

Wireframes

A Web Page

← → ↻ http://

Allianz Logo Time 14:30 Time 14:30 Time 14:30

NEWS UPDATE New Batch codes will now display in OMNIA News Connected

Identify & Verify Customer Context

Mark Swanson
 EAST COAST COMMERCIALS
 AL-A1434300166
 Address 98 CHEVIOT ROAD PALMWOODS QLD 4555
 Email Not Available
 Telephone Not Available

Policy Number	Status	Class	Description
1431360612QTP	01	QTP	2003 HOLDEN RODEO 02ICE
1431360612QTP	01	QTP	2003 HOLDEN RODEO 02ICE
1431360612QTP	01	QTP	2003 HOLDEN RODEO 02ICE
1431360612QTP	01	QTP	2003 HOLDEN RODEO 02ICE
1431360612QTP	01	QTP	2003 HOLDEN RODEO 02ICE

Claim Number	Policy Number	Date of Loss	Status	Type	Description
Clamin01010	187F609929CMP	01/01/2014	HCC	ClaimType	828 Pacific Highway
Clamin01010	187F609929CMP	01/01/2014	HCC	ClaimType	828 Pacific Highway
Clamin01010	187F609929CMP	01/01/2014	HCC	ClaimType	828 Pacific Highway
Clamin01010	187F609929CMP	01/01/2014	HCC	ClaimType	828 Pacific Highway
Clamin01010	187F609929CMP	01/01/2014	HCC	ClaimType	828 Pacific Highway

Idea I for UX
 Customer context
 Grid View with nesting inner grids.

A Web Page

← → ↻ http://

Allianz Logo Time 14:30 Time 14:30 Time 14:30

NEWS UPDATE New Batch codes will now display in OMNIA News Connected

Identify & Verify Customer Context

Mark Swanson
 C1750FLN2Z
 DOB: 07/07/1983
 Address 98 CHEVIOT ROAD PALMWOODS QLD 4555
 Email someone@email.com
 Telephone 042112542522

IDEA II : UX for Customer Context
 NO GRID LOOKS
 FLYOUT PANELS
 PANEL I:
 With Information like Policy, Claim, Broker, Date, status and description. (can be sorted with all fields.)
 1 Click in the row gives another flyout with complete details of policy or claim.

[With us for 20 Years](#)
 View everything in Timeline

Policy	Claims	Broker	Status	Date	Description
187F609929CMP1		NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0101	NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0102	NAB	01	01/01/2015	832 pacific pde
187F609929CMP3		NAB	01	01/01/2015	832 pacific pde
187F609929CMP4	Claim0103	NAB	01	01/01/2015	832 pacific pde
187F609929CMP5	Claim0104	NAB	01	01/01/2015	832 pacific pde
187F609929CMP6		NAB	01	01/01/2015	832 pacific pde
187F609929CMP7	Claim0105	NAB	01	01/01/2015	832 pacific pde

Policy 187F609929CMP1 DETAILS

Risks: Risk value goes here.
 Status: S01201
 Inception Date: 01/01/2015
 Expiry Date: 30/01/2016
 Original Date: 01/01/2013
 Payment Details: MasterCard *****-7464
 Endorsment Details: Details
 Description: Description goes here

Other Parties | Policy Documents | Alfresco Documents

Scratchpad

Transfer Call Complete Call

A Web Page

← → ↻

Allianz Logo

Time 14:30 Time 14:30 Time 14:30

NEWS UPDATE New Batch codes will now display in OMNIA News Connected

Identify & Verify
Customer Context

Mark Swanson

C1750FLN2Z
DOB: 07/07/1983

Address: 98 CHEVIOT ROAD PALMWOODS QLD 4555
Email: someone@email.com
Telephone: 042112542522

With us for 20 Years

View everything in Timeline

Policy	Claims	Broker	Status	Date	Description
187F609929CMP1		NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0101	NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0102	NAB	01	01/01/2015	832 pacific pde
187F609929CMP3		NAB	01	01/01/2015	832 pacific pde
187F609929CMP4	Claim0103	NAB	01	01/01/2015	832 pacific pde
187F609929CMP5	Claim0104	NAB	01	01/01/2015	832 pacific pde
187F609929CMP6		NAB	01	01/01/2015	832 pacific pde
187F609929CMP7	Claim0105	NAB	01	01/01/2015	832 pacific pde

Claim 0101 DETAILS

Claim: Risk value goes here.
Policy: S01201
Date Loss: 01/01/2011
Date Incurred: 01/01/2012
Paid: YES
Balance: NO
Claim Type: ClaimType
Payment Details: MasterCard *****7464
Endorsment Details: Details
Description: Description goes here
Status: Progress

Scratchpad

Link to ACMS
Link to Servis

Transfer Call Complete Call

Transfer Call Complete Call

A Web Page

← → ↻

Time 14

Close timeline ✕

NEWS UPDATE New Batch codes will now display

Identify & Verify

Customer Context

Mark Swanson

C1750FLN2Z
DOB: 07/07/1983

Address: 98 CHEVIOT ROAD PALMWOODS QLD 4555
Email: someone@email.com
Telephone: 042112542522

IDEA II - UX for Customer Context

NO GRID LOOKS
FLYOUT PANELS

All stays same, the timeline button click shows the timeline on right side of screen with scrollable contents.

With close of top or just click the sidebar,

Policy	Claims	Broker	Status	Date	Description
187F609929CMP1		NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0101	NAB	01	01/01/2015	832 pacific pde
187F609929CMP2	Claim0102	NAB	01	01/01/2015	832 pacific pde
187F609929CMP3		NAB	01	01/01/2015	832 pacific pde
187F609929CMP4	Claim0103	NAB	01	01/01/2015	832 pacific pde
187F609929CMP5	Claim0104	NAB	01	01/01/2015	832 pacific pde
187F609929CMP6		NAB	01	01/01/2015	832 pacific pde
187F609929CMP7	Claim0105	NAB	01	01/01/2015	832 pacific pde

Policy 187F609929CMP1 DETAILS

Risks: Risk value goes here.
Status: S01201
Inception Date: 01/01/2015
Expiry Date: 30/01/2016
Original Date: 01/01/2013
Payment Details: MasterCard *****-746-
Endorsment Details: Details
Description: Description goes here

Other Parties Policy Documents Alfresco Document

01/01/2015
Policy 187F609929CMP1 Renewed

01/01/2015CA
Call for Policy 187F609929CMP1 Renewal

01/01/2015
Claimn for 187F609929CMP1 on car crash

01/01/2015
Policy 187F609929CMP1 Renewed

01/01/2015
Policy 187F609929CMP1 Renewed

01/01/2015
Policy 187F609929CMP1 Renewed

01/01/2015
Policy 187F609929CMP1 Renewed

ALLIANZ (11) OMANIA.

News

100. [Customer Club]

Task done

Politeness.

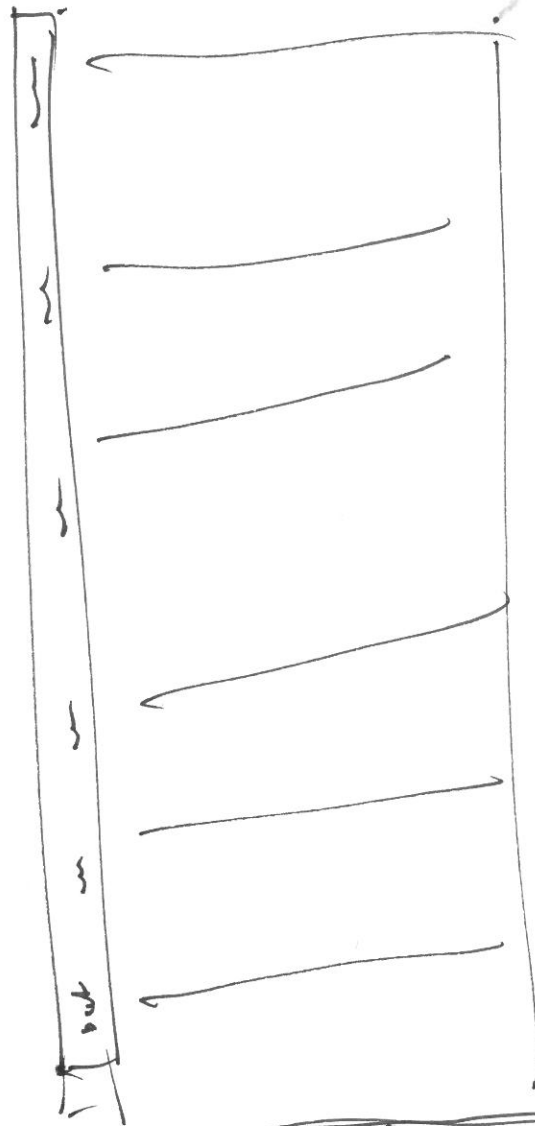
685 [unclear]

685 [unclear]

