

ASSIGNING ACTIVITIES

Assigning Activities



Lesson objectives

By the end of this lesson, you will be able to:

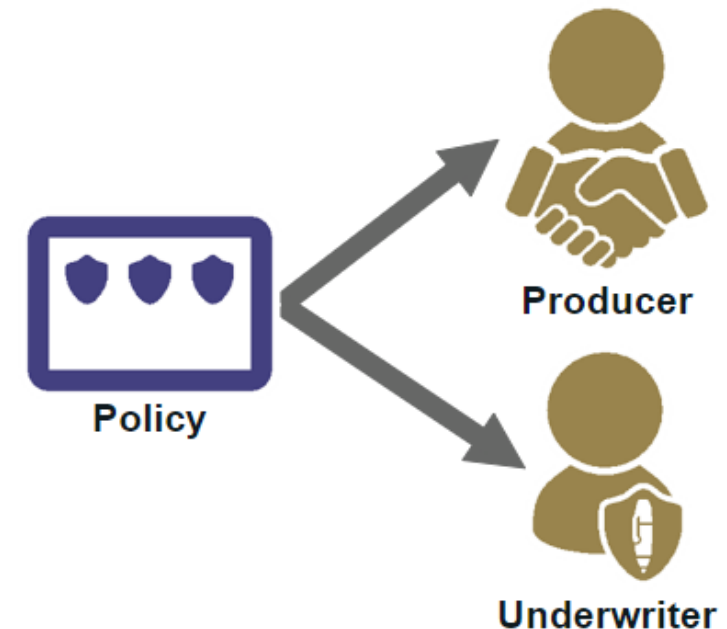
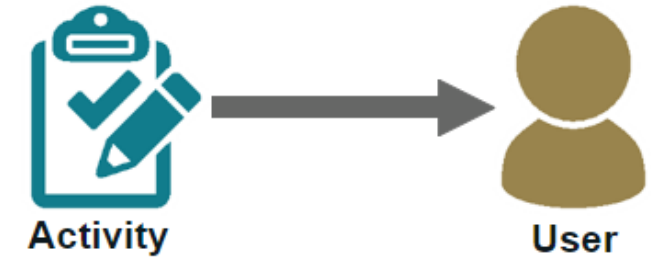
- Describe primary assignment
- Assign an activity



