iConnect 122321- Ability to View Attached Documents in Manual Review Queue

Workflow Changes

None

Features/Requirements

Ability to view uploaded documents in the manual review queue. Additional 'View Additional Documents' button would provide access to any documents that are not the application, but are being included with the application.

## Admin Changes

None

App Changes

- Additional button 'View Additional Documents' added to the Manual review queue
- 'View Application' button to display only application documents as it currently functions
- 'View Additional Documents' works identical to 'View Application'
    - browser tab opens to display additional documents,
    - pdf view is un-editable,
    - all uploaded documents can be scrolled to view
- Make 'View Additional Documents' button visible through organization style sheet to allow for opt in for viewing of uploaded documents in the manual review process

UI Mock Ups

Application Portal- Manual View
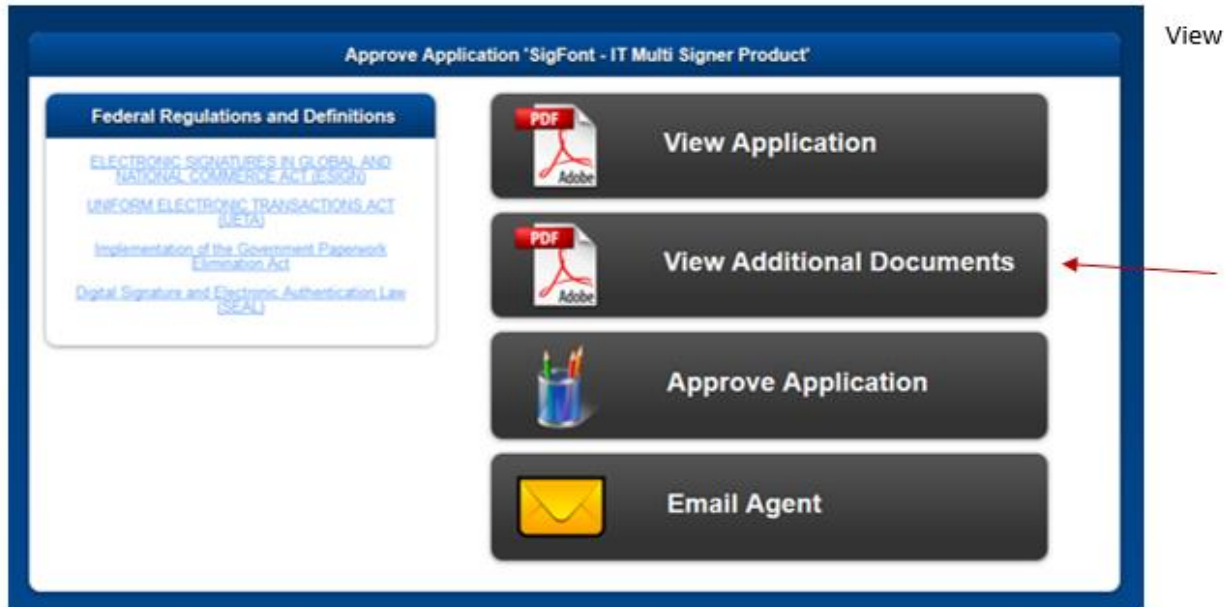
Application/View Additional Documents- additional browser tabs
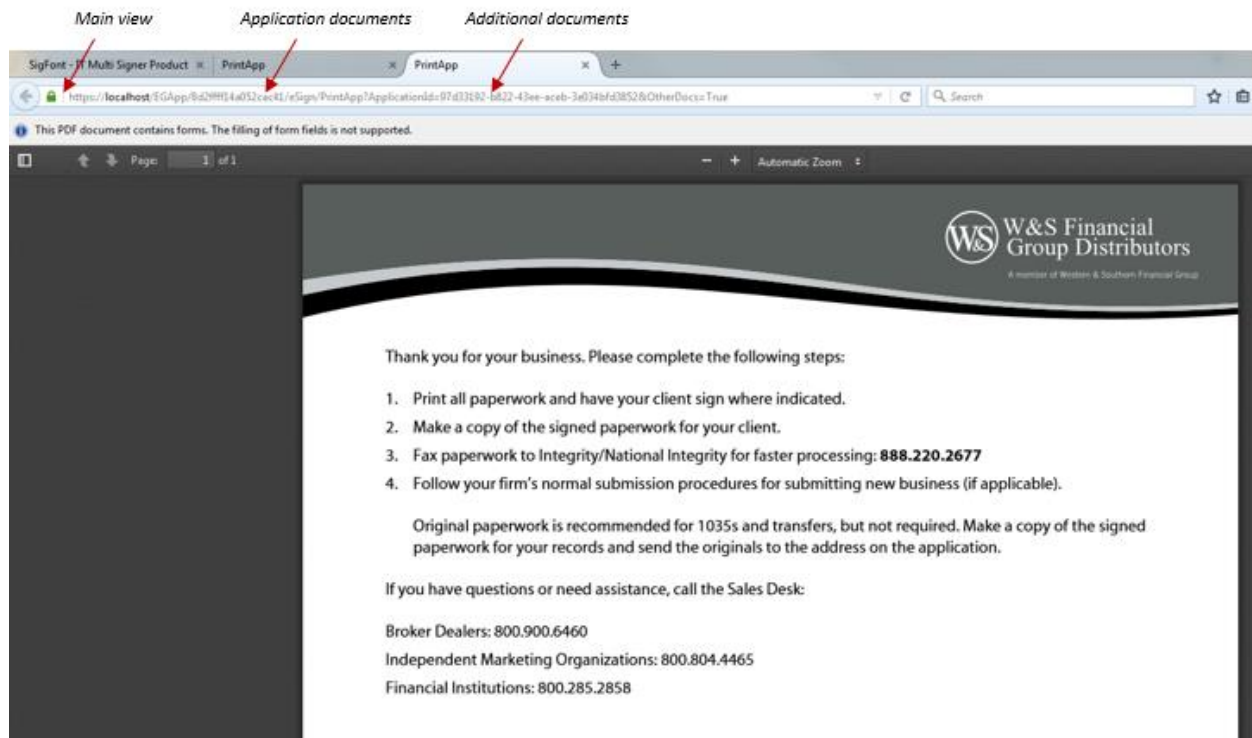
Areas Impacted

System Area	Yes	Comment
Admin Tool		
▪ **Form Library**		
▪ **Design Forms**		
▪ **Profile Administration**		
▪ **Reports**		
▪ **Deployment**		
FireLight App		
▪ **New Application**		
▪ **Edit Application**		
▪ **Signature Process**		
▪ **Review Queue**		
▪ **Manual Review**	x	View Additional Documents button
▪ **User Preferences**		
▪ **Inbound Integration**		
▪ **Outbound Integration**		
▪ **PDF Generation**		
▪ **Other**		
FireLight Console		
▪ **Windows O/S**		
▪ **iOS**		
▪ **Android**		
Other Systems		
▪ **DTCC Integration**		
▪ **Commission netting**		
▪ **Activity Reporting**		

Steps for testing:

1. In the Admin tool Organization tab, check option 'Allow E-Approval' to turn on manual review queue.
2. Create a new application in the app portal and upload a document using the Documents link in the 'Other Actions' dropdown menu.
3. In app portal, when application is complete and signatures have been collected, click the 'Complete' button and choose option to review.
4. Enter email information in the email template fields to send review request email.
5. Using emailed link, enter the external manual review.
6. Click on button 'View Application' and verify that only the application documents are visible.
7. Click on button 'View Additional Documents' and verify that only the uploaded documents are visible.