↳ Changes

↳ Center

~~~~~



Send country in your  
script [unclear]

4 Combed

Album 2 (110) OMNIA

NEWS

4 7

Comedies

IDENTIFIERS

C. Stone Lake

How many i help y

Short laundry ya  
short pees

Thank skunk

POLICERS

633-1111

63-1111

CLAIMS 1

CLAIMS 2

PERSONAL DETAILS

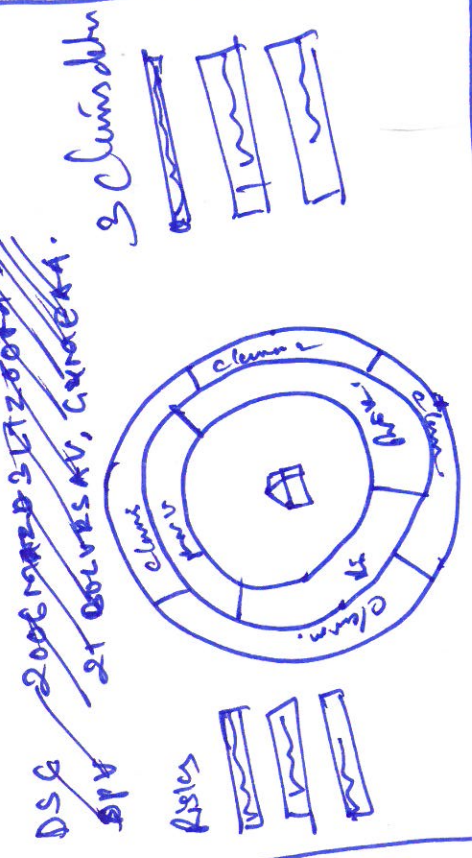
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Amit Gung  
 11/3/4/5/0/5  
 04800083  
 info@growth.com.  
 Sydney, Sydney 2207

Activity log:  
 2015  
 4th 3 papers  
 21/11

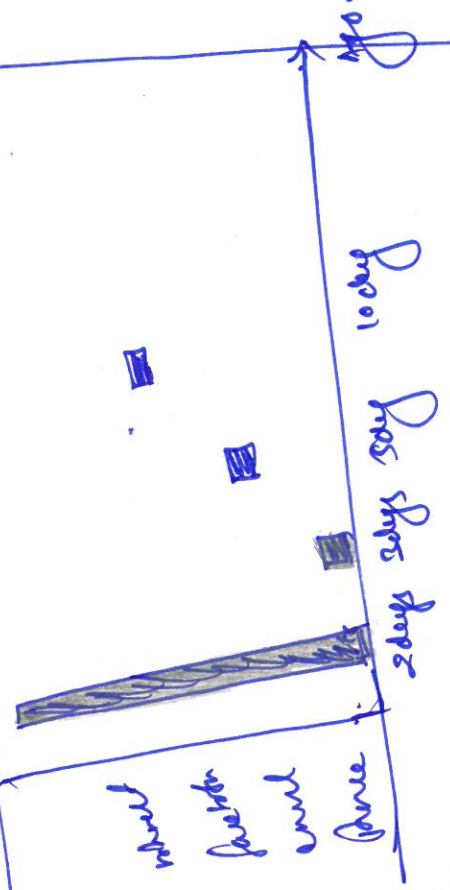
- call
- enrol
- call
- enrol
- Signup
- structure
- enrol
- call
- call

Policy 63330005739DVC (01)

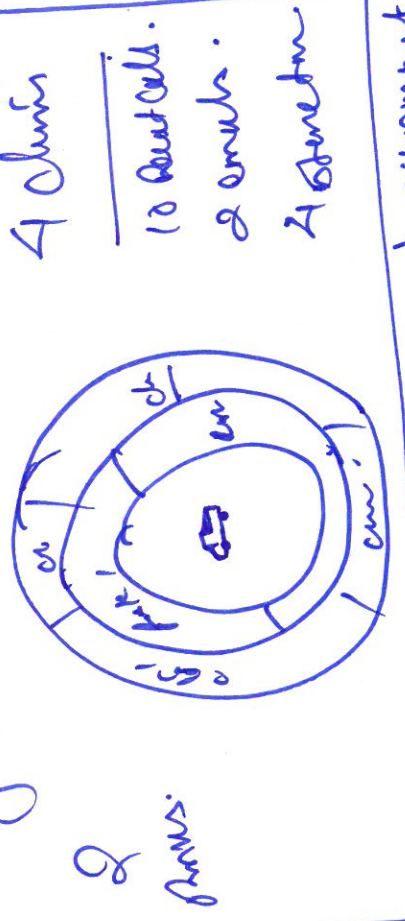


2 Clusters  
 2006 MAR 27 2007  
 21 OCT 2007, CANOEKA.

Parent Agency Documents



Policy 63330005639 (01)



Parent Agency Documents

Policy 63330005637 (02)



Parent Agency Documents

10/15

Tim Byrne  
Schwarzenberg

④

⑤

Tim Byrne  
Agart

Tim Byrne  
Allanz  
C12482225  
07-07-1983 (32 years)  
040508795  
Orest. genyng @ allanz.com.au  
85/320 front Rd, Allanz 2107

- Home
- Banker
- Life/Health
- SP ART
- OTHERS

Curry  
Cubs  
Duke

24/11

Policy 63330055 DVC (01)  
2005-09-12 → 2014-03-12 → 2015-03-12

DSC 2016 MAZDA L200000  
CSV 2017 Toyota 2010000

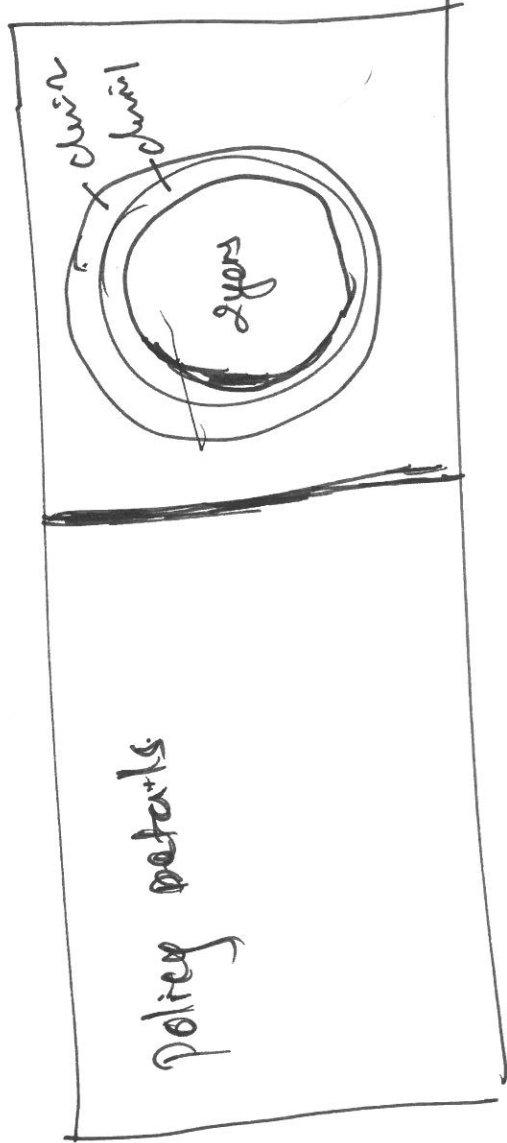
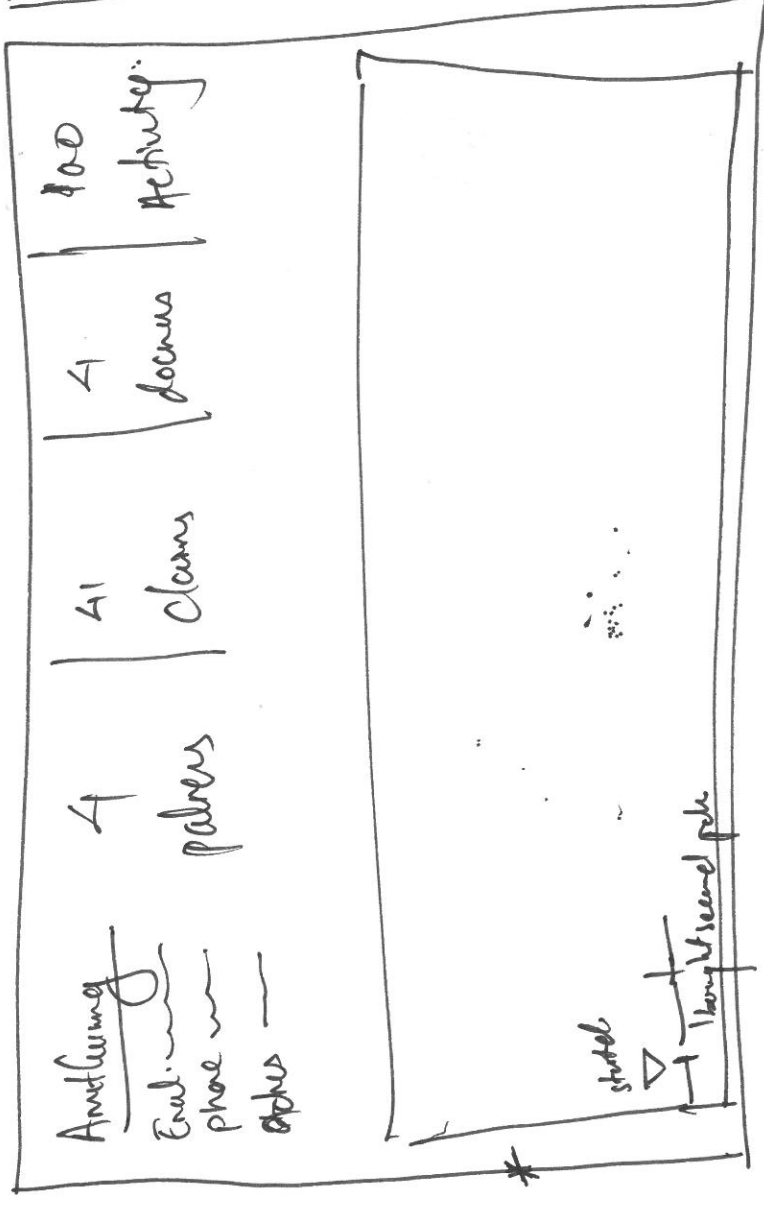
42000  
MASTERCARD #  
DUE NEXT PAYMENT 450.

|    |                   |   |                   |   |                   |
|----|-------------------|---|-------------------|---|-------------------|
| 11 | Reservt<br>Achtur | 2 | Other<br>payments | 5 | Differ<br>Doverks |
|----|-------------------|---|-------------------|---|-------------------|

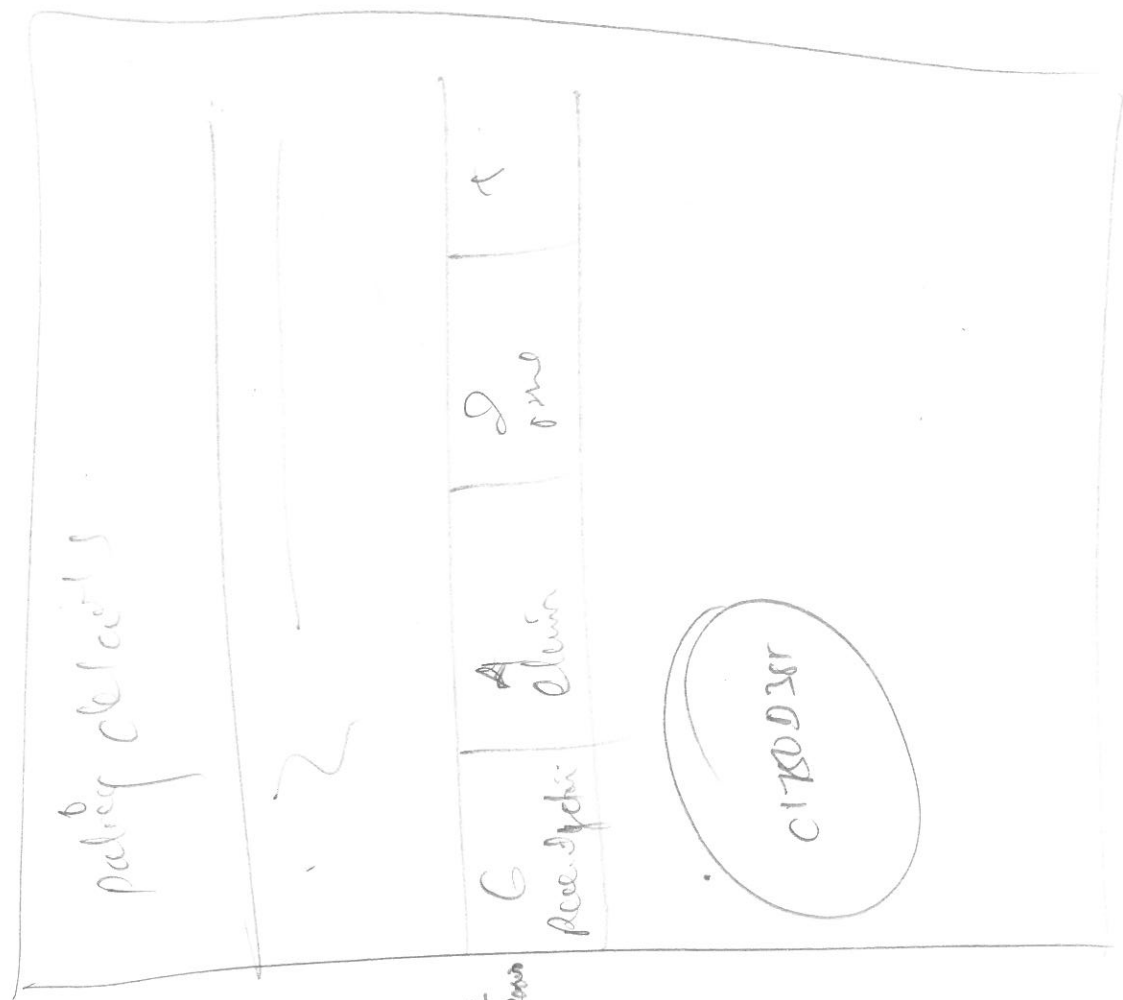
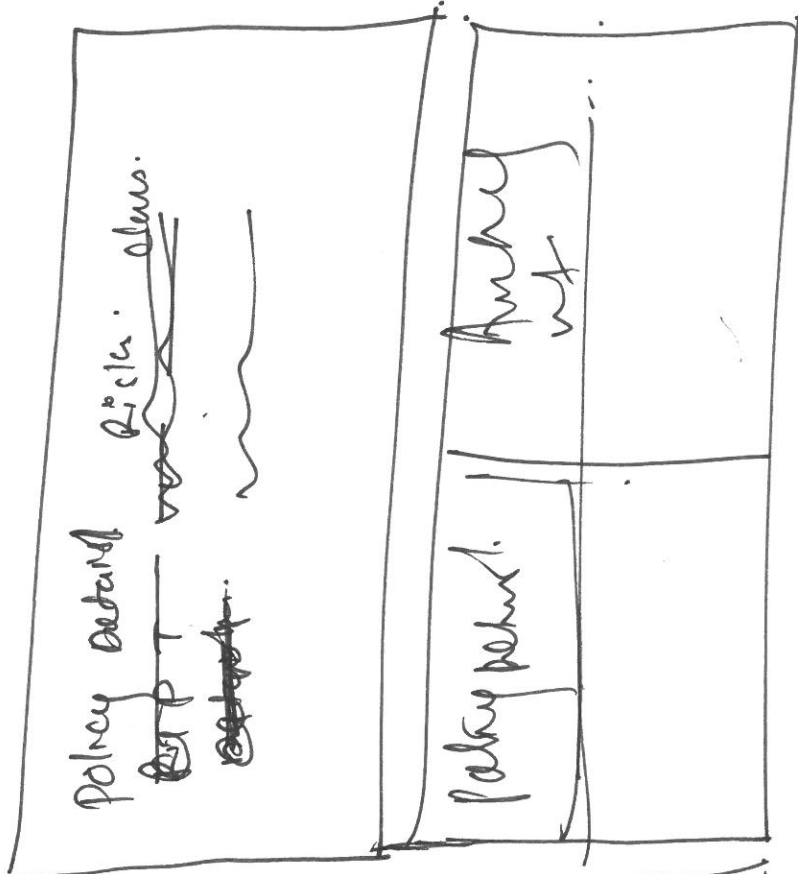
2011 - end  
2012 - end  
2013 - noochi  
2014 -  
2015 -  
2016 -

" Hclears





6830024470MP  
 2010-06-02  
 2010-06-02



Investigative  
Admin

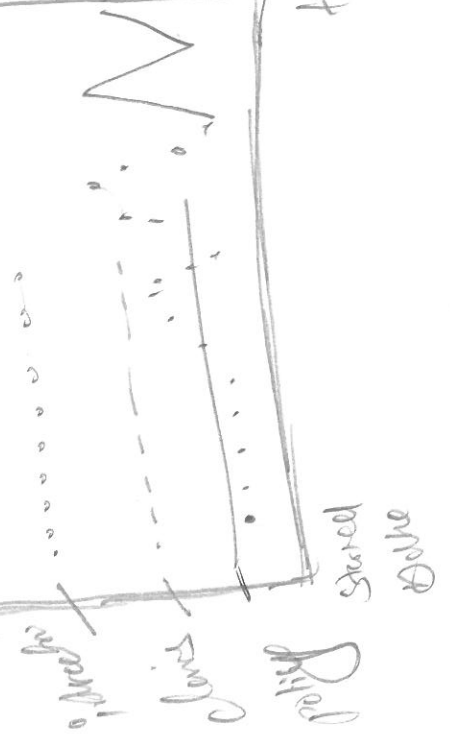
10000  
Tina Byrme  
Type notes Sutherland.

AL v A1750002798

- Home
- Routers
- Life/Heart
- CPT
- OVERS

- 3.
- 2
- 4
- 1
- 5.

Q



tblw.

Parcuse

A 6 23 00127500P (01)  
 PST ~~00127500P~~ ed.  
 DNE Bawey. Neland

A 6 23 00127500P (02)  
 DSM Toyota, 2001  
 PST 00127500P

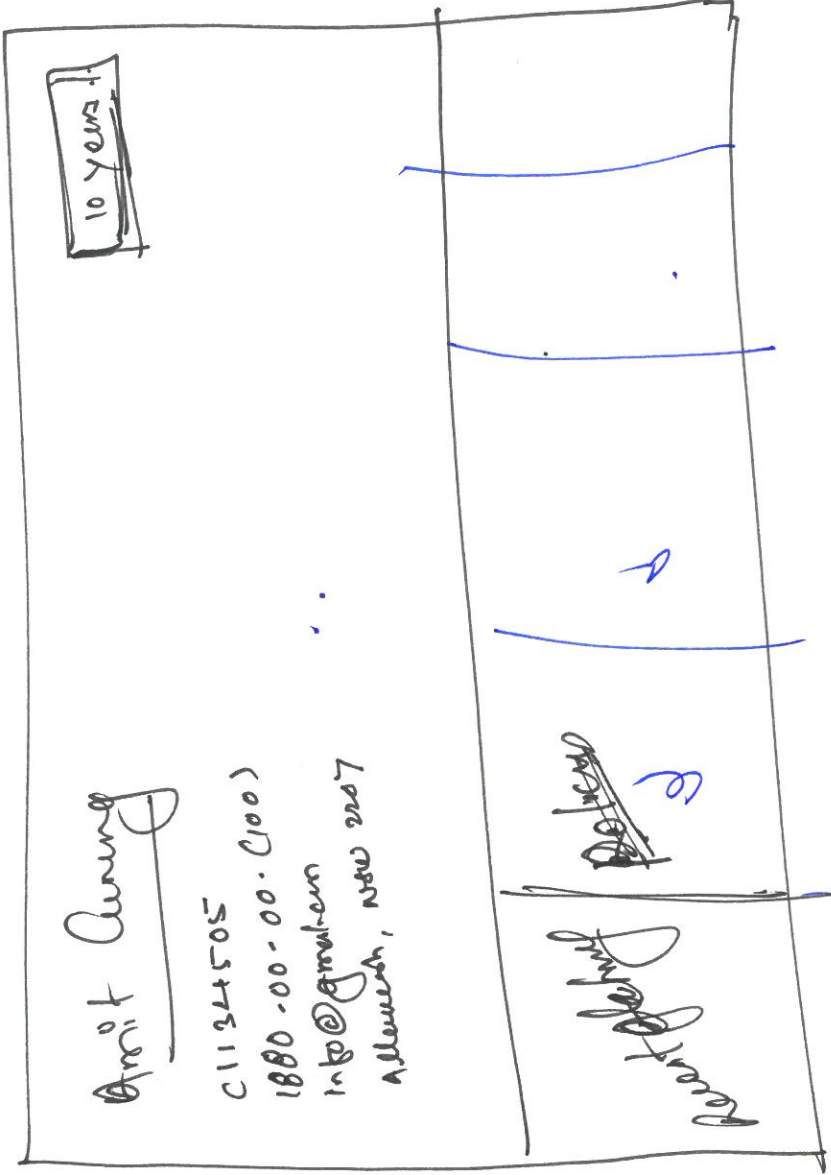
April Caring

C1134505  
1880-00-00-000  
info@grout.com  
Alameda, new 2007

10 years!

Research Planning

~~Research~~



pages

3  
Clubs

4  
Branches

100 Activities

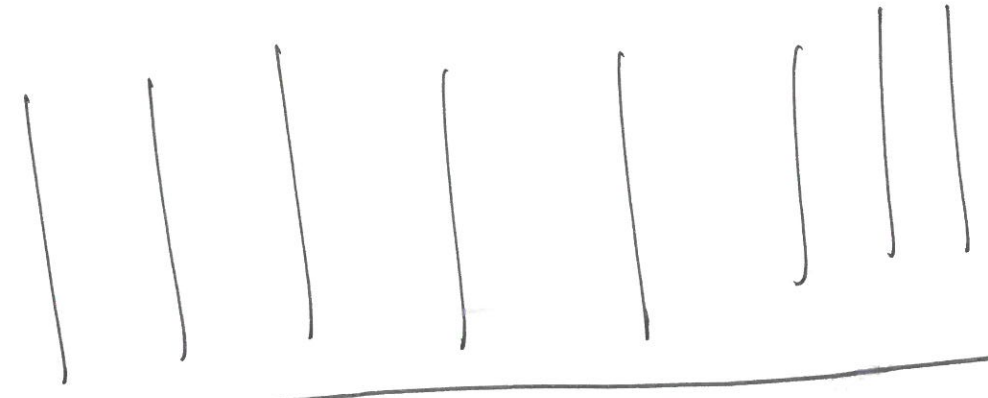
eyes

→ updated the club

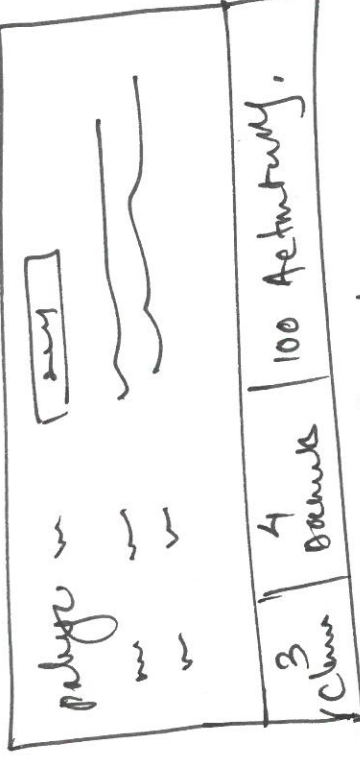
updated  
+ call  
+ call  
+ call

- call

queue



pages  
pages  
pages



policy mem.  
start date  
company

3 clubs

4 document

5 activities

eyes

person

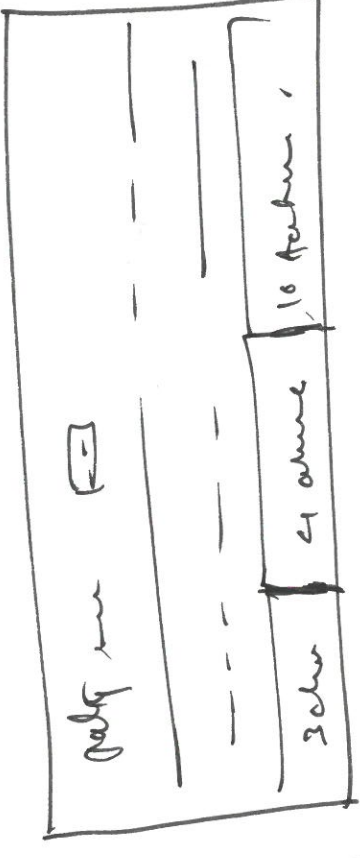
pages

eyes

3 club

4 course

10 activities



A A A A

ALLIANZ (111)



OMNIA PILOT



ACTIVE/OFFLINE

12:00 1:00 2:00 3:00 4:00 5:00

### IDENTIFY & VERIFY

May I start with your name please?

First Name [ ]

Last Name [ ]

Postcode [ ]

~~805011~~

OR

Factory Number or Vehicle Registration

ID [ ]

OR

OTHER [ ]

COMPANY [ ]

[ ]

### Customer Context



WELCOME TO NEWS OFFICE



2



### Results Showing & matching entries found

Name & DOB & PHONE & Email & Address



+ AMIT 07/07/1985 0195087052 AMER. passport number. 5/30/87 unident. sec details Attach, more

Proceed

|         |       |       |           |         |
|---------|-------|-------|-----------|---------|
| Primary | Other | class | reference | contact |
| ---     | ---   | ---   | ---       | ---     |

How may I help you today?

IDENTIFY & VERIFY

~~Customer Contact~~

Drop & Start with your name phone

Customer Contact

welcome

to news, update

How do you help you today?

First name [ ]

[ ]

Let me [ ]

[ ]

part code [ ]

[ ]

OR  
phone number or vehicle registration ID [ ]

OR  
other [ ]

[ ]

Company [ ]


SEE ME

Parents Showing 2 numbers


Fields [ ]

[ ]

# Design v1

**Allianz**  OMNIA PILOT

14:08 Brisbane   14:38 Adelaide   12:08 Perth   13:40 Darwin   15:10 Sydney   15:10 Melbourne   15:10 Hobart

News Updates 18 November 2015   NEW Batch codes will now display in OMNIA News 01/01/2015   OFFLINE   

**IDENTIFY & VERIFY**   CUSTOMER CONTEXT

May I start with your name please?

FIRST NAME  
Mark

SURNAME  
Swanson

POSTCODE  
2207

SEARCH

OR

Policy Number or Vehicle Registration or others?

AVAILABLE ID  
CSALLIAN2207

SEARCH

OR

COMPANY  
NAB

OTHERS  
Search with anything...

SEARCH

Verify Customer Details - 8 matching entries found

| Name          | DOB        | Phone      | Email                 | Address                       |
|---------------|------------|------------|-----------------------|-------------------------------|
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |

| Claim Number | Policy Number | Date of Loss | Status | Type      | Description         |
|--------------|---------------|--------------|--------|-----------|---------------------|
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |

HOW MAY I HELP YOU TODAY?

Start writing on your scratchpad here... |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

Choose Theme

Digital Blue

May I start with your name please?

FIRST NAME

Mark

SURNAME

Swanson

POSTCODE

2207

SEARCH

OR

Policy Number or Vehicle Registration or others?

AVAILABLE ID

CSALLIAN2207

SEARCH

OR

COMPANY

NAB

OTHERS

Search with anything...

SEARCH

Verify Customer Details - 8 matching entries found

| Name          | DOB        | Phone      | Email                 | Address                       |
|---------------|------------|------------|-----------------------|-------------------------------|
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |
| > Amit Gurung | 07/07/1983 | 0405087952 | amit.gurung@gmail.com | 5/35-37 Lancelot Street, 2218 |

| Claim Number | Policy Number | Date of Loss | Status | Type      | Description         |
|--------------|---------------|--------------|--------|-----------|---------------------|
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |



IDENTIFY & VERIFY

CUSTOMER CONTEXT

May I start with your name

HOW MAY I HELP YOU TODAY?

### CONNECT TO PHONE

Enter Phone extension to attach:

Close Connect Disconnect

FIRST NAME  
Mark

SURNAME  
Swanson

POSTCODE  
2207

SEARCH

OR

Policy Number or Vehicle  
Registration or others?

AVAILABLE ID  
CSALLIAN2207

SEARCH

OR

COMPANY  
NAB

OTHERS

Search with anything...

SEARCH

- > Amit Gurung 07/07/1983 0405087952 amit.gurung@gmail.com 5/35-37 Lancelot Street, 2218
- > Amit Gurung 07/07/1983 0405087952 amit.gurung@gmail.com 5/35-37 Lancelot Street, 2218
- ▼ Amit Gurung 07/07/1983 0405087952 amit.gurung@gmail.com 5/35-37 Lancelot Street, 2218

| Claim Number | Policy Number | Date of Loss | Status | Type      | Description         |
|--------------|---------------|--------------|--------|-----------|---------------------|
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |
| Clamin01010  | 187F609929CMP | 01/01/2014   | HCC    | ClaimType | 828 Pacific Highway |



IDENTIFY & VERIFY

CUSTOMER CONTEXT

May I start with your name please?

Verify Customer Details - 8 matching entries found

HOW MAY I HELP YOU TODAY?

FIRST NAME

Mark

SURNAME

Swanson

POSTCODE

2207

AVAILABLE ID

CSALLIAN2207

COMPANY

NAB

OTHERS

Search with anything...

SEARCH

### RECEIVE CALL



#### Caller Details

Customer is Identified

#### Andrew Garfield

ID C161281368  
Date of Birth 1970-10-12 (45 years)  
Address 20 College Street Balmain NSW 2041  
Email mark.swanson@allianz.com.au  
Phone 0411558650

#### Reason for Transfer

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Call Transfer by Mark Wahlberg

Accept

Cancel

|             |               |            |     |           |                     |
|-------------|---------------|------------|-----|-----------|---------------------|
| Clamin01010 | 187F609929CMP | 01/01/2014 | HCC | ClaimType | 828 Pacific Highway |
| Clamin01010 | 187F609929CMP | 01/01/2014 | HCC | ClaimType | 828 Pacific Highway |
| Clamin01010 | 187F609929CMP | 01/01/2014 | HCC | ClaimType | 828 Pacific Highway |

IDENTIFY & VERIFY CUSTOMER CONTEXT

Timothy Rynne

Policy Claim Broker Status Date Description

HOW MAY I HELP YOU TODAY?

Tynan Motors Sutherland  
ID C161281368  
Date of Birth 1970-10-12  
Address 20 College Street Balmain NSW 2041  
Email mark.swanson@allianz.com.au  
Phone 0411558650

TRANSFER CALL

Caller Details

Customer is Identified

Andrew Garfield

ID C161281368  
Date of Birth 1970-10-12 (45 years)  
Address 20 College Street Balmain NSW 2041  
Email mark.swanson@allianz.com.au  
Phone 0411558650

Reason for Transfer

Text area for entering the reason for transfer.

Call Transfer by Mark Wahlberg

Transfer

Cancel

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Timothy Rynne** 

Tynan Motors Sutherland Master

20 YEARS  
WITH US

HOW MAY I HELP YOU TODAY?

Start writing on your scratchpad here... |

ID C161281368  
Date of Birth 1970-10-12 (45 years)  
Address 20 College Street Balmain NSW 2041  
Email mark.swanson@allianz.com.au  
Phone 0411558650

| Policy | Claim | Broker | Status | Date | Description |
|--------|-------|--------|--------|------|-------------|
|--------|-------|--------|--------|------|-------------|

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

**Policy 187F60992CMP1 Details**

|                |                                                |
|----------------|------------------------------------------------|
| Risk           | Risk value goes here                           |
| Status         | S0102                                          |
| Inception Date | 01/01/2015                                     |
| Expiry Date    | 30/012013                                      |
| Original Date  | 01/01/2013                                     |
| Payment        | Mastercard *****7476                           |
| Endorsment     | Details here                                   |
| Description    | 2010 Honda Accord<br>Limited Edition Auto MY10 |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

### Timothy Rynne

Tynan Motors Sutherland Master



20 YEARS  
WITH US

HOW MAY I HELP YOU TODAY?

Start writing on your scratchpad here... |

Tim Rynne  
ALLIANZ MOBILE

Tim Rynne  
DIRECT-STAFF INSURANCE

Timothy Rynne  
INSURANCE BY C

Timothy C Rynne  
STAFF CTP ACCOUNT MARKET ST

Tim Rynne  
INSURANCE BY A

Tim Rynne  
INSURANCE BY B

| Status                              | Date                                           | Description |
|-------------------------------------|------------------------------------------------|-------------|
| <b>Policy 187F60992CMP1 Details</b> |                                                |             |
| Risk                                | Risk value goes here                           |             |
| Status                              | S0102                                          |             |
| Inception Date                      | 01/01/2015                                     |             |
| Expiry Date                         | 30/012013                                      |             |
| Original Date                       | 01/01/2013                                     |             |
| Payment                             | Mastercard *****7476                           |             |
| Endorsment                          | Details here                                   |             |
| Description                         | 2010 Honda Accord<br>Limited Edition Auto MY10 |             |

#### Policy 187F60992CMP1 Details

|                |                                                |  |
|----------------|------------------------------------------------|--|
| Risk           | Risk value goes here                           |  |
| Status         | S0102                                          |  |
| Inception Date | 01/01/2015                                     |  |
| Expiry Date    | 30/012013                                      |  |
| Original Date  | 01/01/2013                                     |  |
| Payment        | Mastercard *****7476                           |  |
| Endorsment     | Details here                                   |  |
| Description    | 2010 Honda Accord<br>Limited Edition Auto MY10 |  |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Timothy Rynne**

Tynan Motors Sutherland Master

ID C161281368  
Date of Birth 1970-10-12 (45 years)  
Address 20 College Street Balmain NSW 2041  
Email mark.swanson@allianz.com.au  
Phone 0411558650

Tim Rynne  
ALLIANZ MOBILE

Tim Rynne  
DIRECT-STAFF INSURANCE

**Timothy Rynne**  
TYAN MOTORS SUTHERLAND MASTER

Timothy C Rynne  
STAFF CTP ACCOUNT MARKET ST

Tim Rynne  
INSURANCE BY A

Tim Rynne  
INSURANCE BY B

Policy Claim Broker Status Date Description

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

18F600992CMP1  
2015 Honda Accord

**Policy 187F60992CMP1 Details**

Risk Risk value goes here

Status S0102

Inception Date 01/01/2015

Expiry Date 30/01/2013

Original Date 01/01/2013

Payment Mastercard \*\*\*\*\*7476

Endorsment Details here

Description 2010 Honda Accord  
Limited Edition Auto MY10

HOW MAY I HELP YOU TODAY?

Start writing on your scratchpad here... |

# Design v2

CUSTOMER CONTEXT version 3



IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

**Tim Rynne**  
ALLIANZ MOBILE

C161281368  
1970-10-12 (45 years)  
0411558650  
mark.swanson@allianz.com.au  
20 College Street Balmain NSW 2041

**20 Years**  
with us.

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**  
Tynan Motors Sutherland Master

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

| Date       | Type        | Flag   | Policy        | Description               | Notes                  |
|------------|-------------|--------|---------------|---------------------------|------------------------|
| 12/10/2015 | Event       | Call   | 6330005739DVC | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | Interaction | Manual | 6330005739DVC | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | Event       | Call   | 6330005739DVC | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | Interaction | Manual | 6330005739DVC | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | Event       | Call   | 6330005739DVC | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | Interaction | Manual | 6330005739DVC | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | Interaction | Manual | 6330005739DVC | AOP_101_General_Enquiries | General Enquiries-test |

IDENTIFY & VERIFY   **CUSTOMER CONTEXT**

**Tim Rynne**  
 Allianz Mobile

**Tim Rynne**  
 ALLIANZ MOBILE

C161281368  
 1970-10-12 (45 years)  
 0411558650  
 mark.swanson@allianz.com.au  
 20 College Street Balmain NSW 2041

20 Years  
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|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**  
 Tynan Motors Sutherland Master

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

**Policy 6330005739DVC** 1 YEAR

|                                                                         |                           |                             |                                |
|-------------------------------------------------------------------------|---------------------------|-----------------------------|--------------------------------|
| INCEPTION DATE<br>01/01/2015                                            | EXPIRY DATE<br>01/01/2015 | ORIGINAL DATE<br>01/01/2015 | PAYMENT<br>MASTERCARD ****7474 |
| ENDORSMENT<br>Details here. 2010 Honda Accord Limited Edition Auto MY10 |                           |                             |                                |

| TIMELINE   | CLAIMS   | OTHER PARTIES | DOCUMENTS                 | ALFRESCO               |
|------------|----------|---------------|---------------------------|------------------------|
| Date       | Type     | Flag          | Description               | Notes                  |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DSC | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**

Tynan Motors Sutherland Master

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |

20 YEARS WITH US

**Tim Rynne**

ALLIANZ MOBILE

C161281368  
1970-10-12 (45 years)  
0411558650  
mark.swanson@allianz.com.au  
20 College Street Balmain NSW 2041

TIMELINE CLAIMS OTHER PARTIES DOCUMENTS ALFRESCO

| Date       | Description               | Notes                  |
|------------|---------------------------|------------------------|
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DSC | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**  
Tynan Motors Sutherland Master

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |

**Policy 6330005739DVC**

1 Year

|                                                           |             |               |
|-----------------------------------------------------------|-------------|---------------|
| INCEPTION DATE                                            | EXPIRY DATE | ORIGINAL DATE |
| 01/01/2015                                                | 01/01/2015  | 01/01/2015    |
| PAYMENT                                                   |             |               |
| MasterCard ****7474                                       |             |               |
| ENDORSEMENT                                               |             |               |
| Details here. 2010 Honda Accord Limited Edition Auto MY10 |             |               |

20 YEARS WITH US

**Tim Rynne**

ALLIANZ MOBILE

C161281368  
1970-10-12 (45 years)  
0411558650  
mark.swanson@allianz.com.au  
20 College Street Balmain NSW 2041


| TIMELINE   | CLAIMS                    | OTHER PARTIES          | DOCUMENTS | ALFRESCO |
|------------|---------------------------|------------------------|-----------|----------|
| Date       | Description               | Notes                  |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |

Option I

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

|               |    |     |                         |                                                                                   |
|---------------|----|-----|-------------------------|-----------------------------------------------------------------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |  |
|               |    | DSC | 2014 DGE JOURNEY ZIP21P |                                                                                   |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |                                                                                   |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |                                                                                   |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |                                                                                   |
|               |    | DTS | 2014 DGE JOURNEY ZIP21P |                                                                                   |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |                                                                                   |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |                                                                                   |
|               |    | DSE | 2014 DGE JOURNEY ZIP21P |                                                                                   |

**Timothy Rynne**  
Tynan Motors Sutherland Master

|               |    |     |                         |
|---------------|----|-----|-------------------------|
| 6330005275DHP | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
| 6330005739DVC | 01 | CTP | 2014 DGE JOURNEY ZIP21P |
|               | 01 | CTP | 2014 DGE JOURNEY ZIP21P |

**Tim Rynne**

20 YEARS WITH US

ALLIANZ MOBILE

C161281368

1970-10-12 (45 years)

20 College Street Balmain NSW 2041

mark.swanson@allianz.com.au

0411558650

**Policy 6330005739DVC**

1 Year

|                |             |               |
|----------------|-------------|---------------|
| INCEPTION DATE | EXPIRY DATE | ORIGINAL DATE |
| 01/01/2015     | 01/01/2015  | 01/01/2015    |

PAYMENT      MasterCard \*\*\*\*7474

ENDORSMENT  
Details here. 2010 Honda Accord Limited Edition Auto MY10

| TIMELINE   | CLAIMS                    | OTHER PARTIES          | DOCUMENTS | ALFRESCO |
|------------|---------------------------|------------------------|-----------|----------|
| Date       | Description               | Notes                  |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |

Option II

IDENTIFY & VERIFY

CUSTOMER CONTEXT

20 YEARS WITH US

**Tim Rynne**  
Allianz Mobile

**Tim Rynne**

ID  
C161281368

EMAIL  
mark.swanson@allianz.com.au

ALLIANZ MOBILE

DATE OF BIRTH  
1970-10-12 (45 years)

PHONE  
0411558650

ADDRESS  
20 College Street Balmain NSW 2041

6330005275DHP 01 CTP 2014 DGE JOURNEY ZIP21P  
DSC 2014 DGE JOURNEY ZIP21P

6330005739DVC 01 CTP 2014 DGE JOURNEY ZIP21P  
DTS 2014 DGE JOURNEY ZIP21P  
DTS 2014 DGE JOURNEY ZIP21P  
DTS 2014 DGE JOURNEY ZIP21P

6330005739DVC 01 CTP 2014 DGE JOURNEY ZIP21P  
DSE 2014 DGE JOURNEY ZIP21P  
DSE 2014 DGE JOURNEY ZIP21P

**POLICY 6330005739DVC** 1 Year

INCEPTION DATE  
01/01/2015

EXPIRY DATE  
01/01/2015

ORIGINAL DATE  
01/01/2015

PAYMENT  
MasterCard \*\*\*\*7474

ENDORSEMENT  
Details here. 2010 Honda Accord Limited Edition Auto MY10

**Timothy Rynne**

Tynan Motors Sutherland Master

6330005275DHP 01 CTP 2014 DGE JOURNEY ZIP21P  
01 CTP 2014 DGE JOURNEY ZIP21P

6330005739DVC 01 CTP 2014 DGE JOURNEY ZIP21P  
01 CTP 2014 DGE JOURNEY ZIP21P  
01 CTP 2014 DGE JOURNEY ZIP21P  
01 CTP 2014 DGE JOURNEY ZIP21P

6330005739DVC 01 CTP 2014 DGE JOURNEY ZIP21P  
01 CTP 2014 DGE JOURNEY ZIP21P

| TIMELINE   | CLAIMS                    | OTHER PARTIES          | DOCUMENTS | ALFRESCO |
|------------|---------------------------|------------------------|-----------|----------|
| Date       | Description               | Notes                  |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |           |          |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |           |          |

Option III



IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

POLICY 6330005275DHP 01

CTP 2014 DGE JOURNEY ZIP21P

DSC 2014 DGE JOURNEY ZIP21P

POLICY 6330005739DVC 01

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

POLICY 6330005739DVC 01

DSE 2014 DGE JOURNEY ZIP21P

DSE 2014 DGE JOURNEY ZIP21P

CTP 2014 DGE JOURNEY ZIP21P

**Tim Rynne**  
Allianz Mobile

POLICY 6330005275DHP 01

CTP 2014 DGE JOURNEY ZIP21P

DSC 2014 DGE JOURNEY ZIP21P

POLICY 6330005739DVC 01

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

POLICY 6330005739DVC 01

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

DTS 2014 DGE JOURNEY ZIP21P

**Tim Rynne**  
ALLIANZ MOBILE

20 YEARS WITH US

C161281368  
1970-10-12 (45 years)  
20 College Street Balmain NSW 2041  
mark.swanson@allianz.com.au  
0411558650

Policy 6330005739DVC 1 Year

|                |             |               |
|----------------|-------------|---------------|
| INCEPTION DATE | EXPIRY DATE | ORIGINAL DATE |
| 01/01/2015     | 01/01/2015  | 01/01/2015    |

PAYMENT MasterCard \*\*\*\*7474

ENDORSEMENT  
Details here. 2010 Honda Accord Limited Edition Auto MY10

TIMELINE CLAIMS OTHER PARTIES DOCUMENTS ALFRESCO

| Date       | Description               | Notes                  |
|------------|---------------------------|------------------------|
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | AOP_101_General_Enquiries | General Enquiries-test |

# **Design v3**

## **Design for Customer Overview**

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**TIM RYNNÉ**  
20 yrs  
WITH US

1970-10-12 (45 years)



**Tim Rynne**  
Allianz Mobile



**Timothy Rynne**  
Tynan Motors Sutherland Master



**Timothy Rynne**  
Tynan Motors Sutherland Master



**Tim Rynne**  
Allianz Mobile

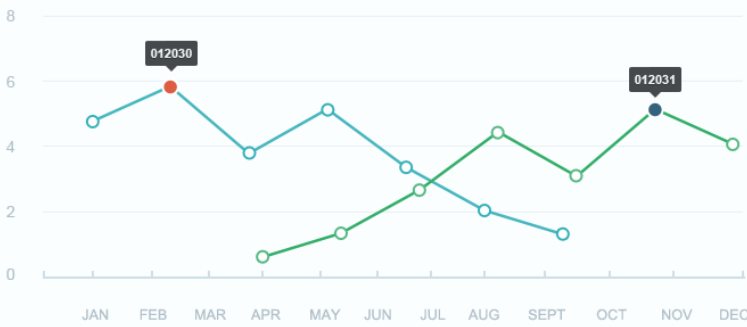


**Timothy Rynne**  
Tynan Motors Sutherland Master



**Timothy Rynne**  
Tynan Motors Sutherland Master

Claims Calls Interactions

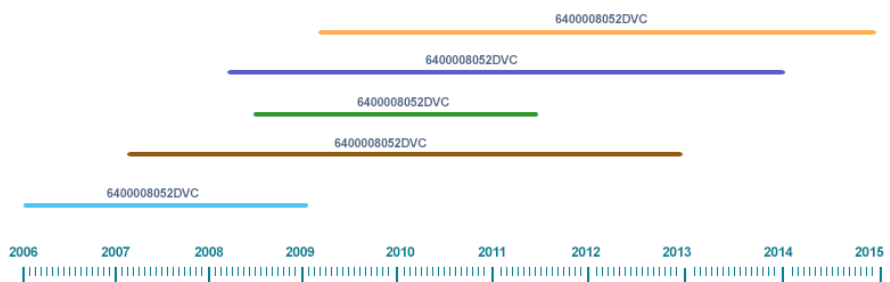


| AGENCY  | YEARS |
|---------|-------|
| WESTPAC | 6yrs  |
| NAB     | 15yrs |
| CBA     | 3yrs  |
| MOBILE  | 10yrs |



|                                |   |
|--------------------------------|---|
| • Fire and ISR                 | 4 |
| • Houseowners/Householders     | 2 |
| • CTP                          | 5 |
| • Commercial Motor Vehicle     | 1 |
| • Domestic Motor Vehicle       | 1 |
| • Marine and Aviation          | 3 |
| • Professional Indemnity       | 2 |
| • Public and Product Liability | 4 |
| • Employers Liability          | 2 |
| • Consumer Credit              | 0 |
| • Travel                       | 0 |
| • Other Accident               | 0 |
| • Other                        | 0 |
| • Other Individual (CCL-Life)  | 0 |
| • Stepped Premium Risk         | 0 |

POLICIES TIMELINE





## **Design for Policy Context**

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Tim Rynne**  
Allianz Mobile

**Tim Rynne**  
ALLIANZ MOBILE

C161281368  
1970-10-12 (45 years)  
0411558650  
mark.swanson@allianz.com.au  
20 College Street Balmain NSW 2041

**20 Years**  
with us.

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**  
Tynan Motors Sutherland Master

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

2001-09-26 POLICY 6330005739DVC      ENDORSMENT CODE CODE23498XWERT      2014-09-26      2015-09-26

DESCRIPTION      MASTERCARD \*\*\*\*1252      RECENT PAYMENT \$298      OUTSTANDING \$298

2010 Honda Accord Limited Edition Auto MY10

| TIMELINE   | CLAIMS   | OTHER PARTIES | DOCUMENTS                 | ALFRESCO               |
|------------|----------|---------------|---------------------------|------------------------|
| Date       | Type     | Flag          | Description               | Notes                  |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |

IDENTIFY & VERIFY

CUSTOMER CONTEXT

**TIM RYNNE**  
12 OCTOBER 1970

Overview

**Tim Rynne**  
ALLIANZ MOBILE

C161281368  
1970-10-12 (45 years)  
0411558650  
mark.swanson@allianz.com.au  
20 College Street Balmain NSW 2041

Address needs verification.

20 Years  
with us.

**Tim Rynne**  
Allianz Mobile

Policy 6330005739DVC

01/01/2015 — 01/01/2015 — 01/01/2015

1 YEAR

|                     |
|---------------------|
| MASTERCARD ****7474 |
| BANK CBA            |
| BSB 2285 6363       |

|                                                                                 |
|---------------------------------------------------------------------------------|
| <b>ENDORSEMENT</b><br>Details here. 2010 Honda Accord Limited Edition Auto MY10 |
| <b>ENDORSEMENT</b><br>Details here. 2010 Honda Accord Limited Edition Auto MY10 |

|                                                                                 |
|---------------------------------------------------------------------------------|
| <b>ENDORSEMENT</b><br>Details here. 2010 Honda Accord Limited Edition Auto MY10 |
| <b>ENDORSEMENT</b><br>Details here. 2010 Honda Accord Limited Edition Auto MY10 |

Policy Expiring on 12/12/2015

|                     |                                                            |
|---------------------|------------------------------------------------------------|
| 01<br>17508014920TP | DSC 2006 MAZD MAZDA3 LTZ00M                                |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 370 FOREST RD, BEXLEY       |
| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

**Timothy Rynne**  
Tynan Motors Sutherland Master

|                     |                                                            |
|---------------------|------------------------------------------------------------|
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| 01<br>17508014920TP | DVP 21 BOLARO AVE GYMEA<br>DVP 35 NEW STREET HURSTVILLE    |
| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

| TIMELINE   | CLAIMS   | OTHER PARTIES | DOCUMENTS                 | ALFRESCO               |
|------------|----------|---------------|---------------------------|------------------------|
| Date       | Type     | Flag          | Description               | Notes                  |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
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| 12/10/2015 | CISNotes | CON           | AOP_105A_Cancellations    | General Enquiries-test |
| 12/10/2015 | CISNotes | CON           | AOP_101_General_Enquiries | General Enquiries-test |

# **Design v4**

## **Customer Context Graphical and Listing View**

IDENTIFY & VERIFY

CUSTOMER CONTEXT



Customer Overview

20

YEARS WITH US

VIEW

**Tim Rynne**  
Allianz Mobile



01  
17508014920TP

DSC 2006 MAZD MAZDA3 LTZ00M



01  
17508014920TP

DVP 21 BOLARO AVE GYMEA  
DVP 370 FOREST RD, BEXLEY



01  
17508014920TP

DVP 21 BOLARO AVE GYMEA  
DVP 35 NEW STREET HURSTVILLE



09  
17508014920TP

CTP 2014 DGE JOURNEY ZIP21P  
CTP 2014 DGE JOURNEY ZIP21P

**Timothy Rynne**  
Tynan Motors Sutherland Master



01  
17508014920TP

DSC 2006 MAZD MAZDA3 LTZ00M



01  
17508014920TP

DVP 21 BOLARO AVE GYMEA  
DVP 370 FOREST RD, BEXLEY



01  
17508014920TP

DVP 21 BOLARO AVE GYMEA  
DVP 35 NEW STREET HURSTVILLE



09  
17508014920TP

CTP 2014 DGE JOURNEY ZIP21P  
CTP 2014 DGE JOURNEY ZIP21P

Policy  Claims  Calls  Interactions

2013 2014 2015 2016

EVENT 2015-09-01 11:59:01  
General Enquiries-test. By adding revenue analytics, Mixpanel enables companies to make smarter decisions around how much can be spent to acquire a customer.  
RESOLVED

- Houseowners
- CTP
- Travel
- Life
- Domestic Motor
- Commercial Motor
- Marine & Aviation
- Others



AGENCIES

| WESTPAC | NAB | CBA | HB  |
|---------|-----|-----|-----|
| 15%     | 45% | 5%  | 30% |



PRODUCTS

| CMP    | CTP    | ITP    | OTHER  |
|--------|--------|--------|--------|
| \$2800 | \$2100 | \$4000 | \$1900 |

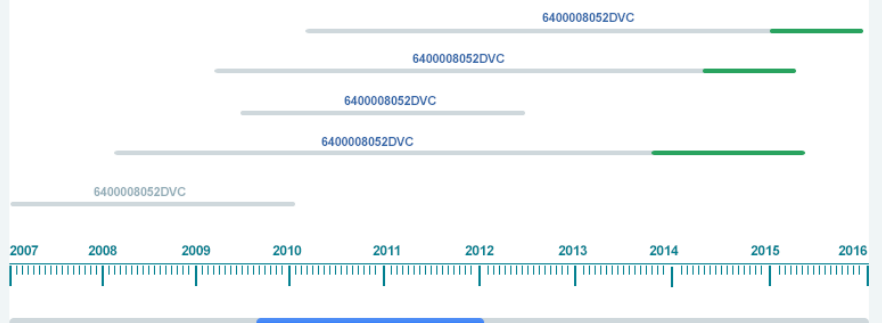


AGENCIES

| WESTPAC | NAB | CBA | HB |
|---------|-----|-----|----|
| 3       | 5   | 6   | 2  |

POLICIES TIMELINE

Products





## **Client Context Graphical and Listing View**

IDENTIFY & VERIFY

CUSTOMER CONTEXT



Customer Overview

20

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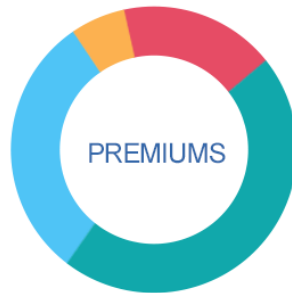
VIEW

Policy  Claims  Calls  Interactions

2013 2014 2015 2016

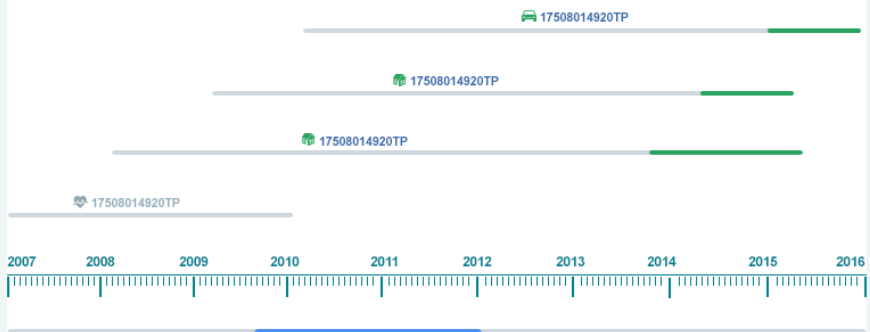
EVENT 2015-09-01 11:59:01  
General Enquiries-test. By adding revenue analytics, Mixpanel enables companies to make smarter decisions around how much can be spent to acquire a customer.  
RESOLVED

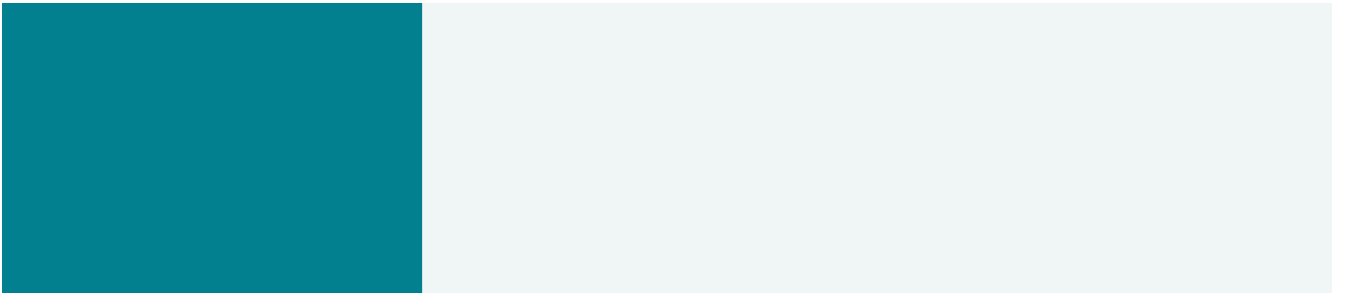
- Houseowners
- CTP
- Travel
- Life
- Domestic Motor
- Commercial Motor
- Marine & Aviation
- Others



| Product | Percentage | Count |
|---------|------------|-------|
| COM     | 15%        | 2     |
| IND     | 45%        | 3     |
| TEC     | 5%         | 1     |
| DMT     | 30%        | 1     |

POLICIES TIMELINE





IDENTIFY & VERIFY

CUSTOMER CONTEXT

**Customer Overview** 20 YEARS WITH US

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**Timothy Rynne**  
Tynan Motors Sutherland Master

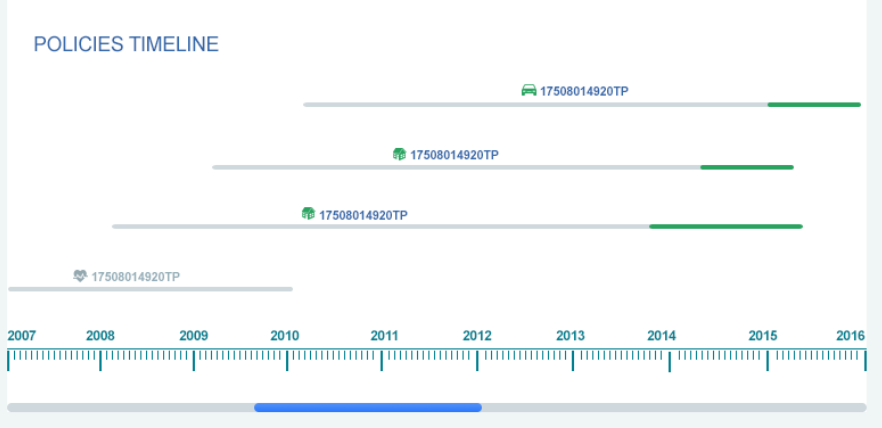
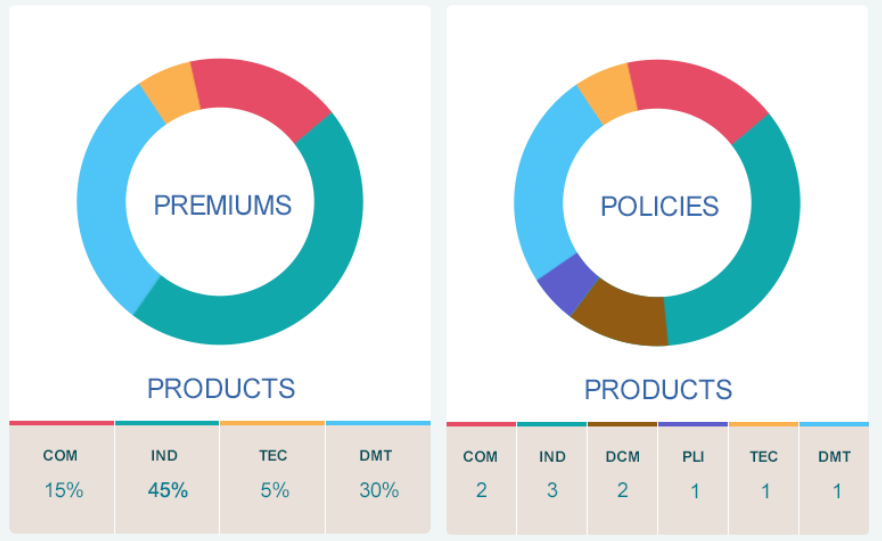
|                     |                                                            |
|---------------------|------------------------------------------------------------|
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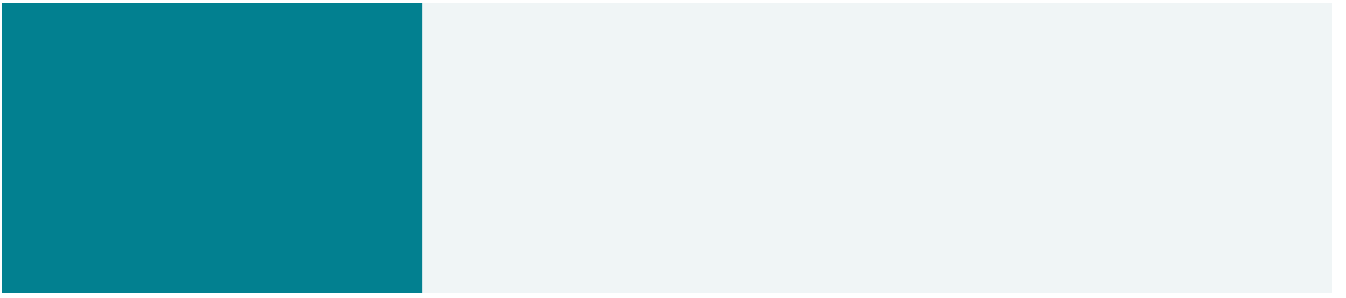
Policy  Claims  Calls  Interactions

2013 2014 2015 2016

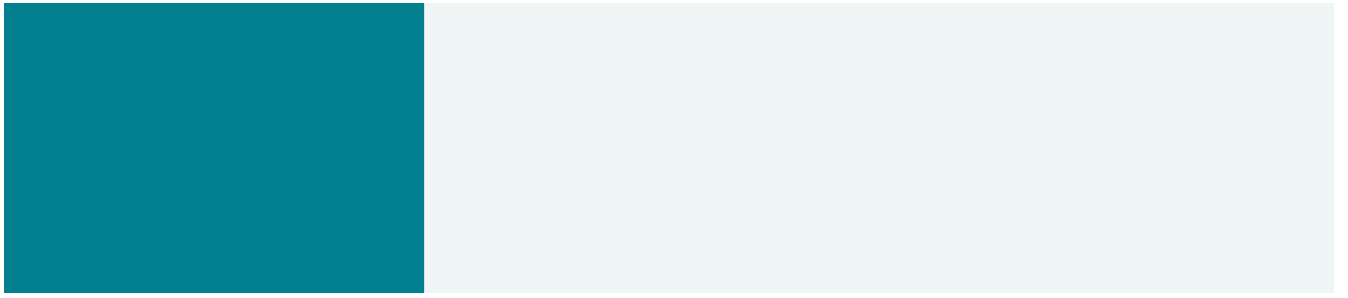
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**RESOLVED**

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- CTP
- Travel
- Life
- Domestic Motor
- Commercial Motor
- Marine & Aviation
- Others









## **Policy Context Graphical and Listing View**



IDENTIFY & VERIFY

CUSTOMER CONTEXT



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**Tim Rynne**  
Allianz Mobile

6330005739DVC

01/01/2015 — 01/01/2016

1 YEAR

Original Inception Date 01/01/2010

|                     |            |                   |             |              |                 |
|---------------------|------------|-------------------|-------------|--------------|-----------------|
| Outstanding Payment | \$336      | Bank Name         | CBA         | Sum Insured  | \$50,00,000     |
| Total Premium       | \$4544     | BSB               | 0226 963    | Situation Ad | TSI \$30,00,000 |
| Payment Amount      | #336       | Account Number    | 02101 1201  | Risk State   | CSI \$10,00,000 |
| Payment Date        | 01/01/2016 | Account Name      | Amit Gurung | Endoresment  | PE \$10,00,000  |
| Bill to Date        | 01/01/2017 | Payment Frequency | Monthly     | Excess       | \$555           |
| Co-insured          | Angela Ern |                   |             | Misc         | Some More Value |

TIMELINE    EVENTS    CLAIMS    OTHER PARTIES    ALFRESCO

Policy     Claims     Calls     Interactions

2013    2014    2015-09-01    2015    2016

11:59:01

**EVENT**

General Enquiries-test. By adding revenue analytics, Mixpanel enables companies to make smarter decisions around how much can be spent to acquire a customer.

**RESOLVED**

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**Timothy Rynne**  
Tynan Motors Sutherland Master

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IDENTIFY & VERIFY

CUSTOMER CONTEXT



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Timothy Rynne  
Tynan Motors Sutherland Master

|                     |                                                            |
|---------------------|------------------------------------------------------------|
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| 09<br>17508014920TP | CTP 2014 DGE JOURNEY ZIP21P<br>CTP 2014 DGE JOURNEY ZIP21P |

# Alerts & Notifications

Allianz OMNIA PILOT

14:08 Brisbane 14:38 Adelaide 12:08 Perth 13:40 Darwin 15:10 Sydney 15:10 Melbourne 15:10 Hobart

News Updates 18 November 2015
CONNECTED

IDENTIFY & VERIFY CUSTOMER CONTEXT

**Customer Overview**

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| Account Number      | 02101 1201  | Misc         | Some More Value |
| Account Name        | Amit Gurung |              |                 |
| Payment Frequency   | Monthly     |              |                 |
| Bill to Date        | 01/01/2017  |              |                 |
| Co-insured          | Angela Ern  |              |                 |

TIMELINE
EVENTS
CLAIMS
OTHER PARTIES
ALFRESCO

Policy
  Claims
  Calls
  Interactions

**EVENT**

General Enquiries-test. By adding revenue analytics, Mixpanel enables companies to make smarter decisions around how much can be spent to acquire a customer.

RESOLVED

**Tim Rynne**

Allianz Mobile

Timothy Rynne

Tynan Motors Sutherland Master

|    |               |     |                          |
|----|---------------|-----|--------------------------|
| 01 | 17508014920TP | DSC | 2006 MAZD MAZDA3 LTZ00M  |
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| 01 | 17508014920TP | DVP | 370 FOREST RD, BEXLEY    |
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| 09 | 17508014920TP | CTP | 2014 DGE JOURNEY ZIP21P  |

# 01.MVP - Generic - IDV Search

|                  |                                                                                                                                                                                                                                                                            |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <ol style="list-style-type: none"> <li> <b>POMNIA-382</b> - MVP - Generic - IDV Search - UI (Closed)</li> <li> <b>POMNIA-509</b> - Create Solr Index for Risk Address (Open)</li> <li> <b>POMNIA-483</b> - IDV Search Results with Risk Address - API (→  Open)</li> </ol> |
| Description      | Prototype - Generic - IDV Search                                                                                                                                                                                                                                           |
| Component        |                                                                                                                                                                                                                                                                            |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                  |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                            |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                            |
| Date Approved    |                                                                                                                                                                                                                                                                            |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                 |

## Story

As an: Contact Centre Specialist

I want: to be able to search for a Customer


So that: I can locate enough information to confirm their identity

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                         | Notes |
|---|------------------------------------|-------------------------------------------------------------------------------------|-------|
| 1 | Constraint                         | Screen Pop will not work for Broker, only for Customers aka we can't AutoID caller. |       |
| 2 | Assumption                         | Trading As is stored in the Company Name field in the Index                         |       |
| 3 | Assumption                         | Risk Address will be included in the API, but will be filtered by UI                |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

|   |                                                                                                                                   |                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---|-----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <p>The Contact Centre specialist has a Generic instance of Omnia</p>                                                              | <p>they are viewing the <b>Identify &amp; Verify</b> screen</p>                                                                                                                                                                                               | <p>Display the Search component, which is split into 3 sections:</p> <p><u>Section 1</u></p> <ul style="list-style-type: none"> <li>Scripting header with the text: " 1 May I start with your name please?"</li> <li>Clear icon</li> <li>Fields (<i>A minimum of two fields below must be entered before searching</i>)</li> </ul> <p><b>First name</b></p> <p><b>Surname</b></p> <p><b>Postcode</b></p> <ul style="list-style-type: none"> <li>"Search" button</li> </ul> <p><u>Section 2</u></p> <ul style="list-style-type: none"> <li>Scripting header with the text " E.g. Policy Number or Vehicle Registration?"</li> <li>Fields:</li> </ul> <p><b>Available ID</b></p> <ul style="list-style-type: none"> <li>"Search" button</li> </ul> <p><u>Section 3</u></p> <ul style="list-style-type: none"> <li><del>Scripting header with the text "...other?"</del></li> <li>Fields:</li> </ul> <p><b>Company Name</b></p> <p><b>Other</b></p> <ul style="list-style-type: none"> <li>"Search" button</li> </ul> |
