

# DataView

## Introduction

DataView is a case status tool to provide visibility in to cases being managed by the BGA for agents and advisors.

## Accessing Data View

### SAML

All of iPipeline's tools are secured with the industry leading security products offered by RSA and provide the ability to use Security Assertion Markup Language (SAML) to allow users to seamlessly login to our tools.

Behind the scenes, SAML passes information between the security domains such as where the information is coming from, when the information was generated, who the user is that is attempting to navigate to the iPipeline tools and any other information that may be relevant.

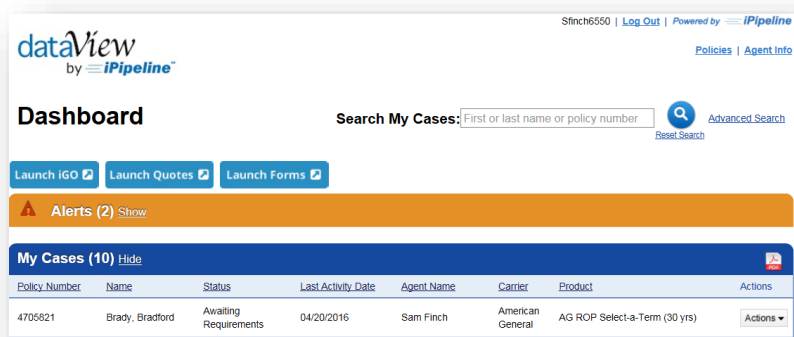
The SAML assertion is encrypted and signed, ensuring secure transmission across the Internet.

Since SAML is a widely used standard and not a proprietary implementation defined by iPipeline, it can be re-used with any number of partners.

**This method of authentication is typically used when embedding DataView within your portal for a seamless end user experience.**

### Dashboard

The Dashboard consists of search features, alerts, and pending case details in order of last accessed.

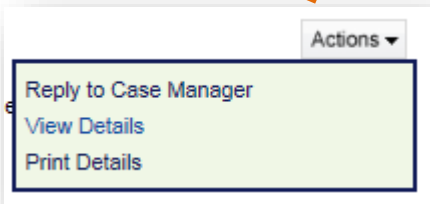


## Alerts

Alerts notify you when case managers have posted a comment that requires your attention.

Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
4705821	Brady, Bradford	Approved	08/29/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions ▾

**Note:** Actions menu located to the right allows you to Reply to Case Manager. View Details, takes you directly to the case. Print Details, prints the case details to PDF.



## Searching

You have the option of a basic or advanced search. The basic search consists of searching by client Name or Policy number.

Search My Cases:  [Advanced Search](#) [Reset Search](#)

The advanced search provides more flexible search options:

**Advanced Search**

First Name:

Last Name:

Application State:

Policy Number:

App. Signed Date Range: From:  To:

Status Category:

Agent Name:

[Reset Search](#) [Search...](#)

**NOTE:** Agent Name is used in the event that you work with other agents and have access to view their cases in DataView.

## My Cases

Case details can be accessed by searching or clicking on any of the policy records from the dashboard.

Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
20674	Brady, Spring	Issued	10/06/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions ▾
468313874	Jones, John	Proposed	12/09/2014	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions ▾
216133333	Foster, Frank T	Approved	10/06/2015	Sam Finch	Banner	OPTerm 20 (2009)	Actions ▾
F000478540333	Mounds, Tess	Eligible, Issue Pending	10/06/2015	Sam Finch	Banner	OPTerm 20 (2009)	Actions ▾
4705821	Brady, Bradford	Approved	08/29/2015	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions ▾

Case details open as shown below.

**Bradford Brady**  
4705821

American General - AG ROP Select-a-Term (30 yrs)

Actions ▾

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**Requirements** [Hide](#)

**Open**

Description	Status	Ordered Date	Required Of:
Blood/HOS	Waived	08/29/2015	Agent
Contract	Outstanding	08/29/2015	Agent

**Completed (1)** ▾

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**Case Details** [Show](#)

**Case Notes (1)** [Show](#) New Message to Case Manager

**Inforce Information** [Show](#)

**Agent Information (1)** [Show](#)

## Requirements

The requirements section allows you to see all requirements on a case. The outstanding requirements pane is expanded by default and completed requirements can be seen by clicking the down arrow. To view any Notes the Carrier has included with a particular Requirement, hover over

the text in the Notes column on the Requirements pane that reads "hover to view notes," and the notes will appear in a modal box.

**Spring Brady** American General - AG ROP Select-a-Term (30 yrs) Actions ▾

20674233

**Requirements** [Hide](#)

Open				
Description	Status	Ordered Date	Required Of	Notes
Blood Profile	Outstanding	10/23/2015	Agent	<i>Hover to view Notes</i>
Resting EKG	Outstanding	10/23/2015	Agent	<i>Hover to view Notes</i> History of heart murmur
Addendum to Part A or B application - 2011 - REV0113	Outstanding	10/23/2015	Agent	

### Case Notes

Case Notes include all case comments from Agency Integrator that the case manager has shared with the agent.

**Bradford Brady** American General - AG ROP Select-a-Term (30 yrs) Actions ▾

4705821

**Requirements (3)** [Show](#)

**Case Details** [Show](#)

**Case Notes** [Hide](#) New Message to Case Manager

Create Date	Note	Created By
11/04/2015	(Doctor information needed) Please Provide DR. Smith's phone number for an APS order.	HELP667

**Inforce Information** [Show](#)

**Agent Information (1)** [Show](#)

The New Message to Case Manager button allows you to communicate with the case manager through Data View.

**Bradford Brady**  
4705821

Requirements (3) [Show](#)

Case Details [Show](#)

Case Notes [Hide](#)

Create Date	Note
11/04/2015	(Doctor information needed) Please APS order.

Inforce Information [Show](#)

Agent Information (1) [Show](#)

**New Message to Case Manager**

Description

Message

Reply

New Message to Case Manager