DataView

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.

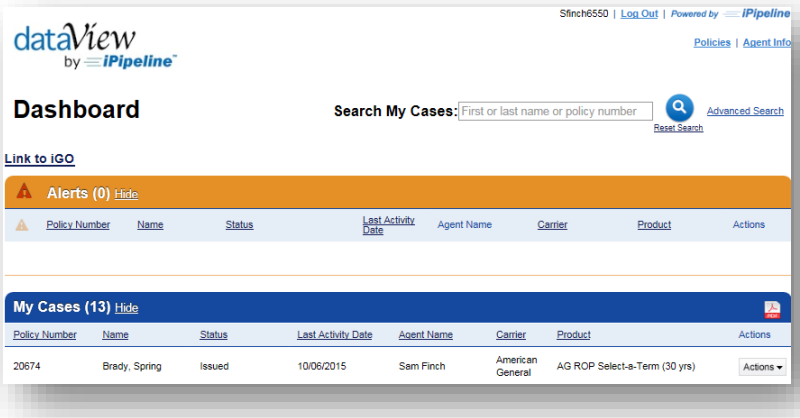
The SAML assertion is encrypted and signed, ensuring secure transmission across the Internet.

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

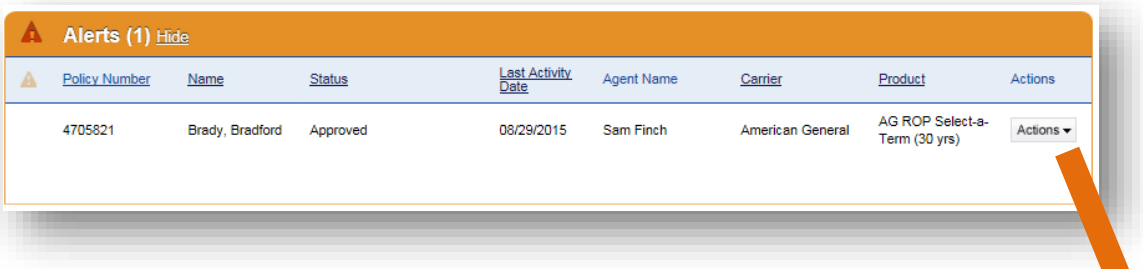
The Dashboard consists of search features, alerts, and pending case details in order of last accessed.



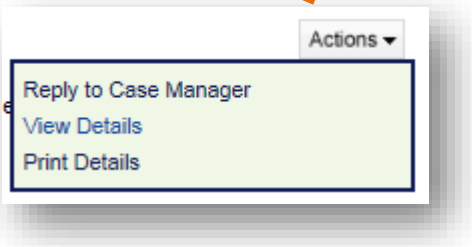
IPIPELINE®
INSURANCE ACCELERATED

Alerts

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

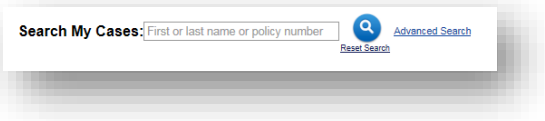


Note: Actions menu located to the right allows you to Reply to Case Manager. View Details, takes you directly to the case. Print Details, prints the case details to PDF.

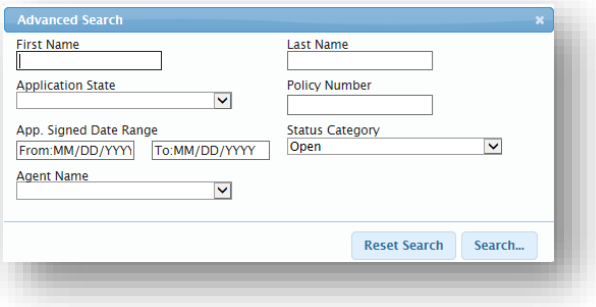


Searching

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



The advanced search provides more flexible search options:

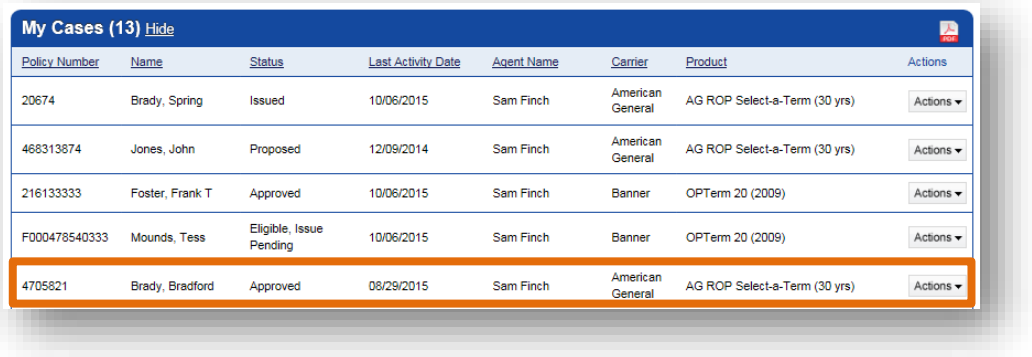


NOTE: Agent Name is used in the event that you work with other agents and have access to view their cases in DataView.

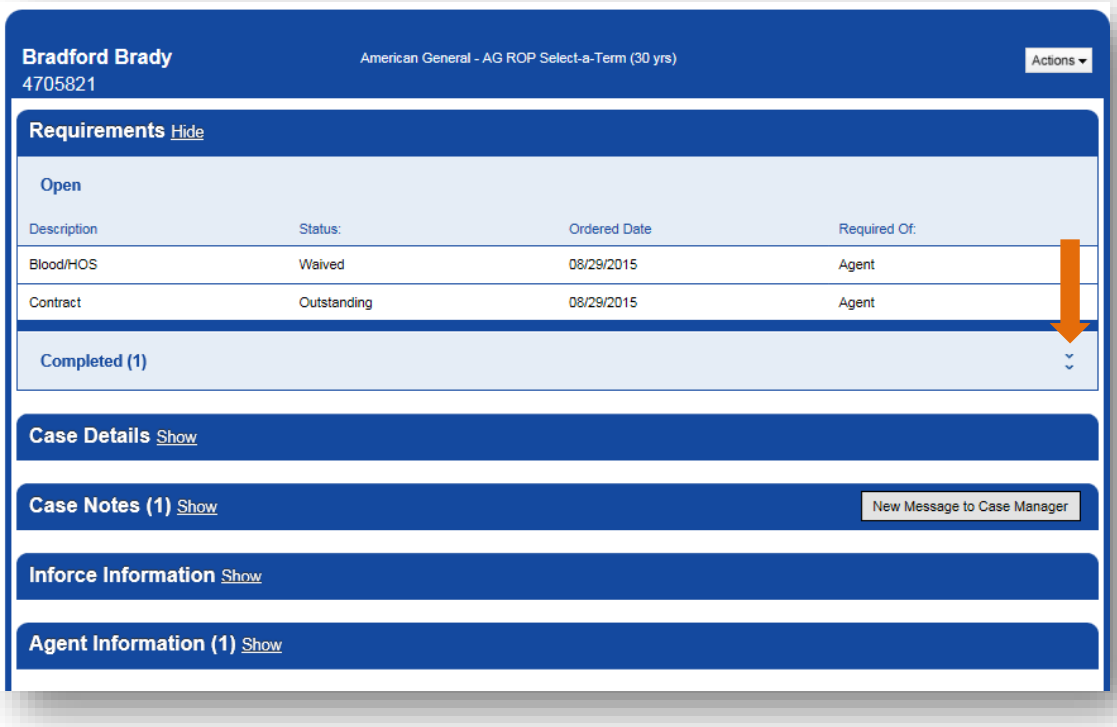
IPIPELINE®
INSURANCE ACCELERATED

My Cases

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



Case details open as shown below.



