

Lesson 4 Assigning Activities

4.1 Requirements

For Commercial Auto submissions at Acme company, if the agent has not inspected the vehicles, create an activity to remind underwriter to inspect vehicles.

Specifications

Spec 1 In the Commercial Auto qualification questions, the default answer for question “Did agent inspect vehicles?” should be true. If the answer to this question is set to False, automatically generate an Inspect Vehicles and assign it to an underwriter.

Spec 2 The description should state: “For customer, <customer name>, inspect all vehicles.”

Spec 3 The activity should be related to the account.

Spec 4 If the activity already exists, don't create another.

Spec 5 Use the activity pattern “Inspect Vehicles” created in the exercise for the lesson Creating Activities.

4.2 Configuration



Activity

Creating and Assigning Activity

1. Create an activity and assign it to an underwriter.

- Create a Job enhancement and add a function called `createInspectVehiclesActivity_Ext()`.
- The code should only apply when the policy product is `BusinessAuto`.

HINT:

- The question code for question “Did agent inspect vehicles?” is `AgentInspected`.
- Use the `createRoleActivity()` method found in the `JobAssignmentEnhancement` class. This method will create and assign an activity to an Underwriter.

2. Call the new function from the job wizard.

Call `createInspectVehiclesActivity_Ext()` from the PreQualification wizard step in the `SubmissionWizard.pcf`. Use the `beforeSave` property of the wizard step to call the code.

3. Either reload PCF by clicking ALT + SHIFT + L in the browser or restart the server.

4.3 Verification

1. Log in to Guidewire PolicyCenter as Alice Applegate aapplegate/gw.
2. Select any company account, e.g. Wright Construction, or create a new one.
3. Start or copy a Commercial Auto submission.
4. Answer “No” to the question “Did agent inspect vehicles?”.
5. After you click “Next,” click on the Workplan link under Tools.

The activity should be displayed and assigned to the submission Underwriter. Verify description field is populated correctly.

6. Go back to Qualification step and click “Next”. Make sure a second Inspect Vehicles activity was not created.

The screenshot shows two parts of the Guidewire PolicyCenter interface:

- Workplan View:** A grid showing a single activity row. The columns include: Activities, Assign, Skip, Complete, Due Date (04/29/2019), Escalation Date (05/13/2019), Priority (Normal), Subject (Inspect vehicles), Status (Open), Assigned To (Alice Applegate), and Assigned By (Alice Applegate). There is also a toolbar with icons for Document, Star, and Print.
- Activity Detail View:** A modal window titled "Activity". It contains tabs for "Activity Detail" and "New Note". The "Activity Detail" tab shows the following fields:

Subject	* Inspect vehicles
Description	For customer, Wright Construction, inspect all vehicles.
Priority	* Normal
Status	Open
Mandatory	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Recurring	No
Target Date	04/29/2019 <input type="button" value="Calendar"/>
Escalation Date	05/13/2019 <input type="button" value="Calendar"/>
Document Template	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="X"/>
Email Template	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="X"/>
Assigned to	Alice Applegate

 The "New Note" tab shows fields for Topic, Subject, Related To (---- Submission : 0000228616 (2019-03-18)), Security Level (Unrestricted), and Text (empty).