| 2 | <p>The Contact Centre specialist has a Generic instance of Omnia</p> <p>AND they are viewing the Identify &amp; Verify screen</p> | <p>they initiate the help component (eg by hovering over the  icon for the Search section)</p> <p>(First name, Surname, Postcode, Available ID, Company Name, Other)</p> | <p>Display tooltip help text, similar to the below (final content to be able to be edited later):</p> <p><b>Two of the first three fields must be entered before searching.</b></p> <p><b>Wildcard searching allowed - *, ~, ?</b></p> <p><b>Available ID - Includes policy number, registration number (vehicle), replacement policy number, claim number, client id.</b></p> <p><b>Other - anything can be entered in this field.</b></p> <p><b>Company - Company name or Trading as can be entered in this field</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 3 | <p>The Contact Centre specialist has a Generic instance of Omnia</p> <p>AND they have entered criteria in the search fields</p>   | <p>they click on the 'Clear' icon</p>                                                                                                                                                                                                                         | <p>All search criteria and results will be cleared</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

|   |                                                                                                                                                                                      |                                                          |                                                                            |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------------------------|
| 4 | The Claims Officer a Generic instance of Omnia<br><br>AND a customer calls on a landline or mobile that is registered with any of their policies                                     | they are viewing the <b>Identify &amp; Verify</b> screen | Simulate Search (refer to story - Prototype - Claims - IDV Search Results) |
| 5 | The Claims Officer a Generic instance of Omnia<br><br>AND a Broker calls<br><br>OR a customer calls on a landline or mobile that is <b>NOT</b> registered with any of their policies |                                                          | Simulate Search (refer to story - Prototype - Claims - IDV Search Results) |

## Data Capture (optional)

| Reference | Field        | Rules                                                                                                                                                                    |
|-----------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D1        | First Name   | Free text field<br>Wildcard searching allowed - *, ~, ?                                                                                                                  |
| D2        | Surname      | Free text field<br>Wildcard searching allowed - *, ~, ?                                                                                                                  |
| D3        | Postcode     | Free text field<br>Wildcard searching allowed - *, ~, ?<br>Limited to 4 numbers<br>No alpha characters                                                                   |
| D4        | Available ID | Includes policy number, registration number (vehicle), replacement policy number, claim number, client id.<br>Wildcard searching allowed - *, ~, ?<br>Independent Search |
| D5        | Other        | Free text field<br>Wildcard searching allowed - *, ~, ?<br>Independent Search                                                                                            |
| D6        | Company      | Company name or Trading as can be entered in this field<br>Free Text field<br>Wildcard searching allowed - *, ~, ?<br>Independent Search                                 |

## Design

May I start with your name please?

FIRST NAME

Mark |

SURNAME

Swanson |

POSTCODE

2207 |

SEARCH

OR

Policy Number or Vehicle  
Registration or others?

AVAILABLE ID

CSALLIAN2207 |

SEARCH

OR

COMPANY

NAB |

OTHERS

Search with anything... |



SEARCH

Questions

---

| # | Question                                                                                  | Resolution                                                             |
|---|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| 1 | Do we need to include 'Risk Address' as a Search field for the Generic instance of Omnia? | TR has advised that we do not need to include Risk Address for Generic |

# 01.MVP - Generic - Navigation Bar

|                  |                                                                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  POMNIA-383 - Top Nav Bar (  Closed) |
| Description      | MVP - Generic - Navigation Bar                                                                                                                                                                           |
| Component        |                                                                                                                                                                                                          |
| Product Owner    | Tim Rynne                                                                                                                                                                                                |
| Storycard Status | APPROVED                                                                                                                                                                                                 |
| Design Status    | APPROVED                                                                                                                                                                                                 |
| Date Approved    | 19/01/2016                                                                                                                                                                                               |
| Story Ready?     | YES                                                                                                                                                                                                      |

## Approval Required From:

| Product Owner                                         | Category | Signed Off | Date       |
|-------------------------------------------------------|----------|------------|------------|
| Tim Rynne <small>Tim Y. Rynne - please review</small> | Approver | Yes        | 19/01/2016 |

## Story

As a: Contact Centre Specialist

I want: to be able to view a navigation bar

So that: I know which system I am in and I can see what the local time is at each city across Australia.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                     | Notes |
|---|------------------------------------|---------------------------------|-------|
| 1 | Assumption                         | This will be a Global component |       |
|   |                                    |                                 |       |
|   |                                    |                                 |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

---

|   |                                                                          |                                          |                                                                                                                                                                                     |
|---|--------------------------------------------------------------------------|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The Contact Centre specialist is logged into a Generic instance of Omnia | they are viewing any screen within Omnia | Display a Navigation bar component at the top of each screen, with the following elements:<br><br>Allianz logo                                                                      |
| 2 |                                                                          |                                          | <b>AND</b> the branded text e.g OMNIA                                                                                                                                               |
| 3 |                                                                          |                                          | <b>AND</b> Australian cities (Brisbane, Adelaide, Perth, Darwin, Sydney, Melbourne, Hobart), with their current local time.<br><br><i>NB: The times vary depending on the City.</i> |

## Data Capture

| Reference | Field | Comments |
|-----------|-------|----------|
|           |       |          |
|           |       |          |



## Design



## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |

# 01.MVP - Generic - News Bar

|                  |                                                                                                                                                                                                      |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  POMNIA-384 - News Items  Closed |
| Description      | MVP - Generic - Navigation Bar                                                                                                                                                                       |
| Component        |                                                                                                                                                                                                      |
| Product Owner    | Tim Rynne                                                                                                                                                                                            |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                      |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                      |
| Date Approved    | 21/01/2016                                                                                                                                                                                           |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                           |

## Story

As an: Contact Centre Specialist

I want: to be able to see at all times any news alerts

So that: I am aware of any important information

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                     | Notes |
|---|------------------------------------|---------------------------------|-------|
| 1 | Assumption                         | This will be a Global component |       |

## Acceptance Criteria

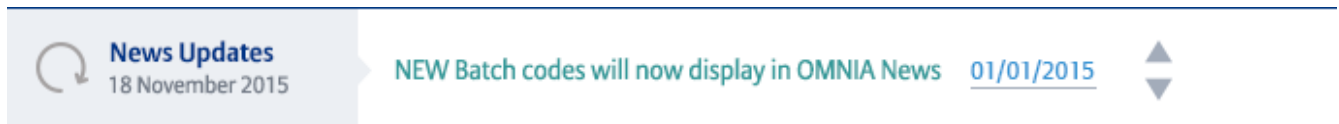
| # | Given                                                                    | When                                                                               | Then                                                                                                                          | Data Ref |
|---|--------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|----------|
| 1 | The Contact Centre Specialist is logged onto a Generic instance of Omnia | they are viewing any screen in Omnia                                               | Display the global News bar component directly underneath the navigation bar with the following:<br><br>Text : "News Updates" |          |
| 2 |                                                                          |                                                                                    | <b>AND</b> the current date                                                                                                   | D1       |
| 3 |                                                                          |                                                                                    | <b>AND</b> a Refresh icon, which will refresh the news information displayed                                                  |          |
| 4 |                                                                          | they are viewing any screen in Omnia<br><br><b>AND</b> there are active news items | Display the latest news items (text), to the right of the date and refresh icon                                               | D2       |

|   |  |                                                                                       |                                                                                                          |  |
|---|--|---------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|--|
| 5 |  | they are viewing any screen in Omnia<br><br>AND there is more than one news item      | Display a scroll bar to the right of the news items, to enable the user to scroll through the news items |  |
| 6 |  | they are viewing any screen in Omnia<br><br>AND there are <b>NO</b> active news items | No news items will be displayed                                                                          |  |
| 7 |  |                                                                                       | AND no scroll bar will be displayed                                                                      |  |

## Data Capture (optional)

| Reference | Field       | Comments                                                                                                                                         |
|-----------|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| D1        | Date        | Format: DD MONTH YYYY                                                                                                                            |
| D2        | News Alerts | This information comes from a Lotus Notes db called Omnia CMS, which is on Domino Server AALAPP09. This will automatically refresh every 3 hours |
|           |             |                                                                                                                                                  |



## Design



## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |

# 01.MVP - Generic - Scratchpad Component

|                  |                                                                                                                                                                                                                                   |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-455</b> - MVP - Generic Scratchpad - UI (  Closed) |
| Description      | Prototype - Generic - Scratchpad Component                                                                                                                                                                                        |
| Component        |                                                                                                                                                                                                                                   |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                         |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                   |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                   |
| Date Approved    | 20/01/2016                                                                                                                                                                                                                        |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                        |

## Story

As a: User

I want: to temporarily record information

So that: I can use it during the call and discard when the call is over

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                     | Notes |
|---|------------------------------------|---------------------------------|-------|
| 1 | Assumption                         | This will be a Global component |       |
|   |                                    |                                 |       |
|   |                                    |                                 |       |

## Acceptance Criteria

| # | Given                                              | When                                                            | Then                                                                                                                                                                                                                                                                                                    |
|---|----------------------------------------------------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The User is logged into Omnia                      | they are viewing any screen within Omnia                        | Display a flyout button/icon (with no text), on the right hand side of the screen.                                                                                                                                                                                                                      |
|   |                                                    | they click on the flyout button/icon                            | Display a scratchpad which the user can enter text on. It should contain the following: <ul style="list-style-type: none"> <li>Header for scratchpad: "Temporary Notes/Scratchpad"</li> <li>Clear icon</li> <li>Placeholder text in the main section of the scratchpad: "Start writing here"</li> </ul> |
| 2 | The User has entered information in the scratchpad | they complete another search<br>OR move onto a different screen | the text will remain on the Scratchpad until the user reloads the page, closes the browser or shuts down the PC                                                                                                                                                                                         |

|   |  |                                |                                                          |
|---|--|--------------------------------|----------------------------------------------------------|
| 3 |  | they click on the 'Clear' icon | the information entered is cleared out of the scratchpad |
|---|--|--------------------------------|----------------------------------------------------------|

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design



Temporary Notes



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## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |
|   |          |            |

# 01.MVP - Generic - Settings Panel

|                  |                                                                                                                                                                                                                                    |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-389</b> - MVP - Generic - Settings Panel (  Closed) |
| Description      | MVP - Generic - Settings Panel                                                                                                                                                                                                     |
| Component        |                                                                                                                                                                                                                                    |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                          |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                    |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                    |
| Date Approved    | 19/01/2016                                                                                                                                                                                                                         |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                         |

## Story

As an: Contact Centre Specialist

I want: to be able to change the theme of my Omnia instance

So that: I can make it more personal to me.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                                                                                 | Notes |
|---|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | Themes and colours within the settings panel will not be included as part of this story. Test style sheets will be created to show the functionality of changing the theme. |       |
| 2 | Assumption                         | This will be a Global component                                                                                                                                             |       |

## Acceptance Criteria

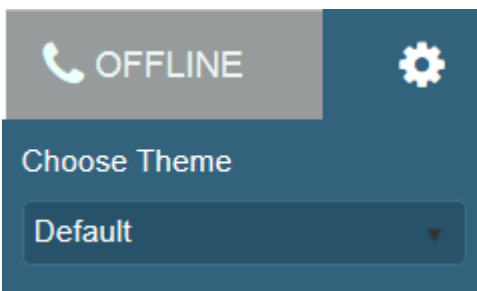
| # | Given                                                                    | When                                  | Then                                                                      | Notes |
|---|--------------------------------------------------------------------------|---------------------------------------|---------------------------------------------------------------------------|-------|
| 1 | The Contact Centre Specialist is logged onto a Generic instance of Omnia | they are viewing any screen in Omnia  | Display a User settings panel icon                                        |       |
| 2 |                                                                          | they click on the Settings panel icon | Display a dropdown with options to change the theme of the Omnia screens. |       |

|   |  |                                                                     |                                                                                                                              |                                                                                                                                                                                                                               |
|---|--|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3 |  | they select a theme (style) from the dropdown in the Settings panel | The theme of the Omnia screens will change.<br><i>Needs to include an option to revert back to the original Omnia theme.</i> | Apply the relevant CSS over the top of the already applied CSS themes<br><br>This is the same functionality that is existing in Omnia - search for "alternate stylesheet" in the html as a starting point to see how it works |
|---|--|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Data Capture (optional)

| Reference | Field | Comments |
|-----------|-------|----------|
|           |       |          |
|           |       |          |
|           |       |          |



## Design



## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |

# 01.MVP - Generic - Telephony

|                  |                                                                                                                                                                                                                                     |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-402</b> - Prototype - Generic - Telephony (  Closed) |
| Description      | MVP - Generic - Telephony                                                                                                                                                                                                           |
| Component        |                                                                                                                                                                                                                                     |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                           |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                     |
| Design Status    | <b>APPROVED</b> <b>PROBABLE REVISIT</b>                                                                                                                                                                                             |
| Date Approved    |                                                                                                                                                                                                                                     |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                          |

## Story

As a: Contact Centre Specialist

I want: to have Omnia integrated with my telephony system

So that: I can receive incoming calls from a Customer/Broker

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                         | Notes |
|---|------------------------------------|-----------------------------------------------------|-------|
| 1 | Assumption                         | This will be a Global component                     |       |
| 2 | Assumption                         | Screenpop will be included as part of another story |       |
|   |                                    |                                                     |       |

## Acceptance Criteria

| # | Given                                                                                                                                | When                                                     | Then                                                                                            | Ref  |
|---|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------------------------------------------------|------|
| 1 | The Contact Centre Specialist has a Generic instance of Omnia<br><br><b>AND</b> they are <b>NOT</b> logged into the telephony system | they are viewing the <b>Identify &amp; Verify</b> screen | Display a grey button with a telephone icon and the text "OFFLINE", in the 'News bar' component | WF01 |

|   |                                                                                                                 |                                                                                                                            |                                                                                                                                                                                                                                                                                                                                    |          |
|---|-----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 2 |                                                                                                                 | they click on the telephone button in the News bar                                                                         | <p>Display a pop-up with the following:</p> <ul style="list-style-type: none"> <li>• Header text: "Telephony Control"</li> <li>• Field text: Enter Phone Extension To Attach To:</li> <li>• Blank field for the extension number to be entered</li> <li>• 3 buttons - Close (grey), Connect (Green), Disconnect(Orange)</li> </ul> | D1, WF03 |
|   |                                                                                                                 |                                                                                                                            | <p>IF they have previously entered their details</p> <p>- default the Extension Number to the last one entered on the current computer</p>                                                                                                                                                                                         |          |
| 3 |                                                                                                                 | the pop-up is open<br>AND they click on the 'Close' button                                                                 | Close the pop-up screen and the telephone button will remain unchanged (grey and OFFLINE)                                                                                                                                                                                                                                          | WF01     |
| 4 |                                                                                                                 | the pop-up is open<br>AND they enter their extension number<br>AND click on the 'Connect' button<br>OR press the enter key | the user is connected to the telephony system and the pop-up will close automatically                                                                                                                                                                                                                                              |          |
| 5 |                                                                                                                 |                                                                                                                            | AND the telephone button will change to Green, with the text "CONNECTED"                                                                                                                                                                                                                                                           | WF02     |
| 6 |                                                                                                                 | they enter an extension number in the extension number field<br>AND it is not a valid phone number                         | <p>Display the following error message:</p> <p><b>"Extension number is not valid, please try again"</b></p>                                                                                                                                                                                                                        |          |
| 7 | The Contact Centre Specialist has a Generic instance of Omnia<br>AND they have logged into the telephony system | there is an incoming call from a Customer                                                                                  | <p>Advise the user of an incoming call through the News bar header</p> <p>AND perform the ScreenPop function (as per ScreenPop storycard)</p>                                                                                                                                                                                      |          |
| 8 |                                                                                                                 | <del>they accept the call</del>                                                                                            | <del>An Interaction and Event is created in the database — UCID (unique caller id) and Client id</del>                                                                                                                                                                                                                             |          |
| 9 |                                                                                                                 | <del>the call is completed</del>                                                                                           | <del>An event is created and the interaction is updated in the database</del>                                                                                                                                                                                                                                                      |          |

|    |                                                                                                                                                                                              |                                                                                                                                          |                                                                |      |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|------|
| 10 | The Contact Centre Specialist has a Generic instance of Omnia<br><br>AND they are logged into the telephony system                                                                           | they want to logout of the telephony system<br><br>AND they click on the telephone icon<br><br>AND they click on the "Disconnect' button | Close the Pop-up screen                                        |      |
| 11 |                                                                                                                                                                                              |                                                                                                                                          | AND Change the telephone icon to grey, with the text "OFFLINE" | WF01 |
| 12 |                                                                                                                                                                                              |                                                                                                                                          | <del>AND call monitoring no longer occurs</del>                |      |
| 13 | The Contact Centre Specialist has a Generic instance of Omnia<br><br>AND they have previously logged into the telephony system<br><br>AND disconnected from telephony and closed the browser | they relaunch the browser                                                                                                                | Telephony will reconnect automatically                         |      |

## Data Capture (optional)

| Reference | Name             | Rules                                                          |
|-----------|------------------|----------------------------------------------------------------|
| D1        | Extension Number | Free text field<br>No alpha characters<br>Limited to 4 numbers |

## Design

### WF01 - Offline button

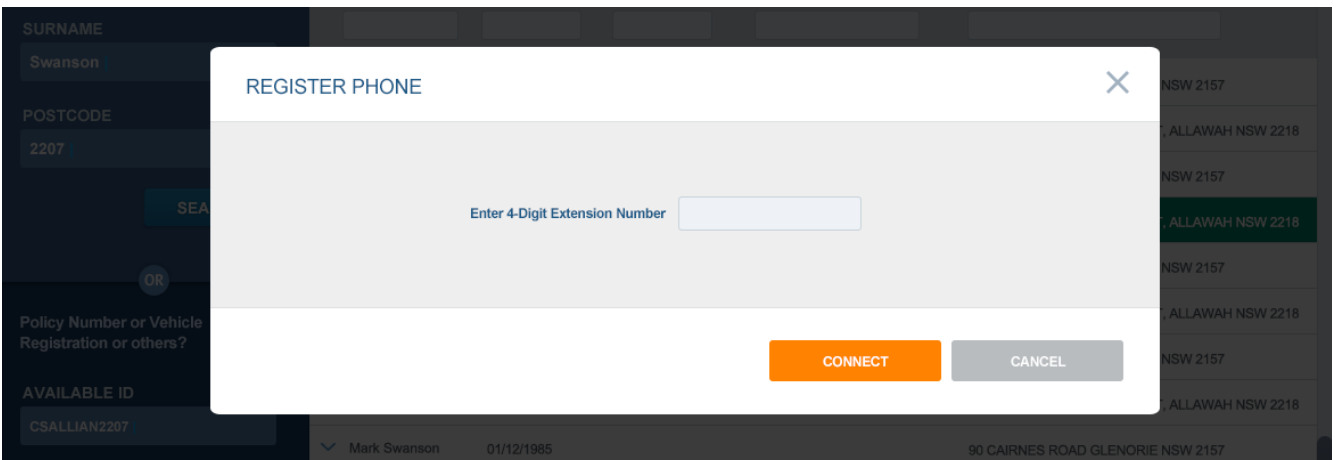


### WF02 - Connected button







**WF03 - Pop up**



**Questions**

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |
|   |          |            |

# 02.MVP - Generic - Alfresco Documents Tab

|                  |                                                                                                                                                                                                                                    |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-448</b> - Generic Alfresco Documents Tab (  Closed) |
| Description      | Prototype - Generic - Alfresco Documents Tab                                                                                                                                                                                       |
| Component        |                                                                                                                                                                                                                                    |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                          |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                    |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                    |
| Date Approved    | 28/01/2016                                                                                                                                                                                                                         |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                         |

## Story

As an: Contact Centre Specialist

I want: to be able to view a Policy document that has been sent to a Customer

So that: I can help with any queries that they have with regards to their documentation.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                    | Notes |
|---|------------------------------------|------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | Will be able to reuse the current web call from the existing Omnia instance to Alfresco (REST) |       |
| 2 | Constraint                         | Not all documents that have been set to the Customer have been stored in Alfresco              |       |
| 3 | Assumption                         | This will be a global component                                                                |       |

## Acceptance Criteria

| # | Given                                                                                                                                                                              | When                                          | Then                      |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|---------------------------|
| 1 | <p>The Contact Centre Specialist has a Generic instance of Omnia</p> <p><b>AND</b> they have performed a search</p> <p><b>AND</b> they are viewing the Customer context screen</p> | they select a policy from the navigation grid | Display an 'ALFRESCO' tab |




































|   |  |                                                                                                               |                                                                                                                                                                                                                                                                                         |
|---|--|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 |  | they click on the 'ALFRESCO' tab                                                                              | Display the list of documents that are stored in Alfresco for the selected policy, with the following details; <ul style="list-style-type: none"> <li>• Created</li> <li>• Source (icon)</li> <li>• Type (icon)</li> <li>• Description</li> <li>• Title (+ link to document)</li> </ul> |
| 3 |  |                                                                                                               | AND display Sort icons next to each of the column headings for each of the fields<br><br>Default is the 'Created' column, showing the documents in reverse chronological order                                                                                                          |
| 4 |  |                                                                                                               | AND display a filter field, which will allow a match with any value                                                                                                                                                                                                                     |
| 5 |  | they click on the 'ALFRESCO' Tab<br><br>AND click on a document title                                         | The document will open                                                                                                                                                                                                                                                                  |
| 6 |  | they click on the 'ALFRESCO' tab<br><br>AND there are no documents stored in Alfresco for the selected policy | Display the following message:<br><br>"No data available in table"                                                                                                                                                                                                                      |

## Data Capture (optional)


| Reference | Field       | Comments                                             |
|-----------|-------------|------------------------------------------------------|
| D1        | Created     | Date format: <del>YYYY-MM-DD HH:MM</del> -dd-mm-YYYY |
| D2        | Source      | Icons for Inbound, Outbound, Internal                |
| D3        | Type        | E.g. Renewal                                         |
| D4        | Description | E.g. Renewal                                         |
| D5        | Title       | Title will include a link to open the document       |

## Design

The filter has to be there. No Other option for that.

| TIMELINE          | EVENTS                                                                              | CLAIMS                                                                              | OTHER PARTIES                                              | ALFRESCO                      |                                                                                     |
