
+	PolPrintDate		N	
+	PolicyNo		N	
Province				
=	Province		N	
+	ProvinceName		N	
Recognition Proposal				
=	ProposalNo		Y	
+	SysDate		N	
temp1				
=	CustID		N	
+	Temp1		N	
+	ADDRESS		N	
Temp2				
=	CustID		Y	
+	InitName		N	
+	FirstName		N	
+	MidName		N	
+	LastName		N	
+	BirthDate		N	
+	Height		N	
+	Nationality		N	
+	Addr1		N	
+	Addr2		N	
+	District		N	
+	Province		N	
+	IdCardType		N	FK
+	IdCardNo		N	
+	IdCardIssued		N	
+	Occupancy		N	
+	Position		N	
+	JobDesc		N	

Record Name	BNF1 Component Name	BNF2	Key Details	
			Primary	FK/AK/IE Key Link
Temp2	+ EmployerName		N	FK
	+ SysDate		N	
Temp3	= CustID		Y	
	+ InitName		N	
	+ FirstName		N	
	+ MidName		N	
	+ LastName		N	
	+ BirthDate		N	
	+ Height		N	
	+ Weight		N	
	+ Nationality		N	
	+ Addr1		N	
	+ Addr2		N	
	+ Distric		Y	FK
	+ Province		Y	FK
	+ IdCardType		Y	FK
	+ IdCardNo		N	
	+ IdCardIssued		N	
	+ Occupy_code		Y	FK
	+ Position		N	
	+ JobDesc		N	
	+ EmployerName		Y	FK
	+ SysDate		N	



EasyCASE Record Description Attribute
User: pha

Printed on 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Record Name	Record Description
AddCoverage	Addition coverage for the policy
Agent	Table of Agent or Broker
Beneficiary	The beneficiary of the insured
Coverage	Coverage risk
Customer	
Customer Information	Customer information on process
District	The District table
Employer	Table of customer's employee
InsuranceCard	Insurance Card
InsuranceCardType	
Occupancy	
PA_BasicCover	Basic Cover for PA
PA_Historical	Customer's historical
Payment Batch Control	Batch Control for paid proposal
PaymentType	Type of Payment
PolicyHeader	The common data of policy
Premium	Premium of policy
Proposal Batch Control	Batch control for registered proposal
Proposal Registration	Registered Proposal
Proposal to be Printed	Keep Proposal No to be printed policy
Province	Table province
Recognition Proposal	Proposal No are accepted by underwriter
temp1	Customer Id for this table
Temp2	Customer profile
Temp3	

16/7/98

Record Name		
AddCoverage	Table Name:	AddCoverage
	Index Name:	PolicyNo+CustID+AddCoverCode [Unique
	Definition:	PA Addition Coverage
<hr/>		
Agent	Table Name:	Agent
	Index Name:	AgentCode [Unique Index]
	Definition:	Agent
<hr/>		
Beneficiary	Table Name:	Beneficiary
	Index Name:	PolicyNo+CustID+Seq [Unique Index]
	Definition:	Beneficiary
<hr/>		
Coverage	Table Name:	Coverage
	Index Name:	AddCoverCode [Unique Index]
	Definition:	Coverage reference
<hr/>		
Customer	Table Name:	Customer
	Index Name:	CustID [Unique Index]
	Definition:	Customer
<hr/>		
Customer Information	Table Name:	
	Index Name:	
	Definition:	
<hr/>		
District	Table Name:	District
	Index Name:	Province+District [Unique Index]
	Definition:	District
<hr/>		
Employer	Table Name:	Employer
	Index Name:	EmployerName [Unique Index]
	Definition:	Customer's Employer
<hr/>		
InsuranceCard	Table Name:	InsuranceCard
	Index Name:	CardType+CardNo [Unique Index]
	Definition:	Insurance Card
<hr/>		
InsuranceCardType	Table Name:	InsuranceCardType
	Index Name:	CardType [Unique Index]
	Definition:	Insurance Card Type
<hr/>		
Occupancy	Table Name:	Occupancy
	Index Name:	Occupy_Code [Unique Index]
	Definition:	Customer's occupancy
<hr/>		
PA_BasicCover	Table Name:	PA_BasicCover
	Index Name:	Policy+CustID [Unique Index]
	Definition:	PA Basic Cover
<hr/>		
PA_Historical	Table Name:	PA_Historical
	Index Name:	CustID [Unique Index]
	Definition:	PA Historical
<hr/>		
Payment Batch Control	Table Name:	BatchProposalCashier
	Index Name:	BatchPropCashier [Unique Index]
	Definition:	Payment Batch Control

