

DataView

Introduction

DataView is a case status tool that provides visibility for cases being managed by the BGA for agents and advisors.

Accessing Data-View

RSA/Pipepass is the standard security authentication method used to access the iPipeline suite of products.

LOGIN

User ID

Password

Need help or new to our site?

- [NEW - sign up for an account](#)
- [Forgot your User ID?](#)
- [Forgot your Password?](#)
- [Update your information](#)

Not Expecting to See Login Page? Click [here](#) for details on what to do.

If you do not already have a Pipepass ID, Click **New- Sign up for an account.**

Dashboard

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

Sfinch6550 | [Log Out](#) | Powered by **iPipeline**

dataView by **iPipeline**

Dashboard

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

[Launch iGO](#) [Launch Quotes](#) [Launch Forms](#)

Alerts (2) [Show](#)

My Cases (10) [Hide](#)

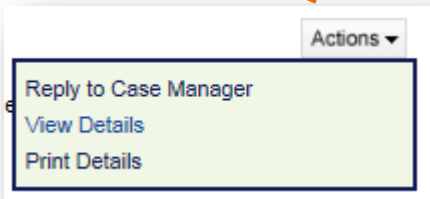
Policy Number	Name	Status	Last Activity Date	Agent Name	Carrier	Product	Actions
4705821	Brady, Bradford	Awaiting Requirements	04/20/2016	Sam Finch	American General	AG ROP Select-a-Term (30 yrs)	Actions

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 can see their cases on DataView.

My Cases

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

My Cases (13) Hide							
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](#)

Requirements [Hide](#)

Open

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

Completed (1)

Case Details [Show](#)

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

Inforce Information [Show](#)

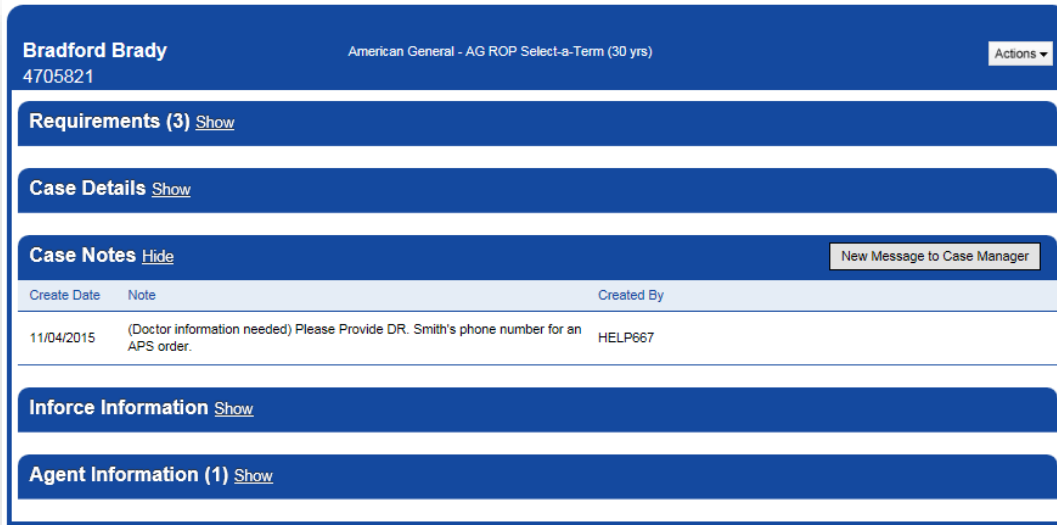
Agent Information (1) [Show](#)

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.

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 DataView.

