ASSEMBLE INSURANCE TANZANIA LTD

Software Requirements Specification

SAS Business Intelligence & Reporting Module

Version: 1.0

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1 Document Information

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2 Project Overview

2.1 Description

The Business Intelligence & Reporting module provides comprehensive analytics, reporting, and data visualization capabilities across all SAS modules. It includes executive dashboards for C-level decision making, operational reports for day-to-day management, advanced analytics for claims/membership/financial/provider/wellness data, custom report builder for ad-hoc analysis, scheduled report distribution, data exports, regulatory reporting, and real-time KPI monitoring. The module integrates with all operational modules to provide unified reporting and supports multi-dimensional analysis, drill-down capabilities, data export in multiple formats, and role-based access to reports and dashboards.

2.2 Objectives

- Provide real-time executive dashboards for strategic decision making
- Enable operational reporting across all modules (claims, membership, finance, sales, provider, wellness)
- Support advanced analytics with drill-down, filtering, and multi-dimensional analysis
- Offer custom report builder for business users to create ad-hoc reports
- Automate scheduled report generation and distribution
- Enable data exports in multiple formats (Excel, PDF, CSV, JSON)
- Support regulatory reporting requirements (TIRA, tax authorities)
- Provide real-time KPI monitoring and alerts
- Enable self-service BI for authorized users
- Maintain audit trail for all report access and generation

2.3 Scope

2.3.1 In Scope

- Executive dashboards (KPIs, trends, performance metrics)
- Operational reports (claims, membership, finance, sales, provider, wellness)
- Financial analytics (revenue, expenses, profitability, loss ratios)
- Claims analytics (frequency, severity, patterns, fraud indicators)

- Membership analytics (enrollment, retention, demographics, lifetime value)
- Sales & agent performance reports
- Utilization analysis (medical services, provider patterns)
- Provider analytics (performance, cost efficiency, quality metrics)
- Wellness program metrics and ROI analysis
- Custom report builder with drag-and-drop interface
- Scheduled reports with automated distribution
- Data exports (Excel, PDF, CSV, JSON)
- Regulatory reporting (TIRA, tax, statutory returns)
- Ad-hoc querying and analysis
- Report versioning and audit trail
- Role-based access control for reports

2.3.2 Out Of Scope

- External BI tool integrations (Power BI, Tableau) - covered in Infrastructure module
- Data warehouse ETL processes - covered in Infrastructure module
- Machine learning and predictive analytics - future enhancement
- Real-time streaming analytics - future enhancement

2.4 Technology Stack

2.4.1 Backend

Django REST Framework, PostgreSQL, Redis (caching), Celery (scheduled reports)

2.4.2 Frontend

React 19 (web dashboards), Chart.js/D3.js (visualizations)

2.4.3 Reporting Engine

Custom report builder + PDF generation (WeasyPrint/ReportLab)

2.4.4 Data Export

openpyxl (Excel), pandas (CSV), JSON serializers

2.4.5 Database

PostgreSQL with materialized views for performance

2.5 Key Stakeholders

- Executive Management (CEO, CFO, COO)
- Finance Team (financial reports, revenue analysis)
- Claims Team (claims analytics, fraud detection)
- Underwriting Team (risk assessment, pricing analytics)
- Sales Management (agent performance, conversion rates)
- Provider Network Team (provider performance, utilization)
- Wellness Team (program metrics, ROI analysis)
- Compliance Team (regulatory reporting)
- IT/BI Team (report administration, custom reports)

3 User Requirements

3.1 Executive Dashboards

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-EXEC-KPI-DASHBOARD	view executive KPI dashboard with real-time metrics	monitor overall business performance at a glance	Must Have	Key metrics: total members, premium revenue, claims ratio, net profit, new policies, retention rate, average claim cost, customer satisfaction. Real-time updates, trend indicators (up/down arrows), comparison to targets.
FT-RPT-EXEC-FINANCIAL-SUMMARY	view financial performance summary dashboard	track revenue, expenses, profitability trends	Must Have	Revenue breakdown by product/region, expense analysis, profit margin trends, loss ratio by product, combined ratio, cash flow summary. Monthly/quarterly/yearly views.
FT-RPT-EXEC-CLAIMS-OVERVIEW	view claims performance	monitor claims trends and identify issues	Must Have	Claims submitted vs settled, average

Feature Code	I Want To	So That I Can	Priority	Notes
	overview dashboard			TAT, claims ratio, fraud alerts, high-value claims, claims by category/provider, pending claims backlog.
FT-RPT-EXEC-MEMBERSHIP-TRENDS	view membership growth and retention dashboard	track enrollment trends and member lifecycle	Must Have	Total members by product/region, new enrollments, terminations, retention rate, churn analysis, member demographics, lifetime value trends.
FT-RPT-EXEC-DRILLDOWN	drill down from executive dashboard to detailed reports	investigate specific metrics and trends	Must Have	Click on any metric to drill down to underlying data, filter by date range/product/region, export drill-down results, maintain context during navigation.

3.2 Operational Reports

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-OPS-CLAIMS-DETAIL	generate detailed claims reports	analyze claims by various dimensions	Must Have	Filter by date range, product, provider, claim type, status,

Feature Code	I Want To	So That I Can	Priority	Notes
				amount range. Group by product/ provider/ diagnosis/ member. Export to Excel/PDF/ CSV.
FT-RPT-OPS-MEMBERSHIP-DETAIL	generate detailed membership reports	analyze member demographics and status	Must Have	Active/inactive members, enrollments/ terminations by period, member demographics (age, gender, location), policy details, dependent analysis.
FT-RPT-OPS-FINANCIAL-DETAIL	generate detailed financial reports	analyze revenue, expenses, and profitability	Must Have	Premium collection reports, outstanding receivables, commission payments, provider payments, expense breakdown, profit/loss by product/region.
FT-RPT-OPS-SALES-DETAIL	generate detailed sales and agent performance reports	track sales metrics and agent productivity	Must Have	Policies sold, premium generated, conversion rates, agent rankings, commission earned, pipeline analysis, sales by

Feature Code	I Want To	So That I Can	Priority	Notes
				product/ region/channel.
FT-RPT-OPS-PROVIDER-DETAIL	generate detailed provider network reports	analyze provider utilization and performance	Must Have	Provider directory, utilization by provider, claims frequency/ severity, capitation payments, fee-for-service payments, network coverage by region.
FT-RPT-OPS-WELLNESS-DETAIL	generate detailed wellness program reports	track wellness participation and outcomes	Must Have	Screening participation, vaccination rates, challenge participation, fitness tracker activity, health risk assessment results, program ROI analysis.

3.3 Financial Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-FIN-REVENUE-ANALYSIS	analyze premium revenue trends and composition	understand revenue drivers and forecast future revenue	Must Have	Revenue by product/ region/channel/ sales agent, trend analysis (MoM, YoY), revenue forecasting, premium rate analysis,

Feature Code	I Want To	So That I Can	Priority	Notes
				payment collection rates.
FT-RPT-FIN-LOSS-RATIO	calculate and analyze loss ratios	assess product profitability and pricing adequacy	Must Have	Loss ratio by product/ region/period, incurred claims vs earned premium, ultimate loss ratio projections, comparison to industry benchmarks, trend analysis.
FT-RPT-FIN-EXPENSE-ANALYSIS	analyze operating expenses and cost structure	identify cost optimization opportunities	Must Have	Expense breakdown (claims, commission, admin, IT, marketing), expense ratio by product, cost per member, cost trend analysis, budget vs actual.
FT-RPT-FIN-PROFITABILITY	analyze profitability by product, region, and segment	identify profitable and unprofitable segments	Must Have	Profit margin by product/ region/customer segment, contribution margin analysis, break-even analysis, ROI by product, profitability trends.
FT-RPT-FIN-CASHFLOW	analyze cash flow and working capital	manage liquidity and financial health	Must Have	Cash inflows (premium collection), cash outflows

Feature Code	I Want To	So That I Can	Priority	Notes
				(claims, commission, expenses), working capital analysis, cash flow forecasting, aging analysis of receivables/ payables.

3.4 Claims Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-CLM-FREQUENCY-SEVERITY	analyze claims frequency and severity	understand claims patterns and trends	Must Have	Claims frequency (count per 1000 members), average claim severity (amount per claim), frequency-severity distribution, trends by product/ region/period.
FT-RPT-CLM-CATEGORY-ANALYSIS	analyze claims by category and diagnosis	identify high-cost conditions and utilization patterns	Must Have	Claims by category (inpatient, outpatient, pharmacy, dental, optical), top diagnoses by frequency/cost, chronic condition prevalence, preventable

Feature Code	I Want To	So That I Can	Priority	Notes
				condition analysis.
FT-RPT-CLM-PROVIDER-ANALYSIS	analyze claims by provider	identify high-cost providers and utilization patterns	Must Have	Claims volume by provider, average cost per claim by provider, provider cost efficiency comparison, outlier detection, network vs non-network utilization.
FT-RPT-CLM-FRAUD-INDICATORS	identify potential fraud patterns in claims data	flag suspicious claims for investigation	Must Have	Duplicate claims detection, unusual billing patterns, high-frequency claimants, provider fraud indicators, member fraud patterns, fraud alert dashboard.
FT-RPT-CLM-TAT-ANALYSIS	analyze claims processing turnaround time	monitor and improve claims processing efficiency	Must Have	Average TAT by claim type/ complexity, TAT distribution, SLA compliance rate, bottleneck identification, adjudicator performance, trend analysis.

3.5 Membership Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-MBR-ENROLLMENT-TRENDS	analyze member enrollment and termination trends	understand member lifecycle and growth patterns	Must Have	New enrollments by period/ product/ channel, terminations by reason, net growth, seasonality analysis, enrollment funnel conversion rates.
FT-RPT-MBR-RETENTION-ANALYSIS	analyze member retention and churn	identify retention drivers and reduce churn	Must Have	Retention rate by product/ cohort/period, churn rate analysis, termination reason breakdown, member tenure distribution, retention by sales channel/ agent.
FT-RPT-MBR-DEMOGRAPHICS	analyze member demographics and segmentation	understand member composition and target segments	Must Have	Age/gender distribution, geographic distribution, product mix, family size, employer group analysis, corporate vs individual members.

