

**Application Name:**  
Agent Portal (AP)

**Industry:**  
Insurance / BFSI

**Domain:**  
Automotive & Home Insurance  
Policy/Quote Management system

**Category:**  
Web Based Application Portal

## Client Profile

A leading regional provider of insurance products and services for small and mid-sized businesses, as well as for individuals, and ranks among the top 70 U.S. property/casualty insurance groups.

## About the Application

Agent Portal is a flagship online web based portal application specifically meant for Agent's in-house use. It provides the Agent user with one intuitive application that reserves and quote for – Business Owners, Workers Compensation, and Commercial Auto & Rapid Rate Umbrella in 17 states and with minimal entry an Agent can get the best Quote Summary. Some of the key features of this application include:

- Market standard products for Small Market accounts
- Default coverage for standard products
- Setup standard products for 200 favorable BOP classes and supporting classes for Workers Comp and Commercial Auto
- Streamline the overall account process
- Automate simplified entry for Small market accounts
- One application to reserve their account and enter all policy data into
- Decrease user entry from 75 screens to 15 screens or less to rate an entire account
- Include entry for BOP, WC, and Commercial Auto
- Utilize CL Agency upload to transmit data and perform rating – eliminating the need to enter into the policy system to get a rate on “cookie cutter” products
- Include the option to edit products in the policy system to add customization

## Prime Solution

Prime's technical team was initially trained by Client in implementing new features and functionality for the Agent Portal application. Currently Prime's Offshore Technical Lead interacts directly with the onsite Client's Project Manager for continuing the on-going development and maintenance support on the Agent Portal product.

Prime followed an Agile methodology during development and deployment of this portal application. The following activities were performed during the course of this engagement:

- Analyze clients systems and business processes
- Conducted user interviews, gathered requirements, analyzed, document and manage requirements
- Requirement gathering, verification/validation of requirements against application
- Created functional requirements with Use cases, GUI. Produced process flow, work flow and data flow documents
- Developed Use case, Functional, Object diagrams
- Interface with business users to prepare/update Use Case, Field level specifications, Functionality Matrix, Business Rules
- Interacting with technical team to provide support and help them in translating requirements into design and Development Prepare Design Document
- Data mapping specs for integration
- QA the product by thorough testing of the application

## Prime QA Challenges

The Business challenge for the client was to implement “Agent Portal” product on Commercial Lines Insurance. As part of Phase 1, the product was to be implemented for about 17 states in the US and included Business Auto, Business Owners & Workers Compensation Line of Business.

The Business challenge for Prime was to perform testing on the “Agent Portal” application, on both UI & Functional areas including testing all Phase 1 17 different States in the US by adopting Client’s QA Process. The testing challenges also include the following:

- Complete UI testing
- Verifying all the Business Rules of all LOB’s(BA,BOP & WC) in 17 different states as part of Functional Testing
- Verification of Upload Process and performing Rate comparisons on the Policies
- Verifying Reports after successful uploads
- Performing Policy Issuance with Binding & Non-Binding
- Testing Policy transactions like “Cancellation, Re-Instate, Amendment etc...”

## Prime QA Solution

Prime has been the preferred vendor and partner on QA for this Client. This has been based on our responsiveness, Knowledge level in Insurance domain, high quality of work and our strong offshore capability.

Prime initially performed an Onsite Business requirements analysis with the help of a BA and an extended QA team was formed and deployed from Prime Offshore to carry out the overall application testing.

Prime QA team supported a huge volume of Functional & Regression testing work that Client required and focused on the implementation and execution of the test strategy. Other areas covered include maintenance of test cases, manual Functional Testing, Regression testing, Database testing, Rate Comparison. Client has been heavily relying on Prime’s domain expertise in Insurance, testing knowledge and its ability and proficiency as an independent verification specialist.

Prime followed some of the best QA practices to successfully launch a stable AP product. Some of the key areas on involvement for Prime included the following:

- Assessing the environment and determining the best course of action
- Designing best Test strategies through plans and providing accurate Estimates
- Weekly reviews to ensure all planned milestones and objectives are on track and being achieved
- Quick Knowledge transfer to internal staff
- Worked on Functional and Regression testing with separate teams for delivering the quality builds on time
- Provided customer with some Quality reports like Daily Status report, Weekly Status Report, Build Health reports, Test Summary Reports (end of each cycle)
- Recommendations on process improvements to integrate test automation regression into the current QA lifecycle.

## Technologies Used

- MS.Net Framework 4.0, ASP.Net, C#.Net
- Microsoft Silverlight 4.0, WCF, XML/XSL
- MS SQL Server 2005
- IE All versions

## Project Duration

Ongoing since 2012

## Prime Team Size

- 5 Software Engineers
- 1 Technical Lead
- 1 Project Manager
- 5 Member QA Team

## Client Testimonials

*“I just wanted to send you a note to let you know that the team is doing a wonderful job. There is a lot that goes on with the Agent Portal projects and they are able to keep up with the constant changes and shifting of work and consistently deliver a clean product. I appreciate the dedication that they display day in and day out on this project”*

**Sr. Analyst (Client POC),**

## Client Testimonials

*“I just wanted to take the time to thank the entire team for their efforts in making this happen. You guys were flexible and not only worked our project but helped test a portion of the browser project, and we appreciate it so THANKS☺”*

**QA Lead**

## About Prime

Prime Technology Group is a global, technology services company where innovation is at the core of our business engagements. We develop cutting-edge solutions and carefully select the best Information Technology professionals locally and globally to become ambassadors of your business. This approach maximizes our ability to leverage our award-winning team and their competencies. Prime is the conduit which bridges the immediate business solutions today to the technology advances of tomorrow.

Our candid ability and forethought has enabled us to navigate seamlessly, bridging the appropriate technology solutions that outlast today's technology trends. How do we do this; simply we listen. Team leaders identify poignant solutions and fuse the appropriate framework and infrastructure necessary for unlocking your capabilities.

Prime Technology Group is organized into four technical practices;

- Cloud (Google PAAS, Microsoft Azure)
- Mobility (IBM Work Lite)
- Analytics (Big Data, Predictive Analytics)
- Quality Assurance

Prime develops customizable frameworks, driven by our robust R & D, which become the cornerstone of our solution offerings. Our philosophy in flexibility allows us to leverage our award-winning resources and competencies to exceed our clients' expectations while improving their bottom line.

We have successfully helped hundreds of clients in Healthcare, Insurance, Life Sciences, Banking, Financial Services, and E-commerce. Our imprint has drastically impacted client growth, we are Prime Technology Group, where we are "Bringing visions to life."

To know more about our services, please visit [www.primetgi.com](http://www.primetgi.com).

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