|-------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------|-------------------------------|-------------------------------------------------------------------------------------|
| Start your filter |                                                                                     |                                                                                     |                                                            |                               |  |
| Created ▾         | Source ▾                                                                            | Type ▾                                                                              | Description ▾                                              | Title ▾                       |                                                                                     |
| 12/10/2015        |    |    | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |    |    | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.doc |                                                                                     |
| 12/10/2015        |    |    | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.xls |                                                                                     |
| 12/10/2015        |    |    | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |    |    | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.gif |                                                                                     |
| 12/10/2015        |    |    | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |    |    | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.doc |                                                                                     |
| 12/10/2015        |    |    | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.xls |                                                                                     |
| 12/10/2015        |    |    | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |  |  | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.gif |                                                                                     |
| 12/10/2015        |  |  | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |  |  | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.doc |                                                                                     |
| 12/10/2015        |  |  |                                                            | 1588624-13EE84A_0_catlady.xls |                                                                                     |
| 12/10/2015        |  |  |                                                            | 1588624-13EE84A_0_catlady.pdf |                                                                                     |
| 12/10/2015        |  |  | Non-Financial Endorsements-test                            | 1588624-13EE84A_0_catlady.gif |                                                                                     |
| 12/10/2015        |  |  | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.gif |                                                                                     |
| 12/10/2015        |  |  | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! | 1588624-13EE84A_0_catlady.gif |                                                                                     |

With Data





| TIMELINE                                                                                                     | EVENTS | CLAIMS | OTHER PARTIES | ALFRESCO |  |
|--------------------------------------------------------------------------------------------------------------|--------|--------|---------------|----------|--|
|  No data available in table |        |        |               |          |  |

Without Data

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |

# 02.MVP - Generic - Client Timeline Table Component

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <div style="border: 1px solid #ccc; padding: 5px;">  <b>POMNIA-497</b> - Client Timeline - UI (  ) <span style="float: right;">Close</span> </div> <ol style="list-style-type: none"> <li>1. d)</li> <li>2.  <b>POMNIA-511</b> - Timeline - API (  ) <span style="float: right;">Closed</span></li> </ol> |
| Description      | MVP - Generic -Client Timeline Component                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Component        | TL-Timeline                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Date Approved    | 28/01/2016                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Story

As an: Contact Centre Specialist

I want: to be able to view a Timeline for a particular client

So that: I can see an overview of all of the events that have occurred for that client.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                                                                                                                                  | Notes |
|---|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | This is a generic component                                                                                                                                                                                                  |       |
| 2 | Assumption                         | The API will exclude events from POLISY which have the same text as TX_E events for the Notes                                                                                                                                |       |
| 3 | Assumption                         | The timeline will only display Omnia Events, which have a prefix of TX_E as an event type, not TX_S                                                                                                                          |       |
| 4 | Assumption                         | This story will only include the Timeline table. The visual timeline will be included as part of another story                                                                                                               |       |
| 5 | Assumption                         | The Priority Flag for Omnia Events will be added at a later date. (please refer to <a href="#">99.MVP-Generic-Priority Flag for Events</a> ), once the new EVENT_FLAG column has been added to the INTERACTION_EVENTS table. |       |

## Acceptance Criteria

| # | Given                                                                                                                                                                            | When                                                                                                                                | Then                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Data ref # |
|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 1 | <p>The Contact Centre Specialist has logged into a Generic instance of Omnia</p> <p>AND they have performed a search</p> <p>AND they are viewing the Customer Context screen</p> | <p>they click on a Client in the navigational grid</p>                                                                              | <p>Display a timeline table, showing the chronological events for the client.</p> <p>These events are:</p> <ul style="list-style-type: none"> <li>• CIS Notes - (<i>Company 6</i>)</li> <li>• POLISY Notes - (<i>Company 1</i>)</li> <li>• Event - Omnia Event (<i>show anything with the prefix TX_E</i>)</li> </ul> <p>For each of the events, show the following information:</p> <ul style="list-style-type: none"> <li>• Flag (see Data Capture section)</li> <li>• Creation date/time</li> <li>• Policy No</li> <li>• Summary</li> <li>• Description</li> </ul> | D1-D5      |
| 2 |                                                                                                                                                                                  |                                                                                                                                     | AND display Sort icons next to each of the column headings for each of the fields in the timeline                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |            |
| 3 |                                                                                                                                                                                  |                                                                                                                                     | AND display a "Filter" field above the timeline table                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |
| 4 |                                                                                                                                                                                  |                                                                                                                                     | AND ensure that event items are not duplicated between POLISY and Omnia events                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |            |
| 5 |                                                                                                                                                                                  | <p>they click on a Client in the navigational grid</p> <p>AND they click on the sort icon for one of the fields in the timeline</p> | Sort the data into ascending or descending order                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |            |
| 6 |                                                                                                                                                                                  | <p>they click on a Client in the navigational grid</p> <p>AND they enter text in the Filter field</p>                               | <p>this will filter the records in the timeline table</p> <p>(Able to match the value in any of the columns).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                     |            |

## Data Capture (optional)

| Reference | Field | Rules                                                                                  |
|-----------|-------|----------------------------------------------------------------------------------------|
| D1        | Date  | <p>Display the date on one line, not over 2 lines.</p> <p>Format: dd-mm-yyyy HH:MM</p> |

|    |               |                                                                                                                                                                                                                                                                                                                                                                                      |
|----|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D2 | Flag          | <p>This is not applicable for POLISY Notes or Omnia Event.</p> <p>Only show PRI (priority) flags, not CON.</p> <p>- (API - if PRI for CIS, <del>or Priority for Event</del>, then flag="P", if POLISY, or Omnia Event or <del>not Priority Event</del> or CON for CIS, then flag="").</p> <p>- (UI - if flag="P", show visual indicator of priority - this needs to be sortable)</p> |
| D3 | Policy Number | Alphanumeric (includes the policy product which is the last 3 characters of the policy number e.g. com or dev)                                                                                                                                                                                                                                                                       |
| D4 | Summary       | <p>This will be blank for POLISY Notes</p> <p>For CIS Notes - This is taken from the 'Description' field in POLISY</p> <p>For Omnia Event - This is the Event Type</p>                                                                                                                                                                                                               |
| D5 | Description   | <p>POLISY Notes - It will be the information from the General Page Notes</p> <p>CIS Notes - this is taken from the 'Detail' field in POLISY</p> <p>Omnia Event - This is the Event Notes</p>                                                                                                                                                                                         |

## Design

**NOTE** - when retrieving the notes from POLISY, do not return items that are duplicated across Omnia and POLISY. These can be compared with the Description - items in POLISY which have the same content as Omnia can be ignored

EVENTS

CLAIMS

Start your filter





| Priority ▼                                                                          | Date ▼           | Policy No. ▼  | Summary ▼                 | Description                                                |
|-------------------------------------------------------------------------------------|------------------|---------------|---------------------------|------------------------------------------------------------|
|                                                                                     | 12-11-2015 15:06 | 142A017201CMP | AOP_101_General_Enquiries | 2015-Non-Financial Endorsements-test                       |
|                                                                                     | 22-10-2015 14:06 | 1428524916CMP | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 11-09-2015 13:52 | 142A074031CMP | AOP_101_General_Enquiries |                                                            |
|    | 13-08-2015 12:46 | 142A066262CMP | AOP_105A_Cancellations    | 5332-Non-Financial Endorsements-test                       |
|                                                                                     | 16-07-2015 11:26 | 161A008477COM | AOP_101_General_Enquiries | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 19-06-2015 11:13 | 161A013734COM | AOP_105A_Cancellations    |                                                            |
|                                                                                     | 23-05-2015 11:11 | 161A005675COM | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 12-05-2015 10:09 | 161A000917COM | AOP_101_General_Enquiries | 5332-Non-Financial Endorsements-test                       |
|                                                                                     | 09-04-2015 9:00  | 161A005675COM | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 02-04-2015 8:19  | 161A004706TSP | AOP_101_General_Enquiries | 5332-Non-Financial Endorsements-test                       |
|  | 26-03-2015 7:07  | 161R001526COM | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 27-02-2015 6:09  | 161A007752TSP | AOP_101_General_Enquiries |                                                            |
|                                                                                     | 12-01-2015 5:12  | 161A018717COM | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 12-12-2014 4:15  | 161A020038COM | AOP_101_General_Enquiries | 2015-Non-Financial Endorsements-test                       |
|                                                                                     | 02-11-2014 3:12  | 161A010176COM | AOP_101_General_Enquiries |                                                            |
|  | 16-10-2014 2:18  | 161S005118COM | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|                                                                                     | 03-07-2014 1:06  | 161A021466COM | AOP_101_General_Enquiries |                                                            |

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |

# 02.MVP - Generic - IDV Detailed Search Results

- Story
- Assumptions, Dependencies, Constraints
- Acceptance Criteria
- Business Rules
- Design
  - Please follow the Acceptance Criteria, not the wireframe
- Data Capture (optional)
  - Data for Verification
- Questions

|                         |                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>JIRA Link</b>        | <ol style="list-style-type: none"> <li> <b>POMNIA-476</b> - IDV Detailed Search Results - UI (Closed)</li> <li> <b>POMNIA-484</b> - IDV Detailed Search Results - API (Closed)</li> </ol> |
| <b>Description</b>      | Prototype - Generic - IDV Detailed Search Results                                                                                                                                                                                                                                                                                                           |
| <b>Component</b>        | IDV - Identify + Verify                                                                                                                                                                                                                                                                                                                                     |
| <b>Product Owner</b>    | Tim Rynne                                                                                                                                                                                                                                                                                                                                                   |
| <b>Storycard Status</b> | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                             |
| <b>Design Status</b>    | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                             |
| <b>Date Approved</b>    | 20/01/2016                                                                                                                                                                                                                                                                                                                                                  |
| <b>Story Ready?</b>     | <b>YES</b>                                                                                                                                                                                                                                                                                                                                                  |

## Story

As a: Contact Centre Specialist

I want: to see the detailed results returned from the search

So that: I can verify the identity of the caller

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                        | Notes |
|---|------------------------------------|------------------------------------------------------------------------------------|-------|
| 1 | Dependency                         | The IDV Search criteria story has been completed (01.MVP - Generic - IDV Search)   |       |
| 2 | Constraint                         | Screen Pop will not work for Agent, only for Customers aka we can't AutoID caller. |       |

## Acceptance Criteria

| # | Given | When | Then | Business Rule Ref # |
|---|-------|------|------|---------------------|
|---|-------|------|------|---------------------|

|   |                                                                          |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                           |       |
|---|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | The Contact Centre Specialist is logged into a Generic instance of Omnia | <p>they enter information in minimum of 2 of the following fields:</p> <p>First name, Surname, Postcode</p> <p>AND click on <b>Search</b> OR click on enter</p> <p>AND click on the drill down for the chosen Client</p> | <p>Expand to display the Policy table, with the following fields populated:</p> <ul style="list-style-type: none"> <li>• Policy No.</li> <li>• Policy Status</li> <li>• Expiry Date</li> <li>• Risk No</li> <li>• Risk Class</li> <li>• Risk Description</li> <li>• Claims (no column label)</li> <li>• Co-Insured</li> </ul>                                                             | BR01, |
| 2 |                                                                          | <p>AND the client has previously lodged a claim</p>                                                                                                                                                                      | <p><del>Display a drill down icon next to all policies which have any associated claims</del></p> <p>Display an icon (black flag) in the Claims column, for the policy which has claims associated to it.</p>                                                                                                                                                                             |       |
| 3 |                                                                          | <p>AND they click on the drill down icon next to a policy which has a flag icon (claim associated to it)</p>                                                                                                             | <p>Expand to display the Claim Description table, with the following fields populated:</p> <ul style="list-style-type: none"> <li>• Claim No.</li> <li>• Date of Loss</li> <li>• Active (aka Claim Status)</li> <li>• Claim Type Description ("Claim Type" label in the table)</li> <li>• Claim Description</li> </ul> <p><i>An API call is made to return the claims in the grid</i></p> | BR02  |
| 4 |                                                                          | <p>they are viewing search results on the <b>Identify &amp; verify</b> screen</p> <p>AND they click on the drill down icon next to the Client name</p> <p>AND the client has <b>NOT</b> previously lodged a claim</p>    | <p><del>DO NOT display a drill down icon next to the policy-</del></p> <p>Mark Swanson - (note - if this is not easy, then add a new column to the risk table that indicates if claims are present for the policy and leave the drill down icon as visible)</p> <p><b>DO NOT</b> display an icon in the Claims column for policies which do not have associated claims.</p>               |       |
| 5 |                                                                          | <p>they click on the drill down icon next to the Policy</p> <p>AND the client has <b>NOT</b> previously lodged a claim</p>                                                                                               | <p>Display an empty claims grid with the message "<b>No data available in table</b>"</p> <p><i>No API call is made</i></p>                                                                                                                                                                                                                                                                |       |

|   |  |                                                                                                                                                                                                                                     |                                                                                    |  |
|---|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|--|
| 6 |  | <p>they are viewing the populated Client details table</p> <p>AND they click on the result that they want to drill down into</p>                                                                                                    | <p>the row is highlighted and an arrow icon is displayed at the end of the row</p> |  |
| 7 |  | <p>they are viewing the populated Client details table</p> <p>AND they double click on the result that they want to drill down into</p> <p>OR they click on the arrow at the end of the result that they want to drilldown into</p> | <p>Navigate to the <b>Custom er Context</b> screen</p>                             |  |

## Business Rules

| Ref # | Name   | Business Rule                                                                                                                                                                                                                                                                                                                           |
|-------|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| BR01  | Policy | <p>Return all active policies or cancelled or lapsed policies with an expiry date up to 2 years old, regardless if they have had claims against them in that time or not</p> <p>Only the latest policy information is to be returned for each policy found within the 2 year period ie not 2 years worth of history for each policy</p> |
| BR02  | Claims | <p>Return All open claims and any claims that have been Closed within the last 5 years (i.e. if a claim was opened 6 years ago, it needs to be shown)</p>                                                                                                                                                                               |

## Design

Please follow the Acceptance Criteria, not the wireframe

WF01

Verify Customer Details - 8 matching entries found



Start your filter



| Name ▾         | DOB ⇅      | Phone ⇅    | Email ⇅                     | Address ⇅                                    |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            |            | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 30-02-1956 |            |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |

Search Results

Verify Customer Details - 0 matching entries found



Start your filter



| Name ▾ | DOB ⇅ | Phone ⇅ | Email ⇅ | Address ⇅ |
|--------|-------|---------|---------|-----------|
|--------|-------|---------|---------|-----------|



No data available in table

No Information Available

Verify Customer Details - 8 matching entries found



Start your filter



| Name ▾         | DOB ⇅      | Phone ⇅    | Email ⇅                     | Address ⇅                                    |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            |            | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▲ Mark Swanson | 30-02-1956 |            |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |

| Policy No. ▾    | Status ▾ | Expiry Date ▾ | Risk No. ▾ | Risk Class ▾ | Risk Description ▾           | Claims ▾ | Co-insured                                    |
|-----------------|----------|---------------|------------|--------------|------------------------------|----------|-----------------------------------------------|
| ▶ 6210312689DHP | 08       | 25-08-2018    | 0001       | DGP          | 44 MERRIMAC LP ROCKINGHAM WA |          | Amit Gurung,<br>Mark Swanson                  |
| ▶ 6210312689DHP | 08       | 02-02-2016    | 0002       | DPV          | 44 MERRIMAC LP ROCKINGHAM WA |          |                                               |
| ▲ 6210312689DHP | 08       | 23-03-2015    | 0003       | DGP          | 44 MERRIMAC LP ROCKINGHAM WA |          | Amit Gurung,<br>Mark Swanson<br>Bahssl Emalks |

Policy Data

Verify Customer Details - 8 matching entries found



Start your filter



| Name ▾         | DOB ⇅      | Phone ⇅    | Email ⇅                     | Address ⇅                                    |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            |            | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▲ Mark Swanson | 30-02-1956 |            |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |

| Policy No. | Status | Expiry Date | Risk No. | Risk Class | Risk Description | Claims | Co-insured |
|------------|--------|-------------|----------|------------|------------------|--------|------------|
|------------|--------|-------------|----------|------------|------------------|--------|------------|



No data available in table

No Policy Data

Verify Customer Details - 8 matching entries found



Start your filter



| Name           | DOB        | Phone      | Email                       | Address                                      |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            |            | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▲ Mark Swanson | 30-02-1956 |            |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |

| Policy No.      | Status | Expiry Date | Risk No. | Risk Class | Risk Description             | Claims | Co-insured                               |
|-----------------|--------|-------------|----------|------------|------------------------------|--------|------------------------------------------|
| ▶ 6210312689DHP | 08     | 25-08-2018  | 0001     | DGP        | 44 MERRIMAC LP ROCKINGHAM WA |        | Amit Gurung, Mark Swanson                |
| ▶ 6210312689DHP | 08     | 02-02-2016  | 0002     | DPV        | 44 MERRIMAC LP ROCKINGHAM WA |        |                                          |
| ▲ 6210312689DHP | 08     | 23-03-2015  | 0003     | DGP        | 44 MERRIMAC LP ROCKINGHAM WA |        | Amit Gurung, Mark Swanson, Bahssl Emalks |

| Claim No.   | Date of Loss | Active                               | Claim Type                                                    | Claim Description                            |
|-------------|--------------|--------------------------------------|---------------------------------------------------------------|----------------------------------------------|
| C6210063945 | 09-06-2014   | <span style="color: green;">●</span> | Fire explosion lightning thunderbolt                          | THEFT OF TP ITEMS FROM INSURED PREMISES      |
| C6210063945 | 11-06-2013   |                                      | Impact by vehicles animals falling trees aerials or masts     | THEFT OF YOUR CONTENTS - TEMPORARILY REMOVED |
| C6210063945 | 02-05-2012   |                                      | Burglary housebreaking (forced entry) Theft (no forced entry) | Storm Damage to Your Buildings               |

Claims Data

Verify Customer Details - 8 matching entries found



Start your filter



| Name           | DOB        | Phone      | Email                       | Address                                      |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            |            | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson |            | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▲ Mark Swanson | 30-02-1956 |            |                             | 90 CAIRNES ROAD GLENORIE NSW 2157            |

| Policy No.      | Status | Expiry Date | Risk No. | Risk Class | Risk Description             | Claims | Co-insured                |
|-----------------|--------|-------------|----------|------------|------------------------------|--------|---------------------------|
| ▶ 6210312689DHP | 08     | 25-08-2018  | 0001     | DGP        | 44 MERRIMAC LP ROCKINGHAM WA |        | Amit Gurung, Mark Swanson |
| ▲ 6210312689DHP | 08     | 02-02-2016  | 0002     | DPV        | 44 MERRIMAC LP ROCKINGHAM WA |        |                           |

| Claim No.                  | Date of Loss | Active     | Claim Type | Claim Description |                              |  |                                          |
|----------------------------|--------------|------------|------------|-------------------|------------------------------|--|------------------------------------------|
| No data available in table |              |            |            |                   |                              |  |                                          |
| ▶ 6210312689DHP            | 08           | 23-03-2015 | 0003       | DGP               | 44 MERRIMAC LP ROCKINGHAM WA |  | Amit Gurung, Mark Swanson, Bahssl Emalks |

No Claims Data

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |





Data for Verification

| GivenName | Surname   | PostalCode | Full_Name        | Polisy_Client_Id | Policy_Nu |
|-----------|-----------|------------|------------------|------------------|-----------|
| JAY       | FLYNN     |            | MR JAY FLYNN     | C601W26714       | 621031268 |
| DARRIN    | SMITH     | 6028       | MR DARRIN SMITH  | C601U68606       | 621026390 |
|           |           |            |                  | C153046930       |           |
|           |           |            |                  | C60105H8L1       |           |
|           |           |            |                  | C601S75952       |           |
| WILLIAM   | MOTT      | 4422       | WILLIAM MOTT     | C142152274       | 142A0438: |
| DAMIEN    | VICTORSEN | 2604       | DAMIEN VICTORSEN | C60104WTGV       | 621001577 |
| JULIE     | LAPWORTH  | 6232       | JULIE LAPWORTH   | C60104KXT9       | 621037158 |
|           |           |            |                  | C60104PDCM       |           |
|           |           |            |                  | C601T78252       |           |
| LOWE      | KIRSTY    | 2905       | LOWE KIRSTY      | C60104ZF4L       | 621002594 |
| MARTIN    | BAVCEVIC  | 6166       | MARTIN BAVCEVIC  | C60104GCPQ       | 611009886 |
| MAUREEN   | MCGOWAN   | 6061       | MAUREEN MCGOWAN  | C601W78221       | 611009748 |
| HEATHER   | KNOCK     | 2265       | HEATHER KNOCK    | C601052TVS       | 621005058 |
|           |           |            |                  | C108383768       |           |
|           |           |            |                  | C108383769       |           |
|           |           |            |                  | C1750CD1R7       |           |
| DENE      | LARWOOD   | 5066       | DENE LARWOOD     | C601L81281       | 621011057 |
|           |           |            |                  |                  |           |
|           |           |            |                  |                  |           |
|           |           |            |                  |                  |           |

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |
|   |          |            |

## 02.MVP - Generic - Other Parties Tab

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <ol style="list-style-type: none"> <li>1.  <b>POMNIA-452</b> - Generic Other Parties Tab - UI (  Closed)</li> <li>2.  <b>POMNIA-535</b> - Other Parties Tab - API (  CI osed)</li> </ol> |
| Description      | MVP- Generic - Third Parties Tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Component        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Date Approved    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

### Story

As an: Contact Centre Specialist

I want: to be able to view the Co-Insured and Third Parties

So that: I can help with any queries about other parties who may be involved with the policy/claim.

### Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                     | Notes |
|---|------------------------------------|---------------------------------|-------|
| 1 | Assumption                         | This will be a global component |       |
|   |                                    |                                 |       |
|   |                                    |                                 |       |

### Acceptance Criteria

| # | Given                                                                                                                                                                              | When                                                 | Then                                                                                                                                                                                           |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <p>The Contact Centre Specialist has a generic instance of Omnia</p> <p><b>AND</b> they have performed a search</p> <p><b>AND</b> they are viewing the Customer context screen</p> | they have selected a policy from the navigation grid | Display an 'Other Parties' tab                                                                                                                                                                 |
| 2 |                                                                                                                                                                                    | they click on the 'Other Parties' tab                | <p>List the following details for the Co-Insured and Third Parties</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Address</li> <li>• Type (Third Party or Co-Insured)</li> </ul> |

|   |  |                                                                                                  |                                                                                   |
|---|--|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 3 |  |                                                                                                  | AND display Sort icons next to each of the column headings for each of the fields |
| 4 |  |                                                                                                  | AND display a filter field, which will allow a match with any value               |
| 5 |  | they click on the 'Other parties' tab<br>AND there are no associated Co-Insured or Third Parties | Display the following message:<br><b>"No data available in table"</b>             |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design


TIMELINE
EVENTS
CLAIMS
OTHER PARTIES
ALFRESCO

*Start your filter* ▼

| Name ▼             | Address ▼                            | Type ▼      |
|--------------------|--------------------------------------|-------------|
| Mrs Laurette Rynne | 21 BOLARO AVE GYMEA NSW              | Co-Insured  |
| Mr Amit Gurung     | 312/ 35 LANCELOT STREET, ALAWAH, NSW | Third Party |

With Data

TIMELINE
EVENTS
CLAIMS
OTHER PARTIES
ALFRESCO




No data available in table

Without Data

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 02.MVP - Generic - Telephony - Screenpop

|                  |                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-503</b> - MVP-Generic - Telephony-Screenpop (Closed) |
| Description      | Auto populating search criteria based on caller details                                                                                          |
| Component        | Telephony                                                                                                                                        |
| Product Owner    | Tim Rynne                                                                                                                                        |
| Storycard Status | <b>APPROVED</b>                                                                                                                                  |
| Design Status    | <b>APPROVED</b> <b>UI REVIST</b>                                                                                                                 |
| Date Approved    | 28/01/2016                                                                                                                                       |
| Story Ready?     | <b>YES</b>                                                                                                                                       |

## Story

As an: Omnia Generic user

I want: the system to automatically search on the caller id

So that: I can identify customers faster by their phone number and without manual searching

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                           | Notes |
|---|------------------------------------|-----------------------------------------------------------------------|-------|
| 1 | Dependency                         | the Telephony story has been completed (01.MVP - Generic - Telephony) |       |
| 2 | Assumption                         | This is a Global component                                            |       |
|   |                                    |                                                                       |       |