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-MBR-LIFETIME-VALUE	calculate and analyze member lifetime value	prioritize high-value member segments	Must Have	LTV calculation by segment/cohort, contribution margin per member, acquisition cost vs LTV, LTV trends over time, predictive LTV modeling.
FT-RPT-MBR-UTILIZATION	analyze member utilization patterns	understand healthcare consumption behavior	Must Have	Utilization rate (members with claims vs total), high utilizers identification, utilization by age/gender/product, preventive care utilization, wellness program participation.

3.6 Sales Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-SLS-AGENT-PERFORMANCE	analyze sales agent performance	track productivity and identify top performers	Must Have	Policies sold per agent, premium generated, conversion rate, average policy value, agent rankings, commission earned, retention rate of sold policies.

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-SLS-CHANNEL-ANALYSIS	analyze sales by channel	optimize channel strategy and resource allocation	Must Have	Sales by channel (direct, broker, corporate, online), channel conversion rates, cost per acquisition by channel, channel profitability, channel growth trends.
FT-RPT-SLS-PRODUCT-MIX	analyze sales product mix	understand product demand and optimize portfolio	Must Have	Policies sold by product, premium generated by product, product growth trends, cross-sell/up-sell analysis, product profitability.
FT-RPT-SLS-PIPELINE	analyze sales pipeline and conversion funnel	forecast sales and identify conversion bottlenecks	Must Have	Lead pipeline by stage, conversion rates by stage, average time in each stage, win/loss analysis, forecasted sales, pipeline velocity.

3.7 Utilization Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
		understand healthcare	Must Have	Utilization by service type (inpatient,

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-UTL-SERVICE-UTILIZATION	analyze utilization of medical services	consumption patterns		outpatient, pharmacy, etc.), utilization rate per 1000 members, high utilizers, seasonal patterns, regional variations.
FT-RPT-UTL-PROVIDER-PATTERNS	analyze provider utilization patterns	optimize provider network and contracts	Must Have	Most utilized providers, provider market share, network vs non-network utilization, provider concentration, geographic coverage gaps.
FT-RPT-UTL-COST-EFFICIENCY	analyze cost efficiency of utilization	identify cost optimization opportunities	Must Have	Cost per service type, cost per member per month, cost variation by provider/ region, preventable costs, generic vs brand drug utilization.

3.8 Provider Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-PRV-PERFORMANCE	analyze provider	identify high-performing and	Must Have	Provider quality scores, claims approval rate, average cost per

Feature Code	I Want To	So That I Can	Priority	Notes
	performance metrics	underperforming providers		visit, member satisfaction, readmission rates, adherence to protocols.
FT-RPT-PRV-COST-ANALYSIS	analyze provider costs and efficiency	negotiate contracts and optimize network	Must Have	Cost per provider vs network average, fee schedule compliance, outlier identification, capitation vs fee-for-service cost comparison.
FT-RPT-PRV-NETWORK-COVERAGE	analyze provider network coverage	identify gaps and expansion opportunities	Must Have	Provider density by region/ specialty, member-to-provider ratio, geographic coverage maps, network adequacy assessment, specialty coverage gaps.

3.9 Wellness Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-WELL-PARTICIPATION	analyze wellness program participation	measure engagement and identify improvement areas	Must Have	Participation rate by program, demographic breakdown, repeat participation, engagement

Feature Code	I Want To	So That I Can	Priority	Notes
				trends, barriers to participation analysis.
FT-RPT-WELL-OUTCOMES	analyze wellness program health outcomes	measure program effectiveness	Must Have	Biometric improvements, risk score changes, chronic disease management outcomes, preventive care utilization, lifestyle behavior changes.
FT-RPT-WELL-ROI	calculate wellness program ROI	justify investment in wellness programs	Must Have	Program costs vs savings (reduced claims), cost per participant, healthcare cost trend for participants vs non-participants, productivity gains, engagement ROI.

3.10 Custom Report Builder

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-CUSTOM-BUILDER	build custom reports using drag-and-drop interface	create ad-hoc reports without IT assistance	Must Have	Drag-and-drop fields, filters, grouping, sorting. Available data sources: claims,

Feature Code	I Want To	So That I Can	Priority	Notes
				members, policies, providers, payments, wellness. Preview before generating.
FT-RPT-CUSTOM-SAVE-SHARE	save and share custom reports	reuse reports and collaborate with team	Must Have	Save report definition, name and categorize, share with users/roles, version history, clone and modify existing reports.
FT-RPT-CUSTOM-VISUALIZATIONS	add visualizations to custom reports	present data in charts and graphs	Must Have	Chart types: bar, line, pie, scatter, heatmap. Customize colors, labels, legends. Multiple visualizations per report, export charts as images.
FT-RPT-CUSTOM-CALCULATIONS	add calculated fields to custom reports	perform custom analytics	Must Have	Formula builder with functions (sum, avg, count, percentage, ratios), aggregations (group by), conditional calculations, date calculations.

3.11 Scheduled Reports

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-SCHEDULE-CONFIG	schedule reports for automated generation	receive regular reports without manual effort	Must Have	Schedule frequency: daily, weekly, monthly, quarterly, annual. Time of day, day of week/month. Effective date range, expiration.
FT-RPT-SCHEDULE-DISTRIBUTION	configure automated report distribution	deliver reports to stakeholders automatically	Must Have	Email distribution list, attachment format (PDF, Excel), report portal notification, FTP/SFTP delivery option, distribution log.
FT-RPT-SCHEDULE-HISTORY	view history of scheduled report executions	track delivery and troubleshoot issues	Must Have	Execution log (success/ failure), generated report archive, download previous reports, error details, retry failed reports.

3.12 Data Exports

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-EXPORT-EXCEL	export reports to Excel format	perform additional analysis in spreadsheets	Must Have	Multi-sheet workbooks, formatted cells, formulas, charts, preserve styling, large dataset support (100K+ rows).
FT-RPT-EXPORT-PDF	export reports to PDF format	share professional formatted reports	Must Have	Professional layout, company branding, page headers/footers, table of contents, charts and visualizations, print-ready format.
FT-RPT-EXPORT-CSV	export reports to CSV format	import data into other systems	Must Have	Configurable delimiter, UTF-8 encoding, header row option, large file support, streaming export for big datasets.
FT-RPT-EXPORT-JSON	export reports to JSON format	integrate with APIs and applications	Must Have	Structured JSON schema, nested objects support, metadata included, pagination for large datasets, API endpoint for exports.

3.13 Regulatory Reporting

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-REG-TIRA-RETURNS	generate TIRA statutory returns	comply with regulatory requirements	Must Have	TIRA quarterly/annual returns, prescribed format, data validation, audit trail, electronic submission format, archival.
FT-RPT-REG-TAX-RETURNS	generate tax returns and supporting documents	comply with tax obligations	Must Have	VAT returns, income tax supporting schedules, withholding tax reports, prescribed format, validation, archival.
FT-RPT-REG-STATUTORY-ACCOUNTS	generate statutory financial statements	meet regulatory and governance requirements	Must Have	Balance sheet, income statement, cash flow statement, notes to accounts, IFRS 17 compliant, trial balance, audit trail.
FT-RPT-REG-COMPLIANCE	generate compliance monitoring reports	demonstrate regulatory compliance	Must Have	Solvency margin calculations, investment compliance, governance compliance, complaint registers, required disclosures.

3.14 Adhoc Querying

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-ADHOC-QUERY-BUILDER	build ad-hoc queries using query builder	answer specific business questions quickly	Must Have	Visual query builder, filter conditions (AND/OR), sorting, aggregations, limit results, save queries for reuse.
FT-RPT-ADHOC-QUICK-FILTERS	apply quick filters to existing reports	slice data by different dimensions	Must Have	Common filters: date range, product, region, provider, status. Filter persistence, clear all filters, filter presets.
FT-RPT-ADHOC-DATA-PREVIEW	preview data before generating full report	verify query results and save time	Must Have	Sample data preview (first 100 rows), record count, performance estimation, modify query before full execution.

3.15 Report Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RPT-MGMT-CATALOG	browse report catalog organized by category	find available reports easily	Must Have	Categories: executive, operational, financial, claims, membership, sales, provider,

Feature Code	I Want To	So That I Can	Priority	Notes
				wellness, regulatory. Search by name/ description, favorites, recently used.
FT-RPT-MGMT-ACCESS-CONTROL	control access to reports based on roles	ensure data security and privacy	Must Have	Role-based access (executive, manager, analyst, viewer), report permissions (view, edit, share, export), data-level security (filter by user's region/ department).
FT-RPT-MGMT-AUDIT-TRAIL	maintain audit trail of report access and generation	track usage and ensure compliance	Must Have	Log who accessed which report, when, parameters used, export actions, modifications to report definitions, retention period 7 years.
FT-RPT-MGMT-VERSIONING	manage report versions	track changes and rollback if needed	Must Have	Version history for report definitions, compare versions, rollback to previous version, change

Feature Code	I Want To	So That I Can	Priority	Notes
				notes, archive old versions.

