

# openIDL - Requirements - Data Call App

| #                              | As a (role) | I want to ...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | So that ...                                                                       | UI Page               | Component                      | Existing |
|--------------------------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------|--------------------------------|----------|
| Authentication / Authorization |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                   |                       |                                |          |
|                                | User        | Login to the system                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | I can work                                                                        |                       | Authentication / Authorization |          |
| User Interface                 |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                   |                       |                                |          |
|                                | User        | View Drafts List                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | I can see the draft data calls                                                    | Home / Drafts         | UI                             |          |
|                                | User        | View Issued List                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | I can see the issued data calls                                                   | Home / Issued         | UI                             |          |
|                                | User        | View Abandoned List                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | I can see the abandoned data calls                                                | Home / Abandoned      | UI                             |          |
|                                | User        | Filter List of Data Calls                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | I see only the data calls I want to see                                           | Home / any list       | UI                             |          |
|                                | Carrier     | View a data call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | I can see what is being requested                                                 | Home / Data Call View | UI                             |          |
|                                | Carrier     | Like / Unlike a data call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | I can share my opinion of the data call                                           | Home / Data Call View | UI                             |          |
|                                | Carrier     | Consent to a data call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | I can agree to participate in the final data call report                          | Home / Data Call View | UI                             |          |
|                                | Carrier     | View an extraction pattern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | I can determine if it is correct for the data call and something I can consent to | Home / Data Call View | UI                             |          |
|                                | Stat Agent  | Deploy Extraction Pattern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | It is available on the data call                                                  | Home / Data Call View | UI                             |          |
|                                | Regulator   | Create Data Call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | It is available to carriers                                                       | Home / Data Call View | UI                             |          |
|                                | Regulator   | Specify details of a data call <ul style="list-style-type: none"> <li>Name : string ( ? )</li> <li>Line of Business : string list</li> <li>Description : string ( ? )</li> <li>Jurisdiction: string list</li> <li>Premium Date Range : two dates</li> <li>Loss Date Range : two dates</li> <li>Expected Public Circulation : string list</li> <li>Deadline : date</li> <li>Purpose : string ( ? )</li> <li>Detailed Criteria : string ( ? )</li> <li>Eligibility Requirement : string ( ? )</li> <li>Add list of participants to summary report : boolean</li> </ul> | The details are complete                                                          | Home / Data Call View | UI                             |          |
|                                | Regulator   | Clone Data Call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | A new data call is made from a similar existing data call                         | Home / data call List | UI                             |          |
|                                | Regulator   | Save a Data Call as Draft                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | The data call is available for like / unlike                                      | Home / Data Call View | UI                             |          |
|                                | Regulator   | Issue a Data Call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | The data call can get an extraction pattern and then be consented                 | Home / Data Call View | UI                             |          |
|                                | Regulator   | Abandon a Data Call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | The data call can no longer be executed                                           | Home / Data Call View | UI                             |          |
|                                | User        | Provide Feedback on the application                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | I can report issues or ideas to the development team                              | Any                   | UI                             | N        |
|                                | Regulator   | Attach a report                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | The contributors can read it                                                      | Home / Data Call View | UI                             |          |
|                                | User        | See the history of the data call                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Tell what has happened to the data call                                           | Home / Data Call View | UI                             |          |
| Extraction Pattern Manager     |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                   |                       |                                |          |
|                                | Carrier     | Test an extraction pattern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | I can determine what data would be shared from my production or test data         |                       | Extraction Pattern Manager     |          |
|                                | Stat Agent  | Create Extraction Pattern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Data extraction is possible                                                       |                       | Extraction Pattern Manager     |          |
|                                | Stat Agent  | Test Extraction Pattern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | I can verify it works correctly                                                   |                       | Extraction Pattern Manager     |          |

|                        |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|------------------------|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|------------------------------|----------------------------|--|
|                        | Stat Agent                | Add filter to an extraction pattern: <ul style="list-style-type: none"> <li>line of business</li> <li>jurisdiction</li> <li>premium date range</li> <li>loss date range</li> </ul> |                                                                             |                              | Extraction Pattern Manager |  |
|                        | Stat Agent                | Publish extraction pattern to network                                                                                                                                              | The extraction pattern is visible in the UI to be attached to the data call | Home / Issued Data Call View | Data Call App API          |  |
| Report Manager         |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|                        | Carrier                   | View data call report                                                                                                                                                              | I can see the result of the data call                                       |                              | Report Manager             |  |
| Insurance Data Manager |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|                        | Carrier                   | Load data into the HDS                                                                                                                                                             | Data is available for extraction                                            |                              | Insurance Data Manager     |  |
| Data Call Processor    |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|                        | Data Call System          | Run extraction patterns when needed: <ul style="list-style-type: none"> <li>when the extraction pattern expires, not when the consent is made</li> </ul>                           | The extraction pattern provides the results necessary to create a report    | --                           | Data Call Processor        |  |
| Network Administration |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|                        | HLF Network Admin         | Onboard an Organization                                                                                                                                                            | The organization can participate in the network                             |                              | Network Administration     |  |
|                        | HLF Node Admin            | Define details about my organization: Name, Logo                                                                                                                                   | I can see my name and Logo on the UI                                        | Home                         | Network Administration     |  |
| Node Administration    |                           |                                                                                                                                                                                    |                                                                             |                              |                            |  |
|                        | HLF Node Admin            | Onboard a User                                                                                                                                                                     | The user can participate in the network on behalf of the organization       |                              | Node Administration        |  |
|                        | Node Infrastructure Admin | Setup the Node                                                                                                                                                                     | The node is up and running                                                  |                              | Node Administration        |  |
|                        | Node Infrastructure Admin | Update the Node                                                                                                                                                                    | The node is up to date with the other nodes on the network                  |                              | Node Administration        |  |
|                        | Node Infrastructure Admin | Troubleshoot the Node                                                                                                                                                              | I can identify and fix issues                                               |                              | Node Administration        |  |