## Acceptance Criteria

| # | Given                                                                                                        | When                                                                                                                                                                  | Then                                                                                                                                                                                    |
|---|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The user has Generic Omnia open<br>AND has registered their extension with Omnia<br>AND is on the IDV screen | their telephone rings<br>AND the CallerID has more than 9 digits<br>AND the CallerID does not contain alphanumerics<br>AND the CallerID is not in the Omnia Blacklist | The incoming number is displayed in the screen information header<br>AND a search is performed against the incoming Caller ID<br>AND the results are shown in the Search Results screen |

|   |                                                                                                                                 |                                                                                                                                                                                   |                                                                                                                                                                                                                                          |
|---|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   |                                                                                                                                 |                                                                                                                                                                                   | The incoming search is prefixed with a QuestionMarkWildcard to ensure compatibility with Avaya - eg incoming number of 28059999 will be passed as "?28059999" to the API for the search<br><br>(see Design section for more information) |
| 2 |                                                                                                                                 | their telephone rings<br><br>AND the CallerID has less than 9 digits<br><br>OR the CallerID is in the Omnia Blacklist                                                             | The incoming number is displayed in the screen information header<br><br>AND no search is performed                                                                                                                                      |
| 3 |                                                                                                                                 | their telephone rings<br><br>AND the CallerID contains alphanumerics (e.g. T5366#1)                                                                                               | Display "Private Number" in the screen information header<br><br>AND no search is performed                                                                                                                                              |
| 4 | The user has Generic Omnia open<br><br>AND has registered their extension with Omnia<br><br>AND is <b>not</b> on the IDV screen | their telephone rings<br><br>AND the CallerID has more than 9 digits<br><br>AND the CallerID does not contain alphanumerics<br><br>AND the CallerID is not in the Omnia Blacklist | a search is performed against the incoming CallerID<br><br>AND the results are populated into the IDV Search Results screen<br><br>AND the screen focus does not change from the current screen                                          |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

If a browser has been registered with Omnia telephony, whenever that telephone extension is called, Omnia is sent a message advising of the details of the incoming call

Based on the caller id (phone number), Omnia is to decide what actions to perform. The call will be ignored if:

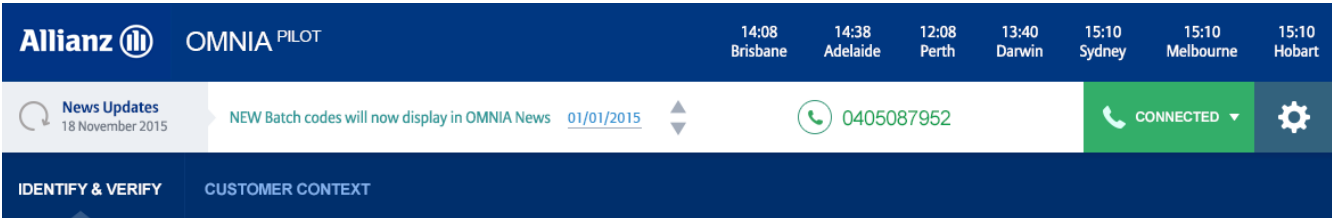
- the number is an internal number (less than 8 digits long)
- the number has alphanumerics (a product of switchboard/ivr routing)
- the number is in the blacklist directory (a file on the server that the browser has loaded at runtime refresh)

The blacklist numbers can be loaded into a list/array in the UI upon screen load/refresh

The DWH api currently has an interface defined for a search based on TelephoneNumber.

NOTE - Currently the Avaya system removes the first character of the phone number - this will need to be replaced with a wildcard when searching. For example:

- 0280559999 is provided as 280559999 by Avaya
- we will need to pass "?28059999" to the search to find the correct customer



Complete design with news bar as it will be part of it.



Incoming call from Number and icon will be animated flashing background.







Incoming Call from Private Number and icon will be animated flashing background.

**Note: Incoming Call information should fade, pulse or blink or something so that it draws attention but isn't too over the top**

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

## 03.MVP - Generic - Claims Tab

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <ol style="list-style-type: none"> <li>1.  <b>POMNIA-498</b> - Claims Tab - UI (  <b>Closed</b> )</li> <li>2.  <b>POMNIA-512</b> - Claims Tab - API (  <b>Closed</b> )</li> </ol> |
| Description      | MVP-Generic-Claims Tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Component        | PD-Policy Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Date Approved    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

### Story

As an: Contact Centre Specialist

I want: to be able to see details of any claims related to a policy

So that: I can help with any claims inquiries.

### Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                                                                                                              | Notes |
|---|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | All open claims and any claims available for the Policy/Client will be returned from DWH - requirements for the UI are limited to the last 5 years, however we will probably deliver more than requested |       |
| 2 | Assumption                         | The Claims tab will appear in the Policy Context <b>AND</b> the Client context screens                                                                                                                   |       |
| 3 | Assumption                         | The same API will be used whether viewing the Policy Context or Client Context The Policy Number should be hidden in the UI if viewing the Policy Context.                                               |       |
| 4 | Assumption                         | The button and link to ACMS will not be included as part of this story                                                                                                                                   |       |
| 5 | Assumption                         | The design for screen size 1200PX and 1400PX will be the same                                                                                                                                            |       |

# Acceptance Criteria














| # | Given                                                                                               | When                                                                                                                         | Then                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---|-----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The Call Centre Specialist has the Generic version of Omnia<br><br>AND they have performed a search | they are viewing the Client Context OR Policy Context                                                                        | Display a <b>CLAIMS</b> tab                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 2 | AND they are viewing the Client Context OR Policy Context                                           | they click on the <b>Claims</b> tab<br><br>AND they have a Minimum Screen 1200px                                             | Display the following information about the Claim(s), related to the selected policy:<br><br><ul style="list-style-type: none"> <li>• Claim No.</li> <li>• Date of Loss</li> <li>• Active (aka Claim Status)</li> <li>• Claim Type (aka Claim Description)</li> <li>• Claim Description</li> </ul><br>AND a 'More Information' icon (3 dots)                                                                                                         |
| 3 |                                                                                                     | AND they click on the 'More Information' icon                                                                                | Display the following in a pop up:<br><br><ul style="list-style-type: none"> <li>• Policy No. <b>(do not display in the UI if viewing the Policy Context)</b></li> <li>• Risk No</li> <li>• Risk Description</li> <li>• Incurred (total expected cost of the claim)</li> <li>• Paid (what we have paid the Customer)</li> </ul>                                                                                                                      |
| 4 | AND they are viewing the Client Context OR Policy Context                                           | they click on the <b>Claims</b> tab<br><br>AND they have a Minimum screen 1200px<br><br>OR they have a Maximum screen 1400px | Display the following information about the Claim(s), related to the selected policy:<br><br><ul style="list-style-type: none"> <li>• Claim No.</li> <li>• Date of Loss</li> <li>• Active (aka Claim Status)</li> <li>• Claim Type (aka Claim Description)</li> <li>• Claim Description</li> <li>• Incurred (total expected cost of the claim)</li> <li>• Paid (what we have paid the Customer)</li> </ul><br>AND a 'More Information' icon (3 dots) |
| 5 |                                                                                                     | AND they click on the 'More Information' icon                                                                                | Display the following in a pop up:<br><br><ul style="list-style-type: none"> <li>• Policy No <b>(do not display in the UI if viewing the Policy Context)</b></li> <li>• Risk No</li> <li>• Risk Description</li> </ul>                                                                                                                                                                                                                               |

|   |                                                                                                                                                                                                                                                 |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6 |                                                                                                                                                                                                                                                 | <p>they click on the <b>Claims</b> tab</p> <p>AND they have a Full size screen</p>                                                                                        | <p>Display the following information about the Claim(s), related to the selected policy:</p> <ul style="list-style-type: none"> <li>• Policy No. (<b>do not display in the UI if viewing the Policy Context</b>)</li> <li>• Claim No.</li> <li>• Date of Loss</li> <li>• Active (aka Claim Status)</li> <li>• Claim Type (aka Claim Description)</li> <li>• Claim Description</li> <li>• Risk No</li> <li>• Risk Description</li> <li>• Incurred (total expected cost of the claim)</li> <li>• Paid (what we have paid the Customer)</li> </ul> |
| 7 |                                                                                                                                                                                                                                                 | <p>they click on the <b>Claims</b> tab</p> <p>AND they have a Minimum Screen 1200px</p> <p>OR they have a Medium Screen 1400px</p> <p>OR they have a Full size screen</p> | <p>Display Sort icons next to each of the column headings for each of the fields in the claims tab</p> <p>Sort by default is the "Date of Loss" field, in descending order</p>                                                                                                                                                                                                                                                                                                                                                                  |
| 8 | <p>The Call Centre Specialist has the Generic version of Omnia</p> <p>AND they have performed a search</p> <p>AND they are viewing the <b>Customer Context</b> screen</p> <p>AND there are <b>NO</b> claims associated to the policy/client</p> | <p>they click on the <b>Claims</b> tab</p>                                                                                                                                | <p>Display the following message:</p> <p><b>"No data available in table"</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |














## Design

| TIMELINE          | EVENTS         | CLAIMS                                                                              | OTHER PARTIES       | ALFRESCO                                                                            |
|-------------------|----------------|-------------------------------------------------------------------------------------|---------------------|-------------------------------------------------------------------------------------|
| Start your filter |                |                                                                                     |                     |  |
| Claim No. ▾       | Date of Loss ▾ | Active ▾                                                                            | Claim Type ▾        | Claim Description ▾                                                                 |
| C1610180834       | 12-11-2015     |    | Change Lanes        | Fire explosion lightning thunderbolt                                                |
| C1610181815       | 22-10-2015     |    | Damage while parked | Impact by vehicles animals falling trees aerials or masts                           |
| C1610183050       | 11-09-2015     |    | Fire                | Storm damage to your buildings                                                      |
| C1610183178       | 13-08-2015     |    | Hit Animal          | Reversed into an object                                                             |
| C1610183335       | 16-07-2015     |    | Hit by Object       | Damaged caused by lost load of unknown other party                                  |
| C1610183433       | 19-06-2015     |                                                                                     | Hail                | Reversed into an object                                                             |
| C1610183598       | 23-05-2015     |    | Hit object          | Damage while parked caused by known other party                                     |
| C1610183899       | 12-05-2015     |    | Hit in rear         | Failed to give right of way                                                         |
| C1610184254       | 09-04-2015     |    | Moving load         | Accidental breakage of prescription glasses                                         |
| C1610184280       | 02-04-2015     |                                                                                     | Larceny by hirer    | Iv reversed and tree guard                                                          |
| C1610184484       | 26-03-2015     |  | Mechanical Failure  | Iv and tp collected eachother at carpark                                            |
| C1610184666       | 27-02-2015     |  | Other               | Accidental damage to glass hob cook top                                             |
| C1610184680       | 12-01-2015     |                                                                                     | Park Brake          | Hail - vehicle damage                                                               |
| C1610184681       | 12-12-2014     |                                                                                     | Pedestrian          | Storm damage to roof and ceiling collapsed                                          |
| C1610184732       | 02-11-2014     |  | Reversing           | Water damage to ceilings from leaking hose                                          |
| C1610184844       | 16-10-2014     |                                                                                     | Repossession        | Failure to give right of way-known third party                                      |
| C1610184855       | 03-07-2014     |  | Storm hail          | Theft of contents in open air                                                       |

Minimum Screen 1200px - **THIS LAYOUT IS NO LONGER REQUIRED. USE THE SAME LAYOUT AS FOR 1400px.**

| TIMELINE          | EVENTS         | CLAIMS      | OTHER PARTIES       | ALFRESCO                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                 |           |             |          |
|-------------------|----------------|-------------|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------|-------------|----------|
| Start your filter |                |             |                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| Claim No. ▾       | Date of Loss ▾ | Active ▾    | Claim Type ▾        | Claim Description ▾                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                 |           |             |          |
| C1610180834       | 12-11-2015     |             | Change Lanes        | Fire explosion lightning thunderbolt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                 |           |             |          |
| C1610181815       | 22-10-2015     |             | Damage while parked | <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff;"> <p><b>Policy No.</b><br/>1020040215CMP <span style="float: right;"> ACMS</span></p> <p><b>Risk No.</b><br/>0001</p> <p><b>Risk Description</b><br/>2010 VOLK TRANSPORTER S107AIC</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;"><b>Incurred</b></td> <td style="width: 30%;">\$2451.00</td> <td style="width: 20%;"><b>Paid</b></td> <td style="width: 30%;">\$584.00</td> </tr> </table> </div> | <b>Incurred</b> | \$2451.00 | <b>Paid</b> | \$584.00 |
| <b>Incurred</b>   | \$2451.00      | <b>Paid</b> | \$584.00            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183050       | 11-09-2015     |             | Fire                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183178       | 13-08-2015     |             | Hit Animal          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183335       | 16-07-2015     |             | Hit by Object       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183433       | 19-06-2015     |             | Hail                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183598       | 23-05-2015     |             | Hit object          | Damage while parked caused by known other party                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                 |           |             |          |
| C1610183899       | 12-05-2015     |             | Hit in rear         | Failed to give right of way                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                 |           |             |          |
| C1610184254       | 09-04-2015     |             | Moving load         | Accidental breakage of prescription glasses                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                 |           |             |          |
| C1610184280       | 02-04-2015     |             | Larceny by hirer    | Iv reversed and tree guard                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                 |           |             |          |
| C1610184484       | 26-03-2015     |             | Mechanical Failure  | Iv and tp collected eachother at carpark                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                 |           |             |          |
| C1610184666       | 27-02-2015     |             | Other               | Accidental damage to glass hob cook top                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                 |           |             |          |
| C1610184680       | 12-01-2015     |             | Park Brake          | Hail - vehicle damage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                 |           |             |          |
| C1610184681       | 12-12-2014     |             | Pedestrian          | Storm damage to roof and ceiling collapsed                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                 |           |             |          |
| C1610184732       | 02-11-2014     |             | Reversing           | Water damage to ceilings from leaking hose                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                 |           |             |          |
| C1610184844       | 16-10-2014     |             | Repossession        | Failure to give right of way-known third party                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                 |           |             |          |
| C1610184855       | 03-07-2014     |             | Storm hail          | Theft of contents in open air                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                 |           |             |          |

Minimum Screen 1200px with more expanded - **THIS LAYOUT IS NO LONGER REQUIRED. USE THE SAME LAYOUT AS FOR 1400px.**

| TIMELINE          | EVENTS         | CLAIMS                                                                              | OTHER PARTIES       | ALFRESCO                                           |             |           |                                                                                     |
|-------------------|----------------|-------------------------------------------------------------------------------------|---------------------|----------------------------------------------------|-------------|-----------|-------------------------------------------------------------------------------------|
| Start your filter |                |                                                                                     |                     |                                                    |             |           |  |
| Claim No. ▾       | Date of Loss ▾ | Active ▾                                                                            | Claim Type ▾        | Claim Description ▾                                | Incurred ▾  | Paid ▾    |                                                                                     |
| C1610180834       | 12-11-2015     |    | Change Lanes        | Storm damage - fence pergola & roof                | \$81.82     | \$150.00  | ...                                                                                 |
| C1610181815       | 22-10-2015     |    | Damage while parked | Storm damage to your buildings                     | \$4598      | \$130.00  | ...                                                                                 |
| C1610183050       | 11-09-2015     |    | Fire                | Reversed into an object                            | \$81.82     | \$100.00  | ...                                                                                 |
| C1610183178       | 13-08-2015     |    | Hit Animal          | Damaged caused by lost load of unknown other party | \$3662.96   | \$120.00  | ...                                                                                 |
| C1610183335       | 16-07-2015     |    | Hit by Object       | Reversed into an object                            | \$267.05    | \$1010.00 | ...                                                                                 |
| C1610183433       | 19-06-2015     |                                                                                     | Hail                | Hit an object and no third party involved          | \$3277.46   | \$150.00  | ...                                                                                 |
| C1610183598       | 23-05-2015     |    | Hit object          | Damage while parked caused by known other party    | \$828.29    | \$130.00  | ...                                                                                 |
| C1610183899       | 12-05-2015     |    | Hit in rear         | Hit in rear by a known other party                 | \$245.45    | \$100.00  | ...                                                                                 |
| C1610184254       | 09-04-2015     |    | Moving load         | Failed to give right of way                        | \$277.55    | \$120.00  | ...                                                                                 |
| C1610184280       | 02-04-2015     |                                                                                     | Larceny by hirer    | Cause to be determined                             | \$-187.61   | \$1010.00 | ...                                                                                 |
| C1610184484       | 26-03-2015     |    | Mechanical Failure  | Accidental breakage of prescription glasses        | \$81.82     | \$150.00  | ...                                                                                 |
| C1610184666       | 27-02-2015     |    | Other               | Accidental damage to glass hob cook top            | \$7844.76   | \$130.00  | ...                                                                                 |
| C1610184680       | 12-01-2015     |                                                                                     | Park Brake          | Storm damage to roof and ceiling collapsed         | \$509.11    | \$100.00  | ...                                                                                 |
| C1610184681       | 12-12-2014     |                                                                                     | Pedestrian          | Water damage to ceilings from leaking hose         | \$15693.73  | \$120.00  | ...                                                                                 |
| C1610184732       | 02-11-2014     |  | Reversing           | Failure to give right of way-known third party at  | \$1846.93   | \$1010.00 | ...                                                                                 |
| C1610184844       | 16-10-2014     |                                                                                     | Repossession        | Theft of contents in open air                      | \$0         | \$150.00  | ...                                                                                 |
| C1610184855       | 03-07-2014     |  | Storm hail          | Reversing-known third party reversed into insured  | \$124644.54 | \$130.00  | ...                                                                                 |

Medium Screen 1440px

| TIMELINE          | EVENTS       | CLAIMS | OTHER PARTIES       | ALFRESCO                                          |             |           |     |
|-------------------|--------------|--------|---------------------|---------------------------------------------------|-------------|-----------|-----|
| Start your filter |              |        |                     |                                                   |             |           |     |
| Claim No.         | Date of Loss | Active | Claim Type          | Claim Description                                 | Incurred    | Paid      |     |
| C1610180834       | 12-11-2015   | ●      | Change Lanes        | Storm damage - fence pergola & roof               | \$81.82     | \$150.00  | ... |
| C1610181815       | 22-10-2015   | ●      | Damage while parked | Storm damage to your buildings                    |             |           |     |
| C1610183050       | 11-09-2015   | ●      | Fire                | Reversed into an object                           |             |           |     |
| C1610183178       | 13-08-2015   | ●      | Hit Animal          | Damaged caused by lost load of unknown            |             |           |     |
| C1610183335       | 16-07-2015   | ●      | Hit by Object       | Reversed into an object                           | \$267.05    | \$1010.00 | ... |
| C1610183433       | 19-06-2015   |        | Hail                | Hit an object and no third party involved         | \$3277.46   | \$150.00  | ... |
| C1610183598       | 23-05-2015   | ●      | Hit object          | Damage while parked caused by known other party   | \$828.29    | \$130.00  | ... |
| C1610183899       | 12-05-2015   | ●      | Hit in rear         | Hit in rear by a known other party                | \$245.45    | \$100.00  | ... |
| C1610184254       | 09-04-2015   | ●      | Moving load         | Failed to give right of way                       | \$277.55    | \$120.00  | ... |
| C1610184280       | 02-04-2015   |        | Larceny by hirer    | Cause to be determined                            | \$-187.61   | \$1010.00 | ... |
| C1610184484       | 26-03-2015   | ●      | Mechanical Failure  | Accidental breakage of prescription glasses       | \$81.82     | \$150.00  | ... |
| C1610184666       | 27-02-2015   | ●      | Other               | Accidental damage to glass hob cook top           | \$7844.76   | \$130.00  | ... |
| C1610184680       | 12-01-2015   |        | Park Brake          | Storm damage to roof and ceiling collapsed        | \$509.11    | \$100.00  | ... |
| C1610184681       | 12-12-2014   |        | Pedestrian          | Water damage to ceilings from leaking hose        | \$15693.73  | \$120.00  | ... |
| C1610184732       | 02-11-2014   | ●      | Reversing           | Failure to give right of way-known third party at | \$1846.93   | \$1010.00 | ... |
| C1610184844       | 16-10-2014   |        | Repossession        | Theft of contents in open air                     | \$0         | \$150.00  | ... |
| C1610184855       | 03-07-2014   | ●      | Storm hail          | Reversing-known third party reversed into insured | \$124644.54 | \$130.00  | ... |

**Policy No.**  
1020040215CMP

**Risk No.**  
0001

**Risk Description**  
2010 VOLK TRANSPORTER S107AIC

[ACMS](#)

Medium Screen 1440px with more expanded

| TIMELINE          | EVENTS       | CLAIMS | OTHER PARTIES       | ALFRESCO                                           |          |                               |             |           |                      |
|-------------------|--------------|--------|---------------------|----------------------------------------------------|----------|-------------------------------|-------------|-----------|----------------------|
| Start your filter |              |        |                     |                                                    |          |                               |             |           |                      |
| Claim No.         | Date of Loss | Active | Claim Type          | Claim Description                                  | Risk No. | Risk Description              | Incurred    | Paid      |                      |
| C1610180834       | 12-11-2015   | ●      | Change Lanes        | Storm damage - fence pergola & roof                | 0001     | 2013 VOLKSWAGEN POLO          | \$81.82     | \$150.00  | <a href="#">ACMS</a> |
| C1610181815       | 22-10-2015   | ●      | Damage while parked | Storm damage to your buildings                     | 0002     | 2013 HYUNDAI ELANTRA 355THS   | \$4598      | \$130.00  | <a href="#">ACMS</a> |
| C1610183050       | 11-09-2015   | ●      | Fire                | Reversed into an object                            | 0006     | 2013 MITS TRITON 683TGX       | \$81.82     | \$100.00  | <a href="#">ACMS</a> |
| C1610183178       | 13-08-2015   | ●      | Hit Animal          | Damaged caused by lost load of unknown other party | 0005     | 2013 HOLDEN COLORADO 548TFZ   | \$3662.96   | \$120.00  | <a href="#">ACMS</a> |
| C1610183335       | 16-07-2015   | ●      | Hit by Object       | Reversed into an object                            | 0002     | 2013 MAZD CX-9 288THV         | \$267.05    | \$1010.00 | <a href="#">ACMS</a> |
| C1610183433       | 19-06-2015   |        | Hail                | Hit an object and no third party involved          | 0001     | 2013 VOLKSWAGEN AMAROK 395TII | \$3277.46   | \$150.00  | <a href="#">ACMS</a> |
| C1610183598       | 23-05-2015   | ●      | Hit object          | Damage while parked caused by known other party    | 0001     | 2011 TOYO FJ CRUISER CB66NI   | \$828.29    | \$130.00  | <a href="#">ACMS</a> |
| C1610183899       | 12-05-2015   | ●      | Hit in rear         | Hit in rear by a known other party                 | 0002     | 2012 HOLDEN COMMODORE CB65DA  | \$245.45    | \$100.00  | <a href="#">ACMS</a> |
| C1610184254       | 09-04-2015   | ●      | Moving load         | Failed to give right of way                        | 0006     | 1995 TOYOTA CAMRY CB48WA      | \$277.55    | \$120.00  | <a href="#">ACMS</a> |
| C1610184280       | 02-04-2015   |        | Larceny by hirer    | Cause to be determined                             | 0005     | 2008 HOLDEN COMMODORE 982319  | \$-187.61   | \$1010.00 | <a href="#">ACMS</a> |
| C1610184484       | 26-03-2015   | ●      | Mechanical Failure  | Accidental breakage of prescription glasses        | 0002     | 2005 HOLDEN CRUZE CA03WN      | \$81.82     | \$150.00  | <a href="#">ACMS</a> |
| C1610184666       | 27-02-2015   | ●      | Other               | Accidental damage to glass hob cook top            | 0001     | 2003 TOYOTA COROLLA 566608    | \$7844.76   | \$130.00  | <a href="#">ACMS</a> |
| C1610184680       | 12-01-2015   |        | Park Brake          | Storm damage to roof and ceiling collapsed         | 0001     | 2008 FORD FOCUS CB71NX        | \$509.11    | \$100.00  | <a href="#">ACMS</a> |
| C1610184681       | 12-12-2014   |        | Pedestrian          | Water damage to ceilings from leaking hose         | 0002     | 2004 NISSAN X-TRAIL CB30QM    | \$15693.73  | \$120.00  | <a href="#">ACMS</a> |
| C1610184732       | 02-11-2014   | ●      | Reversing           | Failure to give right of way-known third party at  | 0006     | 2009 FORD RANGER 5543NT       | \$1846.93   | \$1010.00 | <a href="#">ACMS</a> |
| C1610184844       | 16-10-2014   |        | Repossession        | Theft of contents in open air                      | 0005     | 2015 TOYOTA KLUGER CC07HP     | \$0         | \$150.00  | <a href="#">ACMS</a> |
| C1610184855       | 03-07-2014   | ●      | Storm hail          | Reversing-known third party reversed into insured  | 0002     | 2015 SUZUKI SWIFT             | \$124644.54 | \$130.00  | <a href="#">ACMS</a> |

Full Screen



| TIMELINE                                               | EVENTS      | CLAIMS         | OTHER PARTIES | ALFRESCO            |                                                    |            |                               |             |           |                      |
|--------------------------------------------------------|-------------|----------------|---------------|---------------------|----------------------------------------------------|------------|-------------------------------|-------------|-----------|----------------------|
| Start your filter <span style="float: right;">▼</span> |             |                |               |                     |                                                    |            |                               |             |           |                      |
| Policy No. ▼                                           | Claim No. ▼ | Date of Loss ▼ | Active ▼      | Claim Type ▼        | Claim Description ▼                                | Risk No. ▼ | Risk Description ▼            | Incurred ▼  | Paid ▼    |                      |
| 142A017201CMP                                          | C1610180834 | 12-11-2015     | ●             | Change Lanes        | Storm damage - fence pergola & roof                | 0001       | 2013 VOLKSWAGEN POLO          | \$81.82     | \$150.00  | <a href="#">ACMS</a> |
| 1428524916CMP                                          | C1610181815 | 22-10-2015     | ●             | Damage while parked | Storm damage to your buildings                     | 0002       | 2013 HYUNDAI ELANTRA 355THS   | \$4598      | \$130.00  | <a href="#">ACMS</a> |
| 142A074031CMP                                          | C1610183050 | 11-09-2015     | ●             | Fire                | Reversed into an object                            | 0006       | 2013 MITS TRITON 683TGX       | \$81.82     | \$100.00  | <a href="#">ACMS</a> |
| 142A066262CMP                                          | C1610183178 | 13-08-2015     | ●             | Hit Animal          | Damaged caused by lost load of unknown other party | 0005       | 2013 HOLDEN COLORADO 548TFZ   | \$3662.96   | \$120.00  | <a href="#">ACMS</a> |
| 161A008477COM                                          | C1610183335 | 16-07-2015     | ●             | Hit by Object       | Reversed into an object                            | 0002       | 2013 MAZD CX-9 288THV         | \$267.05    | \$1010.00 | <a href="#">ACMS</a> |
| 161A013734COM                                          | C1610183433 | 19-06-2015     |               | Hail                | Hit an object and no third party involved          | 0001       | 2013 VOLKSWAGEN AMAROK 395TII | \$3277.46   | \$150.00  | <a href="#">ACMS</a> |
| 161A005675COM                                          | C1610183598 | 23-05-2015     | ●             | Hit object          | Damage while parked caused by known other party    | 0001       | 2011 TOYO FJ CRUISER CB66NI   | \$828.29    | \$130.00  | <a href="#">ACMS</a> |
| 161A000917COM                                          | C1610183899 | 12-05-2015     | ●             | Hit in rear         | Hit in rear by a known other party                 | 0002       | 2012 HOLDEN COMMODORE CB65DA  | \$245.45    | \$100.00  | <a href="#">ACMS</a> |
| 161A005675COM                                          | C1610184254 | 09-04-2015     | ●             | Moving load         | Failed to give right of way                        | 0006       | 1995 TOYOTA CAMRY CB48WA      | \$277.55    | \$120.00  | <a href="#">ACMS</a> |
| 161A004706TSP                                          | C1610184280 | 02-04-2015     |               | Larceny by hirer    | Cause to be determined                             | 0005       | 2008 HOLDEN COMMODORE 982319  | \$-187.61   | \$1010.00 | <a href="#">ACMS</a> |
| 161R001526COM                                          | C1610184484 | 26-03-2015     | ●             | Mechanical Failure  | Accidental breakage of prescription glasses        | 0002       | 2005 HOLDEN CRUZE CA03WN      | \$81.82     | \$150.00  | <a href="#">ACMS</a> |
| 161A007752TSP                                          | C1610184666 | 27-02-2015     | ●             | Other               | Accidental damage to glass hob cook top            | 0001       | 2003 TOYOTA COROLLA 566608    | \$7844.76   | \$130.00  | <a href="#">ACMS</a> |
| 161A018717COM                                          | C1610184680 | 12-01-2015     |               | Park Brake          | Storm damage to roof and ceiling collapsed         | 0001       | 2008 FORD FOCUS CB71NX        | \$509.11    | \$100.00  | <a href="#">ACMS</a> |