4 Detailed Feature Requirements

4.1 Ft Rpt Exec Kpi Dashboard

4.1.1 Priority

Must Have

4.1.2 User Story

As a CEO, I want to view executive KPI dashboard with real-time metrics so that I can monitor overall business performance at a glance

4.1.3 Preconditions

User authenticated with executive role, data populated in database

4.1.4 Postconditions

KPI dashboard displayed with real-time metrics, trend indicators, and comparison to targets

4.1.5 Test Cases

Id	Description	Weight
EXEC-KPI-DASHBOARD-TC-001	Verify all key metrics displayed (members, revenue, claims ratio, profit, new policies, retention, avg claim cost, CSAT)	High
EXEC-KPI-DASHBOARD-TC-002	Verify real-time data updates	High
EXEC-KPI-DASHBOARD-TC-003	Verify trend indicators (up/down arrows, % change)	High
EXEC-KPI-DASHBOARD-TC-004	Verify comparison to targets/benchmarks	High

Id	Description	Weight
EXEC-KPI-DASHBOARD-TC-005	Verify date range selection (MTD, QTD, YTD)	Medium
EXEC-KPI-DASHBOARD-TC-006	Verify dashboard loads within 3 seconds	High

4.2 Ft Rpt Exec Financial Summary

4.2.1 Priority

Must Have

4.2.2 User Story

As a CFO, I want to view financial performance summary dashboard so that I can track revenue, expenses, profitability trends

4.2.3 Preconditions

Financial data available, user has CFO/finance role

4.2.4 Postconditions

Financial summary dashboard displayed with revenue, expenses, profit trends, loss ratio, combined ratio

4.2.5 Test Cases

Id	Description	Weight
EXEC-FINANCIAL-SUMMARY-TC-001	Verify revenue breakdown by product/region	High
EXEC-FINANCIAL-SUMMARY-TC-002	Verify expense analysis with categorization	High
EXEC-FINANCIAL-SUMMARY-TC-003	Verify profit margin trends over time	High
		High

Id	Description	Weight
EXEC-FINANCIAL-SUMMARY-TC-004	Verify loss ratio calculation by product	
EXEC-FINANCIAL-SUMMARY-TC-005	Verify combined ratio calculation	High
EXEC-FINANCIAL-SUMMARY-TC-006	Verify cash flow summary	High
EXEC-FINANCIAL-SUMMARY-TC-007	Verify monthly/quarterly/yearly view toggle	Medium

4.3 Ft Rpt Exec Claims Overview

4.3.1 Priority

Must Have

4.3.2 User Story

As a COO, I want to view claims performance overview dashboard so that I can monitor claims trends and identify issues

4.3.3 Preconditions

Claims data available, user has executive role

4.3.4 Postconditions

Claims overview dashboard displayed with key metrics, trends, and alerts

4.3.5 Test Cases

Id	Description	Weight
EXEC-CLAIMS-OVERVIEW-TC-001	Verify claims submitted vs settled count	High
EXEC-CLAIMS-OVERVIEW-TC-002	Verify average TAT calculation	High

Id	Description	Weight
EXEC-CLAIMS-OVERVIEW-TC-003	Verify claims ratio display	High
EXEC-CLAIMS-OVERVIEW-TC-004	Verify fraud alerts visible	High
EXEC-CLAIMS-OVERVIEW-TC-005	Verify high-value claims flagged	High
EXEC-CLAIMS-OVERVIEW-TC-006	Verify claims by category breakdown	Medium
EXEC-CLAIMS-OVERVIEW-TC-007	Verify pending claims backlog shown	High

4.4 Ft Rpt Exec Membership Trends

4.4.1 Priority

Must Have

4.4.2 User Story

As an executive, I want to view membership growth and retention dashboard so that I can track enrollment trends and member lifecycle

4.4.3 Preconditions

Membership data available, user authenticated

4.4.4 Postconditions

Membership trends dashboard displayed with growth, retention, churn metrics

4.4.5 Test Cases

Id	Description	Weight
EXEC-MEMBERSHIP-TRENDS-TC-001	Verify total members by product/region	High

Id	Description	Weight
EXEC-MEMBERSHIP-TRENDS-TC-002	Verify new enrollments over time	High
EXEC-MEMBERSHIP-TRENDS-TC-003	Verify terminations analysis	High
EXEC-MEMBERSHIP-TRENDS-TC-004	Verify retention rate calculation	High
EXEC-MEMBERSHIP-TRENDS-TC-005	Verify churn analysis with reasons	High
EXEC-MEMBERSHIP-TRENDS-TC-006	Verify member demographics breakdown	Medium
EXEC-MEMBERSHIP-TRENDS-TC-007	Verify lifetime value trends	Medium

4.5 Ft Rpt Exec Drilldown

4.5.1 Priority

Must Have

4.5.2 User Story

As an executive, I want to drill down from executive dashboard to detailed reports so that I can investigate specific metrics and trends

4.5.3 Preconditions

Executive dashboard displayed, metrics have underlying detail data

4.5.4 Postconditions

Detailed report displayed with context preserved, filters applied

4.5.5 Test Cases

Id	Description	Weight
EXEC-DRILLDOWN-TC-001	Verify click on metric opens detailed report	High
EXEC-DRILLDOWN-TC-002	Verify filters carried forward to detail view	High
EXEC-DRILLDOWN-TC-003	Verify breadcrumb navigation available	Medium
EXEC-DRILLDOWN-TC-004	Verify export option available in drill-down	Medium
EXEC-DRILLDOWN-TC-005	Verify back navigation returns to dashboard	Medium
EXEC-DRILLDOWN-TC-006	Verify context maintained across drill levels	High

4.6 Ft Rpt Ops Claims Detail

4.6.1 Priority

Must Have

4.6.2 User Story

As a claims manager, I want to generate detailed claims reports so that I can analyze claims by various dimensions

4.6.3 Preconditions

Claims data available, user has claims role

4.6.4 Postconditions

Detailed claims report generated with filters, grouping, and export options

4.6.5 Test Cases

Id	Description	Weight
OPS-CLAIMS-DETAIL-TC-001	Verify filter by date range works	High
OPS-CLAIMS-DETAIL-TC-002	Verify filter by product/ provider/type/status/amount	High
OPS-CLAIMS-DETAIL-TC-003	Verify group by product/ provider/diagnosis/member	High
OPS-CLAIMS-DETAIL-TC-004	Verify export to Excel format	High
OPS-CLAIMS-DETAIL-TC-005	Verify export to PDF format	High
OPS-CLAIMS-DETAIL-TC-006	Verify export to CSV format	High
OPS-CLAIMS-DETAIL-TC-007	Verify pagination for large result sets	Medium

4.7 Ft Rpt Ops Membership Detail

4.7.1 Priority

Must Have

4.7.2 User Story

As a membership manager, I want to generate detailed membership reports so that I can analyze member demographics and status

4.7.3 Preconditions

Membership data available, user authenticated

4.7.4 Postconditions

Membership detail report generated with comprehensive member information

4.7.5 Test Cases

Id	Description	Weight
OPS-MEMBERSHIP-DETAIL-TC-001	Verify active/inactive member filtering	High
OPS-MEMBERSHIP-DETAIL-TC-002	Verify enrollments/terminations by period	High
OPS-MEMBERSHIP-DETAIL-TC-003	Verify demographics breakdown (age, gender, location)	High
OPS-MEMBERSHIP-DETAIL-TC-004	Verify policy details included	High
OPS-MEMBERSHIP-DETAIL-TC-005	Verify dependent analysis	Medium
OPS-MEMBERSHIP-DETAIL-TC-006	Verify export functionality	High

4.8 Ft Rpt Ops Financial Detail

4.8.1 Priority

Must Have

4.8.2 User Story

As a finance manager, I want to generate detailed financial reports so that I can analyze revenue, expenses, and profitability

4.8.3 Preconditions

Financial data available, user has finance role

4.8.4 Postconditions

Financial detail report generated with comprehensive financial data

4.8.5 Test Cases

Id	Description	Weight
OPS-FINANCIAL-DETAIL-TC-001	Verify premium collection report	High
OPS-FINANCIAL-DETAIL-TC-002	Verify outstanding receivables report	High
OPS-FINANCIAL-DETAIL-TC-003	Verify commission payments report	High
OPS-FINANCIAL-DETAIL-TC-004	Verify provider payments report	High
OPS-FINANCIAL-DETAIL-TC-005	Verify expense breakdown report	High
OPS-FINANCIAL-DETAIL-TC-006	Verify profit/loss by product/region	High
OPS-FINANCIAL-DETAIL-TC-007	Verify multi-currency support	High

4.9 Ft Rpt Ops Sales Detail

4.9.1 Priority

Must Have

4.9.2 User Story

As a sales manager, I want to generate detailed sales and agent performance reports so that I can track sales metrics and agent productivity

4.9.3 Preconditions

Sales data available, user has sales role

4.9.4 Postconditions

Sales detail report generated with agent performance metrics

4.9.5 Test Cases

Id	Description	Weight
OPS-SALES-DETAIL-TC-001	Verify policies sold by period	High
OPS-SALES-DETAIL-TC-002	Verify premium generated report	High
OPS-SALES-DETAIL-TC-003	Verify conversion rates calculation	High
OPS-SALES-DETAIL-TC-004	Verify agent rankings display	High
OPS-SALES-DETAIL-TC-005	Verify commission earned report	High
OPS-SALES-DETAIL-TC-006	Verify pipeline analysis	Medium
OPS-SALES-DETAIL-TC-007	Verify sales by product/ region/channel	High

4.10 Ft Rpt Ops Provider Detail

4.10.1 Priority

Must Have

4.10.2 User Story

As a provider network manager, I want to generate detailed provider network reports so that I can analyze provider utilization and performance

4.10.3 Preconditions

Provider data available, user has provider network role

4.10.4 Postconditions

Provider detail report generated with utilization and performance metrics

4.10.5 Test Cases

Id	Description	Weight
OPS-PROVIDER-DETAIL-TC-001	Verify provider directory listing	High
OPS-PROVIDER-DETAIL-TC-002	Verify utilization by provider	High
OPS-PROVIDER-DETAIL-TC-003	Verify claims frequency/ severity by provider	High
OPS-PROVIDER-DETAIL-TC-004	Verify capitation payments report	High
OPS-PROVIDER-DETAIL-TC-005	Verify fee-for-service payments report	High
OPS-PROVIDER-DETAIL-TC-006	Verify network coverage by region	Medium

