

DataView

Introduction

DataView is a case status tool to provide visibility in to cases being managed by the BGA for agents and advisors.

Accessing Data View

SAML

All of iPipeline's tools are secured with the industry leading security products offered by RSA and provide the ability to use Security Assertion Markup Language (SAML) to allow users to seamlessly login to our tools.

Behind the scenes, SAML passes information between the security domains such as where the information is coming from, when the information was generated, who the user is that is attempting to navigate to the iPipeline tools and any other information that may be relevant.

The SAML assertion is encrypted and signed, ensuring secure transmission across the Internet.

Since SAML is a widely used standard and not a proprietary implementation defined by iPipeline, it can be re-used with any number of partners.

This method of authentication is typically used when embedding DataView within your portal for a seamless end user experience.

Dashboard

The Dashboard consists of search features, alerts, and pending case details in order of last accessed.

The screenshot shows the DataView dashboard interface. At the top right, it displays the user ID 'Sfinch6550', a 'Log Out' link, and 'Powered by iPipeline'. The main header includes the 'dataView by iPipeline' logo and a search bar labeled 'Search My Cases:' with a search icon and 'Advanced Search' link. Below the search bar is a 'Reset Search' button. The dashboard is divided into two main sections: 'Alerts (0) Hide' and 'My Cases (13) Hide'. The 'Alerts' section is currently empty. The 'My Cases' section contains a table with the following data:

Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
20674	Brady, Spring	Issued	10/06/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions

Alerts

Alerts notify you when case managers have posted a comment that requires your attention.

Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
4705821	Brady, Bradford	Approved	08/29/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions ▾

Note: Actions menu located to the right allows you to Reply to Case Manager. View Details, takes you directly to the case. Print Details, prints the case details to PDF.



Searching

You have the option of a basic or advanced search. The basic search consists of searching by client Name or Policy number.

Search My Cases:

The advanced search provides more flexible search options:

Advanced Search ✕

First Name <input type="text"/>	Last Name <input type="text"/>
Application State <input type="text" value=""/>	Policy Number <input type="text"/>
App. Signed Date Range From:MM/DD/YYYY <input type="text"/> To:MM/DD/YYYY <input type="text"/>	Status Category <input type="text" value="Open"/>
Agent Name <input type="text" value=""/>	

NOTE: Agent Name is used in the event that you work with other agents and have access to view their cases in DataView.

My Cases

Case details can be accessed by searching or clicking on any of the policy records from the dashboard.

My Cases (13) Hide							
Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
20674	Brady, Spring	Issued	10/06/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions
468313874	Jones, John	Proposed	12/09/2014	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions
216133333	Foster, Frank T	Approved	10/06/2015	Sam Finch	Banner	OPTerm 20 (2009)	Actions
F000478540333	Mounds, Tess	Eligible, Issue Pending	10/06/2015	Sam Finch	Banner	OPTerm 20 (2009)	Actions
4705821	Brady, Bradford	Approved	08/29/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions

Case details open as shown below.

Bradford Brady
4705821
American General - AG ROP Select-a-Term (30 yrs)
Actions

Requirements [Hide](#)

Open

Description	Status	Ordered Date	Required Of:
Blood/HOS	Waived	08/29/2015	Agent
Contract	Outstanding	08/29/2015	Agent

Completed (1)

Case Details [Show](#)

Case Notes (1) [Show](#)
New Message to Case Manager

Inforce Information [Show](#)

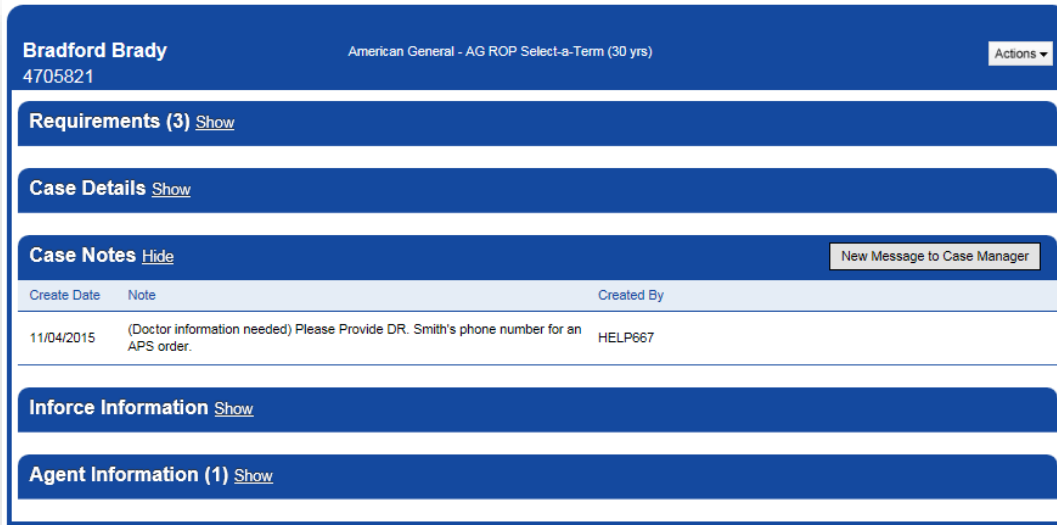
Agent Information (1) [Show](#)

Requirements

The requirements section allows you to see all requirements on a case. The outstanding requirements pane is expanded by default and completed requirements can be seen by clicking the down arrow.

Case Notes

Case Notes include all case comments from Agency Integrator that the case manager has shared with the agent.



The New Message to Case Manager button allows you to communicate with the case manager through Data View.

