Lesson 11 **Activities**

11.1 Requirements

Add a new activity and verify that it appears in the user interface.

11.2 Add a new activity

Activity

1. **Log in to PolicyCenter as studentXX/gw**
2. **Create a new submission**

   You can create a new one or copy a submission that you have previously used.

3. **Create a new activity**
   a) Go to the **Action** menu
   b) Click New Activity
   c) Examine all the options. For this submission, you will create an activity for an underwriter. This is a common Activity feature function.
   d) Select New Activity → Underwriter Review → Review and approve
4. **Populate activity details**
   a) In the lower half the screen, set the details for the Activity
   e) Prepend “Student XX –” in the Subject field for easier recognition (for example, “Student 01 - Review and approve”)
   f) In the Assign To field, assign the activity to Underwriter
   g) Note the underwriter which is displayed on the info bar
   h) Note the account, submission, or policy number
   i) Select OK to save the activity
5. **Log out of PolicyCenter**

11.3 Verify the activity

Activity

1. **Log back in as the underwriter on the submission**

   The user name is first initial + last name and password is gw. For example, the login is bbaker/gw for underwriter Bruce Baker.

2. **Find the activity**

   Where can you find the activity? Do you see the Activity that you added?

3. **Open and complete the Activity**

   What happens when you click Complete?

Stop

11.4 Solutions

11.4.1 Verify the activity

Solution

Verify the new activity appears as expected

1. **Log back in as the underwriter on the submission**
2. **Find the activity on these pages**
   a) The **My Activities** list is found on the desktop if you are the owner of the activity
   b) The **Tools → Workplan** page of the policy transaction, for example, a submission or policy change
   c) The **Current Activities** section on the summary page of the account or policy
3. **Open and complete the Activity**

   What happens when you click Complete?

After an activity is completed, it is not displayed on the My Activities list on the desktop and the Tools → Workplan page of the policy transaction, if the filter is set as “All open” (the default setting). In addition, it disappears from the Current Activities section on the summary page of the account or policy.

Stop