4.11 Ft Rpt Ops Wellness Detail

4.11.1 Priority

Must Have

4.11.2 User Story

As a wellness manager, I want to generate detailed wellness program reports so that I can track wellness participation and outcomes

4.11.3 Preconditions

Wellness data available, user has wellness role

4.11.4 Postconditions

Wellness detail report generated with participation and outcomes metrics

4.11.5 Test Cases

Id	Description	Weight
OPS-WELLNESS-DETAIL-TC-001	Verify screening participation rates	High
OPS-WELLNESS-DETAIL-TC-002	Verify vaccination rates report	High
OPS-WELLNESS-DETAIL-TC-003	Verify challenge participation metrics	High
OPS-WELLNESS-DETAIL-TC-004	Verify fitness tracker activity stats	Medium
OPS-WELLNESS-DETAIL-TC-005	Verify HRA results summary	High
OPS-WELLNESS-DETAIL-TC-006	Verify wellness program ROI analysis	High

4.12 Ft Rpt Fin Revenue Analysis

4.12.1 Priority

Must Have

4.12.2 User Story

As a CFO, I want to analyze premium revenue trends and composition so that I can understand revenue drivers and forecast future revenue

4.12.3 Preconditions

Revenue data available, user has finance role

4.12.4 Postconditions

Revenue analysis report generated with trends, composition, and forecasts

4.12.5 Test Cases

Id	Description	Weight
FIN-REVENUE-ANALYSIS-TC-001	Verify revenue by product breakdown	High
FIN-REVENUE-ANALYSIS-TC-002	Verify revenue by region/channel/agent	High
FIN-REVENUE-ANALYSIS-TC-003	Verify trend analysis (MoM, YoY)	High
FIN-REVENUE-ANALYSIS-TC-004	Verify revenue forecasting capability	Medium
FIN-REVENUE-ANALYSIS-TC-005	Verify premium rate analysis	Medium
FIN-REVENUE-ANALYSIS-TC-006	Verify payment collection rates	High

4.13 Ft Rpt Fin Loss Ratio

4.13.1 Priority

Must Have

4.13.2 User Story

As an actuary, I want to calculate and analyze loss ratios so that I can assess product profitability and pricing adequacy

4.13.3 Preconditions

Claims and premium data available, user has finance/actuarial role

4.13.4 Postconditions

Loss ratio analysis report generated with calculations by product, region, period

4.13.5 Test Cases

Id	Description	Weight
FIN-LOSS-RATIO-TC-001	Verify loss ratio calculation formula (incurred claims / earned premium)	High
FIN-LOSS-RATIO-TC-002	Verify loss ratio by product	High
FIN-LOSS-RATIO-TC-003	Verify loss ratio by region/ period	High
FIN-LOSS-RATIO-TC-004	Verify incurred vs earned premium calculation	High
FIN-LOSS-RATIO-TC-005	Verify ultimate loss ratio projections	Medium
FIN-LOSS-RATIO-TC-006	Verify comparison to industry benchmarks	Medium
FIN-LOSS-RATIO-TC-007	Verify trend analysis over time	High

4.14 Ft Rpt Fin Expense Analysis

4.14.1 Priority

Must Have

4.14.2 User Story

As a CFO, I want to analyze operating expenses and cost structure so that I can identify cost optimization opportunities

4.14.3 Preconditions

Expense data available, user has finance role

4.14.4 Postconditions

Expense analysis report generated with breakdown, ratios, trends

4.14.5 Test Cases

Id	Description	Weight
FIN-EXPENSE-ANALYSIS-TC-001	Verify expense breakdown by category (claims, commission, admin, IT, marketing)	High
FIN-EXPENSE-ANALYSIS-TC-002	Verify expense ratio by product calculation	High
FIN-EXPENSE-ANALYSIS-TC-003	Verify cost per member calculation	High
FIN-EXPENSE-ANALYSIS-TC-004	Verify cost trend analysis	High
FIN-EXPENSE-ANALYSIS-TC-005	Verify budget vs actual comparison	High
FIN-EXPENSE-ANALYSIS-TC-006	Verify variance analysis with explanations	Medium

4.15 Ft Rpt Fin Profitability

4.15.1 Priority

Must Have

4.15.2 User Story

As a CFO, I want to analyze profitability by product, region, and segment so that I can identify profitable and unprofitable segments

4.15.3 Preconditions

Financial data available across all dimensions, user has finance role

4.15.4 Postconditions

Profitability analysis report generated with multi-dimensional breakdown

4.15.5 Test Cases

Id	Description	Weight
FIN-PROFITABILITY-TC-001	Verify profit margin by product calculation	High
FIN-PROFITABILITY-TC-002	Verify profitability by region	High
FIN-PROFITABILITY-TC-003	Verify profitability by customer segment	High
FIN-PROFITABILITY-TC-004	Verify contribution margin analysis	High
FIN-PROFITABILITY-TC-005	Verify break-even analysis	Medium
FIN-PROFITABILITY-TC-006	Verify ROI by product calculation	High
FIN-PROFITABILITY-TC-007	Verify profitability trends over time	High

4.16 Ft Rpt Fin Cashflow

4.16.1 Priority

Must Have

4.16.2 User Story

As a CFO, I want to analyze cash flow and working capital so that I can manage liquidity and financial health

4.16.3 Preconditions

Cash flow data available, user has finance role

4.16.4 Postconditions

Cash flow analysis report generated with inflows, outflows, forecasts

4.16.5 Test Cases

Id	Description	Weight
FIN-CASHFLOW-TC-001	Verify cash inflows (premium collection) tracking	High
FIN-CASHFLOW-TC-002	Verify cash outflows (claims, commission, expenses) tracking	High
FIN-CASHFLOW-TC-003	Verify working capital analysis	High
FIN-CASHFLOW-TC-004	Verify cash flow forecasting	Medium
FIN-CASHFLOW-TC-005	Verify aging analysis of receivables	High
FIN-CASHFLOW-TC-006	Verify aging analysis of payables	High

4.17 Ft Rpt Clm Frequency Severity

4.17.1 Priority

Must Have

4.17.2 User Story

As an actuarial analyst, I want to analyze claims frequency and severity so that I can understand claims patterns and trends

4.17.3 Preconditions

Claims data available with member counts, user has claims/actuarial role

4.17.4 Postconditions

Frequency-severity analysis report generated with distributions and trends

4.17.5 Test Cases

Id	Description	Weight
CLM-FREQUENCY-SEVERITY-TC-001	Verify claims frequency calculation (count per 1000 members)	High
CLM-FREQUENCY-SEVERITY-TC-002	Verify average claim severity calculation (amount per claim)	High
CLM-FREQUENCY-SEVERITY-TC-003	Verify frequency-severity distribution chart	High
CLM-FREQUENCY-SEVERITY-TC-004	Verify trends by product analysis	High
CLM-FREQUENCY-SEVERITY-TC-005	Verify trends by region analysis	High
CLM-FREQUENCY-SEVERITY-TC-006	Verify trends by period (MoM, YoY)	High

4.18 Ft Rpt Clm Category Analysis

4.18.1 Priority

Must Have

4.18.2 User Story

As a claims manager, I want to analyze claims by category and diagnosis so that I can identify high-cost conditions and utilization patterns

4.18.3 Preconditions

Claims data with categories and diagnoses, user has claims role

4.18.4 Postconditions

Category analysis report generated with cost drivers and patterns

4.18.5 Test Cases

Id	Description	Weight
CLM-CATEGORY-ANALYSIS-TC-001	Verify claims by category (inpatient, outpatient, pharmacy, dental, optical)	High
CLM-CATEGORY-ANALYSIS-TC-002	Verify top diagnoses by frequency	High
CLM-CATEGORY-ANALYSIS-TC-003	Verify top diagnoses by cost	High
CLM-CATEGORY-ANALYSIS-TC-004	Verify chronic condition prevalence	High
CLM-CATEGORY-ANALYSIS-TC-005	Verify preventable condition analysis	Medium
CLM-CATEGORY-ANALYSIS-TC-006	Verify cost per category calculation	High

4.19 Ft Rpt Clm Provider Analysis

4.19.1 Priority

Must Have

4.19.2 User Story

As a provider network manager, I want to analyze claims by provider so that I can identify high-cost providers and utilization patterns

4.19.3 Preconditions

Claims data with provider information, user has provider network role

4.19.4 Postconditions

Provider analysis report generated with cost and utilization metrics

4.19.5 Test Cases

Id	Description	Weight
CLM-PROVIDER-ANALYSIS-TC-001	Verify claims volume by provider	High
CLM-PROVIDER-ANALYSIS-TC-002	Verify average cost per claim by provider	High
CLM-PROVIDER-ANALYSIS-TC-003	Verify provider cost efficiency comparison	High
CLM-PROVIDER-ANALYSIS-TC-004	Verify outlier detection (unusually high costs)	High
CLM-PROVIDER-ANALYSIS-TC-005	Verify network vs non-network utilization	High
CLM-PROVIDER-ANALYSIS-TC-006	Verify provider ranking by cost/volume	Medium

4.20 Ft Rpt Clm Fraud Indicators

4.20.1 Priority

Must Have

4.20.2 User Story

As a fraud investigator, I want to identify potential fraud patterns in claims data so that I can flag suspicious claims for investigation

4.20.3 Preconditions

Claims data available, fraud detection rules configured, user has fraud investigation role

4.20.4 Postconditions

Fraud indicators report generated with flagged claims and patterns

4.20.5 Test Cases

Id	Description	Weight
CLM-FRAUD-INDICATORS-TC-001	Verify duplicate claims detection	High
CLM-FRAUD-INDICATORS-TC-002	Verify unusual billing patterns flagged	High
CLM-FRAUD-INDICATORS-TC-003	Verify high-frequency claimants identified	High
CLM-FRAUD-INDICATORS-TC-004	Verify provider fraud indicators tracked	High
CLM-FRAUD-INDICATORS-TC-005	Verify member fraud patterns identified	High
CLM-FRAUD-INDICATORS-TC-006	Verify fraud alert dashboard available	High
CLM-FRAUD-INDICATORS-TC-007	Verify flagged claims can be exported for investigation	Medium

