
Export Results of Searches

FIRELIGHT BASE



EXPORT RESULTS OF SEARCHES

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iConnect 233156 Design Approach - Export Results of Searches

Project Overview

With this feature clients will have the ability to export search results from all available views on All Activities and Review Queue screens on the App side into a Comma Separated File (CSV). Clients will then be able to take that data in CSV and use it for further research.

Impacts:

A new icon will be added on both the screens below to allow exporting data visible on the screen, either from the default view or after a search is performed.

FL App -> Manage -> All Activities - "Export" functionality

FL App -> Manage -> Review Queue -> Queues - "Export" functionality

1 (App) Add Export Results option on Review Queue

A new "Export" button will be added on Review Queue page. Clicking on this button will export all pages of current view result set into a CSV file. It will show a prompt to save the CSV file. User can export the default, saved or an advanced search result set.

This new button will display for only "Queues" tab on Review Queue screen.

In below screenshot,

1. All data listed/searched from fields within the red highlighted box will have export option.
2. All fields listed within the yellow highlighted box will be exported to the CSV file.

My Review Queue

Queues

(6)

History

Summary

Reviewers

(6)

Saved Search

Advanced Search

All Dates

All Statuses

6 items.

New Account Opening - DSB Account Opening

Policy Number: 6407FSEB2111020829

Product Name: DSB Account Opening

Issue State: AL

Locked by

_test0890 (:

o_test)

Normal

Created: 11/10/2021 1:12:19 AM EST

Carrier: FL Access Carrier - Test

Product: DSB Account Opening

Jurisdiction: Alabama

Agent Organization: FL Access Carrier - Test

Select Queue

Select Reviewer

Assign Reviewer

Unlock

Approve

Reject

More Info

Application History

Queue History

Attach Documents

Audit Report

New Account Opening - DSB Account Opening By Pass enabled

Policy Number: 6407FSEB2111020831

Product Name: DSB Account Opening

Issue State: AL

Locked by

_test0890 (:

o_test)

Normal

Created: 11/10/2021 1:19:21 AM EST

Carrier: FL Access Carrier - Test

Product: DSB Account Opening

Jurisdiction: Alabama

Agent Organization: FL Access Carrier - Test

Select Queue

Select Reviewer

Assign Reviewer

Unlock

Approve

Reject

More Info

Application History

Queue History

Attach Documents

Audit Report

New Account Opening - DSB Account Opening

Policy Number: 6407FSEB2111020834

Product Name: DSB Account Opening

Issue State: AL

Locked by

_test0890 (:

_test)

Normal

Created: 11/10/2021 1:27:17 AM EST

Carrier: FL Access Carrier - Test

Product: DSB Account Opening

Jurisdiction: Alabama

Agent Organization: FL Access Carrier - Test

Select Queue

Select Reviewer

Assign Reviewer

Unlock

Approve

Reject

More Info

Application History

Queue History

Attach Documents

Audit Report

Below Mockup display the "Export" button and placement.

PreSubmit (5)

Saved Search

Advanced Search


All Dates

All Statuses

5 items.

Export

Copy of MRQ 48,49 - RQ Testing


Locked by Unknown

[Application History](#)
[Queue History](#)
[Attach Documents](#)
[Audit Report](#)

Normal

Created: 11/15/2021 7:23:16 AM EST

Carrier: FL Access Carrier - Test Product: RQ Testing

Jurisdiction: Alabama Agent Organization: FL Access Carrier - Test

Unlock

Reviewer Documents

Approve

Reject

More Info

New Application - rSinghDemoProduct

[Application PDF](#)
[Application History](#)
[Queue History](#)
[Attach Documents](#)
[Audit Report](#)

Normal

Created: 11/16/2021 5:40:56 AM EST

Carrier: FL Access Carrier - Test Product: rSinghDemoProduct

Jurisdiction: Alabama Agent Organization: FL Access Carrier - Test

Review

Approve

Reject

More Info

Sample of fields that will be exported to the CSV file:

User	Review Queue	Activity Name	Policy Number	Product Name	Issue State	Locked By	Status	Created	Carrier	Product	Jurisdiction	Agent Organization
User_Test	Pre-Review	New Needs Determination - Need Determination	6407FSEB21111102829	DSB Account Opening	AL	User_Test	Normal	12/16/21 1:19:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test
User_Test	Pre-Review	New Application - ISured Lifetime Income	6407FSEB21111102830	DSB Account Opening	AL	User_Test	Normal	12/15/21 5:21:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test
User_Test	Pre-Review	New Needs Determination - Need Determination-2	6407FSEB21111102827	DSB Account Opening	AL	User_Test	Normal	12/12/21 1:11:27 AM EST	FL Access Carrier - Test	DSB Account Opening	Alabama	FL Access Carrier - Test

Acceptance Criteria

- When basic search is performed, search results exported are the results in the basic search.
- When "Advanced Search" is performed, search results exported are the results returned in the Advanced Search.
- New "Export" button is available on "Queues" tab of Review Queue screen.
- Clicking on this Export button will export review data listed on the screen into a CSV file.
- Exported CSV file has all fields containing review data as mentioned in the sample CSV format.



2 (App) Add Export Results option on All Activities


A new "Export" button will be added on All Activities pages. Clicking this button will export all pages of current view results into a CSV file. A prompt will also be displayed to optionally save the CSV file. The user can export the default, saved or advanced search result data.

In below screenshot,

1. All data listed/searched from fields within the red highlighted box will have export option.
2. All fields listed within the yellow highlighted box will be exported to the CSV file.


Below Mockup highlights the placement of the "Export" button.



[Week](#)
[Month](#)
[Quarter](#)
[YTD](#)
[All](#)


[Saved Search](#)
[Advanced Search](#)
[Export](#)

User My Activities
Status Any
Sort Last Update

User Keerti_FLADEMO_Test: 7 activities updated in the last 30 days.



New Application - Dform

Dform

Data Entry

Last Action:
Updates by Agent
Last Audit Entry: 11/25/2021 12:46:22 AM EST
Activity updated by 'Keerti_FLADEMO_Test'. Saved 1 changes in 0 minutes 1 seconds.
[View History](#)
Created: 11/11/2021

View Requests Delete Copy



New Application - Addendum Testing App
(Pending Requests!)

Addendum Testing App

Pending Pre-Submit Review

Last Action:
Agent Email Sent
Last Audit Entry: 11/24/2021 6:51:59 AM EST
Auto generated email has been sent to the agent.
[View History](#)
Created: 11/19/2021

View Requests Delete Copy


New Application - KC-333

KC-333

Signatures Complete

Last Action:
Agent On-Site Signature Approved
Last Audit Entry: 11/12/2021 4:43:49 AM EST
Activity 'New Application - KC-333' was signed by Agent 'Keerti Agent' from within City 'fsdfs'.
[View History](#)
Created: 11/12/2021

View Requests Delete Copy

Sample CSV file of fields exported:

User	Activity Name	Activity Type	Status	Last Action	Last Audit Entry	Created
User_Test	New Needs Determination - Need Determination	Need Determination	Data Entry	Updates by Agent	12/20/2021 7:40:57 AM EST Activity updated by 'User_Test'. Saved 1 changes in 0 minutes 1 seconds.	12/20/2021
User_Test	New Application - iSured Lifetime Income	iSured Lifetime Income	Pending Signatures	Locked	12/14/2021 8:02:22 AM EST Application lock. Electronic signatures accepted.	12/16/2021
User_Test	New Needs Determination - Need Determination-2	Need Determination	Complete	Back Office Message	12/6/2021 7:07:49 AM EST All Back Office Processing Complete.	12/15/2021

Acceptance Criteria

- When basic search is performed, search results exported are the results in the basic search.
- When "Advanced Search" is performed, search results exported are the results returned in the Advanced Search.
- New "Export" button is available on All Activities screen.

- Clicking on this Export button will export app data listed on the screen into a CSV file.
- Exported CSV file has all fields containing app data as mentioned in the sample CSV format.