| 161A020038COM                                          | C1610184681 | 12-12-2014     |               | Pedestrian          | Water damage to ceilings from leaking hose         | 0002       | 2004 NISSAN X-TRAIL CB30QM    | \$15693.73  | \$120.00  | <a href="#">ACMS</a> |
| 161A010176COM                                          | C1610184732 | 02-11-2014     | ●             | Reversing           | Failure to give right of way-known third party at  | 0006       | 2009 FORD RANGER 5543NT       | \$1846.93   | \$1010.00 | <a href="#">ACMS</a> |
| 161S005118COM                                          | C1610184844 | 16-10-2014     |               | Repossession        | Theft of contents in open air                      | 0005       | 2015 TOYOTA KLUGER CC07HP     | \$0         | \$150.00  | <a href="#">ACMS</a> |
| 161A021466COM                                          | C1610184855 | 03-07-2014     | ●             | Storm hail          | Reversing-known third party reversed into insured  | 0002       | 2015 SUZUKI SWIFT             | \$124644.54 | \$130.00  | <a href="#">ACMS</a> |

Full Screen with Policy column (This is for the Client Context)

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 03.MVP - Generic - Customer Context - Left Navigation

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>JIRA Link</b></p>        | <ol style="list-style-type: none"> <li>1.  <b>POMNIA-542</b> - Customer Context Navigator - UI (Closed)</li> <li>2.  <b>POMNIA-594</b> - MVP-Generic- Customer Context (Visual) (Closed)</li> </ol>                                                                                                                                                                                                                                                                                                                               |
| <p><b>Description</b></p>      | <p>MVP - Generic - Customer Context - Left Navigation</p> <p>Update the look and feel of the navigation to the new style included</p> <p>Client - selectable, collapsable</p> <p>Policy - selectable, shows risks as multiple lines on the policy section (individual risks are NOT a separate navigation item)</p> <p>Show ⚠ where missing information has been found</p> <p>Show currently selected item (colour/highlight)</p> <p>On IDV, automatically select and highlight the relevant Client or Policy record (if more than a screen, the nav should scroll so the entry is visible)</p> <p>Navigator is scrollable if more than a screen full is present</p> <p>Navigator can be hidden</p> |
| <p><b>Component</b></p>        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <p><b>Product Owner</b></p>    | <p>Tim Y. Rynne</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <p><b>Storycard Status</b></p> | <p><b>SKELETON</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <p><b>Design Status</b></p>    | <p><b>APPROVED</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <p><b>Date Approved</b></p>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <p><b>Story Ready?</b></p>     | <p><b>YES</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description | Notes |
|---|------------------------------------|-------------|-------|
|   |                                    |             |       |
|   |                                    |             |       |
|   |                                    |             |       |


# Story

As a:

I want:

So that:

## Acceptance Criteria

| # | Given                                 | When                         | Then                                                                                                                               |
|---|---------------------------------------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 1 | user passes IDV                       |                              | Show the navigator on the left with client, policy and risk information                                                            |
|   |                                       | there is missing information | Show an indicator <br>When hovered, show detail |
|   |                                       | select client                | highlight selection<br>show client details on right hand context                                                                   |
|   |                                       | selects policy               | highlight selection<br>show policy details on right hand context                                                                   |
|   |                                       | lots of entries returned     | navigator is scrollable                                                                                                            |
|   |                                       | user clicks on collapse all  | all entries collapsed to only show client headings                                                                                 |
|   |                                       | user clicks on expand all    | all policy entries are expanded in all client headings                                                                             |
|   |                                       | user clicks on hide          | navigator hides to the left<br>right component grows to fill the screen                                                            |
|   |                                       | user clicks on show          | right component shrinks to accomodate navigator<br>navigator shows                                                                 |
|   | user selects client on IDV            |                              | auto highlight client entry in navigator<br>auto populate client context on right side                                             |
|   | <del>user selects policy in IDV</del> |                              | <del>auto highlight policy entry in navigator</del><br><del>auto populate policy context on right</del>                            |
|   |                                       |                              |                                                                                                                                    |

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |
|   |          |            |

# Design

20 **Customer Overview**  
YEARS WITH US



**Tim Rynne**  
Allianz Mobile

17508014920TP   
2006 MAZD MAZDA3 LTZ00M

17508014920TP   
21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP   
21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP   
2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW

**Tim Rogan Leddeker**  
BANK WEST

17508014920TP   
2006 MAZD MAZDA3 LTZ00M

17508014920TP   
21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP   
21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP   
2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW



**Tims Mathnew**  
NAB



**17508014920TP**

01



2006 MAZD MAZDA3 LTZ00M

**17508014920TP**

01



21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

**17508014920TP**

09



21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW


**17508014920TP**

09




2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW



20 **Customer Overview**  
YEARS WITH US

 **Tim Rynne**  
Allianz Mobile

17508014920TP     
2006 MAZD MAZDA3 LTZ00M

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21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW



17508014920TP    
2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW

 **Tim Rogan Leddeker**  
BANK WEST

17508014920TP     
2006 MAZD MAZDA3 LTZ00M

17508014920TP    
21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP     
21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP    
2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW



**Tims Mathnew**  
NAB



**17508014920TP**

01



2006 MAZD MAZDA3 LTZ00M

**17508014920TP**

01



21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

**17508014920TP**

09



21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

**17508014920TP**

09



2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW

IDENTIFY & VERIFY

CUSTOMER CONTEXT

20 Customer Overview  
YEARS WITH US


Tim Rynne  
Allianz Mobile

17508014920TP **!** Policy Expiring on 12/12/2015


2006 MAZD MAZDA3 LTZ00M

17508014920TP **!** Credit card Expiring on 12-03-2016

21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP 09 

21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP 09 

2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW

Tim Rogan Leddeker  
BANK WEST

17508014920TP **!** Outstanding Payment \$456

2006 MAZD MAZDA3 LTZ00M

17508014920TP 01 

21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP **!** Current Dishonour \$455

21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP 09 

2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW



**Tims Mathnew**  
NAB



**17508014920TP**

01



2006 MAZD MAZDA3 LTZ00M

**17508014920TP**

01



21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

**17508014920TP**

09



21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

**17508014920TP**

09



2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW

IDENTIFY & VERIFY

CUSTOMER CONTEXT

20 Customer Overview  
YEARS WITH US



Tim Rynne  
MOBILE

Tim Rynne  
CBA

Tim Rynne  
NAB

Tim Rynne  
VODAFONE

Tim Rynne  
OPTUS

Tim Rynne  
SAMSUNG

Tim Rogan Leddeker  
BANK WEST

17508014920TP ! 01 🚗  
2006 MAZD MAZDA3 LTZ00M

17508014920TP 01 🏠  
21 BOLARO AVE GYMEA  
370 FOREST RD, BEXLEY, NSW, AUS

17508014920TP ! 09 🏠  
21 BOLARO AVE GYMEA, NSW  
35 NEW STREET HURSTVILLE, NSW

17508014920TP 09 👤  
2014 DGE JOURNEY ZIP21P  
2014 DGE JOURNEY ZIP21P, NSW



**Tim Rynne**  
APPLE



**Tim Rynne**  
GOOGLE



**Tim Rynne**  
TRAVEL



**Tim Rynne**  
SINGAPORE AIRLINE



20 **Customer Overview**  
YEARS WITH US



**Timm Bose Rynne**  
MOBILE



**Tim K. Rynne**  
CBA



**Tim Xydane Rynne**  
NAB



**Timiky Usketa**  
VODAFONE



**Timginene Awothry**  
OPTUS



**Tim Micheal Jose**  
SAMSUNG



**Tim Rogan Leddeker**  
BANK WEST



**Tim Rynne**  
APPLE



**Tim Rynne**  
GOOGLE



**Tim Rynne**  
TRAVEL



**Tim Rynne**  
SINGAPORE AIRLINE

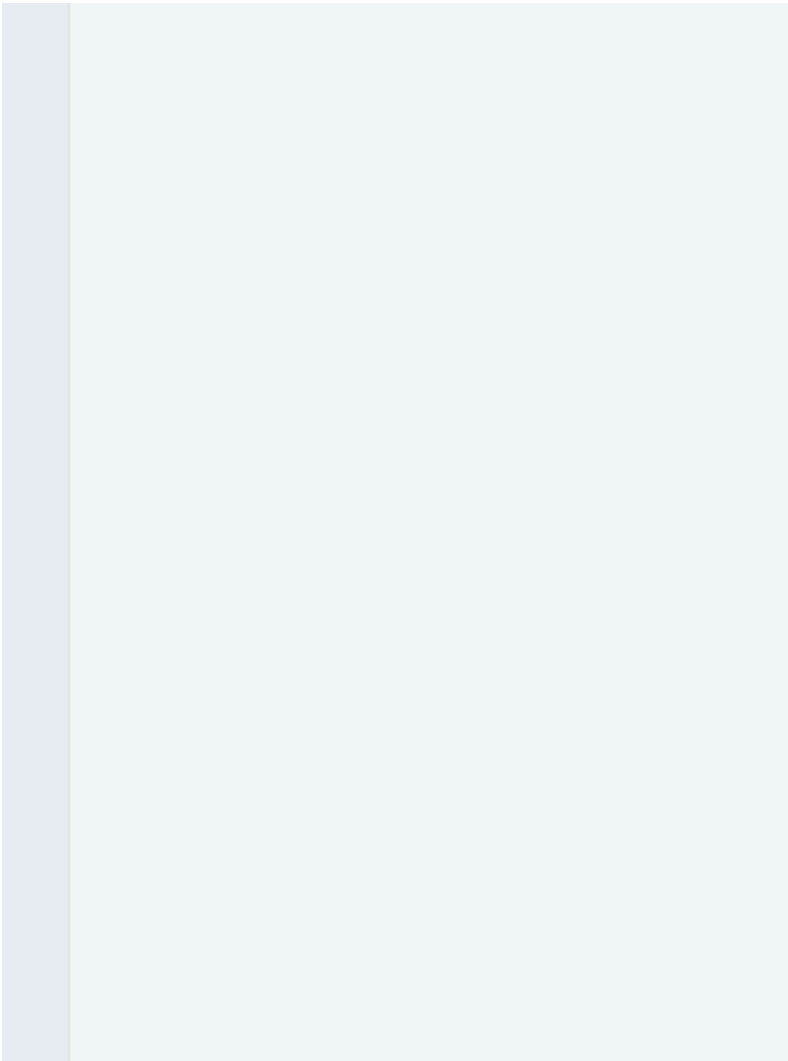




IDENTIFY & VERIFY

CUSTOMER CONTEXT



III EXPAND



**Data Capture (optional)**

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

# 03.MVP-Generic- Disable Screenpop

|                  |                                                                                                                                                                                                                               |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-553</b> - Disable Screenpop (  <b>Closed</b> ) |
| Description      | MVP-Generic- Disable Screenpop                                                                                                                                                                                                |
| Component        |                                                                                                                                                                                                                               |
| Product Owner    | Tim Y. Rynne                                                                                                                                                                                                                  |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                               |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                               |
| Date Approved    |                                                                                                                                                                                                                               |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                    |

## Story

As a: Call Centre Specialist

I want: to be able to disable screenpop

So that: it shows that there is an incoming call, but does not perform a search

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint)           | Description | Notes |
|---|----------------------------------------------|-------------|-------|
|   | Automated Search should be defaulted to TRUE |             |       |
|   |                                              |             |       |
|   |                                              |             |       |

## Acceptance Criteria

| # | Given                                                      | When                                                    | Then                                                                                                                                                  |
|---|------------------------------------------------------------|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The Call Centre Specialist has a Generic instance of Omnia | they click on the settings icon                         | An option is shown to Enable automated search on incoming call                                                                                        |
| 2 |                                                            | The option is Enabled<br>AND there is an incoming call  | Show the incoming caller phone number<br>AND perform a search<br>IF other criteria are met for automated search (blacklist, internal, private number) |
| 3 |                                                            | The option is Disabled<br>AND there is an incoming call | Show the incoming caller phone number<br>AND DO NOT perform a search                                                                                  |

# Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

# Design

notes, mock-ups, diagrams, algorithms, etc

Design with option for status Offline



# Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 03.MVP - Generic - Policy Table in Policy Context

|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <ul style="list-style-type: none"> <li>1.  <b>POMNIA-502</b> - Policy Table in Policy Context - UI (  Closed)</li> <li>2.  <b>POMNIA-601</b> - PolicyTable API (  Closed)</li> <li>3.  <b>POMNIA-544</b> - Add payment details to customercontext - api (  Closed)</li> <li>4.  <b>POMNIA-588</b> - Dishonours - UI (  Open)</li> <li>5.  <b>POMNIA-589</b> - Dishonours - API (  Closed)</li> <li>6.  <b>POMNIA-590</b> - On-Hold Details - UI (  Open)</li> <li>7.  <b>POMNIA-591</b> - Onhold details - API (  Clos ed)</li> </ul> |
| Description      | MVP - Generic - Policy Table in Policy Context                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Component        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Design Status    | <b>APPROVED</b><br><b>ON HOLD AND DISHONOUR REVIEW</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Date Approved    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

NOTE - new content for expiry dates covered in this storycard 04.MVP-Generic- Policy Expiry and Credit Card Expiry Alert in Policy Header

## Story

As a: Call Centre Specialist

I want: to see policy payment and policy risk details

So that: I can potentially answer simple inquiry questions.

## Story Narrative

The purpose of this story is to show the Payment and Risk information for a particular policy. This information is displayed on the Policy Context screen.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Co nstraint) | Description | Notes |
|---|-------------------------------------|-------------|-------|
|---|-------------------------------------|-------------|-------|

|   |            |                                                                                                                                                                                                                                                       |  |
|---|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 1 | Assumption | Policies are All active policies or cancelled/lapsed policies with an expiry date up to 2 years old. Only the latest policy information will be shown for each policy found within the 2 year period ie not 2 years worth of history for each policy. |  |
| 2 | Dependency | Dependent on Payment Data and Risk data being added to the Customer context API                                                                                                                                                                       |  |
| 3 | Assumption | see decision document<br>- no inception from/to date available in POLISY<br>- no dishonour amount, only count available                                                                                                                               |  |

## Acceptance Criteria

| # | Given                                                                                                                                                                                                             | When                                                                                                                      | Then                                                                                                                                                                                                                                                                           | Wireframe Ref # |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| 1 | The Call Centre Specialist has the Generic instance of OMNIA<br><br>AND they have performed a search                                                                                                              | they are viewing the Clients in the <b>Policy Context</b> screen<br><br>AND they click on a Policy in the navigation grid | Display the following policy information, underneath the Policy Header:<br><br><ul style="list-style-type: none"> <li>• Policy number</li> <li>• Calendar icon</li> <li>• Inception date - Expiry Date</li> <li>• Tenure</li> <li>• the text "Total Premium \$xxxx"</li> </ul> | WF01            |
| 2 |                                                                                                                                                                                                                   | there have Co-insured or Third Party associated to the policy                                                             | Display the following:<br><br><ul style="list-style-type: none"> <li>• People icon</li> <li>• Text: "Co-insured with &lt;insert names of the Co-insured&gt;"</li> </ul>                                                                                                        | WF01            |
| 3 | The Call Centre Specialist has the Generic instance of OMNIA<br><br>AND is viewing a Policy in the Policy Context screen                                                                                          | they mouse hover over the 'Tenure' label                                                                                  | Display the following text:<br><br><b>"Original Inception Date dd-mm-yyyy"</b>                                                                                                                                                                                                 | WF02            |
| 4 | The Call Centre Specialist has the Generic instance of OMNIA<br><br>AND is viewing a Policy in the Policy Context screen<br><br>AND the Client is on an Annual Billing Plan (no payment information is available) |                                                                                                                           | <b>DO NOT</b> display the payment icon on the Total Premium                                                                                                                                                                                                                    | WF02            |

|                         |                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                    |                         |       |                 |   |         |  |      |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-------|-----------------|---|---------|--|------|
| 4a                      | <p>The Call Centre Specialist has the Generic instance of OMNIA</p> <p>AND is viewing a Policy in the Policy Context screen</p> <p>AND the Client is on a Billing Plan (payment information is available)</p>                                                                           |                                                                                                                                                                                                                          | <p>Display the payment icon next to the Total Premium</p>                                                                                                                                                                                                                                          | WF03                    |       |                 |   |         |  |      |
| 5                       | <p>The Call Centre Specialist has the Generic instance of OMNIA</p> <p>AND is viewing a Policy in the Policy Context screen</p> <p>AND the Client is on an Instalment Billing Plan (payment information is available)</p> <p>And the Client makes their payments via a Bank Account</p> | <p>they click on the payment icon</p>                                                                                                                                                                                    | <p>Display a Pop up with the following information:</p> <ul style="list-style-type: none"> <li>Account Name</li> <li>Bank Name</li> <li>BSB</li> <li>Account Number</li> <li>Payment Amount \$xxx</li> <li>Payment Date</li> <li>Billed To Date</li> <li>Payment Frequency</li> </ul>              | WF05                    |       |                 |   |         |  |      |
| 6                       | <p>The Call Centre Specialist has the Generic instance of OMNIA</p> <p>AND is viewing a Policy in the Policy Context screen</p> <p>AND the Client is on an Instalment Billing Plan (payment information is available)</p> <p>And the Client makes their payments via a Credit Card</p>  | <p>they click on the payment icon</p>                                                                                                                                                                                    | <p>Display a Pop up with the following information:</p> <ul style="list-style-type: none"> <li>Card Name</li> <li>Card Type</li> <li>Card Number</li> <li>Card Expiry Date</li> <li>Payment Amount \$xxx</li> <li>Billed To Date</li> <li>Payment Frequency</li> </ul>                             | WF05                    |       |                 |   |         |  |      |
| 7                       | <p>The Call Centre Specialist has the Generic instance of OMNIA</p> <p>AND is viewing a Policy in the Policy Context screen</p>                                                                                                                                                         | <p>there is one or more of the following on the policy</p> <ul style="list-style-type: none"> <li>Outstanding Payment</li> <li>Dishonour</li> <li>Hold</li> </ul>                                                        | <p>Display a red exclamation icon next to the 'Total Premium' field</p>                                                                                                                                                                                                                            | WF04                    |       |                 |   |         |  |      |
| 8                       |                                                                                                                                                                                                                                                                                         | <p>there is one or more of the following on the policy</p> <ul style="list-style-type: none"> <li>Outstanding payment</li> <li>Dishonour</li> <li>Hold</li> </ul> <p>AND they click on the red exclamation mark icon</p> | <p>Display a pop up, showing one or more of the below, which relates to the policy:</p> <table border="1" data-bbox="944 1697 1182 1944"> <tr> <td>Outstanding Payment (s)</td> <td>\$xxx</td> </tr> <tr> <td>Dishonour Count</td> <td>x</td> </tr> <tr> <td>On Hold</td> <td></td> </tr> </table> | Outstanding Payment (s) | \$xxx | Dishonour Count | x | On Hold |  | WF08 |
| Outstanding Payment (s) | \$xxx                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                    |                         |       |                 |   |         |  |      |
| Dishonour Count         | x                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                    |                         |       |                 |   |         |  |      |
| On Hold                 |                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                    |                         |       |                 |   |         |  |      |

|    |                                                                                                      |                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |           |
|----|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| 9  | The Call Centre Specialist has the Generic instance of OMNIA<br><br>AND they have performed a search | they are viewing the Clients in the <b>Policy Context</b> screen<br><br>AND they click on a Policy in the navigation grid | Display the Policy Risk information, underneath the Policy/Payment Information:<br><br><ul style="list-style-type: none"> <li>• Grid header with the Text: <b>Risks</b></li> <li>• Grid containing the following Policy Risk information: <ul style="list-style-type: none"> <li>• Risk Description</li> <li>• Sum Insured Total (plus an 'i' icon for the Sum Insured Breakdown - if applicable)</li> <li>• Endorsement Codes</li> <li>• Excess (could be multiple)</li> <li>• Miscellaneous</li> </ul> </li> <li>• Carousel Navigation - showing there are multiple risks associated to the policy and enabling the user to see the previous risk or next risk.</li> <li>• (not sure we need the dots in the carousel - just the next/prev)</li> </ul> | WF01-WF07 |
| 10 |                                                                                                      | there is only a single risk                                                                                               | <b>DO NOT</b> display the Carousel Navigation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | WF07      |
| 11 |                                                                                                      | they click on the 'i' icon next to the Sum Insured                                                                        | displays the Sum Insured breakdown.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | WF06      |

## Data

| Reference | Field                        | Business Rules                                                            |
|-----------|------------------------------|---------------------------------------------------------------------------|
| D1        | Policy Number                | Concatenation of Policy Number and Policy Type                            |
| D2        | Inception date - Expiry date | Format: dd-mm-yyyy                                                        |
| D3        | Tenure                       | Format : X YEARS<br><br>Original Inception Date - Current Policy End Date |
| D4        | Outstanding Payments         | Only display if there is an outstanding payment<br><br>\$ value           |
| D5        | Total Premium                | Total Amount of the Premium<br><br>\$ value                               |
| D6        | Co-insured                   | Includes Co-insured or Third Parties                                      |
| D7        | Account Name                 | Name of the Bank Account Holder                                           |
| D8        | Bank Name                    | Name of the bank                                                          |
| D9        | BSB                          | Numeric - 6 Digits                                                        |

|     |                       |                                                                                                                         |
|-----|-----------------------|-------------------------------------------------------------------------------------------------------------------------|
| D10 | Account Number        | Numeric - 9 Digits                                                                                                      |
| D11 | Payment Amount        | Instalment Amount. Only display for IB<br>\$ value                                                                      |
| D12 | Payment Date          | Format: dd-mm-yyyy                                                                                                      |
| D13 | Billed To Date        | Only display for IB<br>Format: dd-mm-yyyy                                                                               |
| D14 | Payment Frequency     | Only display for IB<br>Periods can be Annual, half-yearly, quarterly, monthly and fortnightly                           |
| D15 | Card Name             | Name of the card holder                                                                                                 |
| D16 | Card Type             | E.g. MasterCard, Visa                                                                                                   |
| D17 | Card Number           | Masked apart from the last 4 digits                                                                                     |
| D18 | Card Expiry Date      | Format: dd-mm-yyyy                                                                                                      |
| D19 | Risk Description      | Risk Address - String                                                                                                   |
| D20 | Sum Insured Total     | \$ value                                                                                                                |
| D21 | Sum Insured Breakdown | Equals the Sum Insured Total<br>Includes what the Sum Insured is for and \$ value                                       |
| D22 | Endorsement Codes     | Could be multiple<br>API will pass a single string                                                                      |
| D23 | Excess                | Could be multiple.<br>API will pass a single string                                                                     |
| D24 | Misc                  | This is anything else which is related to the policy, which is passed in the API.<br>API will pass a single string      |
| D25 | Co-insured            | Includes Co-insured or Third Parties                                                                                    |
| D26 | Dishonour             | Only display if there is a Dishonour flag<br>\$ value                                                                   |
| D27 | Dishonour Total       | Only display if there is a Dishonour flag<br>Number of dishonours the customer has had                                  |
| D28 | On-Hold               | Only display if there is a Hold flag<br>Hold Inc (inception date) - Hold Expiry Date<br>Format: dd-mm-yyyy - dd-mm-yyyy |

## Design


WF01 - Normal View

6330005739DVC  01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

 Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS  < >

|                   |                                                                                                 |        |                 |
|-------------------|-------------------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW)           |        |                 |
| Sum Insured       | \$5,00,00,000  | Excess | \$555           |
| Endoresment Codes | CDR                                                                                             | Misc   | Some More Value |

WF02 - Mouse hover on Tenure Label


6330005739DVC  01/01/2015 — 01/01/2016 6 YEARS

Original Inception Date 01/01/2010

Total Premium \$4555

 Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS  < >

|                   |                                                                                                 |        |                 |
|-------------------|-------------------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW)           |        |                 |
| Sum Insured       | \$5,00,00,000  | Excess | \$555           |
| Endoresment Codes | CDR                                                                                             | Misc   | Some More Value |


WF03 - No Outstanding Payment

6330005739DVC  01/01/2015 — 01/01/2016 6 YEARS

 Total Premium \$4555

 Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS  < >

|                   |                                                                                                   |        |                 |
|-------------------|---------------------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW)             |        |                 |
| Sum Insured       | \$5,00,00,000  | Excess | \$555           |
| Endoresment Codes | CDR                                                                                               | Misc   | Some More Value |

WF04 - Payment icon extended to show Bank Account details

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

WF05 - Payment icon extended to Credit card details

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

**Pieter Meade Schenkan**  
Commonwealth Bank  
0226 963  
02101 1201

**Payment Amount**  
**\$399**

|              |              |                   |
|--------------|--------------|-------------------|
| Payment Date | Bill to Date | Payment Frequency |
| 01/05/2016   | 01/05/2016   | Monthly           |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

**Pieter Meade Schenkan**  
MasterCard  
\*\*\*\* \* 5456  
25/2018

**Payment Amount**  
**\$399**

|              |              |                   |
|--------------|--------------|-------------------|
| Payment Date | Bill to Date | Payment Frequency |
| 01/05/2016   | 01/05/2016   | Monthly           |

WF06 - Risk Details

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endorsement Codes | TSI [\$30,00,000], CSI [\$10,00,000], PE [\$10,00,000]                                | Misc   | Some More Value |

WF07 - Single Risk View

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

**RISKS**

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000                                                                         | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

WF08 - Options for the Outstanding, Dishonour and Hold

See recent amendment to Acceptance Criteria for changes to Design.

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

**RISKS** ● ● ● < >

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000                                                                         | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

**RISKS**

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000                                                                         | Excess | \$555           |
| Endorsement Codes | CDR                                                                                   | Misc   | Some More Value |

**Outstanding Payment(s)** \$369

**Dishonour Count** 5

**Policy Expiring**

**Credit Card Expiring**

**On Hold**

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

! Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

Outstanding Payment(s) **\$369**

---

Dishonour Count **6**

RISKS

|                   |                                              |        |                 |
|-------------------|----------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Syd |        |                 |
| Sum Insured       | \$5,00,00,000 <span>i</span>                 | Excess | \$555           |
| Endoresment Codes | CDR                                          | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

! Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

Outstanding Payment(s) **\$369**

---

On Hold **II**

RISKS

|                   |                                              |        |                 |
|-------------------|----------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Syd |        |                 |
| Sum Insured       | \$5,00,00,000 <span>i</span>                 | Excess | \$555           |
| Endoresment Codes | CDR                                          | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

! Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

Dishonour Count **7**

---

On Hold **II**

RISKS

|                   |                                              |        |                 |
|-------------------|----------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Syc |        |                 |
| Sum Insured       | \$5,00,00,000 <span>i</span>                 | Excess | \$555           |
| Endoresment Codes | CDR                                          | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

Outstanding Payment(s) \$369

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endoresment Codes | CDR                                                                                   | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

Dishonour Count 9

RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endoresment Codes | CDR                                                                                   | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

On Hold




RISKS

|                   |                                                                                       |        |                 |
|-------------------|---------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW) |        |                 |
| Sum Insured       | \$5,00,00,000 <i>i</i>                                                                | Excess | \$555           |
| Endoresment Codes | CDR                                                                                   | Misc   | Some More Value |


6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

 Total Premium \$4555

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae

|                        |                                                                                     |
|------------------------|-------------------------------------------------------------------------------------|
| Outstanding Payment(s) | \$369                                                                               |
| Dishonour Count        | 5                                                                                   |
| Policy Expiring        |  |
| Credit Card Expiring   |  |
| On Hold                |  |

RISKS


|                   |                                                                                                 |      |  |
|-------------------|-------------------------------------------------------------------------------------------------|------|--|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Syd                                                    |      |  |
| Sum Insured       | \$5,00,00,000  | Exce |  |
| Endorsement Codes | CDR                                                                                             | Misc |  |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS

Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS


|                   |                                                                                                   |        |                 |
|-------------------|---------------------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW)             |        |                 |
| Sum Insured       | \$5,00,00,000  | Excess | \$555           |
| Endorsement Codes | CDR                                                                                               | Misc   | Some More Value |

6330005739DVC 01/01/2015 — 01/01/2016 6 YEARS



Co-insured with Angela Ern, Engas Dev, Jhon Doe, Nevsi Tata, Notaina Kae, Kohleo Sow and William Tho

RISKS



|                   |                                                                                                   |        |                 |
|-------------------|---------------------------------------------------------------------------------------------------|--------|-----------------|
| Risk Description  | Unit 12, 1238-445 Market Street, Sydney, Sydney, NSW 2207, Australia, Australia (NSW)             |        |                 |
| Sum Insured       | \$5,00,00,000  | Excess | \$555           |
| Endorsement Codes | CDR                                                                                               | Misc   | Some More Value |

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |



# 04.Generic - UI Design - review of Search UI

|                  |                                                                                                                                                                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | 1.  <b>POMNIA-620</b> - UI Design - review of Search UI (  Closed) |
| Description      |                                                                                                                                                                                                                                        |
| Component        |                                                                                                                                                                                                                                        |
| Product Owner    | Tim Y. Rynne                                                                                                                                                                                                                           |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                        |
| Design Status    | <b>APPROVED</b><br><b>MINOR CHANGES UPDATED</b>                                                                                                                                                                                        |
| Date Approved    |                                                                                                                                                                                                                                        |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                             |

## Story

As a: System

I want: to have a nicer search UI

So that: it's simple and easy to use

## Assumptions, Dependencies, Constraints


| # | (Assumption Dependency Constraint) | Description | Notes |
|---|------------------------------------|-------------|-------|
|   |                                    |             |       |

update the Search UI

- white/blue
- reduce width
- reduce height
- ensure different design sizes etc

## Acceptance Criteria

| # | Given                  | When                                                                                                                                                        | Then                                                                       |
|---|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
|   | the IDV screen is open | Enter value in Firstname, Surname or postcode<br>AND at least 2 of the 3 are present<br>AND Search is clicked<br>OR enter is pressed from 1 of the 3 fields | perform search on all available items from Firstname, Surname and Postcode |

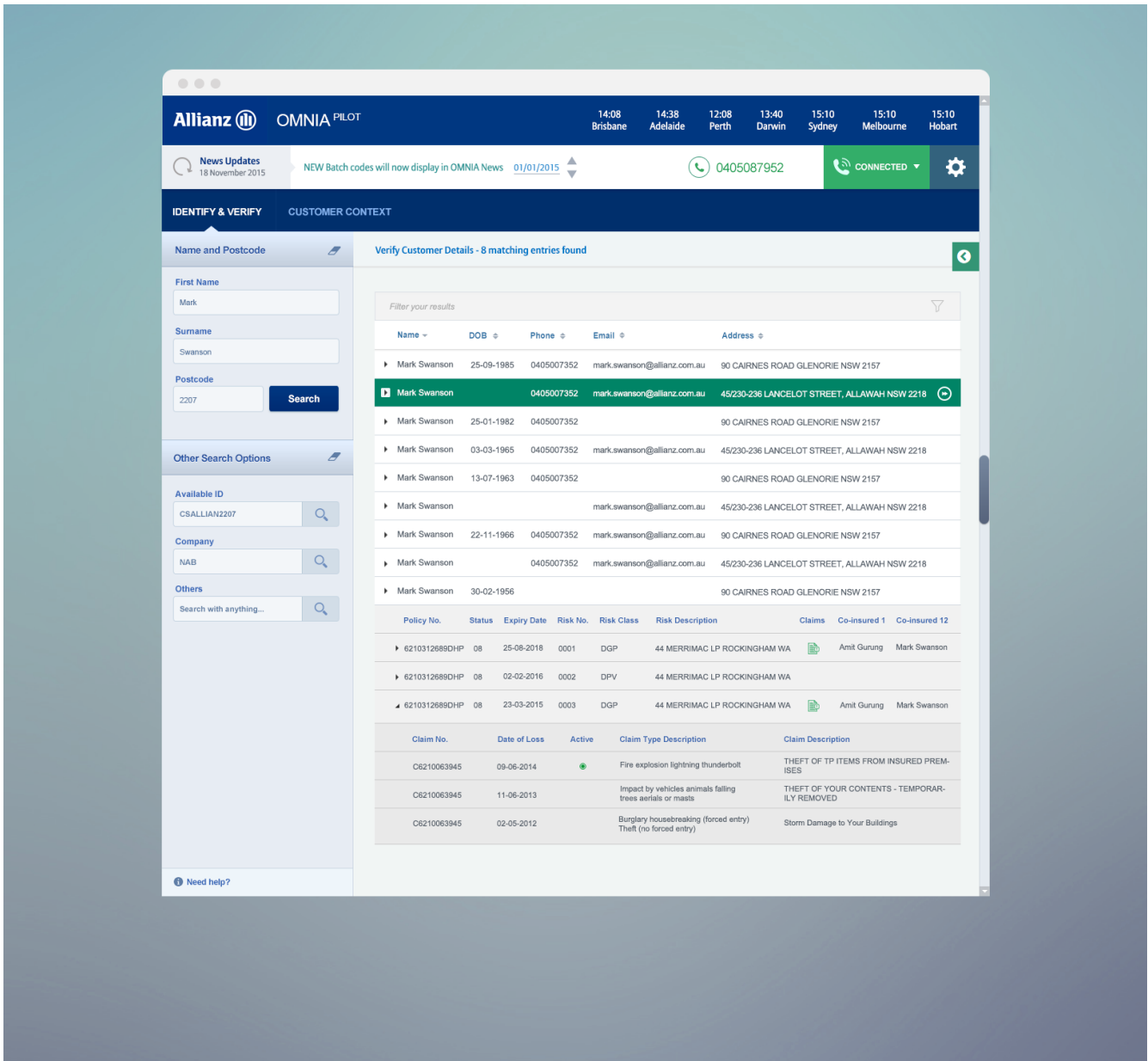
|  |                                                                                                      |                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                     |
|--|------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |                                                                                                      | <p>Enter values in Firstname, Surname and postcode</p> <p>AND only 1 item is selected</p> <p>AND search is clicked</p> <p>OR enter is pressed from 1 of the 3 fields</p> | <p>Show error message informing user the at least 2 options are required</p> <p>"Please enter values in at least 2 search fields"</p>                                                                                                                                                                                                               |
|  |                                                                                                      | <p>Enter value in Available ID</p> <p>AND click on the associated Search icon</p> <p>OR press enter</p>                                                                  | perform search on Available ID                                                                                                                                                                                                                                                                                                                      |
|  |                                                                                                      | <p>Enter value in Company Name</p> <p>AND click on the associated Search Icon</p> <p>OR press enter</p>                                                                  | perform search on Company Name                                                                                                                                                                                                                                                                                                                      |
|  |                                                                                                      | <p>Enter value in Other</p> <p>AND click on the associated Search icon</p> <p>OR press enter</p>                                                                         | perform search on Other                                                                                                                                                                                                                                                                                                                             |
|  |                                                                                                      | <p>Press the search related to Available ID, Company Name or Other</p> <p>AND there is no text in the textbox to search</p>                                              | <p>do NOT perform the search</p> <p>show error message - "Please enter a search term" for the related field</p>                                                                                                                                                                                                                                     |
|  |                                                                                                      | press the Clear icon                                                                                                                                                     | <p>clear all search fields</p> <p>clear the search results table</p> <p>clear the filter</p> <p><b>NOTE - the design shows 2 Clear icons, we only need 1 at the top of the first section which will clear all fields and results</b></p>                                                                                                            |
|  |                                                                                                      | press the  Need Help                                                                  | <p>Show a panel at the bottom of the screen that will have information about how to search</p> <p>(slide up/appear from the bottom of the screen)</p> <p>(allow scrolling if the panel content is too big)</p> <p><b>NOTE - content for the panel can be left blank at this stage. It will be provided as html to be displayed in the panel</b></p> |
|  |  has been pressed | press the  icon again, or the X in the corner                                         | close the panel that is showing the information                                                                                                                                                                                                                                                                                                     |
|  |                                                                                                      |                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                     |
|  | A search is performed                                                                                | The search criteria is passed to the api                                                                                                                                 | ensure that the values are trimmed (front and back)                                                                                                                                                                                                                                                                                                 |
|  | A search is performed                                                                                | The search event is written to the Event tables                                                                                                                          | ensure that the values are trimmed (front and back)                                                                                                                                                                                                                                                                                                 |
|  |                                                                                                      |                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                     |

# Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

# Design

notes, mock-ups, diagrams, algorithms, etc



**Allianz** OMNIA PILOT

14:08 Brisbane 14:38 Adelaide 12:08 Perth 13:40 Darwin 15:10 Sydney 15:10 Melbourne 15:10 Hobart

News Updates 18 November 2015 NEW Batch codes will now display in OMNIA News 01/01/2015 0405087952 CONNECTED

**IDENTIFY & VERIFY** CUSTOMER CONTEXT

Name and Postcode Verify Customer Details - 8 matching entries found

First Name: Mark  
Surname: Swanson  
Postcode: 2207 **Search**

Available ID: CSALLIAN2207  
Company: NAB  
Others: Search with anything...

Need help?

Two of the first three fields must be entered before searching.  
Wildcard searching allowed - \*, -, ?  
Available ID - Includes policy number, registration number (vehicle), replacement policy number, claim number, client id.  
Other - anything can be entered in this field.  
Company - Company name or Trading

Filter your results

| Name           | DOB        | Phone      | Email                       | Address                                      |
|----------------|------------|------------|-----------------------------|----------------------------------------------|
| ▶ Mark Swanson | 25-09-1985 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 25-01-1982 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 03-03-1965 | 0405007352 | mark.swanson@allianz.com.au | 45/230-236 LANCELOT STREET, ALLAWAH NSW 2218 |
| ▶ Mark Swanson | 13-07-1963 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 22-11-1966 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |
| ▶ Mark Swanson | 30-02-1956 | 0405007352 | mark.swanson@allianz.com.au | 90 CAIRNES ROAD GLENORIE NSW 2157            |

Please enter values in at least 2 search fields.

| Policy No.      | Status | Expiry Date | Risk No. | Risk Class | Risk Description             | Claims | Co-insured 1 | Co-insured 12 |
|-----------------|--------|-------------|----------|------------|------------------------------|--------|--------------|---------------|
| ▶ 6210312688DHP | 08     | 25-08-2018  | 0001     | DGP        | 44 MERRIMAC LP ROCKINGHAM WA | 📄      | Amit Gurung  | Mark Swanson  |
| ▶ 6210312688DHP | 08     | 02-02-2016  | 0002     | DPV        | 44 MERRIMAC LP ROCKINGHAM WA |        |              |               |
| ▶ 6210312688DHP | 08     | 23-03-2015  | 0003     | DGP        | 44 MERRIMAC LP ROCKINGHAM WA | 📄      | Amit Gurung  | Mark Swanson  |

| Claim No.   | Date of Loss | Active | Claim Type Description                                        | Claim Description                            |
|-------------|--------------|--------|---------------------------------------------------------------|----------------------------------------------|
| C6210063945 | 09-06-2014   | 🟢      | Fire explosion lightning thunderbolt                          | THEFT OF TP ITEMS FROM INSURED PREMISES      |
| C6210063945 | 11-06-2013   |        | Impact by vehicles animals falling trees aerials or masts     | THEFT OF YOUR CONTENTS - TEMPORARILY REMOVED |
| C6210063945 | 02-05-2012   |        | Burglary housebreaking (forced entry) Theft (no forced entry) | Storm Damage to Your Buildings               |

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 04.MVP-Generic-Client Context-Policy Groups View

|                  |                                                                                                                                                                                                                                                                                      |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <ul style="list-style-type: none"> <li>1.  <b>POMNIA-583</b> - Policy type grouping - UI (  ) <span style="float: right;">CI</span><br/>osed)</li> <li>2.  <b>POMNIA-610</b> - Policy type grouping - API (  )<br/>Closed)</li> </ul>                                                |
| Description      | <p>03.MVP - Generic - Client Context Risks View</p> <p>Show a tabular/visual view of policies held for the client based on a breakdown into the top policy categories</p> <p>show the count for each type</p> <p>grey out the icons if they don't have any policies of that type</p> |
| Component        |                                                                                                                                                                                                                                                                                      |
| Product Owner    | Tim Y. Rynne                                                                                                                                                                                                                                                                         |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                      |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                                      |
| Date Approved    |                                                                                                                                                                                                                                                                                      |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                           |

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description | Notes |
|---|------------------------------------|-------------|-------|
|   |                                    |             |       |
|   |                                    |             |       |
|   |                                    |             |       |

## Story

As a:

I want:

So that:

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

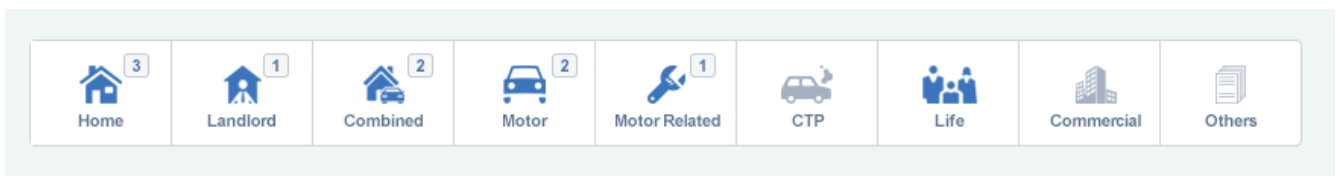
|   |                                  |                                                 |                                                          |
|---|----------------------------------|-------------------------------------------------|----------------------------------------------------------|
| 1 | the user enters a client context | viewing the client overview                     | show a list of the top policy groups                     |
|   |                                  | the client has one or more policies of the type | show the count of policies held for the type in the icon |
|   |                                  | the client does NOT have a policy of the type   | grey out the icon                                        |

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |
|   |          |            |

## Design

notes, mock-ups, diagrams, algorithms, etc




Icons with/without colour. size 92x68px without border.



## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

# 06.MVP-Claims-Screenpop on 3rd party phone numbers

|                  |                                                                                                                                                                                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        | <div style="border: 1px solid #ccc; padding: 5px;">  <b>POMNIA-442</b> - Weekly ETL From ACMS of Third Party Phone Contact Details for Screenpop (→👤 <b>Open</b>)<br/>           1. )         </div> |
| Description      | <p>For claims screen pop, also use the database of 3rd party phone numbers and return the client who owns the claim for the 3rd party.</p> <p>ideally, we would have some sort of indicator telling us that the client record was matched on 3rd party info, not client info...</p>   |
| Component        |                                                                                                                                                                                                                                                                                       |
| Product Owner    | Tim Y. Rynne                                                                                                                                                                                                                                                                          |
| Storycard Status | <b>OPEN</b>                                                                                                                                                                                                                                                                           |
| Design Status    | <b>OPEN</b>                                                                                                                                                                                                                                                                           |
| Date Approved    |                                                                                                                                                                                                                                                                                       |
| Story Ready?     | <b>NO</b>                                                                                                                                                                                                                                                                             |

## Story

As a: Call Centre Specialist

I want: to be able to be able to go directly to ACMS from the Claims tab

So that: I can easily access further information about the claim to help the Customer.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                              | Notes |
|---|------------------------------------|--------------------------------------------------------------------------|-------|
| 1 | Dependency                         | The Claims tab story has been completed (03.MVP - Generic - Claims Tab). |       |
| 2 | Dependency                         | Redirect to ACMS in Lotus Notes client needs to be completed             |       |
|   |                                    |                                                                          |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

|   |                                                                                                                                                                                                                          |                                     |                              |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|------------------------------|
| 1 | The Call Centre Specialist has the Generic Instance of Omnia<br><br>AND they have performed a search<br><br>AND they are viewing the Policy Context OR the Client Context<br><br>OR is viewing the Client Context screen | they click on the <b>CLAIMS</b> tab | Display an icon link to ACMS |
| 2 |                                                                                                                                                                                                                          | they click on the ACMS link         | Navigate them to ACMS        |
| 3 |                                                                                                                                                                                                                          |                                     |                              |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

notes, mock-ups, diagrams, algorithms, etc

Standard Screen below 1440px

| TIMELINE          | EVENTS         | CLAIMS   | OTHER PARTIES       | ALFRESCO                               |            |           |   |
|-------------------|----------------|----------|---------------------|----------------------------------------|------------|-----------|---|
| Start your filter |                |          |                     |                                        |            |           |   |
| Claim No. ▾       | Date of Loss ▾ | Active ▾ | Claim Type ▾        | Claim Description ▾                    | Incurred ▾ | Paid ▾    |   |
| C1610180834       | 12-11-2015     |          | Change Lanes        | Storm damage - fence pergola & roof    | \$81.82    | \$150.00  | ⋮ |
| C1610181815       | 22-10-2015     |          | Damage while parked | Storm damage to your buildings         |            |           | ⋮ |
| C1610183050       | 11-09-2015     |          | Fire                | Reversed into an object                |            |           | ⋮ |
| C1610183178       | 13-08-2015     |          | Hit Animal          | Damaged caused by lost load of unknown |            |           | ⋮ |
| C1610183335       | 16-07-2015     |          | Hit by Object       | Reversed into an object                | \$207.00   | \$1010.00 | ⋮ |

Policy No.  
1020040215CMP

Risk No.  
0001

Risk Description  
2010 VOLK TRANSPORTER S107AIC



Screen above 1440px

|             |            |  |      |                         |      |                         |         |          |  |
|-------------|------------|--|------|-------------------------|------|-------------------------|---------|----------|--|
| C1610183050 | 11-09-2015 |  | Fire | Reversed into an object | 0006 | 2013 MITS TRITON 683TGX | \$81.82 | \$100.00 |  |
|-------------|------------|--|------|-------------------------|------|-------------------------|---------|----------|--|

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 08.MVP - Generic - Customer Timeline

|                  |                                                                                                                                                                                                                                            |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <a href="#">POMNIA-449 - Customer Overview Timeline - UI</a> (  Open) |
| Description      | MVP - Generic -Customer Timeline Component -UI                                                                                                                                                                                             |
| Component        |                                                                                                                                                                                                                                            |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                  |
| Storycard Status | <div style="background-color: green; color: white; padding: 2px; display: inline-block;">APPROVED</div><br><div style="border: 1px solid orange; padding: 2px; display: inline-block;">SPLIT UI/API</div>                                  |
| Design Status    | <div style="background-color: red; color: white; padding: 2px; display: inline-block;">AWAITING APPROVAL</div>                                                                                                                             |
| Date Approved    |                                                                                                                                                                                                                                            |
| Story Ready?     | <div style="background-color: red; color: white; padding: 2px; display: inline-block;">NO</div>                                                                                                                                            |

## Story

As an: Contact Centre Specialist

I want: to be able to view a Timeline for a Customer

So that: I can see an overview of all of the events that have occurred.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                             | Notes |
|---|------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | This is a generic component                                                                                             |       |
| 2 | Assumption                         | The timeline will show all Customer events for the previous 2 years                                                     |       |
| 3 | Dependency                         | The API story needs to be completed (Please refer to 03. MVP - Generic - Customer Timeline - API)                       |       |
| 4 | Dependency                         | <del>The new column EVENT_FLAG, needs to be added in the INTERACTION_EVENTS table before the API can be completed</del> |       |
| 5 | Assumption                         | Omnia Event priority flag will be covered in a later story (please refer to 99.MVP-Generic-Priority Flag for Events).   |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

|   |                                                                                                                          |                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---|--------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The Contact Centre Specialist has logged into a Generic instance of Omnia<br><br><b>AND</b> they have performed a search | they are viewing the <b>Client Context</b>                                                                                                       | At the top of the navigation grid, display the following: <ul style="list-style-type: none"> <li>• Customer Name</li> <li>• Date of Birth</li> <li>• <b>Overview</b> button</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |
| 2 |                                                                                                                          | they click on the Customer Overview in the navigational grid                                                                                     | Display a timeline table, showing the chronological events for the customer for the previous 2 years.<br><br>These events are: <ul style="list-style-type: none"> <li>• CIS Notes - (<i>Company 6</i>)</li> <li>• POLISY Notes - (<i>Company 1</i>)</li> <li>• Event - Omnia Event (<i>show anything with the prefix TX_E</i>)</li> </ul> For each of the events, show the following information: <ul style="list-style-type: none"> <li>• Priority Flag (see Data Capture section)</li> <li>• Creation date/time</li> <li>• Summary</li> <li>• Description</li> </ul> |
| 3 |                                                                                                                          |                                                                                                                                                  | <b>AND</b> display Sort icons next to each of the column headings for each of the fields in the timeline                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 4 |                                                                                                                          |                                                                                                                                                  | <b>AND</b> display a "Filter" field above the timeline table                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 5 |                                                                                                                          |                                                                                                                                                  | <b>AND</b> ensure that event items are not duplicated between POLISY and Omnia events                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 6 |                                                                                                                          | they click on the Customer Overview in the navigational grid<br><br><b>AND</b> they click on the sort icon for one of the fields in the timeline | Sort the data into ascending or descending order                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 7 |                                                                                                                          | they click on the Customer Overview in the navigational grid<br><br><b>AND</b> they enter text in the Filter field                               | this will filter the records in the timeline table<br><br>(Able to match the value in any of the columns).                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 8 |                                                                                                                          |                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Data Capture (optional)

| Reference | Field         | Rules                                                                                                          |
|-----------|---------------|----------------------------------------------------------------------------------------------------------------|
| D1        | Date          | Display the date on one line, not over 2 lines.<br><br>Format: dd-mm-yyyy HH:MM                                |
| D2        | Policy Number | Alphanumeric (includes the policy product which is the last 3 characters of the policy number e.g. com or dev) |

|    |               |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D3 | Priority Flag | <p>This is not applicable for POLISY Notes or Omnia Events</p> <p><del>This relates to the EVENT_FLAG (new column in INTERACTION_EVENTS table) for Event</del></p> <p>Only show PRI (priority) flags, not CON.</p> <p>- (API - if PRI for CIS, <del>or Priority for Event</del>, then flag="P", if POLISY, or Omnia Event or CON for CIS, then flag="").</p> <p>- (UI - if flag="P", show visual indicator of priority - this needs to be sortable)</p> |
| D4 | Summary       | <p>This will be blank for POLISY Notes</p> <p>For CIS Notes - This is taken from the 'Description' field in POLISY</p> <p>For Omnia Event - This is the Event Type</p>                                                                                                                                                                                                                                                                                  |
| D5 | Description   | <p>POLISY Notes - It will be the information from the General Page Notes</p> <p>CIS Notes - this is taken from the 'Detail' field in POLISY</p> <p>Omnia Event - This is the Event Notes</p>                                                                                                                                                                                                                                                            |

## Design



## Customer Events



Start your filter



| Date ▾                                                                                              | Summary ▾                 | Description ▾                                              |
|-----------------------------------------------------------------------------------------------------|---------------------------|------------------------------------------------------------|
| 12-11-2015 15:06                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |
| 22-10-2015 14:06                                                                                    | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|  11-09-2015 13:52  | AOP_101_General_Enquiries |                                                            |
| 13-08-2015 12:46                                                                                    | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test           |
| 16-07-2015 11:26                                                                                    | AOP_101_General_Enquiries | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! |
| 19-06-2015 11:13                                                                                    | AOP_105A_Cancellations    |                                                            |
| 23-05-2015 11:11                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
| 12-05-2015 10:09                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |
| 09-04-2015 9:00                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
|  02-04-2015 8:19 | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |
| 26-03-2015 7:07                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
| 27-02-2015 6:09                                                                                     | AOP_101_General_Enquiries |                                                            |
| 12-01-2015 5:12                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
| 12-12-2014 4:15                                                                                     | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |
|  02-11-2014 3:12 | AOP_101_General_Enquiries |                                                            |
| 16-10-2014 2:18                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |
| 03-07-2014 1:06                                                                                     | AOP_101_General_Enquiries |                                                            |

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |



# 08.MVP-Generic-Double Click on Policy to Continue to Context

|                  |                                                                                     |
|------------------|-------------------------------------------------------------------------------------|
| JIRA Link        | <b>POMNIA-558</b> - Double click on Policy to Continue to Context ( <b>Closed</b> ) |
| Description      |                                                                                     |
| Component        |                                                                                     |
| Product Owner    | Tim Y. Rynne                                                                        |
| Storycard Status | <b>APPROVED</b>                                                                     |
| Design Status    | N/A                                                                                 |
| Date Approved    |                                                                                     |
| Story Ready?     | <b>YES</b>                                                                          |

## Story

As a: Call Centre Specialist

I want: to be able to double click on the Policy from the IDV search results

So that: I can be taken straight through to the policy context quickly

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description | Notes |
|---|------------------------------------|-------------|-------|
|   |                                    |             |       |
|   |                                    |             |       |
|   |                                    |             |       |

## Acceptance Criteria

| # | Given                                                                                                                                                                                                                                                                                                      | When                          | Then                                                                   |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|------------------------------------------------------------------------|
| 1 | <p>The Call Centre Specialist is logged into the Generic instance of Omnia</p> <p><b>AND</b> they have performed a Search OR screenpop has occurred</p> <p><b>AND</b> they have clicked on the drilldown icon, next to a client in the Search results</p> <p><b>AND</b> the Client has active policies</p> | they double click on a policy | Navigate the user to the Policy Context screen for the selected policy |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

notes, mock-ups, diagrams, algorithms, etc

Verify Customer Details - 8 matching entries found

Start your filter

| Name                | DOB               | Phone             | Email                              | Address                                             |
|---------------------|-------------------|-------------------|------------------------------------|-----------------------------------------------------|
| Mark Swanson        | 25-09-1985        | 0405007352        | mark.swanson@allianz.com.au        | 90 CARNES ROAD GLENORE NSW 2157                     |
| Mark Swanson        |                   | 0405007352        | mark.swanson@allianz.com.au        | 45230-236 LANCELOT STREET, ALLAWAH NSW 2218         |
| Mark Swanson        | 25-01-1982        | 0405007352        |                                    | 90 CARNES ROAD GLENORE NSW 2157                     |
| <b>Mark Swanson</b> | <b>03-03-1965</b> | <b>0405007352</b> | <b>mark.swanson@allianz.com.au</b> | <b>45/230-236 LANCELOT STREET, ALLAWAH NSW 2218</b> |
| Mark Swanson        | 13-07-1963        | 0405007352        |                                    | 90 CARNES ROAD GLENORE NSW 2157                     |