4.21 Ft Rpt Clm Tat Analysis

4.21.1 Priority

Must Have

4.21.2 User Story

As a claims manager, I want to analyze claims processing turnaround time so that I can monitor and improve claims processing efficiency

4.21.3 Preconditions

Claims data with timestamps, SLA targets configured, user has claims role

4.21.4 Postconditions

TAT analysis report generated with efficiency metrics and bottlenecks

4.21.5 Test Cases

Id	Description	Weight
CLM-TAT-ANALYSIS-TC-001	Verify average TAT by claim type	High
CLM-TAT-ANALYSIS-TC-002	Verify average TAT by complexity	High
CLM-TAT-ANALYSIS-TC-003	Verify TAT distribution (histogram)	Medium
CLM-TAT-ANALYSIS-TC-004	Verify SLA compliance rate calculation	High
CLM-TAT-ANALYSIS-TC-005	Verify bottleneck identification	High
CLM-TAT-ANALYSIS-TC-006	Verify adjudicator performance comparison	High
CLM-TAT-ANALYSIS-TC-007	Verify trend analysis over time	High

4.22 Ft Rpt Mbr Enrollment Trends

4.22.1 Priority

Must Have

4.22.2 User Story

As a membership manager, I want to analyze member enrollment and termination trends so that I can understand member lifecycle and growth patterns

4.22.3 Preconditions

Membership data available, user has membership role

4.22.4 Postconditions

Enrollment trends report generated with growth metrics and patterns

4.22.5 Test Cases

Id	Description	Weight
MBR-ENROLLMENT-TRENDS-TC-001	Verify new enrollments by period	High
MBR-ENROLLMENT-TRENDS-TC-002	Verify enrollments by product analysis	High
MBR-ENROLLMENT-TRENDS-TC-003	Verify enrollments by channel (direct, broker, corporate)	High
MBR-ENROLLMENT-TRENDS-TC-004	Verify terminations by reason breakdown	High
MBR-ENROLLMENT-TRENDS-TC-005	Verify net growth calculation	High
MBR-ENROLLMENT-TRENDS-TC-006	Verify seasonality analysis	Medium
MBR-ENROLLMENT-TRENDS-TC-007	Verify enrollment funnel conversion rates	High

4.23 Ft Rpt Mbr Retention Analysis

4.23.1 Priority

Must Have

4.23.2 User Story

As a marketing manager, I want to analyze member retention and churn so that I can identify retention drivers and reduce churn

4.23.3 Preconditions

Membership data with enrollment/termination dates, user has membership/marketing role

4.23.4 Postconditions

Retention analysis report generated with retention rate, churn rate, and drivers

4.23.5 Test Cases

Id	Description	Weight
MBR-RETENTION-ANALYSIS-TC-001	Verify retention rate by product calculation	High
MBR-RETENTION-ANALYSIS-TC-002	Verify retention by cohort analysis	High
MBR-RETENTION-ANALYSIS-TC-003	Verify retention by period (monthly, annual)	High
MBR-RETENTION-ANALYSIS-TC-004	Verify churn rate analysis	High
MBR-RETENTION-ANALYSIS-TC-005	Verify termination reason breakdown	High
MBR-RETENTION-ANALYSIS-TC-006	Verify member tenure distribution	Medium
MBR-RETENTION-ANALYSIS-TC-007	Verify retention by sales channel/agent	High

4.24 Ft Rpt Mbr Demographics

4.24.1 Priority

Must Have

4.24.2 User Story

As a marketing manager, I want to analyze member demographics and segmentation so that I can understand member composition and target segments

4.24.3 Preconditions

Member demographic data available, user has membership/marketing role

4.24.4 Postconditions

Demographics report generated with breakdowns by age, gender, location, product, etc.

4.24.5 Test Cases

Id	Description	Weight
MBR-DEMOGRAPHICS-TC-001	Verify age distribution analysis	High
MBR-DEMOGRAPHICS-TC-002	Verify gender distribution analysis	High
MBR-DEMOGRAPHICS-TC-003	Verify geographic distribution	High
MBR-DEMOGRAPHICS-TC-004	Verify product mix analysis	High
MBR-DEMOGRAPHICS-TC-005	Verify family size distribution	Medium
MBR-DEMOGRAPHICS-TC-006	Verify employer group analysis	High
MBR-DEMOGRAPHICS-TC-007	Verify corporate vs individual member breakdown	High

4.25 Ft Rpt Mbr Lifetime Value

4.25.1 Priority

Must Have

4.25.2 User Story

As a marketing manager, I want to calculate and analyze member lifetime value so that I can prioritize high-value member segments

4.25.3 Preconditions

Member revenue and cost data available, user has marketing/finance role

4.25.4 Postconditions

LTV analysis report generated with calculations by segment and cohort

4.25.5 Test Cases

Id	Description	Weight
MBR-LIFETIME-VALUE-TC-001	Verify LTV calculation by segment	High
MBR-LIFETIME-VALUE-TC-002	Verify LTV by cohort analysis	High
MBR-LIFETIME-VALUE-TC-003	Verify contribution margin per member calculation	High
MBR-LIFETIME-VALUE-TC-004	Verify acquisition cost vs LTV comparison	High
MBR-LIFETIME-VALUE-TC-005	Verify LTV trends over time	High
MBR-LIFETIME-VALUE-TC-006	Verify predictive LTV modeling available	Medium

4.26 Ft Rpt Mbr Utilization

4.26.1 Priority

Must Have

4.26.2 User Story

As a claims manager, I want to analyze member utilization patterns so that I can understand healthcare consumption behavior

4.26.3 Preconditions

Member and claims data available, user has claims/membership role

4.26.4 Postconditions

Member utilization report generated with utilization metrics and patterns

4.26.5 Test Cases

Id	Description	Weight
MBR-UTILIZATION-TC-001	Verify utilization rate (members with claims vs total)	High
MBR-UTILIZATION-TC-002	Verify high utilizers identification	High
MBR-UTILIZATION-TC-003	Verify utilization by age group	High
MBR-UTILIZATION-TC-004	Verify utilization by gender	High
MBR-UTILIZATION-TC-005	Verify utilization by product	High
MBR-UTILIZATION-TC-006	Verify preventive care utilization tracking	High
MBR-UTILIZATION-TC-007	Verify wellness program participation correlation	Medium

4.27 Ft Rpt Sls Agent Performance

4.27.1 Priority

Must Have

4.27.2 User Story

As a sales manager, I want to analyze sales agent performance so that I can track productivity and identify top performers

4.27.3 Preconditions

Sales data available, user has sales management role

4.27.4 Postconditions

Agent performance report generated with rankings and metrics

4.27.5 Test Cases

Id	Description	Weight
SLS-AGENT-PERFORMANCE-TC-001	Verify policies sold per agent	High
SLS-AGENT-PERFORMANCE-TC-002	Verify premium generated per agent	High
SLS-AGENT-PERFORMANCE-TC-003	Verify conversion rate by agent	High
SLS-AGENT-PERFORMANCE-TC-004	Verify average policy value by agent	High
SLS-AGENT-PERFORMANCE-TC-005	Verify agent rankings	High
SLS-AGENT-PERFORMANCE-TC-006	Verify commission earned by agent	High
SLS-AGENT-PERFORMANCE-TC-007	Verify retention rate of sold policies	High

4.28 Ft Rpt Sls Channel Analysis

4.28.1 Priority

Must Have

4.28.2 User Story

As a sales manager, I want to analyze sales by channel so that I can optimize channel strategy and resource allocation

4.28.3 Preconditions

Sales data with channel information, user has sales management role

4.28.4 Postconditions

Channel analysis report generated with performance by channel

4.28.5 Test Cases

Id	Description	Weight
SLS-CHANNEL-ANALYSIS-TC-001	Verify sales by channel (direct, broker, corporate, online)	High
SLS-CHANNEL-ANALYSIS-TC-002	Verify channel conversion rates	High
SLS-CHANNEL-ANALYSIS-TC-003	Verify cost per acquisition by channel	High
SLS-CHANNEL-ANALYSIS-TC-004	Verify channel profitability analysis	High
SLS-CHANNEL-ANALYSIS-TC-005	Verify channel growth trends	High
SLS-CHANNEL-ANALYSIS-TC-006	Verify channel market share	Medium

4.29 Ft Rpt Sls Product Mix

4.29.1 Priority

Must Have

4.29.2 User Story

As a product manager, I want to analyze sales product mix so that I can understand product demand and optimize portfolio

4.29.3 Preconditions

Sales data by product, user has product/sales management role

4.29.4 Postconditions

Product mix analysis report generated with demand patterns

4.29.5 Test Cases

Id	Description	Weight
SLS-PRODUCT-MIX-TC-001	Verify policies sold by product	High
SLS-PRODUCT-MIX-TC-002	Verify premium generated by product	High
SLS-PRODUCT-MIX-TC-003	Verify product growth trends	High
SLS-PRODUCT-MIX-TC-004	Verify cross-sell analysis	High
SLS-PRODUCT-MIX-TC-005	Verify up-sell analysis	High
SLS-PRODUCT-MIX-TC-006	Verify product profitability correlation	High

4.30 Ft Rpt Sls Pipeline

4.30.1 Priority

Must Have

4.30.2 User Story

As a sales manager, I want to analyze sales pipeline and conversion funnel so that I can forecast sales and identify conversion bottlenecks

