
Improve Review Queues Search with Save and Results
Persistence

FIRELIGHT BASE

FireLight[®]

Platform

IMPROVE REVIEW QUEUES SEARCH WITH SAVE AND RESULTS PERSISTENCE

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Insurance Technologies, LLC

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iConnect 218228 Design Approach – Improve Review Queues Search with Save and Results Persistence

Project Overview

Currently within FireLight, a user can select the advanced search in the Review Queue and enter the information to narrow their search, but there is not a feature to save this search to go back to at a later date.

In this enhancement, we will be adding in a new button to allow for searches to be saved, as well as adding a dropdown to access those saved searches at a later time. The advanced search functionality will also be reconfigured to make the searching capability more user friendly.

Impacts:

Advanced Search within the Review Queue

Advanced Search within the Review Queue History Tab

Advanced Search within the Review Queue Reviewer List Tab

Reviewer Documents (any active search will clear if entering information onto the reviewer documents, but an active search will persist if the Documents are locked)

List Profile (This is set within the Provider, any of the search items that are set within the List Profile will display in the advanced search)

Saved Searches will only clear when selecting the clear button, or moving to another queue

1 Reconfigure the UI Layout of the Advanced Search in Review Queue

When "Advanced Search" is selected within the review queue, a separate dialog shows text fields and dropdowns to help the user narrow their search.

We will need to reconfigure the structure of the advanced search feature that is in place today. None of the text boxes or dropdowns will be removed, but will allow for a new layout that will have a better flow for the users.

The date/time range (shown at the top left hand corner of the mockup) will change from a dropdown to radio buttons, but the rest of the text fields, dropdowns, and calendar boxes will stay the same.

This new layout will also allow for the saved searches capability (covered in Story 12428). This includes the Saved Searches dropdown and save button

Advance Search

☐ Week ☐ Month ☐ Quarter ☐ YTD ☒ All

☐ One Year ☐ Two Years

User

Activity Type

Status

Sort

All User

All Activity

All Status

Activity Name

Issue State

Policy Number

Product Name

Company ID

Tele-Sign App ID

☐ AND ☒ OR

Begin Date

End Date

Save

Search

Cancel

This reconfiguration will occur within the Queue search, Review Queue History, and Review Queue Reviewer's List. As the Review Queue History and Reviewer's List search has different dropdowns than the above mock-up, please see below the mock-up for the History and Reviewer's list:

Advance Search

☐ Week
 ☐ Month
 ☐ Quarter
 ☐ YTD
 ☒ All

☐ One Year
 ☐ Two Years

Queue

All Queues
▼

Action

All Action
▼

Activity Name

Issue State

Policy Number

Product Name

Company ID

Tele-Sign App ID

☐ AND ☒ OR

Begin Date

End Date

Save

Search

Cancel

Acceptance Criteria

- When Advanced Search is selected, a new layout of the feature will be displayed (that is shown in the attached mock-ups) within a dialog box.
- The date/time range (on the upper left corner) will display as radio buttons
- User, Activity Type, Status, and Sort are existing dropdowns and will continue to function as it does today.
- Queues and Actions (on the History and Reviewers List Search) are existing dropdowns and will continue to function as they do today.
- Activity Name, Policy Number, Company ID, Issue State, Owner First Name, Owner Last Name, Tele-Sign App ID, and Product Name are text fields that are alpha-numeric
- The And and OR buttons are existing radio buttons and will continue to function as they do today.
- The Begin Date and End Date are existing Calendar Boxes and will continue to function as they do today.

- This reconfiguration will occur for the Review Queue Search, Review Queue History search, and Review Queue Reviewer's List Search
- The Saved search capability will be covered through story 12428. This includes the Saved Searches dropdown and Save button

2 Add Saved Search Capability to Advanced Search in Review Queue

We will need to add the ability to save a search within the advanced search functionality for the review queue.

When a user selects the Advanced Search button, a new dialog box will display and the user can enter in their information for the search.