Record Name

PaymentType	Table Name: PaymentType Index Name: PaidBy [Unique Index] Definition: Type of Payment
PolicyHeader	Table Name: PolicyHeader Index Name: PolicyNo [Unique Index] Definition: Header of Policy
Premium	Table Name: Premium Index Name: PremSerialNo [Unique Index] Definition: Premium
Proposal Batch Control	Table Name: BatchPropsalUndw Index Name: BatchPropUndw [Unique Index] Definition: Batch control for proposal
Proposal Registration	Table Name: Registration Index Name: ProposalNo [Unique Index] Definition: Registration
Proposal to be Printed	Table Name: PropPrint Index Name: ProposalNo [Unique Index] Definition: Proposal To be Print
Province	Table Name: Province Index Name: Province [Unique Index] Definition: Province
Recognition Proposal	Table Name: RecogProp Index Name: ProposalNo [Unique Index] Definition: Recognition Proposal
temp1	Table Name: FILE1 Index Name: Definition: FILE11111
Temp2	Table Name: customer Index Name: CustID [Unique Index] Definition: customer profile
Temp3	Table Name: Customer Index Name: CustID [Unique Index] Definition: Customer

EasyCASE Element Attributes
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Element Name

AcceptDate	Field Name: AcceptDate Field Type: Date Field Length: Constraint: Field Format:
AddCoverCode	Field Name: AddCoverCode Field Type: Char Field Length: 5 Constraint: Field Format:
Addr1	Field Name: Addr1 Field Type: Char Field Length: 50 Constraint: Field Format:
Addr2	Field Name: Addr2 Field Type: Char Field Length: 50 Constraint: Field Format:
AgentAddr1	Field Name: AgentAddr1 Field Type: Char Field Length: 50 Constraint: Field Format:
agentAddr2	Field Name: agentAddr2 Field Type: Char Field Length: 50 Constraint: Field Format:
AgentCode	Field Name: AgentCode Field Type: Char Field Length: 10 Constraint: Field Format:
AgentName	Field Name: AgentName Field Type: Char Field Length: 50 Constraint: Field Format:
AgentTax	Field Name: AgentTax Field Type: Double Field Length: Constraint: Field Format:
Batch No	Field Name: Batch No Field Type: Char Field Length: 20 Constraint: Field Format:
BatchPropCashier	Field Name: BatchPropCashier Field Type: Char Field Length: 20 Constraint: Field Format:

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EasyCASE Element Attributes
User: pha

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Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name

BatchPropUndw	Field Name: BatchPropUndw Field Type: Char Field Length: 20 Constraint: Field Format:
BirthDate	Field Name: BirthDate Field Type: Date Field Length: Constraint: Field Format: mm-dd-yyyy
Bnf_Address	Field Name: Bnf_Address Field Type: Char Field Length: 60 Constraint: Field Format:
Bnf_Name	Field Name: Bnf_Name Field Type: Char Field Length: 50 Constraint: Field Format:
Business	Field Name: Business Field Type: Char Field Length: 50 Constraint: Field Format:
CardNo	Field Name: CardNo Field Type: Int Field Length: Constraint: Field Format:
CardType	Field Name: CardType Field Type: Char Field Length: 1 Constraint: Field Format:
ChqDate	Field Name: ChqDate Field Type: Date Field Length: Constraint: Field Format:
ChqNo	Field Name: ChqNo Field Type: Char Field Length: 15 Constraint: Field Format:
CustID	Field Name: CustID Field Type: Char Field Length: 15 Constraint: Not Null Field Format:
Distric	Field Name: Distric Field Type: Char Field Length: 2 Constraint: Field Format:

EasyCASE Element Attributes
User: pha

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Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name	
DistrictName	Field Name: DistrictName Field Type: Char Field Length: 30 Constraint: Field Format:
DueDate	Field Name: DueDate Field Type: Date Field Length: Constraint: Field Format:
EffectDate	Field Name: EffectDate Field Type: Date Field Length: Constraint: Field Format:
EmployerAddr	Field Name: EmployerAddr Field Type: Char Field Length: 80 Constraint: Field Format:
EmployerName	Field Name: EmployerName Field Type: Char Field Length: 30 Constraint: Field Format:
FirstName	Field Name: FirstName Field Type: char Field Length: 30 Constraint: Field Format:
Height	Field Name: Height Field Type: Double Field Length: Constraint: Field Format:
IdCardIssued	Field Name: Z,ZZZ.99 Field Name: IdCardIssued Field Type: Char Field Length: 50 Constraint: Field Format:
IdCardNo	Field Name: IdCardNo Field Type: Char Field Length: 15 Constraint: Field Format:
IdCardType	Field Name: IdCardType Field Type: Char Field Length: 1 Constraint: Field Format:
InitName	Field Name: InitName Field Type: Field Length: Constraint: Field Format:

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EasyCASE Element Attributes
User: pha

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Project: New Project Name
Project Directory: c:\mydocu~1\abact\sel

Element Name

Item1_InsureAmt	Field Name: Item1_InsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item1_prem	Field Name: Item1_prem Field Type: double Field Length: Constraint: Field Format:
Item10_Other	Field Name: Item10_Other Field Type: Double Field Length: Constraint: Field Format:
Item10_Salary	Field Name: Item10_Salary Field Type: Double Field Length: Constraint: Field Format:
Item11_NOR	Field Name: Item11_NOR Field Type: Char Field Length: 1 Constraint: Field Format:
Item12_NOR	Field Name: Item12_NOR Field Type: Char Field Length: 1 Constraint: Field Format:
Item131_YN	Field Name: Item131_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item132_YN	Field Name: Item132_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item133_YN	Field Name: Item133_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item134_YN	Field Name: Item134_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item135_YN	Field Name: Item135_YN Field Type: Char Field Length: 1 Constraint: Field Format:

EasyCASE Element Attributes
User: pha

Printed on: 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name	
Item13b_YN	Field Name: Item13b_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item14_YN	Field Name: Item14_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item15_YN	Field Name: Item15_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item16_YN	Field Name: Item16_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item2_InsureAmt	Field Name: Item2_InsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item22_prem	Field Name: Item22_prem Field Type: Double Field Length: Constraint: Field Format:
Item3_InsureAmt	Field Name: Item3_InsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item3_Prem	Field Name: Item3_Prem Field Type: Double Field Length: Constraint: Field Format:
Item4_InsureAmt	Field Name: Item4_InsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item4_Period	Field Name: Item4_Period Field Type: Int Field Length: Constraint: Field Format:
Item4_Prem	Field Name: Item4_Prem Field Type: Double Field Length: Constraint: Field Format:

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EasyCASE Element Attributes
User: pha

Printed on: 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abacksel

Element Name	
Item4_SelfInsureAmt	Field Name: Item4_SelfInsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item5_Period	Field Name: Item5_Period Field Type: Int Field Length: Constraint: Field Format:
Item6_InsureAmt	Field Name: Item6_InsureAmt Field Type: Double Field Length: Constraint: Field Format:
Item6_prem	Field Name: Item6_prem Field Type: Double Field Length: Constraint: Field Format:
Item6_SelfInsure	Field Name: Item6_SelfInsure Field Type: Double Field Length: Constraint: Field Format:
Item6_YN	Field Name: Item6_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item7_YN	Field Name: Item7_YN Field Type: Char Field Length: 1 Constraint: With Default Field Format:
Item8_YN	Field Name: Item8_YN Field Type: Char Field Length: 1 Constraint: Field Format:
Item9_AmtComps	Field Name: Item9_AmtComps Field Type: Double Field Length: Constraint: Field Format:
Item9_Company	Field Name: Item9_Company Field Type: Char Field Length: 30 Constraint: Field Format:
Item9_TypeInj	Field Name: Item9_TypeInj Field Type: Char Field Length: 30 Constraint: Field Format:

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EasyCASE Element Attributes

User: pha

Printed on: 16/7/98

Project: New Project Name

Project Directory: c:\mydocu~1\abac\se\

Element Name

Item9_YN	Field Name: Item9_YN Field Type: Char Field Length: 1 Constraint: Field Format:
JobDesc	Field Name: JobDesc Field Type: Char Field Length: 50 Constraint: Field Format:
LastName	Field Name: LastName Field Type: char Field Length: 30 Constraint: Field Format:
MidName	Field Name: MidName Field Type: char Field Length: 10 Constraint: Field Format:
Narration	Field Name: Narration Field Type: Char Field Length: 50 Constraint: Field Format:
Nationality	Field Name: Nationality Field Type: Char Field Length: 30 Constraint: Field Format:
Occupy	Field Name: Occupy Field Type: Field Length: Constraint: Field Format:
Occupy_code	Field Name: Occupy Field Type: Char Field Length: 5 Constraint: Field Format:
Occupy_Group	Field Name: Occupy_Group Field Type: Char Field Length: 5 Constraint: Field Format:
PaidAmt	Field Name: PaidAmt Field Type: Double Field Length: Constraint: Field Format:
PaidBy	Field Name: PaidBy Field Type: Char Field Length: 1 Constraint: Field Format:

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EasyCASE Element Attributes
User: pha

Printed on: 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name

PolicyNo	Field Name: PolicyNo Field Type: Char Field Length: 15 Constraint: Field Format: x/xx/xx/xxxxxx-xxxx
PolPrintDate	Field Name: PolPrintDate Field Type: Date Field Length: Constraint: Field Format:
Position	Field Name: Position Field Type: Char Field Length: 20 Constraint: Field Format:
Premium	Field Name: Premium Field Type: Double Field Length: Constraint: Field Format:
PremSerialNo	Field Name: PremSerialNo Field Type: Int Field Length: Constraint: Field Format:
ProposalNo	Field Name: ProposalNo Field Type: Char Field Length: 15 Constraint: Field Format:
Province	Field Name: Province Field Type: Char Field Length: 2 Constraint: Field Format:
ProvinceName	Field Name: ProvinceName Field Type: Char Field Length: 30 Constraint: Field Format:
Relation	Field Name: Relation Field Type: Char Field Length: 50 Constraint: Field Format:
Seq	Field Name: Seq Field Type: Int Field Length: Constraint: Field Format:
Stamp	Field Name: Stamp Field Type: Double Field Length: Constraint: Field Format:

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EasyCASE Element Attributes
User: pha

Printed on: 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name	
SysDate	Field Name: SysDate Field Type: Date Field Length: Constraint: Field Format: mm-dd-yyyy
Tax	Field Name: Tax Field Type: Double Field Length: Constraint: Field Format:
Temp1	Field Name: CustName Field Type: Char Field Length: 10 Constraint: Field Format:
TotalProp	Field Name: TotalProp Field Type: Int Field Length: Constraint: Field Format:
TreatAme	Field Name: TreatAme Field Type: Double Field Length: Constraint: Field Format:
UID_accept	Field Name: UID_accept Field Type: Char Field Length: 20 Constraint: Field Format:
UID_Create	Field Name: UID_Create Field Type: Char Field Length: 20 Constraint: Field Format:
UID_Register	Field Name: UID_Register Field Type: Char Field Length: 20 Constraint: Field Format:
Weight	Field Name: Weight Field Type: Int Field Length: Constraint: Field Format:

16/7/98

EasyCASE Element Description Attribute
User: pha

Printed on 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name:	Element Description:
AcceptDate	Cashier's Acceptance date
AddCoverCode	Addition coverage code
Addr1	Customer's Address line 1
Addr2	Customer's Address line 2
AgentAddr1	Agent Address line 1
agentAddr2	Agent Address line 2
AgentCode	Code of Agent
AgentName	Name of Agent
AgentTax	Tax withhold
Batch No	Standard Batch No
BatchPropCashier	Batch number for Summarized Payment Slip
BatchPropUndw	Batch number for summarized proposal slip
BirthDate	Customer's birth date
Bnf_Address	Beneficiary's Address
Bnf_Name	Beneficiary's Name
Business	Business type
CardNo	Insurance Card No
CardType	Type of Insurance Card
ChqDate	Cheque Date
ChqNo	Cheque Number
CustID	Customer ID Issued by company
Customer Information	
District	District Code
DistrictName	District's name
DueDate	The due date
EffectDate	The effective date
EmployerAddr	Employer Address
EmployerName	The employer's name
FirstName	The customer's first name

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Element Name:	Element Description:
Height	
IdCardIssued	The issued location of Insurance Card
IdCardNo	Insurance Card Number
IdCardType	Insurance Card Type
InitName	Initial Name of Customer
Item1_InsureAmt	Item1 Loss of life Sum Insured
Item1_prem	Item1 Loss of life premium
Item10_Other	Other per year in Item 10.
Item10_Salary	Salary per year in Item 10.
Item11_NOR	Do you drive or ride as passenger on motorcycle?
Item12_NOR	Do you Take or Consume alcoholic drinks?
Item131_YN	Do you have Epilepsy?
Item132_YN	Do you have Heart disease?
Item133_YN	Do you have Abnormal Blood Pressur
Item134_YN	Do you have Diabetes?
Item135_YN	Do you have Arthritis?
Item136_YN	Do you have Cancer?
Item14_YN	Do you have defects in eyesight or hearing?
Item15_YN	Do you have any disabled part of your body?
Item16_YN	Have you ever been addicted to drugs?
Item2_InsureAmt	Item 2 Loss of sight Amount
Item22_prem	Item 2 Loss of sight Premium
Item3_InsureAmt	Item3 Permnent Disability insure Amount
Item3_Prem	Item3 Permnent Disability insure Premium
Item4_InsureAmt	Item4 Total Temporary Disability maximum amount insured
Item4_Period	Item4 Total Temporary Disability maximum
Item4_Prem	Item4 Total Temporary Disability maximum amount premium
Item4_SelfInsureAmt	Item4 Total Temporary Disability maximum amount self-insure
Item5_Period	Item 5 Partial temporary Disability Max period

EasyCASE Element Description Attribute
User: pha

Printed on 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name:	Element Description:
Item6_InsureAmt	Item6 Total Temporary Disability maximum Premium
Item6_prem	Item6 Total Temporary Disability maximum Premium
Item6_SelfInsure	Item6 Total Temporary Disability maximum self-insure
Item6_YN	Item 6. Do you require coverage for Murder or Assault?
Item7_YN	Item 7. Do you have or have proposed for personal accident
Item8_YN	Item 8. Have you ever been declined life insurance?
Item9_AmtComps	Amount of Compensation in Item 9
Item9_Company	Company of Item 9.
Item9_TypeInj	Type of injury of Item9
Item9_YN	Item 9. In the past two years, have you ever received under your personal accident insurance?
JobDesc	Job description
LastName	The customer's last name
MidName	The customer's middle name
Narration	Narration of the code
Nationality	
Occupy	Customer's Occupation
Occupy_code	The customer's occupation code
Occupy_Group	The occupy's group
PaidAmt	Premium Payment
PaidBy	What type is Premium paid by?
PolicyNo	Policy number
PolPrintDate	Date print this policy
Position	Customer's position
Premium	Premium
PremSerialNo	Premium Serial Number
ProposalNo	Proposal number
Province	Province Code
ProvinceName	Province's name
Relation	Relation between the insured and Beneficiary person

16/7/98

EasyCASE Element Description Attribute
User: pha

Printed on 16/7/98
Project: New Project Name
Project Directory: c:\mydocu~1\abac\se\

Element Name:	Element Description:
Seq	Sequence number
Stamp	Duty stamp
SysDate	Record create date
Tax	Comercial Tax
Temp1	
Temp2	
TotalProp	Total records of registered proposal
TreatAme	Treaty amount
UID_accept	User ID who make an acceptance
UID_Create	User ID who create record
UID_Register	User Id who register the proposal
Weight	Weight



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