4.30.3 Preconditions

Pipeline data available, user has sales management role

4.30.4 Postconditions

Pipeline analysis report generated with forecasts and conversion metrics

4.30.5 Test Cases

Id	Description	Weight
SLS-PIPELINE-TC-001	Verify lead pipeline by stage	High

Id	Description	Weight
SLS-PIPELINE-TC-002	Verify conversion rates by stage	High
SLS-PIPELINE-TC-003	Verify average time in each stage	High
SLS-PIPELINE-TC-004	Verify win/loss analysis	High
SLS-PIPELINE-TC-005	Verify forecasted sales calculation	High
SLS-PIPELINE-TC-006	Verify pipeline velocity metrics	Medium

4.31 Ft Rpt Utl Service Utilization

4.31.1 Priority

Must Have

4.31.2 User Story

As a utilization manager, I want to analyze utilization of medical services so that I can understand healthcare consumption patterns

4.31.3 Preconditions

Claims data with service types, member counts, user has utilization management role

4.31.4 Postconditions

Service utilization report generated with patterns and rates

4.31.5 Test Cases

Id	Description	Weight
UTL-SERVICE-UTILIZATION-TC-001	Verify utilization by service type (inpatient, outpatient, pharmacy, etc.)	High
UTL-SERVICE-UTILIZATION-TC-002	Verify utilization rate per 1000 members	High
		High

Id	Description	Weight
UTL-SERVICE-UTILIZATION-TC-003	Verify high utilizers identification	
UTL-SERVICE-UTILIZATION-TC-004	Verify seasonal patterns analysis	Medium
UTL-SERVICE-UTILIZATION-TC-005	Verify regional variations	High
UTL-SERVICE-UTILIZATION-TC-006	Verify trend analysis over time	High

4.32 Ft Rpt Utl Provider Patterns

4.32.1 Priority

Must Have

4.32.2 User Story

As a provider network manager, I want to analyze provider utilization patterns so that I can optimize provider network and contracts

4.32.3 Preconditions

Claims data with provider information, user has provider network role

4.32.4 Postconditions

Provider utilization report generated with patterns and concentration metrics

4.32.5 Test Cases

Id	Description	Weight
UTL-PROVIDER-PATTERNS-TC-001	Verify most utilized providers identification	High
UTL-PROVIDER-PATTERNS-TC-002	Verify provider market share calculation	High

Id	Description	Weight
UTL-PROVIDER-PATTERNS-TC-003	Verify network vs non-network utilization	High
UTL-PROVIDER-PATTERNS-TC-004	Verify provider concentration analysis	High
UTL-PROVIDER-PATTERNS-TC-005	Verify geographic coverage gaps identification	High
UTL-PROVIDER-PATTERNS-TC-006	Verify specialty utilization patterns	Medium

4.33 Ft Rpt Utl Cost Efficiency

4.33.1 Priority

Must Have

4.33.2 User Story

As a finance manager, I want to analyze cost efficiency of utilization so that I can identify cost optimization opportunities

4.33.3 Preconditions

Claims cost data, user has finance/utilization management role

4.33.4 Postconditions

Cost efficiency report generated with opportunities for optimization

4.33.5 Test Cases

Id	Description	Weight
UTL-COST-EFFICIENCY-TC-001	Verify cost per service type calculation	High
UTL-COST-EFFICIENCY-TC-002	Verify cost per member per month (PMPM)	High

Id	Description	Weight
UTL-COST-EFFICIENCY-TC-003	Verify cost variation by provider	High
UTL-COST-EFFICIENCY-TC-004	Verify cost variation by region	High
UTL-COST-EFFICIENCY-TC-005	Verify preventable costs identification	High
UTL-COST-EFFICIENCY-TC-006	Verify generic vs brand drug utilization cost impact	High

4.34 Ft Rpt Prv Performance

4.34.1 Priority

Must Have

4.34.2 User Story

As a provider network manager, I want to analyze provider performance metrics so that I can identify high-performing and underperforming providers

4.34.3 Preconditions

Provider performance data available, user has provider network role

4.34.4 Postconditions

Provider performance report generated with quality and efficiency metrics

4.34.5 Test Cases

Id	Description	Weight
PRV-PERFORMANCE-TC-001	Verify provider quality scores display	High
PRV-PERFORMANCE-TC-002	Verify claims approval rate by provider	High

Id	Description	Weight
PRV-PERFORMANCE-TC-003	Verify average cost per visit by provider	High
PRV-PERFORMANCE-TC-004	Verify member satisfaction scores	High
PRV-PERFORMANCE-TC-005	Verify readmission rates tracking	Medium
PRV-PERFORMANCE-TC-006	Verify adherence to protocols assessment	Medium

4.35 Ft Rpt Prv Cost Analysis

4.35.1 Priority

Must Have

4.35.2 User Story

As a provider network manager, I want to analyze provider costs and efficiency so that I can negotiate contracts and optimize network

4.35.3 Preconditions

Provider cost data available, user has provider network role

4.35.4 Postconditions

Provider cost analysis report generated with efficiency benchmarks

4.35.5 Test Cases

Id	Description	Weight
PRV-COST-ANALYSIS-TC-001	Verify cost per provider vs network average	High
PRV-COST-ANALYSIS-TC-002	Verify fee schedule compliance tracking	High

Id	Description	Weight
PRV-COST-ANALYSIS-TC-003	Verify outlier identification (high-cost providers)	High
PRV-COST-ANALYSIS-TC-004	Verify capitation vs fee-for-service cost comparison	High
PRV-COST-ANALYSIS-TC-005	Verify cost trend by provider over time	High
PRV-COST-ANALYSIS-TC-006	Verify cost efficiency ranking	High

4.36 Ft Rpt Prv Network Coverage

4.36.1 Priority

Must Have

4.36.2 User Story

As a provider network manager, I want to analyze provider network coverage so that I can identify gaps and expansion opportunities

4.36.3 Preconditions

Provider location data, member location data, user has provider network role

4.36.4 Postconditions

Network coverage report generated with gap analysis and recommendations

4.36.5 Test Cases

Id	Description	Weight
PRV-NETWORK-COVERAGE-TC-001	Verify provider density by region	High
PRV-NETWORK-COVERAGE-TC-002	Verify provider density by specialty	High

Id	Description	Weight
PRV-NETWORK-COVERAGE-TC-003	Verify member-to-provider ratio calculation	High
PRV-NETWORK-COVERAGE-TC-004	Verify geographic coverage maps displayed	High
PRV-NETWORK-COVERAGE-TC-005	Verify network adequacy assessment	High
PRV-NETWORK-COVERAGE-TC-006	Verify specialty coverage gaps identification	High

4.37 Ft Rpt Well Participation

4.37.1 Priority

Must Have

4.37.2 User Story

As a wellness manager, I want to analyze wellness program participation so that I can measure engagement and identify improvement areas

4.37.3 Preconditions

Wellness participation data available, user has wellness role

4.37.4 Postconditions

Wellness participation report generated with engagement metrics and barriers

4.37.5 Test Cases

Id	Description	Weight
WELL-PARTICIPATION-TC-001	Verify participation rate by program	High
WELL-PARTICIPATION-TC-002	Verify demographic breakdown of participants	High

Id	Description	Weight
WELL-PARTICIPATION-TC-003	Verify repeat participation tracking	High
WELL-PARTICIPATION-TC-004	Verify engagement trends over time	High
WELL-PARTICIPATION-TC-005	Verify barriers to participation analysis	Medium
WELL-PARTICIPATION-TC-006	Verify participation vs non-participation comparison	High

4.38 Ft Rpt Well Outcomes

4.38.1 Priority

Must Have

4.38.2 User Story

As a wellness manager, I want to analyze wellness program health outcomes so that I can measure program effectiveness

4.38.3 Preconditions

Wellness outcomes data available, user has wellness role

4.38.4 Postconditions

Wellness outcomes report generated with health improvements and effectiveness metrics

4.38.5 Test Cases

Id	Description	Weight
WELL-OUTCOMES-TC-001	Verify biometric improvements tracking (weight, BP, cholesterol, etc.)	High
WELL-OUTCOMES-TC-002		High

Id	Description	Weight
	Verify risk score changes analysis	
WELL-OUTCOMES-TC-003	Verify chronic disease management outcomes	High
WELL-OUTCOMES-TC-004	Verify preventive care utilization increase	High
WELL-OUTCOMES-TC-005	Verify lifestyle behavior changes tracking	Medium
WELL-OUTCOMES-TC-006	Verify before/after comparison for participants	High

4.39 Ft Rpt Well Roi

4.39.1 Priority

Must Have

4.39.2 User Story

As a wellness manager, I want to calculate wellness program ROI so that I can justify investment in wellness programs

4.39.3 Preconditions

Wellness program costs and claims data available, user has wellness/finance role

4.39.4 Postconditions

Wellness ROI report generated with cost-benefit analysis

4.39.5 Test Cases

Id	Description	Weight
WELL-ROI-TC-001	Verify program costs calculation	High

Id	Description	Weight
WELL-ROI-TC-002	Verify savings calculation (reduced claims)	High
WELL-ROI-TC-003	Verify cost per participant calculation	High
WELL-ROI-TC-004	Verify healthcare cost trend comparison (participants vs non-participants)	High
WELL-ROI-TC-005	Verify productivity gains estimation	Medium
WELL-ROI-TC-006	Verify engagement ROI calculation	Medium
WELL-ROI-TC-007	Verify ROI trend over time	High

4.40 Ft Rpt Custom Builder

4.40.1 Priority

Must Have

4.40.2 User Story

As a business analyst, I want to build custom reports using drag-and-drop interface so that I can create ad-hoc reports without IT assistance

