

EECE5496 Project 7 (Weeks 7 and 8): Insurance Enterprise Phase 3

Topic: Unified Architecture Framework (UAF)

Team size: 2 students | **Duration:** 2 weeks

Viewpoints in scope: Strategic, Operational, Resources

Starting point: UAF Training Lab: Insurance Enterprise (Dassault Systemes)

Due dates:

Week 7 checkpoint: 10/15/26

Final submission and presentation: Week 8:
10/22/26

1. Overview

In the lab exercise provided on developing an Insurance Company Enterprise model, you have the as-is architecture of an insurance company. It sells to private customers (Phase 1), then adds small companies (Phase 2).

In this project you extend that model to a Phase 3 to-be architecture and show how one change ripples through the Strategic, Operational and Resources viewpoints.

2. Scenario

The board has approved a new vision:

"Become the fastest-paying insurer in the region for private customers and small companies."

The target is to **settle simple claims within 24 hours**. To get there, the company plans an AI-assisted claims service (for example, a customer uploads photos of damage and the system triages the claim). Your team acts as the enterprise architecture team. You must:

1. Describe Phase 3 strategically (vision, goals, capabilities, measurements).
2. Redesign the Claim Handling operation to support it.
3. Define the resources (systems, data, people) that make it work, and compare two options:
 - **Alternative A:** build an in-house AI claims platform.
 - **Alternative B:** integrate a third-party claims automation service.
4. Check that every operational need is covered, and report any gaps.

3. What You Must Deliver

Part 1: Strategic Viewpoint

#	Deliverable	Requirement
S1	Capability taxonomy	Reuse the lab capabilities and add 2 to 3 new ones (for example, Automated Claims Triage, Fraud Detection)
S2	Phase 3 definition	Add Phase 3 with a vision, 2 goals, and the capabilities it exhibits; update the Actual Enterprise Phase Taxonomy table (Phases 1, 2, 3)
S3	Capability dependencies	Strategic Connectivity diagram showing how new capabilities depend on existing ones

S4	Measurements	3 measurements (for example, claim cycle time, straight-through-processing rate, fraud loss ratio), each with a typical definition and at least one actual or target value
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Part 2: Operational Viewpoint

#	Deliverable	Requirement
O1	Structure and connectivity	Add at least 1 new operational performer (for example, Fraud Analyst); update the exchanges and the Operational Connectivity table
O2	To-be process flow	Updated Process Claim flow with an automated-triage branch and a human-review branch; show which performer owns each activity and which exchanges flow between them
O3	Constraints	At least 3 new constraints (for example, 24-hour settlement, data privacy, record keeping), in an Operational Constraints table

Keep this viewpoint solution-independent: describe what must happen and who does it, not which software does it.

Part 3: Resources Viewpoint

#	Deliverable	Requirement
R1	Personnel	Add 2 new posts with responsibilities (for example, AI Model Steward, Fraud Analyst); update the personnel structure

R2	Resource architectures	Short architecture views for Alternative A and Alternative B: software systems, data stores, interfaces, and the posts that operate them
R3	Traceability	Updated implementation matrix (operational performers vs. resources); close the lab's Insurance Policy Management and Marketing gaps; list any remaining gaps
R4	Alternatives comparison	One-page weighted decision matrix comparing A and B (suggested criteria: cost, time to deploy, risk, staffing impact, ability to meet the 24-hour goal). Link each criterion to a goal or measurement from Part 1

Final Package

1. **Model or diagram set.** Use CATIA UAF tool.
2. **Short report (4 to 6 pages).** Include your scope memo, key views, the decision matrix, and a one-page traceability summary: Goal > Capability > Operational performer/activity > Resource/Post.
3. **Presentation (8 minutes).** Pitch your recommendation (A or B) to a non-technical executive audience.

4. Suggested Work Split

Student	Lead on	Shared
Student 1	Strategic and Operational parts	Scope memo, alternatives comparison, presentation

Student 2	Resources and traceability parts	Scope memo, alternatives comparison, presentation
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Each of you reviews the other's views for naming consistency before submission.

5. Timeline

Week	Goals	You should have by the end of the week
1	Recreate the key lab views; define Phase 3	S1 to S4 complete; O1 and O3 done; O2 drafted; 1-page scope memo
2	Resources, traceability, comparison, presentation	R1 to R4 complete; O2 final; report and slides submitted

6. Grading (100 points)

Criterion	Points	What earns full marks
Strategic extension	20	Correct view types; Phase 3 consistent with the lab baseline; measurements are meaningful
Operational extension	25	Solution-independent; exchanges and process flow agree with each other
Resources and personnel architecture	20	Both alternatives clearly defined; posts have clear responsibilities
Traceability and gap analysis	15	Matrix is complete; gaps are identified and addressed or explained

Alternatives comparison	10	Criteria tied to goals; recommendation is justified
Communication	10	Clear diagrams, concise report, effective briefing

7. Tips for Success

- Start from the lab model and change it; do not rebuild from scratch.
- Use identical names for the same element in every view. Traceability depends on it.
- Give every diagram a purpose: be able to say which question it answers.
- Keep software names out of the Operational viewpoint.
- Do not skip the gap analysis. Finding what is not covered is where architecture adds the most value.

8. Optional Stretch (not required for two-person teams - Include for three-person team)

- Add a hybrid Alternative C and extend your decision matrix.
- Add a Security or Services view for the new claims flow.
- Add a sustainability measurement (for example, paperless claims).

9. Submission Checklist

- ☐ S1 to S4 (Strategic)
- ☐ O1 to O3 (Operational)
- ☐ R1 to R4 (Resources)
- ☐ Model or diagram set
- ☐ Report (4 to 6 pages) with traceability summary

- [] Presentation slides (8 minutes)
- [] Both team members' names on every file