
Addition of Reviewer notes to audit history 2.18

FIRELIGHT BASE



ADDITION OF REVIEWER NOTES TO AUDIT HISTORY 2.18

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Design Approach - Addition of Reviewer notes to audit history 2.18

This enhancement will allow for Reviewer and Supervisor comments that are included in the Reviewer Documents to be viewed in both the Review Queue History and Review Queue Audit report. For this to occur, additions will need to be made the Review Queue page. The addition of new FL tags will be needed along with a new section on the review queue page of FL to house these tags. Once in place, the Reviewer will be able to view comments in both the Review Queue Audit History and Review Queue Audit report.

Sequential Review Queues - Reviewer documents and their comments will be retained in the original queue, but since each queue has a brand-new document set, these comments will not be retained across sequential review queues. However, these comments can be copied through a client's provider at this time. If interested in this, please reach out to your project manager.

Impacts:

Reviewer Documents

Admin: Capture the dataitems for each queue in text field titled: Data item to include in review audit

Review Audit: New section within the Review Audit titled: Reviewer Audit Comments


1 Admin: Addition of DataItems to include in the Review Queue Audit and History


The addition of new comma separated value list of dataitems are needed to be collected in the Admin\Review to support storing the values entered in these data items in the Review audit. This will allow Reviewers to view comments made by other reviewers in the Reviewer Documents.


1.1 Review Queue Audit: Add Dataitem field to Review Queue

The addition of a new section labeled "Data Items to include in the Review Audit" will be added to the Admin\Review Queue. There will be a text box where the admin can enter a list of data items in a comma separated value list. Any data items in this box that appear in the reviewer documents will be stored in the reviewer audit and history (see other stories). (This will work like the additional information fields.)

This section will appear for each queue, but the values are not unique per selected Queue. Therefore, we will need to add *These values apply to all Queues* as shown in the below example.




Add New Queue



SU	Post-Submit	SU		
abc	Post-Submit	123		X
ARM	Post-Submit	334	22	X
BasicQ	Post-Submit	100		X
ert	Post-Submit	444		X
JET_Queue	Post-Submit	7894		X
PreSubmit	Pre-Submit	PreSubmit	Queue for PreSubmit requests.	
Q2	Post-Submit	335		X
RW_Test	Post-Submit	3124		X

Queue Name
Queue Number
Email Group
Remarks
Additional Info
Last Updated
4/1/2020 2:14 PM UTC
Disable Approval Actions
☐
Disable Show Application On Lock
☐
Enable Children Links
☐

Data item to include in Review Audit
* These values apply to all queues.

Automated
☐
Automation Retry Interval
 minutes

Review Queue Deadline
At Deadline
Deadline Length
 days
Deadline Date - Include Weekends
☐
Deadline Date - Include FINRA Holidays
☐
Deadline Date - Include Market Days
☐
Deadline Date - Continue From Previous Queue
☐

[Edit Review Queue Script](#)

Acceptance Criteria

- "Data item to include in Review Audit" and "
- These values apply to all queues." label is present with a text box.
- The text box is editable and supports data items in a comma separated value list.
- One or many data items can be entered and saved.
- Data item to include Review Audit section appears for each queue but the values are not unique per Queue.

1.2 1-Addition of Dataitems

The addition of two dataitems will be needed to access comments made by a specific reviewer within the Review Queue Audit History and the Review Queue History.

The dataitems that will be defined by the client.

2 APP: Updates to Review Queue Audit report and History

Enhancements to both the Review Queue Audit history report and Review Queue history log will be needed to show reviewer comments entered into the Reviewer documents for the data items listed in the Admin\Review Queue.

2.1 Review Queue Audit: Updates to Review Queue History

The Review Queue history will be updated to capture the the values entered in the Reviewer Documents for the data items listed in the Admin\Review Queue.

A new section in the Review Queue History is required to store Reviewer Comments. Label the section Reviewer Comments.

If the data items listed in the Admin\Review Queue are not null, we will store those values in the Review Queue History. The Review Queue history will include a timestamp when the data items are saved and not null along with the user who entered the data items and the value of the data items at that time it is saved. We will need to support alpha numeric values in the text fields.

The history is viewable throughout all review queues. If there are multiple queues, the comments in the reviewer documents in the defined data items will remain in the review queue history for the subsequent review queues.