| Mark Swanson        |                   |                   | mark.swanson@allianz.com.au        | 45230-236 LANCELOT STREET, ALLAWAH NSW 2218         |
| Mark Swanson        | 22-11-1986        | 0405007352        | mark.swanson@allianz.com.au        | 90 CARNES ROAD GLENORE NSW 2157                     |
| Mark Swanson        |                   | 0405007352        | mark.swanson@allianz.com.au        | 45230-236 LANCELOT STREET, ALLAWAH NSW 2218         |
| Mark Swanson        | 30-02-1956        |                   |                                    | 90 CARNES ROAD GLENORE NSW 2157                     |


| Policy No.    | Status | Expiry Date | Risk No. | Risk Class | Risk Description                                             | Claims | Co-insured       | Co-insured2         |
|---------------|--------|-------------|----------|------------|--------------------------------------------------------------|--------|------------------|---------------------|
| 6210312689DHP | 06     | 25-09-2018  | 0001     | DGP        | Unit 12,1238-244 Market Street, Sydney                       |        | Andi Gunung      | Lokeatara Paribasan |
| 6210312689DHP | 06     | 02-02-2016  | 0002     | DPV        | Unit 12,1238-244 Market Street, Sydney New South Wales, 2294 |        |                  | Sahudikamasa Emaika |
| 6210312689DHP | 06     | 23-03-2015  | 0003     | DGP        |                                                              |        | Dadi Mui Seseano | Sahudikamasa Emaika |

| Claim No.   | Date of Loss | Active                               | Claim Type                                                    | Claim Description                            |
|-------------|--------------|--------------------------------------|---------------------------------------------------------------|----------------------------------------------|
| 06210063945 | 09-06-2014   | <span style="color: green;">●</span> | Fire explosion lightning thunderbolt                          | THEFT OF TP ITEMS FROM INSURED PREMISES      |
| 06210063945 | 11-06-2013   |                                      | Impact by vehicles animals falling trees aerials or masts     | THEFT OF YOUR CONTENTS - TEMPORARILY REMOVED |
| 06210063945 | 02-05-2012   |                                      | Burglary housebreaking (forced entry) Theft (no forced entry) | Storm Damage to Your Buildings               |

# Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 08.MVP- Generic-Telephony-Call Transfer

|                  |                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <a href="#">POMNIA-527 - Generic-Telephony- Call Transfer (→ Open)</a> |
| Description      | Generic-Telephony-Call Transfer                                                                                                                          |
| Component        | T-Telephony                                                                                                                                              |
| Product Owner    | Tim Rynne                                                                                                                                                |
| Storycard Status | <b>OPEN</b>                                                                                                                                              |
| Design Status    | <b>AWAITING APPROVAL</b>                                                                                                                                 |
| Date Approved    |                                                                                                                                                          |
| Story Ready?     | <b>NO</b>                                                                                                                                                |

## Story

As a: Call Centre Specialist

I want: to transfer a call to another Claims Consultant and keep the same UCID

So that: I can see all actions against the Client record, related to the call or the search performed

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                                   | Notes |
|---|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | The Call Centre Specialist is working from an inbound call                                                                    |       |
| 2 | Assumption                         | The Call Centre Specialist has completed IDV for the customer and is transferring the call whilst on the Context screen       |       |
| 3 | Assumption                         | The Call Centre Specialist that is getting the call transferred to them has Omnia                                             |       |
| 4 | Assumption                         | Both parties can access the same Omnia interaction at the same time if they wish                                              |       |
| 5 | Assumption                         | Conference calls retain the UCID so that it can be processed as a transfer within Omnia - <b>What exactly does this mean?</b> |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

|   |                                                                                                                                                                                                                                                                                                               |                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <p>The Call Centre Specialist (User 1) has the Generic instance of Omnia</p> <p>AND is connected to the telephony system (AES)</p> <p>AND has completed IDV for the customer</p> <p>AND is on the Context screen</p> <p>AND they have UCID assigned to the call</p> <p>AND they want to transfer the call</p> | <p>they click on <b>Call transfer</b></p> <p>Where?</p>                                        | <p>Display a Modal with the following information:</p> <ul style="list-style-type: none"> <li>• Header: TRANSFER CALL</li> <li>• Text: Caller Details</li> <li>• Call details prepopulated</li> <li>• Text: Reason for Transfer</li> <li>• Blank field for the user to enter the reason for transfer</li> <li>• Text: Call Transfer by &lt;caller name&gt;</li> <li>• 'Transfer' button</li> <li>• 'Cancel' button</li> <li>• Checkbox with the text "Customer is identified" (default is checkbox is ticked)</li> </ul> |
| 2 |                                                                                                                                                                                                                                                                                                               | <p>they enter the phone number and reason for the transfer</p> <p>where?</p>                   | <p>Click on <b>Transfer</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 3 | <p>There is another Call Centre Specialist (User 2) who is logged onto OMNIA</p> <p>AND is not on a call/interaction and is waiting for new work</p>                                                                                                                                                          | <p>the call has been transferred by User 1</p>                                                 | <p>Screenpop will be displayed as screen overlay on the IDV screen, advising CC2 that there is an internal transfer</p>                                                                                                                                                                                                                                                                                                                                                                                                  |
| 4 |                                                                                                                                                                                                                                                                                                               | <p>User 2 accepts the call</p>                                                                 | <p>Display the Customer context screen based on the client id</p> <p>Would the context screen then be automatically displayed?</p> <p>AND retain the UCID</p>                                                                                                                                                                                                                                                                                                                                                            |
| 5 |                                                                                                                                                                                                                                                                                                               | <p>User 2 declines the transfer</p>                                                            | <p>The User 2's IDV screen would be blank as per normal</p> <p>AND Would User 1 get a message to say that User 2 declined the call?</p>                                                                                                                                                                                                                                                                                                                                                                                  |
| 6 | <p>There is another Call Centre Specialist (User 2) who is logged onto OMNIA</p> <p>AND is in the middle of an interaction</p>                                                                                                                                                                                | <p>User 2 is viewing the Context screen</p> <p>AND the call has been transferred by User 1</p> | <p>User 2 is notified that there is an incoming transfer <b>What happens? Does screenpop flash for example</b></p> <p>User 2 will complete their current interaction</p> <p>AND go to the IDV screen and accept the transfer</p>                                                                                                                                                                                                                                                                                         |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design



notes, mock-ups, diagrams, algorithms, etc

The screenshot shows a 'TRANSFER CALL' modal window. At the top, it has a title 'TRANSFER CALL' and a close button. Below the title is a 'TRANSACTIONS HISTORY' section with a table. The table has columns for 'TIME' and 'TRANSACTIONS'. The first row shows a transaction at 12-11-2015 15:06 labeled 'Terminal\_Ringing'. The second row shows a transaction at 22-10-2015 14:06 labeled 'Terminal\_Dropped'. The third row shows a transaction at 11-09-2015 13:52 labeled 'IDVSearch'. The fourth row shows a transaction at 13-08-2015 12:46 labeled 'IDVProceed'. The fifth row shows a transaction at 16-07-2015 11:26 labeled 'IDVSearch'. To the right of the table, there is a 'Client ID: C102011059' and 'Policy ID: 1020040215CMP' with a calendar icon and the date '11-09-2015 13:52'. Below the table is a 'REASON FOR TRANSFER' section with a dropdown menu currently set to 'Need more information'. To the left of the notes field is contact information for 'Andrew Garfield', including his name, company 'Tynan Motors Sutherland Master', phone number 'C161281368', date of birth '1970-10-12 (45 years)', another phone number '0411558650', email 'mark.swanson@allianz.com.au', and address '20 College Street Balmain NSW 2041'. There is also a 'Policy: 1020040215CMP' field. To the right of the contact information is a 'Notes' section with a text input field containing the placeholder text 'Type the reason for transfer here...'. At the bottom of the modal are two buttons: 'TRANSFER' (orange) and 'CANCEL' (grey).

## Questions

| # | Question                                                   | Resolution |
|---|------------------------------------------------------------|------------|
| 1 | What happens if Claims Consultant 2 declines the transfer? |            |
| 2 | What is a line 2 consultant?                               |            |

# 02.MVP - Generic - Policy Timeline Table Component (Events Tab)

|                  |                                                                                                                                                                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-501</b> - Policy Timeline Component (Events Tab) (✓) <b>Closed</b><br> <b>POMNIA-511</b> - Timeline - API (✓) <b>Closed</b> |
| Description      | MVP - Generic -Policy Timeline Component                                                                                                                                                                                                                                                                 |
| Component        | TL-Timeline                                                                                                                                                                                                                                                                                              |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                                                                                                |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                                                                                          |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                                                                                          |
| Date Approved    | 28/01/2016                                                                                                                                                                                                                                                                                               |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                                                                                               |

## Story

As a: Contact Centre Specialist

I want: to be able to view a Timeline for a particular policy

So that: I can see an overview of all of the events that have occurred for that policy

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                    | Notes |
|---|------------------------------------|----------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | This is a generic component                                                                                    |       |
| 2 | Assumption                         | The API will exclude events from POLISY which have the same text as TX_E events for the Notes                  |       |
| 3 | Assumption                         | The timeline will only display Omnia Events, which have a prefix of TX_E as an event type, not TX_S            |       |
| 4 | Assumption                         | This story will only include the Timeline table. The visual timeline will be included as part of another story |       |

|   |            |                                                                                                                                                                                                                                                                                                                                                                            |  |
|---|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 5 | Assumption | <p>The Priority Flag for Omnia Events will be added at a later date, <del>once the new EVENT_FLAG column has been added to the INTERACTION_EVENTS table.</del></p> <p><del>(can we include the column in the UI build, but leave it unpopulated as it won't be in the db table?)</del> (Please refer to story <a href="#">99.MVP-Generic-Priority Flag for Events</a>)</p> |  |
|---|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|

## Acceptance Criteria





| # | Given                                                                                                                                                                                          | When                                                                                                                                       | Then                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Data ref # |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 1 | <p>The Contact Centre Specialist has logged into a Generic instance of Omnia</p> <p><b>AND</b> they have performed a search</p> <p><b>AND</b> they are viewing the Customer Context screen</p> | <p>they click on a Policy in the navigational grid</p> <p><b>AND</b> click on the 'Events' tab</p>                                         | <p>Display a timeline table, showing the chronological events for the client.</p> <p>These events are:</p> <ul style="list-style-type: none"> <li>• CIS Notes - (<i>Company 6</i>)</li> <li>• POLISY Notes - (<i>Company 1</i>)</li> <li>• Event - Omnia Event (<i>show anything with the prefix TX_E</i>)</li> </ul> <p>For each of the events, show the following information:</p> <ul style="list-style-type: none"> <li>• Flag (see Data Capture section)</li> <li>• Creation date/time</li> <li>• Summary</li> <li>• Description</li> </ul> | D1-D5      |
| 2 |                                                                                                                                                                                                |                                                                                                                                            | <b>AND</b> display Sort icons next to each of the column headings for each of the fields in the timeline                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |
| 3 |                                                                                                                                                                                                |                                                                                                                                            | <b>AND</b> display a "Filter" field above the timeline table                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |            |
| 4 |                                                                                                                                                                                                |                                                                                                                                            | <b>AND</b> ensure that event items are not duplicated between POLISY and Omnia events                                                                                                                                                                                                                                                                                                                                                                                                                                                            |            |
| 5 |                                                                                                                                                                                                | <p>they click on a Policy in the navigational grid</p> <p><b>AND</b> they click on the sort icon for one of the fields in the timeline</p> | Sort the data into ascending or descending order                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |
| 6 |                                                                                                                                                                                                | <p>they click on a Policy in the navigational grid</p> <p><b>AND</b> they enter text in the Filter field</p>                               | <p>this will filter the records in the timeline table</p> <p>(Able to match the value in any of the columns).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                |            |

## Data Capture (optional)


| Reference | Field       | Rules                                                                                                                                                                                                                                                                                                                                                                             |
|-----------|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D1        | Date        | <p>Display the date on one line, not over 2 lines.</p> <p>Format: dd-mm-yyyy HH:MM</p>                                                                                                                                                                                                                                                                                            |
| D2        | Flag        | <p>This is not applicable for POLISY Notes or Omnia Event</p> <p>Only show PRI (priority) flags, not CON.</p> <p>- (API - if PRI for CIS, <del>or Priority for Event</del>, then flag="P", if POLISY, Omnia Event, or <del>not Priority Event</del> or CON for CIS, then flag="").</p> <p>- (UI - if flag="P", show visual indicator of priority - this needs to be sortable)</p> |
| D3        | Summary     | <p>This will be blank for POLISY Notes</p> <p>For CIS Notes - This is taken from the 'Description' field in POLISY</p> <p>For Omnia Event - This is the Event Type</p>                                                                                                                                                                                                            |
| D4        | Description | <p>POLISY Notes - It will be the information from the General Page Notes</p> <p>CIS Notes - this is taken from the 'Detail' field in POLISY</p> <p>Omnia Event - This is the Event Notes</p>                                                                                                                                                                                      |

## Design

**NOTE** - when retrieving the notes from POLISY, do not return items that are duplicated across Omnia and POLISY. These can be compared with the Description - items in POLISY which have the same content as Omnia can be ignored

| TIMELINE                                                                                            | EVENTS                    | CLAIMS                                                     | OTHER PARTIES | ALFRESCO                                                                            |
|-----------------------------------------------------------------------------------------------------|---------------------------|------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------|
| Start your filter                                                                                   |                           |                                                            |               |  |
| Date ▼                                                                                              | Summary ▼                 | Description                                                |               |                                                                                     |
| 12-11-2015 15:06                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |               |                                                                                     |
| 22-10-2015 14:06                                                                                    | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 11-09-2015 13:52                                                                                    | AOP_101_General_Enquiries |                                                            |               |                                                                                     |
|  13-08-2015 12:46  | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test           |               |                                                                                     |
| 16-07-2015 11:26                                                                                    | AOP_101_General_Enquiries | 20/07/2015-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 19-06-2015 11:13                                                                                    | AOP_105A_Cancellations    |                                                            |               |                                                                                     |
| 23-05-2015 11:11                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 12-05-2015 10:09                                                                                    | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |               |                                                                                     |
| 09-04-2015 9:00                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 02-04-2015 8:19                                                                                     | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |               |                                                                                     |
|  26-03-2015 7:07 | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 27-02-2015 6:09                                                                                     | AOP_101_General_Enquiries |                                                            |               |                                                                                     |
| 12-01-2015 5:12                                                                                     | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 12-12-2014 4:15                                                                                     | AOP_101_General_Enquiries | 2015-07-15-x5332-Non-Financial Endorsements-test           |               |                                                                                     |
| 02-11-2014 3:12                                                                                     | AOP_101_General_Enquiries |                                                            |               |                                                                                     |
|  16-10-2014 2:18 | AOP_105A_Cancellations    | 2015-07-15-x5332-Non-Financial Endorsements-test conclude! |               |                                                                                     |
| 03-07-2014 1:06                                                                                     | AOP_101_General_Enquiries |                                                            |               |                                                                                     |

With Data



| TIMELINE                                                                                                       | EVENTS | CLAIMS | OTHER PARTIES | ALFRESCO |
|----------------------------------------------------------------------------------------------------------------|--------|--------|---------------|----------|
|  No data available in table |        |        |               |          |

Without Data

## Questions

| # | Question | Resolution |
|---|----------|------------|
|   |          |            |
|   |          |            |

# 03.MVP - Generic - Policy/Client Header

|                  |                                                                                                                                                                                                                              |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-504</b> - Policy/Client Header  <b>Closed</b> |
| Description      | MVP-Generic- Policy/Client Header                                                                                                                                                                                            |
| Component        |                                                                                                                                                                                                                              |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                    |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                              |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                              |
| Date Approved    |                                                                                                                                                                                                                              |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                   |

## Story

As a: Call Centre Specialist

I want: to be able to see information about the Client

So that: I can understand the Client and potentially answer simple inquiry questions

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                                                             | Notes |
|---|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| 1 | Assumption                         | The missing Information in the header is not included as part of this story (please refer to 03. MVP - Generic - Policy/Client Header Missing Details). |       |
|   |                                    |                                                                                                                                                         |       |
|   |                                    |                                                                                                                                                         |       |

## Acceptance Criteria

| # | Given                                                                                                     | When                                                                                                   | Then                                                                                                                                                                                                                                                                                                                                     |
|---|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | The Call Centre Specialist has a Generic instance of Omnia<br><br><b>AND</b> they have performed a Search | they are viewing the Client Context screen<br><br><b>OR</b> they are viewing the Policy Context screen | Display a header underneath the News bar, with the following populated information (field names are not to be displayed): <ul style="list-style-type: none"> <li>• Client Name</li> <li>• Broker Name</li> <li>• Client ID</li> <li>• Date of Birth (age)</li> <li>• Phone number</li> <li>• Email Address</li> <li>• Address</li> </ul> |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

### 1200px General View

#### Sakatattiya Visanukram Prasit Mahintara Yudthaya Mahadilok Pohp

Hero and Tynan Motors Sutherland Master

C161281368  
07-07-1983 (33 Years)

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

#### Sakatattiya Visanukram Prasit Mahintara Yudthaya Mahadilok Pohp

Hero and Tynan Motors Sutherland Master

C161281368  
No Date of Birth

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

### 1200px View with Short Name/Agency Name and info at absolute position.

01

Allianz

C161281368  
07-07-1983 (33 Years)

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

01

Allianz

C161281368  
No Date of Birth

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

### 1440px View with info at absolute position.

01

Allianz

C161281368  
07-07-1983 (33 Years)

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

01

Allianz

C161281368  
No Date of Birth

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

1920px View with info at absolute position.

01

Allianz

C161281368  
07-07-1983 (33 Years)

0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

01

Allianz

C161281368  
No Date of Birth



0411558650  
mark.swanson@allianz.com.au

20 College Street  
Balmain NSW 2041

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# 03.MVP - Generic - Policy/Client Header Missing Details

|                  |                                                                                                                                                                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JIRA Link        |  <b>POMNIA-543</b> - Highlight Missing Information - UI (  Closed) |
| Description      | MVP-Generic- Policy/Client Header                                                                                                                                                                                                      |
| Component        |                                                                                                                                                                                                                                        |
| Product Owner    | Tim Rynne                                                                                                                                                                                                                              |
| Storycard Status | <b>APPROVED</b>                                                                                                                                                                                                                        |
| Design Status    | <b>APPROVED</b>                                                                                                                                                                                                                        |
| Date Approved    |                                                                                                                                                                                                                                        |
| Story Ready?     | <b>YES</b>                                                                                                                                                                                                                             |

## Story

As a: Call Centre Specialist

I want: to be able to easily see if there is any missing information for the Client

So that: I can ask the Client for the information and update it in the relevant system.

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description                                                                                                | Notes |
|---|------------------------------------|------------------------------------------------------------------------------------------------------------|-------|
| 1 | Dependency                         | the Policy/Client header story must be completed (please refer to 03.MVP - Generic - Policy/Client Header) |       |
|   | Scope                              | This storycard does not cover the displaying of alerts in the navigator when data is missing               |       |
|   |                                    |                                                                                                            |       |

## Acceptance Criteria

| # | Given | When | Then |
|---|-------|------|------|
|---|-------|------|------|

|   |                                                                                                           |                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <p>The Call Centre Specialist has a Generic instance of Omnia</p> <p>AND they have performed a Search</p> | <p>they are viewing the Client Context screen</p> <p>OR they are viewing the Policy Context screen</p> | <p>Highlight any missing information, by displaying the applicable message from the below:</p> <ul style="list-style-type: none"> <li>Client Name - "<b>No Client Name</b>"</li> <li>Broker Name - "<b>No Broker Name</b>"</li> <li>Client ID - "<b>No Client ID</b>"</li> <li>Date of Birth (age) - "<b>No Date of Birth</b>"</li> <li>Phone number - "<b>No Phone Number</b>"</li> <li>Email Address - "<b>No Email Address</b>"</li> <li>Postal Address - "<b>No Address</b>"</li> </ul> |
|---|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

1200px General View

### Sakatattiya Visanukram Prasit Mahintara Yudthaya Mahadilok Pohp

Hero and Tynan Motors Sutherland Master

No Client ID  
No Date of Birth

No Phone Number  
No Email Address

No Address

01

Allianz

No Client ID  
No Date of Birth

No Phone Number  
No Email Address

No Address

1440px View with info at absolute position.

01

Allianz

No Client ID  
No Date of Birth

No Phone Number  
No Email Address

No Address

1920px View with info at absolute position.

01

Allianz

No Client ID  
No Date of Birth

No Phone Number  
No Email Address

No Address

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |

# z99.MVP - Generic - InteractionEvent - Change Date Time Format

|                  |              |
|------------------|--------------|
| JIRA Link        |              |
| Description      |              |
| Component        |              |
| Product Owner    | Tim Y. Rynne |
| Storycard Status | OPEN         |
| Design Status    | OPEN         |
| Date Approved    |              |
| Story Ready?     | NO           |

## Story

As a: System

I want: my date and time formats to be consistent

So that: I feel good about myself

## Assumptions, Dependencies, Constraints

| # | (Assumption Dependency Constraint) | Description | Notes |
|---|------------------------------------|-------------|-------|
|   |                                    |             |       |
|   |                                    |             |       |
|   |                                    |             |       |

## Acceptance Criteria

| # | Given                                        | When                  | Then                                                                                                                 |
|---|----------------------------------------------|-----------------------|----------------------------------------------------------------------------------------------------------------------|
| 1 | a date or date/time is received from the api | it is called by Omnia | the format is consistent with all dates in the system<br>- dd-mm-yyyy hh:mm:ss<br>- dd-mm-yyyy hh:mm<br>- dd-mm-yyyy |
|   |                                              |                       |                                                                                                                      |
|   |                                              |                       |                                                                                                                      |

## Data Capture (optional)

| Reference | Field | Label | Comments |
|-----------|-------|-------|----------|
| D-XXXX    |       |       |          |
|           |       |       |          |
|           |       |       |          |

## Design

notes, mock-ups, diagrams, algorithms, etc

## Questions

| Ref # | Question | Resolution |
|-------|----------|------------|
|       |          |            |
|       |          |            |