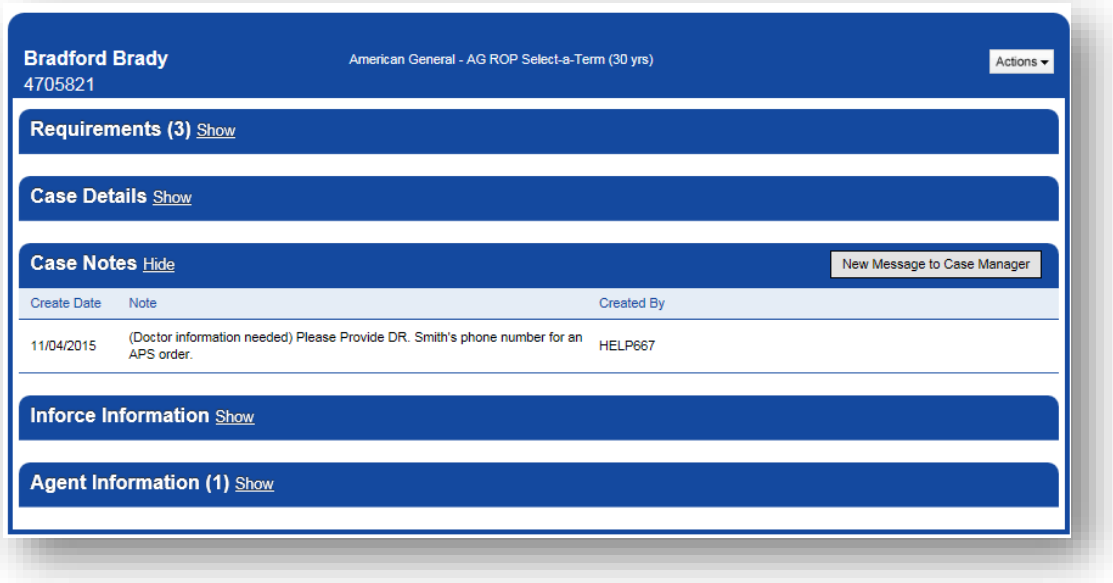
Requirements

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.

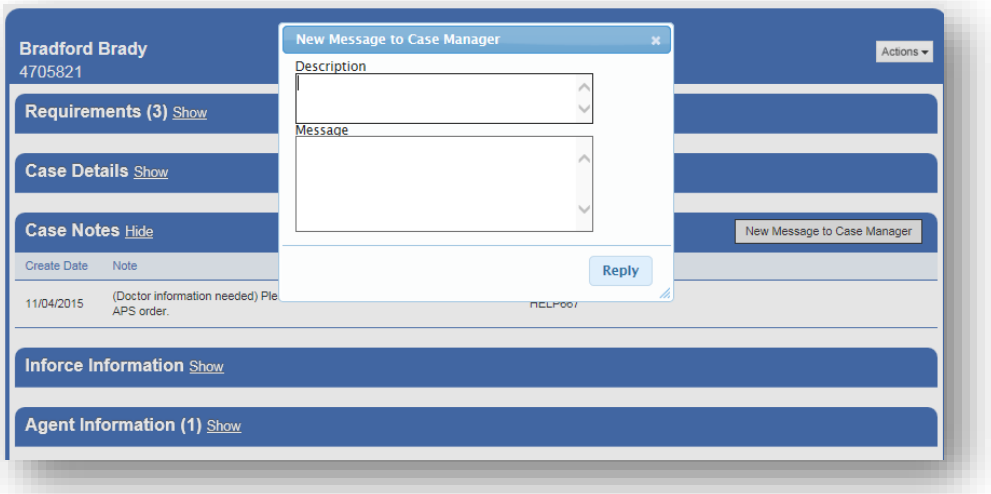
IPIPELINE®
INSURANCE ACCELERATED

Case Notes

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



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



IPIPELINE®
INSURANCE ACCELERATED