Status as of 4/7/2020 23:45 PM EST : **Approved**

HISTORY:

Approved 4/7/2020 23:45 PM EST	User Name: Remarks: This application has been approved to move to the next step of the review process by Jon Doe Supervisor_Comments: Application approved
Lock 4/7/2020 23:20 PM EST	User Name: Remarks: Reviewer_Comments: Thank You
ReviewerDocuments 4/7/2020 23:12 PM EST	User Name: Remarks: Supervisor_Comments: Application under Review
ReviewerDocuments 4/7/2020 23:00 PM EST	User Name: Remarks: Reviewer_Comments: Application has been edited and ready for further review
ReviewerDocuments 4/7/2020 22:48 PM EST	User Name: Remarks: Supervisor_Comments: Application needs edits
Lock 4/7/2020 22:45 PM EST	User Name: Remarks: Reviewer_Comments: Please review Application

Acceptance Criteria

- Reviewer Comments section is added to the Review Queue history for each review queue.
- Each comment is timestamped.
- Every time a comment is added for the defined data items, the audit is added.

- Audit comments are present in the history for the queue. the logged in user is indicated for the Reviewer.
- The history is viewable for the subsequent review queues.

2.2 Review Queue Audit: Updates to Review Queue Audit report

The Review Queue Audit History Report will now include a new section titled Reviewer comments. This section will capture the values for the data items listed in the Admin\Review Queue. As the reviewer enters data into the Reviewer Documents into the fields with the defined data items, the text entered at that time will be stored and displayed in the Reviewer Audit. We will need to support alpha numeric values in the text fields.

The Reviewer Audit comments section will allow for the following:

- A timestamp when each reviewer added a comment into the data items
- Session user ID
- The data items will be listed along with the audit comments saved for the values of that data items.

Example: In the below example, the data items listed in Admin\Review Queue are Reviewer_Comments and Supervisor_comments.

Here is the Reviewer Document with the data items.

Mockup:

Save

PHP REVIEWER DOCS | PHP RE

Page 1

Page Name: Page 1

Form Properties

Form History

Input Control

Name:

Delete Control

Copy Fields

Field Properties

Rules Window

Primary Rule Set

Wizard Json Window

Display Form

Set Tab Order

Toolbox

Add Control to Form

Text Box

CheckBox

Calendar

Radio Button

Combo Box

Label

Signature Box

Signature Initials

BarCode

Button

Address Autocomplete



Production Points

Reviewer Notes:

Reviewer_Comments

Supervisor_Comments

Review Queue Activity Audit - 67b09d42-61cd-4f8d-adb5-8fb705b8dba5		
Timestamp (UTC)	Session User	Audit Message
4/7/2020 22:45		Auto Added to Queue
4/7/2020 22:48	it	Locked for Review
4/7/2020 22:48	it	Application is unlocked and released back in the queue.
4/7/2020 22:50	it	Locked for Review
4/7/2020 22:50	it	This application has been processed and approved by the reviewer 'it' and has been released to the carrier. Please contact the carrier if you have any further questions about the status of this application.
4/7/2020 22:50	it	A review queue approval email was sent to it.

Reviewer Audit Comments		
Timestamp (UTC)	Session User	Audit Comments
4/7/2020 22:45	ChrisH FLADEMO	Reviewer_Comments: Please review Application
4/7/2020 22:48	ChrisH FLADEMO	Supervisor_Comments: Application needs edits
4/7/2020 23:00	ChrisH FLADEMO	Reviewer_Comments: Application has been edited and ready for further review
4/7/2020 23:12	ChrisH FLADEMO	Supervisor_Comments: Application under Review
4/7/2020 23:20	ChrisH FLADEMO	Reviewer_Comments: Thank You
4/7/2020 23:45	ChrisH FLADEMO	Supervisor_Comments: Application approved

Signature Summary

Acceptance Criteria

- Reviewer Audit Comments section is added to the Review Queue Audit history. This will repeat per queue so that it is clear which queue the comments were added.
- Each comment is timestamped
- Session ID of user is present with all added comments
- Audit comments are present, and the data item is indicated before the comment. Example, Reviewer Comments: Please Review Application
- The audit for these data items is added for each review queues.
- If there are multiple review queues, the Reviewer comments will be under each queue. So, this will repeat under each queue so that it is clear which queue the comments were added.

Acceptance Criteria