4.40.3 Preconditions

User authenticated with report builder access, data sources configured

4.40.4 Postconditions

Custom report built and executed successfully

4.40.5 Test Cases

Id	Description	Weight
CUSTOM-BUILDER-TC-001	Verify drag-and-drop fields to report canvas	High
CUSTOM-BUILDER-TC-002	Verify filter configuration (conditions, operators)	High
CUSTOM-BUILDER-TC-003	Verify grouping configuration	High
CUSTOM-BUILDER-TC-004	Verify sorting configuration	High
CUSTOM-BUILDER-TC-005	Verify data sources available (claims, members, policies, providers, payments, wellness)	High
CUSTOM-BUILDER-TC-006	Verify preview before generating full report	High
CUSTOM-BUILDER-TC-007	Verify report execution and display	High

4.41 Ft Rpt Custom Save Share

4.41.1 Priority

Must Have

4.41.2 User Story

As a business analyst, I want to save and share custom reports so that I can reuse reports and collaborate with team

4.41.3 Preconditions

Custom report created, user authenticated

4.41.4 Postconditions

Report saved and shared with specified users/roles

4.41.5 Test Cases

Id	Description	Weight
CUSTOM-SAVE-SHARE-TC-001	Verify save report definition	High
CUSTOM-SAVE-SHARE-TC-002	Verify name and categorize report	High
CUSTOM-SAVE-SHARE-TC-003	Verify share with users/roles	High
CUSTOM-SAVE-SHARE-TC-004	Verify version history tracking	Medium
CUSTOM-SAVE-SHARE-TC-005	Verify clone and modify existing reports	High
CUSTOM-SAVE-SHARE-TC-006	Verify access control on shared reports	High

4.42 Ft Rpt Custom Visualizations

4.42.1 Priority

Must Have

4.42.2 User Story

As a business analyst, I want to add visualizations to custom reports so that I can present data in charts and graphs

4.42.3 Preconditions

Custom report with data, user authenticated

4.42.4 Postconditions

Visualizations added to report and displayed correctly

4.42.5 Test Cases

Id	Description	Weight
CUSTOM-VISUALIZATIONS-TC-001	Verify chart types available (bar, line, pie, scatter, heatmap)	High
CUSTOM-VISUALIZATIONS-TC-002	Verify customize colors	Medium
CUSTOM-VISUALIZATIONS-TC-003	Verify customize labels and legends	Medium
CUSTOM-VISUALIZATIONS-TC-004	Verify multiple visualizations per report	High
CUSTOM-VISUALIZATIONS-TC-005	Verify export charts as images	Medium
CUSTOM-VISUALIZATIONS-TC-006	Verify chart data linked to report data	High

4.43 Ft Rpt Custom Calculations

4.43.1 Priority

Must Have

4.43.2 User Story

As a business analyst, I want to add calculated fields to custom reports so that I can perform custom analytics

4.43.3 Preconditions

Custom report builder open, user authenticated

4.43.4 Postconditions

Calculated fields added to report and computed correctly

4.43.5 Test Cases

Id	Description	Weight
CUSTOM-CALCULATIONS-TC-001	Verify formula builder with functions (sum, avg, count, percentage, ratios)	High
CUSTOM-CALCULATIONS-TC-002	Verify aggregations (group by) support	High
CUSTOM-CALCULATIONS-TC-003	Verify conditional calculations (IF/THEN)	High
CUSTOM-CALCULATIONS-TC-004	Verify date calculations (date diff, date add, etc.)	High
CUSTOM-CALCULATIONS-TC-005	Verify calculation validation and error handling	High
CUSTOM-CALCULATIONS-TC-006	Verify calculated field naming and reuse	Medium

4.44 Ft Rpt Schedule Config

4.44.1 Priority

Must Have

4.44.2 User Story

As a report administrator, I want to schedule reports for automated generation so that I can receive regular reports without manual effort

4.44.3 Preconditions

Report defined, user has scheduling permissions

4.44.4 Postconditions

Report schedule configured and activated

4.44.5 Test Cases

Id	Description	Weight
SCHEDULE-CONFIG-TC-001	Verify schedule frequency options (daily, weekly, monthly, quarterly, annual)	High
SCHEDULE-CONFIG-TC-002	Verify time of day configuration	High
SCHEDULE-CONFIG-TC-003	Verify day of week/month configuration	High
SCHEDULE-CONFIG-TC-004	Verify effective date range configuration	Medium
SCHEDULE-CONFIG-TC-005	Verify expiration date configuration	Medium
SCHEDULE-CONFIG-TC-006	Verify schedule activation/deactivation	High

4.45 Ft Rpt Schedule Distribution

4.45.1 Priority

Must Have

4.45.2 User Story

As a report administrator, I want to configure automated report distribution so that I can deliver reports to stakeholders automatically

4.45.3 Preconditions

Report scheduled, user has distribution permissions

4.45.4 Postconditions

Distribution configured and reports delivered automatically

4.45.5 Test Cases

Id	Description	Weight
SCHEDULE-DISTRIBUTION-TC-001	Verify email distribution list configuration	High
SCHEDULE-DISTRIBUTION-TC-002	Verify attachment format selection (PDF, Excel)	High
SCHEDULE-DISTRIBUTION-TC-003	Verify report portal notification option	Medium
SCHEDULE-DISTRIBUTION-TC-004	Verify FTP/SFTP delivery option	Medium
SCHEDULE-DISTRIBUTION-TC-005	Verify distribution log maintained	High
SCHEDULE-DISTRIBUTION-TC-006	Verify email delivery with proper formatting	High

4.46 Ft Rpt Schedule History

4.46.1 Priority

Must Have

4.46.2 User Story

As a report administrator, I want to view history of scheduled report executions so that I can track delivery and troubleshoot issues

4.46.3 Preconditions

Scheduled reports exist, user has admin access

4.46.4 Postconditions

Execution history displayed with status and details

4.46.5 Test Cases

Id	Description	Weight
SCHEDULE-HISTORY-TC-001	Verify execution log shows success/failure	High
SCHEDULE-HISTORY-TC-002	Verify generated report archive accessible	High
SCHEDULE-HISTORY-TC-003	Verify download previous reports	High
SCHEDULE-HISTORY-TC-004	Verify error details available for failed executions	High
SCHEDULE-HISTORY-TC-005	Verify retry failed reports capability	Medium
SCHEDULE-HISTORY-TC-006	Verify execution time and duration tracked	Medium

4.47 Ft Rpt Export Excel

4.47.1 Priority

Must Have

4.47.2 User Story

As a business user, I want to export reports to Excel format so that I can perform additional analysis in spreadsheets

4.47.3 Preconditions

Report generated, user authenticated

4.47.4 Postconditions

Report exported to Excel file successfully

4.47.5 Test Cases

Id	Description	Weight
EXPORT-EXCEL-TC-001	Verify multi-sheet workbooks supported	High
EXPORT-EXCEL-TC-002	Verify formatted cells preserved	Medium
EXPORT-EXCEL-TC-003	Verify formulas included where applicable	Medium
EXPORT-EXCEL-TC-004	Verify charts included in export	Medium
EXPORT-EXCEL-TC-005	Verify styling preserved (colors, fonts, borders)	Medium
EXPORT-EXCEL-TC-006	Verify large dataset support (100K+ rows)	High
EXPORT-EXCEL-TC-007	Verify file download successful	High

4.48 Ft Rpt Export Pdf

4.48.1 Priority

Must Have

4.48.2 User Story

As a business user, I want to export reports to PDF format so that I can share professional formatted reports

4.48.3 Preconditions

Report generated, user authenticated

4.48.4 Postconditions

Report exported to PDF file successfully

4.48.5 Test Cases

Id	Description	Weight
EXPORT-PDF-TC-001	Verify professional layout applied	High
EXPORT-PDF-TC-002	Verify company branding included	Medium
EXPORT-PDF-TC-003	Verify page headers/footers present	Medium
EXPORT-PDF-TC-004	Verify table of contents for multi-section reports	Medium
EXPORT-PDF-TC-005	Verify charts and visualizations rendered correctly	High
EXPORT-PDF-TC-006	Verify print-ready format	Medium
EXPORT-PDF-TC-007	Verify file download successful	High

4.49 Ft Rpt Export Csv

4.49.1 Priority

Must Have

4.49.2 User Story

As a data analyst, I want to export reports to CSV format so that I can import data into other systems

4.49.3 Preconditions

Report generated, user authenticated

4.49.4 Postconditions

Report exported to CSV file successfully

4.49.5 Test Cases

Id	Description	Weight
EXPORT-CSV-TC-001	Verify configurable delimiter (comma, semicolon, tab)	Medium
EXPORT-CSV-TC-002	Verify UTF-8 encoding	High
EXPORT-CSV-TC-003	Verify header row option	High
EXPORT-CSV-TC-004	Verify large file support	High
EXPORT-CSV-TC-005	Verify streaming export for big datasets	High
EXPORT-CSV-TC-006	Verify file download successful	High

4.50 Ft Rpt Export Json

4.50.1 Priority

Must Have

4.50.2 User Story

As a developer, I want to export reports to JSON format so that I can integrate with APIs and applications

4.50.3 Preconditions

Report generated, user has API access

4.50.4 Postconditions

Report exported to JSON format successfully

4.50.5 Test Cases

Id	Description	Weight
EXPORT-JSON-TC-001	Verify structured JSON schema	High
EXPORT-JSON-TC-002	Verify nested objects support	High
EXPORT-JSON-TC-003	Verify metadata included (report name, date, parameters)	Medium
EXPORT-JSON-TC-004	Verify pagination for large datasets	High
EXPORT-JSON-TC-005	Verify API endpoint for exports available	High
EXPORT-JSON-TC-006	Verify JSON validation and proper formatting	High

4.51 Ft Rpt Reg Tira Returns

4.51.1 Priority

Must Have

4.51.2 User Story

As a compliance officer, I want to generate TIRA statutory returns so that I can comply with regulatory requirements

