

iConnect 205762 Design Approach - Automated Queue Creation with the Ability to perform Web Service Calls

Project Overview

Currently within FireLight, we are only able to manually do a web service call using a custom action button on a reviewer document within the review queue. We'll need to add the opportunity to have this check be automatic.

The desired workflow will create the ability to address if a queue is automated or not, and add a distinction for the queue to notify the user that this queue is selected to be automated. This queue will also be able to perform web service calls through the use of the provider, and messages will be sent to the queue (i.e. reject or approve) in order to move the activity either to be submitted, or rejected.

Release Documentation for Automated Queue Impacts:

Review Queue UI

Review Queue workflow pertaining to automated queues

Expiration Deadline date

Provider

Provider Capabilities to connect to the Review Queue

Requirements / User Stories

Provide Capability for the Review Queue to call into the provider

Need the ability for the review queue to call into the provider and the provider will be able to determine if this activity should be approved or rejected in an automated sense. The call out to the web service, when received (determined by the client), will move the provider to instantly change the status of the activity to be either approved or rejected.

Acceptance Criteria

- If an activity has been added to a particular queue that is automated, the provider will determine through the use of either polling or a web service call, if it should be approved or rejected.
- If activity is not accepted/rejected on first call to provider, use Retry interval specified on review queue next run time.

Add Automated options to Review Queue views Admin

Add in a checkbox that will determine if this particular queue is Automated or not. Default will be not selected. Add in an interval to utilize the admin tool instead of the providers.

When this checkbox is selected, a deadline date has to be entered as well.

Queue Name	<input type="text" value="50"/>	Automated	<input type="checkbox"/>
Queue Number	<input type="text" value="50"/>	Automation Retry Interval	<input type="text" value="0"/> minutes
Email Group	<input type="text"/>	Deadline Length	<input type="text" value="0"/> days
Remarks	<input type="text"/>	Deadline Date - Include Weekends	<input type="checkbox"/>
Additional Info	<input type="text"/>	Deadline Date - Include FINRA Holidays	<input type="checkbox"/>
Last Updated	9/18/2019 2:04 PM UTC	Deadline Date - Include Market Days	<input type="checkbox"/>
Disable Approval Actions	<input type="checkbox"/>	Deadline Date - Continue From Previous Queue	<input type="checkbox"/>
Disable Show Application On Lock	<input type="checkbox"/>		
Enable Children Links	<input type="checkbox"/>		

[Edit Review Queue Script](#)

Note: The review queue script is global to all queues and is deployed using Organization Configuration.

Acceptance Criteria

- If checkbox is not selected, the queue will operate in a manual state
- If Checkbox is selected, the queue will operate in an automated state - approve/reject without manual interference
- If Checkbox is selected, the expiration deadline date will turn to a required field, and a value will have to be entered (higher than 0)
- If Checkbox is selected a retry interval must be specified (Increments of 5 minutes)

Approve or Reject from a Queue without using SOAP call

Provide a change to back office provider service to allow the auto approval or rejection without using the existing SOAP Call. Extend the back office system in FireLight to allow the provider to approve or reject an application. Allow provider to include Remarks to be included with Accept/Reject

Acceptance Criteria

- A method has been added so the provider can approve or reject an activity
- When the provider approves or rejects an activity, it should work as if the user had done this in the review queue UI

Admin: Change Distinction to a column reflecting Queue Type

We need the ability to describe the types of Queues that will be listed in the Queue table. Currently we have verbiage and Color-coding reflecting a few queues that are different than the normal OSJ queue, and this will need to be removed to make way for the new functionality.

We'll need to add a column after the Queue Name that will be named "Queue Type" and will list the following types:

Pre-Submit

Post-Submit

Automated

Pre-Submit Queues will be linked to any Queue that will be using the Manual Review Queue process selected in the Activities tab.

Post-Submit Queues will be all of the "OSJ" queues that are listed today

Automated Queues will be queues that have the "Automated" checkbox selected

Queue Name ▼	Queue Type ▼	Queue Number ▼	Remarks ▼	
50	Post-Submit	50		X
abc	Post-Submit	123		X
ARM	Post-Submit	334	22	X
AutoTest	Automated	AutoTest		X
AutoTest2	Automated	AutoTest2		X
AutoTest3	Automated	AutoTest3		X
BasicQ	Post-Submit	100		X
ert	Post-Submit	444		X
FINRA	Post-Submit	FINRA		X

Acceptance Criteria

- "Queue Type" will be visible and the 2nd column of the Queue Table
- Pre-Submit will be listed next to the PreSubmit Queue
- Post-Submit will be listed next to queues that are not PreSubmit or do not have the Automated checkbox selected
- Automated will be listed next to queues that have the Automated checkbox selected

App: Separate Automated Queues from other queues to show distinction

Today in Firelight, all of the queues from the Queue table are listed, not reflecting if one is Automated, Pre-submit or Post-Submit. In order for the Automated queues to be highlighted, the "Automated" verbiage, and color coding needs to be removed, and we will need to separate the Automated queues from the other queue. To do this, we will need to add the Automated queue into its own Queue listing.

This queue listing will only show up if there is an automated queue selected within the admin. Otherwise, it will be hidden from the user.

My Review Queue

Queues

abc (1)

ARM (0)

BasicQ (8)

PreSubmit (1)

Automated Queues

AutoTest (0)

AutoTest2 (0)

AutoTest3 (3)

Acceptance Criteria

- Automated Queue listing will only be visible when an Automated queue has been selected from the admin
- The Automated Queue listing will only show Automated Queues
- The Queue Listing will show all other queues, including: PreSubmit and Post-Submit (OSJ) queues


If activity is unlocked, provider will be put into a holding pattern

A small select group will have access to the automated queue through the groups option that we have today. They would be able to access the cases and unlock them if necessary. This unlocking will cause the provider to be put into a holding pattern for that case. The provider will then have a time interval to check back on the case, but the lock will be honored. If the app does not get locked then the provider can re-lock and continue.

Acceptance Criteria

- Someone else locking the app will cause the provider to bypass the case in the automated queue
- If the case happens to be unlocked, the provider will pick back up where it left off, but if not, it is the responsibility of the admin to reject or move the case. The provider retry will be cancelled

Activity will be rejected from Queue if expiration timeframe is exceeded

 **Rejected by IT System User**

New Application - Gwiz

Normal Created: 9/20/2019 5:27:03 PM EST Last Action: 9/20/2019 5:27:13 PM EST

Carrier: Insurance Technologies Product: Gwiz
Jurisdiction: Colorado Agent Organization: Insurance Technologies

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

Acceptance Criteria

- Activity is rejected from review queue no differently than other expirations. Any subsequent calls to the provider will not happen