

Lesson 3 Creating Activities

3.1 Requirements

Create a new general activity pattern called “Inspect Vehicles”, due in 30 business days (from activity creation date), escalated in 40 business days (from activity creation date), normal priority, and Reminder category. You can reference this activity pattern to all assignable.

3.2 Configuration



Activity

Creating Activity Pattern

1. Log in to PolicyCenter as super user (su/gw).
2. Go to Administration → Business Settings → Activity Patterns.
3. Click New Activity Pattern.



Stop

3.3 Solution



Solution

New Activity Pattern

[Up to Activity Patterns](#)

Short Subject	<input type="text"/>	Target Days	<input type="text" value="30"/>
Automated Only	* <input type="radio"/> Yes <input checked="" type="radio"/> No	Target Hours	<input type="text"/>
Description	<input type="text"/>	Category	<input type="text" value="Reminder"/>
Escalation Days	<input type="text" value="40"/>	Activity Class	* <input type="text" value="Task"/>
Escalation Hours	<input type="text"/>	Escalation Start Point	<input type="text" value="Activity creation date"/>
Mandatory	* <input type="radio"/> Yes <input checked="" type="radio"/> No	Target Start Point	<input type="text" value="Activity creation date"/>
Code	* <input type="text" value="InspectVehicles_Ext"/>	Escalation Include Days	<input type="text" value="Business days"/>
Recurring	* <input type="radio"/> Yes <input checked="" type="radio"/> No	Target Include Days	<input type="text" value="Business days"/>
Subject	* <input type="text" value="Inspect Vehicles"/>	Templates	
Priority	<input type="text" value="Normal"/>	Document Template	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="X"/>
Type	* <input type="text" value="General"/>	Email Template	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="X"/>
Pattern Level	* <input type="text" value="All"/>		

3.4 References

3.4.1 Activity pattern

Activity Patterns are templates that standardize how activities are generated.

Activity patterns are typically created and modified by administrators on the page **Administration tab → Business Settings → Activity Patterns**.

1. To create a new activity pattern, click the New Activity Pattern button

The Code field is a unique internal name for the pattern and is used to reference an activity pattern in Gosu

2. To edit an existing activity pattern, click the name of the activity pattern in the list

Changes to an activity pattern affect only activities from that point forward



Find

Please refer to the *PolicyCenter Application Guide* for the definitions of each field of the Activity Pattern.

3.4.2 Create an activity in Gosu

1. Retrieve an activity pattern by its pattern code

```
ActivityPattern.finder.getActivityPatternByCode("pattern_code")
```

2. Create an activity related to an Account, a Policy or a Job

- a) create an activity related to an Account

```
activityPattern.createAccountActivity(bundle, activityPattern, Account, subject, description, approvalIssue, priority, mandatory, targetDate, escalationDate)
```

or

```
account.newActivity(activityPattern)
```

- b) create an activity related to a Policy

```
activityPattern.createPolicyActivity(bundle, policy, subject, description, approvalIssue, priority, mandatory, targetDate, escalationDate)
```

- c) create an activity related to a Job

```
activityPattern.createJobActivity(bundle, job, subject, description, approvalIssue, priority, mandatory, targetDate, escalationDate)
```

3. After creating the activity in Gosu, the next step is normally to assign it to a user or a queue.

The activity assignment is discussed in the next lesson.



Stop