4.51.3 Preconditions

Financial and operational data available, user has compliance role

4.51.4 Postconditions

TIRA returns generated in prescribed format

4.51.5 Test Cases

Id	Description	Weight
REG-TIRA-RETURNS-TC-001	Verify TIRA quarterly returns generation	High
REG-TIRA-RETURNS-TC-002	Verify TIRA annual returns generation	High
REG-TIRA-RETURNS-TC-003	Verify prescribed format compliance	High
REG-TIRA-RETURNS-TC-004	Verify data validation before submission	High
REG-TIRA-RETURNS-TC-005	Verify audit trail maintained	High
REG-TIRA-RETURNS-TC-006	Verify electronic submission format	High
REG-TIRA-RETURNS-TC-007	Verify archival of submitted returns	Medium

4.52 Ft Rpt Reg Tax Returns

4.52.1 Priority

Must Have

4.52.2 User Story

As a tax officer, I want to generate tax returns and supporting documents so that I can comply with tax obligations

4.52.3 Preconditions

Financial data available, user has tax/finance role

4.52.4 Postconditions

Tax returns generated in prescribed format

4.52.5 Test Cases

Id	Description	Weight
REG-TAX-RETURNS-TC-001	Verify VAT returns generation	High
REG-TAX-RETURNS-TC-002	Verify income tax supporting schedules	High
REG-TAX-RETURNS-TC-003	Verify withholding tax reports	High
REG-TAX-RETURNS-TC-004	Verify prescribed format compliance	High
REG-TAX-RETURNS-TC-005	Verify validation before submission	High
REG-TAX-RETURNS-TC-006	Verify archival of tax returns	Medium

4.53 Ft Rpt Reg Statutory Accounts

4.53.1 Priority

Must Have

4.53.2 User Story

As a CFO, I want to generate statutory financial statements so that I can meet regulatory and governance requirements

4.53.3 Preconditions

Financial data available, user has CFO/finance role

4.53.4 Postconditions

Statutory accounts generated in compliance with IFRS 17

4.53.5 Test Cases

Id	Description	Weight
REG-STATUTORY-ACCOUNTS-TC-001	Verify balance sheet generation	High

Id	Description	Weight
REG-STATUTORY-ACCOUNTS-TC-002	Verify income statement generation	High
REG-STATUTORY-ACCOUNTS-TC-003	Verify cash flow statement generation	High
REG-STATUTORY-ACCOUNTS-TC-004	Verify notes to accounts	High
REG-STATUTORY-ACCOUNTS-TC-005	Verify IFRS 17 compliance	High
REG-STATUTORY-ACCOUNTS-TC-006	Verify trial balance support	High
REG-STATUTORY-ACCOUNTS-TC-007	Verify audit trail maintained	High

4.54 Ft Rpt Reg Compliance

4.54.1 Priority

Must Have

4.54.2 User Story

As a compliance officer, I want to generate compliance monitoring reports so that I can demonstrate regulatory compliance

4.54.3 Preconditions

Compliance data available, user has compliance role

4.54.4 Postconditions

Compliance reports generated with monitoring metrics

4.54.5 Test Cases

Id	Description	Weight
REG-COMPLIANCE-TC-001	Verify solvency margin calculations	High
REG-COMPLIANCE-TC-002	Verify investment compliance reports	High
REG-COMPLIANCE-TC-003	Verify governance compliance reports	High
REG-COMPLIANCE-TC-004	Verify complaint registers generation	High
REG-COMPLIANCE-TC-005	Verify required disclosures included	High
REG-COMPLIANCE-TC-006	Verify compliance tracking over time	Medium

4.55 Ft Rpt Adhoc Query Builder

4.55.1 Priority

Must Have

4.55.2 User Story

As a business analyst, I want to build ad-hoc queries using query builder so that I can answer specific business questions quickly

4.55.3 Preconditions

User authenticated with query builder access

4.55.4 Postconditions

Ad-hoc query executed and results displayed

4.55.5 Test Cases

Id	Description	Weight
ADHOC-QUERY-BUILDER-TC-001	Verify visual query builder interface	High

Id	Description	Weight
ADHOC-QUERY-BUILDER-TC-002	Verify filter conditions (AND/OR logic)	High
ADHOC-QUERY-BUILDER-TC-003	Verify sorting configuration	High
ADHOC-QUERY-BUILDER-TC-004	Verify aggregations support	High
ADHOC-QUERY-BUILDER-TC-005	Verify limit results option	Medium
ADHOC-QUERY-BUILDER-TC-006	Verify save queries for reuse	High

4.56 Ft Rpt Adhoc Quick Filters

4.56.1 Priority

Must Have

4.56.2 User Story

As a report user, I want to apply quick filters to existing reports so that I can slice data by different dimensions

4.56.3 Preconditions

Report displayed, user authenticated

4.56.4 Postconditions

Quick filters applied and report updated

4.56.5 Test Cases

Id	Description	Weight
ADHOC-QUICK-FILTERS-TC-001		High

Id	Description	Weight
	Verify common filters available (date range, product, region, provider, status)	
ADHOC-QUICK-FILTERS-TC-002	Verify filter persistence across page refresh	Medium
ADHOC-QUICK-FILTERS-TC-003	Verify clear all filters option	High
ADHOC-QUICK-FILTERS-TC-004	Verify filter presets for common scenarios	Medium
ADHOC-QUICK-FILTERS-TC-005	Verify multiple filters can be applied simultaneously	High
ADHOC-QUICK-FILTERS-TC-006	Verify report updates dynamically on filter change	High

4.57 Ft Rpt Adhoc Data Preview

4.57.1 Priority

Must Have

4.57.2 User Story

As a business analyst, I want to preview data before generating full report so that I can verify query results and save time

4.57.3 Preconditions

Query or report configured, user authenticated

4.57.4 Postconditions

Data preview displayed with sample results

4.57.5 Test Cases

Id	Description	Weight
ADHOC-DATA-PREVIEW-TC-001	Verify sample data preview (first 100 rows)	High
ADHOC-DATA-PREVIEW-TC-002	Verify record count displayed	High
ADHOC-DATA-PREVIEW-TC-003	Verify performance estimation shown	Medium
ADHOC-DATA-PREVIEW-TC-004	Verify modify query before full execution	High
ADHOC-DATA-PREVIEW-TC-005	Verify preview loads quickly (< 2 seconds)	High
ADHOC-DATA-PREVIEW-TC-006	Verify proceed to full report generation	High

4.58 Ft Rpt Mgmt Catalog

4.58.1 Priority

Must Have

4.58.2 User Story

As a report user, I want to browse report catalog organized by category so that I can find available reports easily

4.58.3 Preconditions

User authenticated, reports exist in catalog

4.58.4 Postconditions

Report catalog displayed with categorization and search

4.58.5 Test Cases

Id	Description	Weight
MGMT-CATALOG-TC-001	Verify categories displayed (executive, operational, financial, claims, membership, sales, provider, wellness, regulatory)	High
MGMT-CATALOG-TC-002	Verify search by name/ description	High
MGMT-CATALOG-TC-003	Verify favorites functionality	Medium
MGMT-CATALOG-TC-004	Verify recently used reports shown	Medium
MGMT-CATALOG-TC-005	Verify report preview/ description available	Medium
MGMT-CATALOG-TC-006	Verify access to authorized reports only	High

4.59 Ft Rpt Mgmt Access Control

4.59.1 Priority

Must Have

4.59.2 User Story

As a report administrator, I want to control access to reports based on roles so that I can ensure data security and privacy

4.59.3 Preconditions

Reports defined, roles configured, user has admin access

4.59.4 Postconditions

Access control configured and enforced

4.59.5 Test Cases

Id	Description	Weight
MGMT-ACCESS-CONTROL-TC-001	Verify role-based access (executive, manager, analyst, viewer)	High
MGMT-ACCESS-CONTROL-TC-002	Verify report permissions (view, edit, share, export)	High
MGMT-ACCESS-CONTROL-TC-003	Verify data-level security (filter by user's region/ department)	High
MGMT-ACCESS-CONTROL-TC-004	Verify unauthorized access blocked	High
MGMT-ACCESS-CONTROL-TC-005	Verify permission inheritance from roles	High
MGMT-ACCESS-CONTROL-TC-006	Verify override permissions for specific users	Medium

4.60 Ft Rpt Mgmt Audit Trail

4.60.1 Priority

Must Have

4.60.2 User Story

As a compliance officer, I want to maintain audit trail of report access and generation so that I can track usage and ensure compliance

4.60.3 Preconditions

Reports accessed/generated, user has compliance role

4.60.4 Postconditions

Audit trail maintained with comprehensive logging

4.60.5 Test Cases

Id	Description	Weight
MGMT-AUDIT-TRAIL-TC-001	Verify log who accessed which report	High
MGMT-AUDIT-TRAIL-TC-002	Verify log when report accessed	High
MGMT-AUDIT-TRAIL-TC-003	Verify log parameters used for report generation	High
MGMT-AUDIT-TRAIL-TC-004	Verify log export actions	High
MGMT-AUDIT-TRAIL-TC-005	Verify log modifications to report definitions	High
MGMT-AUDIT-TRAIL-TC-006	Verify retention period 7 years	High
MGMT-AUDIT-TRAIL-TC-007	Verify audit log cannot be modified or deleted	High

4.61 Ft Rpt Mgmt Versioning

4.61.1 Priority

Must Have

4.61.2 User Story

As a report administrator, I want to manage report versions so that I can track changes and rollback if needed

4.61.3 Preconditions

Reports exist, user has admin access

4.61.4 Postconditions

Report versioning enabled with history and rollback

4.61.5 Test Cases

Id	Description	Weight
MGMT-VERSIONING-TC-001	Verify version history for report definitions	High
MGMT-VERSIONING-TC-002	Verify compare versions functionality	Medium
MGMT-VERSIONING-TC-003	Verify rollback to previous version	High
MGMT-VERSIONING-TC-004	Verify change notes captured for each version	Medium
MGMT-VERSIONING-TC-005	Verify archive old versions	Medium
MGMT-VERSIONING-TC-006	Verify version metadata (who, when, what changed)	High