

iConnect 166376 Design Approach for Review Queue Manual Move

Project Overview

This enhancement will allow an application in the review queue to be manually moved by an authorized user from one queue to another. Currently an application can be moved from one queue to another only through the approval process. The review queue script is used to move the application from the first queue to the second queue after the app is approved or rejected by the reviewer. With this enhancement, the reviewer will be able to move an application from the first queue to a queue of their choosing without the approval process or the reliance on the pre-established review queue script.

Features/Requirements

- In the Admin tool's Review Queue Only group options, the option 'Enable Manual Queue Move' will give the reviewer the authorization to move applications from one queue to another
- An initial review queue script must be present in the Admin's Review Queue tab in order to enter the application into the initial review queue
- Each application in the review queue will have a drop-down menu displaying the available queues based on the reviewer's queue access
- The available queue drop-down menu will default to the application's current queue location
- The 'Apply Move' button will be enabled when the 'Review' button is clicking, locking the application
- The reviewer will receive a warning before the application is moved from the current queue to the requested queue chosen in the available queue drop-down menu
- Once the reviewer has confirmed the queue move, the current page will refresh and the application will be removed from that queue and placed in the requested queue
- If the reviewer has elected to manually move the app and not approve/reject the app, the review queue script will not run
- The move will be audited as a manual move in the review queue audit trail
- The new queue location will be used for any subsequent automated queue moves
- An app may be moved to the same queue multiple times if needed

Use Cases / Workflow Changes

An application will initially enter the review queue process through the use of the review queue script. A reviewer who has the 'Enable Manual Queue Move' turned on in the Review Queue Only group options can elect to not approve/reject an application, but instead move the app to another review queue. In the review queue, the available queue drop-down will be visible and defaulted to the current queue. The 'Apply Move' button will be disabled for any unlocked application. The reviewer would click the 'Review' button to lock the application, preventing any other user from moving the application at the same time. The 'Apply Move' button is then enabled. Only the queues the reviewer has access to will be shown in the available queue drop-down menu. The reviewer can select the appropriate queue and click the

'Apply Move' button. The reviewer will then confirm their selection and the application will be removed from the current queue and placed in the requested queue.

Admin Changes

- Group option 'Enable Manual Queue Move' added to the Review Queue Only tab

App Changes

- Available queue drop-down menu added if the 'Enable Manual Queue Move' is turned on in the Admin tool
- Available queue drop-down menu defaulted to the application's current queue location
- The 'Apply Move' button will be enabled after the 'Review' button has been clicked to lock the application
- After the reviewer has selected a queue location and clicked the 'Apply Changes' button, the reviewer can confirm or cancel the move request in the Queue Move Confirmation pop-up
- If the move is confirmed, an audit is recorded, listing the manual move to the new queue location
- The review queue script will not run if an app is manually moved, but in subsequent script runs, the new app queue location will be used
- The queue will allow an app to be placed in the same queue multiple times if needed

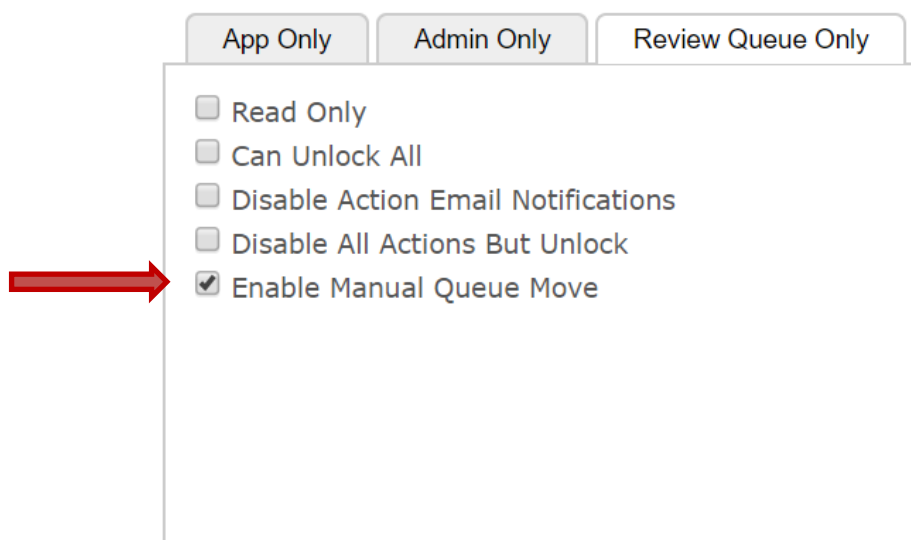
Integration Changes

None needed

UI Mock Ups

Admin Tool

Group option to allow a user to move apps from one queue to another



App Portal

Retest Hi TestQ - FSE WL Product



Locked by you

Low Created: 7/14/2016 10:39:34 AM MST

Carrier: Product:

Solicitation State: Colorado Agent Organization: Insurance Technologies

Unlock

Approve

Reject

More Info

ARM

Apply Move

[Application Pdf](#)

[Application History](#)

[Queue History](#)

[Reviewer Only Documents](#)

[Audit Report](#)

RE of Low TestQ - FSE WL Product

Urgent Created: 7/14/2016 10:42:36 AM MST

Carrier: Product:

Solicitation State: Colorado Agent Organization: Insurance Technologies

Review

Approve

Reject

More Info

ARM

Apply Move

[Application Pdf](#)

[Application History](#)

[Queue History](#)

[Reviewer Only Documents](#)

[Audit Report](#)

How to Enable and Use This Feature

1. In the Admin tool, select Groups from the Profile drop-down menu.
2. Click the 'Enable Manual Queue Moves' for the appropriate user role code in the Review Queue Only tab
3. Then click on the Review Queue option in the Profile drop-down menu. Add a new review queue.
4. Click on the link 'Edit Review Queue Script' to add a new script. The below is an example of a 2 queue script.
5. In the application portal, complete and submit an application that is set up to enter the review queue based on the review queue script.
6. Then exit the application and click on the Review Queue button. Ensure that the displayed queue in the available queue drop-down is the correct queue.
7. Click on the 'Review' button for the application to lock the app. The 'Apply Move' button should enable.
8. Only the queues approved for the user should display in the list of available queues. Select the desired queue and then click 'Apply Move'.
9. The application should be removed from the current queue and should appear in the requested queue.
10. If the review queue script has more than two queues, the subsequent automated queue moves should reflect the current location of the app, i.e. if the app should move to queue 2 after being approved in queue 1, it should not move to queue 2 after approval if it was already manually moved to queue 2.

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Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		

- Design Forms		
- Profile Administration		-‘Enable Manual Queue Move’ added to Review Queue Only group options
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		-Available queue drop-down added with default set to current queue -‘Apply Change’ button -New audit for manual queue move -New confirmation dialog for manual queue move
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		

- Activity Reporting		