Advance Search

☐ Week
 ☐ Month
 ☐ Quarter
 ☐ YTD
 ☒ All

☐ One Year
 ☐ Two Years

User

Activity Type

Status

Sort

All User

All Activity

All Status

Activity Name

Issue State

Policy Number

Product Name

Company ID

Tele-Sign App ID

☐ AND
 ☒ OR

Begin Date

End Date

Save

Search

Cancel

If the user would like to save this information, they can select the "Save" button at the bottom of the search. When they do, a pop-up will appear that will allow the user to name this search, which then they can select "OK" to save, and "Cancel" to cancel the save.

Save Search

Name:

Save **Cancel**

Once the search has been saved, the user can then proceed with the search by selecting the "Search" button.

Additionally, when the user wants to access their saved searches, they will be able to do so by selecting the "Saved Searches" button at the top of the review queue next to the "Advances Search" button. When this is selected, a dropdown will list all of the users saved searches. This search box has no maximum limits, and is scrollable by alphabetical order to allow for as many searches as the user has.

Saved Search

Advance Search **Clear**

Saved Search

Hello Search

Julie's test search

When a saved search from the dropdown is selected, then the advanced search dialog box appears with all of the saved information listed within the texts, dropdowns, and calendar boxes. Any of the text boxes, dropdowns, and calendar boxes can be left blank, not all of the fields have to be filled out, however, the User is a required field to allow for a saved search to occur.

Queue

ARM (5)

Julie's test search

Advance Search

Clear

All Dates

All Status

Advance Search

☒ Week
☐ Month
☐ Quarter
☐ YTD
☐ All

☐ One Year
☐ Two Years

User

Activity Type

Status

Sort

it

All Activity

All Status

Activity Name

Issue State

Policy Number

Product Name

Company ID

Next Steps

AL

Tele-Sign App ID

☐ AND
☒ OR

Begin Date

End Date

Delete

Save

Search

Cancel

[ation History](#)
[ueue History](#)
[h Documents](#)
[Audit Report](#)

[ore Info](#)

[lication PDF](#)
[ation History](#)
[ueue History](#)
[h Documents](#)
[Audit Report](#)

If the user changes any of the information in an existing saved search, it can be re-saved under the same name by selecting the "Save" button, and the name in the pop-up will default to the original name.

If the user wants to delete a search, they can select the search in the saved searches dropdown, and select the "Delete" button, which will appear only when a user is in a saved search.

All Dates

All Status

Advance Search

☒ Week ☐ Month ☐ Quarter ☐ YTD ☐ All

☐ One Year ☐ Two Years

User

Activity Type

Status

Sort

it

All Activity

All Status

Activity Name

Issue State

Policy Number

Product Name

Company ID

Next Steps

AL

Tele-Sign App ID

☐ AND ☒ OR

Begin Date

End Date

Delete

Save

Search

Cancel

A pop-up will appear asking "Are you sure you want to delete this search?" which the user can select "Yes" to delete, or "Cancel" to cancel.

Delete Search

Are you sure you want to delete this search ?

Delete

Cancel

If the user wants to resume the default search in review queue, they can select the "Clear" button located next to the Advanced Search on the header, which will clear the search and show the default

list of activities within the review queue. The Clear button or moving to another queue is the only way to clear out a search, even if other actions are taken on an app within the queue.



Acceptance Criteria

- A search can be saved when entering at least the user information and selecting the "save" button.
- The "Save" button will prompt a pop-up where the user can enter the name of their search. If they select "Ok" it saves, but if they select "Cancel" it will cancel.
- When a user wants to access their saved search, they select the "Saved Searches" button. A dropdown will display listing all of the searches that have been saved
- Saved searches have no limit, and the dropdown that is displayed in alphabetical order will be scrollable.
- When a saved search is selected within the dropdown, the advanced search dialog appears with the saved search information listed within the textboxes, dropdowns, or calendar boxes. Not every field has to be populated.
- A user can edit their saved search by changing the information within the dialog and selecting the "Save" button. The pop-up that appears will default to the last name.
- A user can delete a saved search by selecting it in the saved search dropdown, and selecting "Delete Search" button at the top right. This will prompt a pop-up asking "Are you sure you want to delete this search?" A "yes" will delete, and "Cancel" will cancel the delete.
- If the user wants to resume a default search, they can select the "clear" button next to the advanced search button on the header. The clear button is the only way to cancel a search.
- Saved Functionality should apply to Review Queue History and Reviewers List as well