4.4 Solution



1. Create an activity and assign it to an underwriter in a new Job enhancement.

JobEnhancement.gsx

```
package gw.acme.pc.enhancements.entity

uses gw.api.locale.DisplayKey

enhancement JobEnhancement: Job {
    function createInspectVehiclesActivity_Ext() : void {
        var isBusinessAuto = this.Policy.ProductCode == "BusinessAuto"
        var answerToAgentInspected = this.LatestPeriod.PeriodAnswers.firstWhere(\q -> q.QuestionCode ==
"AgentInspected" ).BooleanAnswer
        var activityExists = this.AllOpenActivities.hasMatch(\act -> act.ActivityPattern.Code ==
"Inspect_vehicles_Ext")

        if( isBusinessAuto && !answerToAgentInspected && !activityExists ) {
            var pattern = ActivityPattern.finder.getActivityPatternByCode("Inspect_vehicles_Ext")
            var description = DisplayKey.get("Ext.InspectVehicles",
this.LatestPeriod.PrimaryNamedInsured.DisplayName)

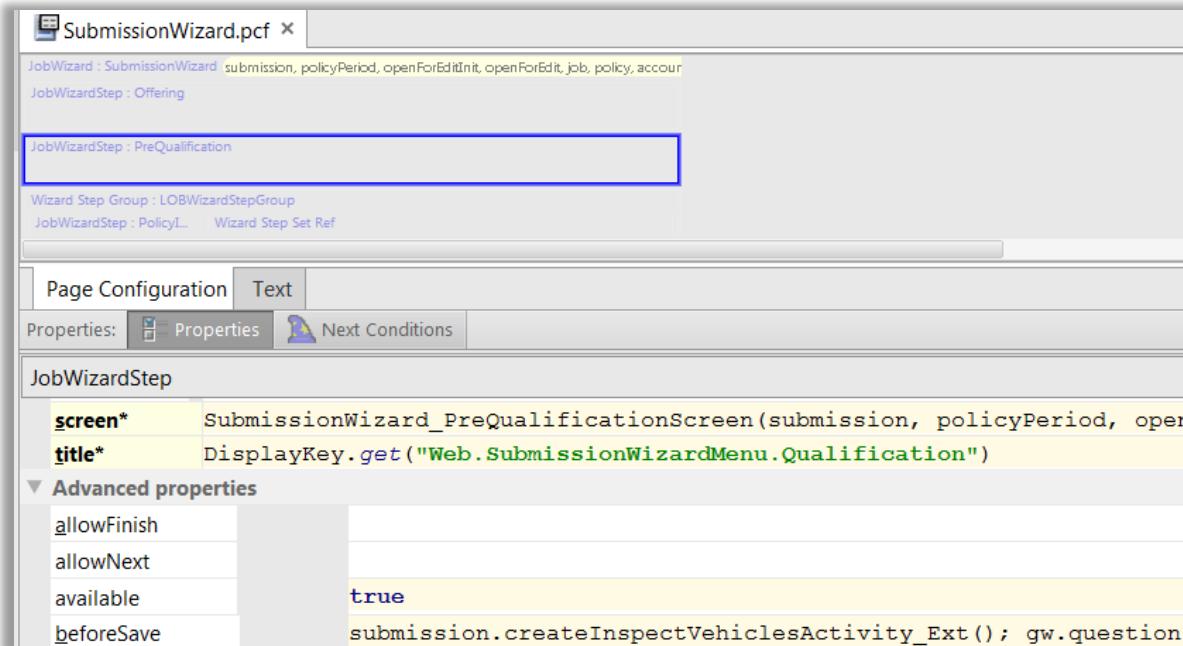
            this.createRoleActivity(typekey.UserRole.TC_UNDERWRITER, pattern, null, description)
        }
    }
}
```

display.properties

```
Ext.InspectVehicles = For customer, {0}, inspect all vehicles.
```

2. Call the new function from the job wizard.

Call `createInspectVehiclesActivity_Ext()` from the PreQualification wizard step in the `SubmissionWizard.pcf`. Use the `beforeSave` property of the wizard step to call the code.



3. Either reload PCF by clicking ALT + SHIFT + L in the browser or restart the server.

4.5 References

4.5.1 Assignment

1. Guidewire refers to certain business entities as assignable entities. There are two types of assignable entities: Primary vs Role Based.
 - o **Primary** assignment (discussed in this lesson): The entity can have a single owner only. In the base configuration, this applies to Activity entities. To be primarily assignable, an entity must implement Assignable and PCAssignable delegates, which provide methods and fields needed for assignment.
 - o **Role-based** assignment: The entity has a set of users – with different roles – assigned to it. In the base configuration, this applies to Account, Job (and its subtypes), and Policy entities.
2. An activity can be assigned to a user or a queue. Under no circumstances should you configure the application so that an entity is assigned at the same time to both a queue and a user.

When an activity is assigned to a user, it is considered owned by both the user and the group. It appears in the user's My Activities desktop list.

3. An activity is assigned either by Assignment rules or assignment classes or combination of both.

4. Assignment rules:

- GlobalActivityAssignmentRules and DefaultGroupActivityAssignmentRules.
- Calling the Activity.autoAssign() and Activity.autoAssign(group, null) in the Gosu code will trigger the assignment rules to be run.

Note: Never call the autoAssign() methods in the assignment rules. If userId is not null in the call to autoAssign(group, user), no assignment rules are run, and the activity is assigned to the specified user directly.

- The assignment rules can then call other Activity assignment methods to construct the assignment logic, such as round robin to a user in a group based on location.

5. Assignment classes

- Some files that contain assignment logics in the default configuration.

gsrc/gw/assignment: AssignmentUtil, AuditAssignmentEnhancement, JobAssignmentEnhancement

- The assignment classes can call the Activity assignment methods to initiate assignment logic.

6. Common assignment strategies

- Assign to a specific group and then round-robin among users
 - Round robin ignores users that lack permission to own the object
 - Round-robin functionality can be configured to take into account user workload/load factors
- Assign to a specific group and user
- Assign to a queue

7. Common assignment methods on the Activity entity

- Assignment methods return boolean values

True: assignment was successful

False: unsuccessful, appropriate group (or user) could not be found

Context	Method	Assigns to
Group	assignGroup	Named group
Group	assignGroupByLocation	Group matching specified location and group type
User	assign()	Named user (and group)
User	assignUserAndDefaultGroup()	Named user (default group)
Queue	assignActivityToQueue()	Named Queue