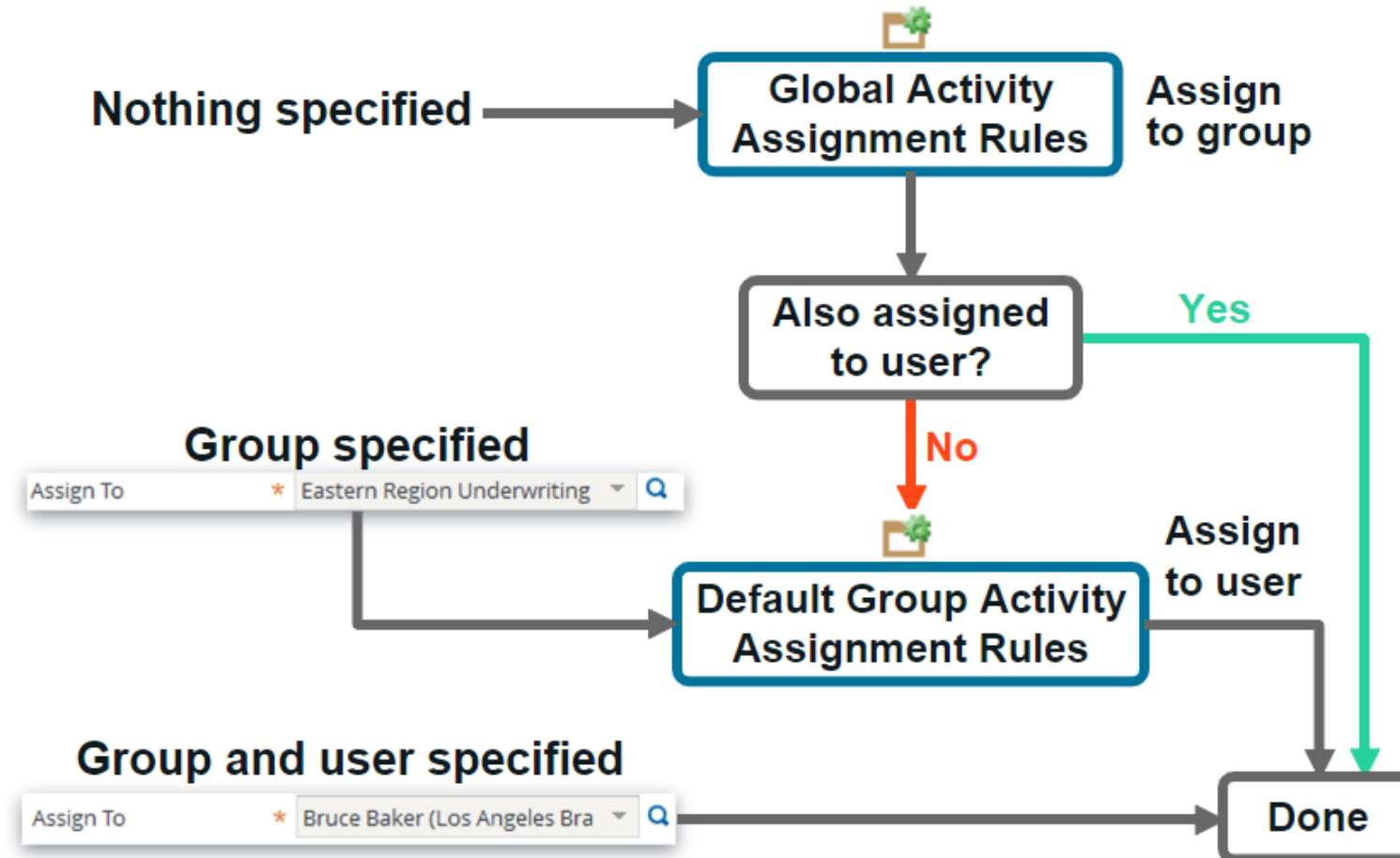
Assignment basics

Primary versus role-based assignment

- **Primary assignment** (discussed in this lesson)
 - The entity can have a single owner only
 - In the base configuration, this applies to **Activity** entities
- **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



Typical flow of assignment execution



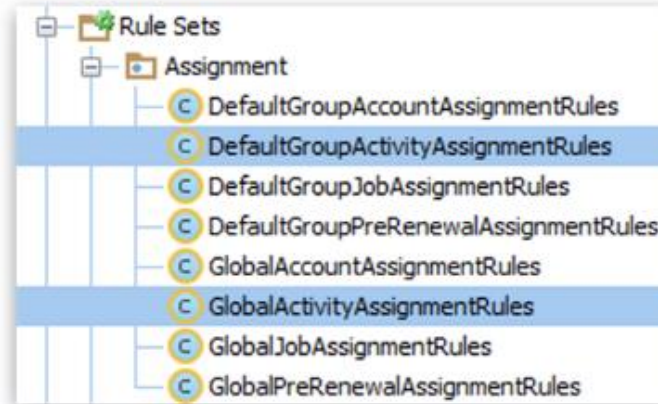
Activity ownership

- An activity is owned by (assigned to) both a user and a group
 - The assigned user must be a member of the assigned group
 - Assigning “just” a user also assigns that user’s default group
- When an activity is assigned to a user:
 - It appears in that user's My Activities desktop list
 - It can be edited only by that user (or other users with appropriate permissions, such as the owner's supervisor)
 - It can be viewed by other users in the group

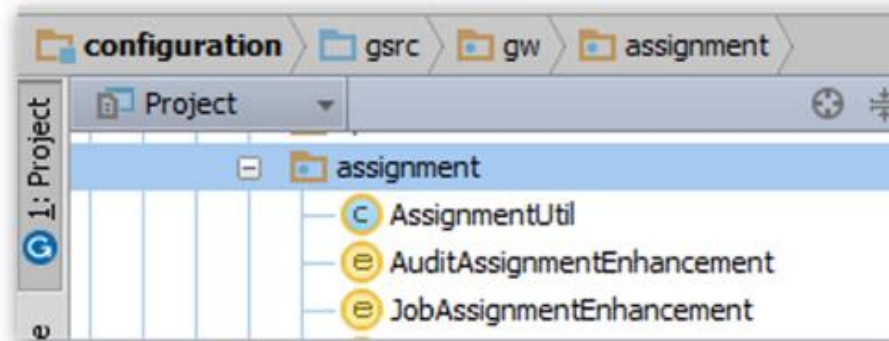
Activity assignment

In PolicyCenter, an activity is assigned by:

- Assignment rules, or

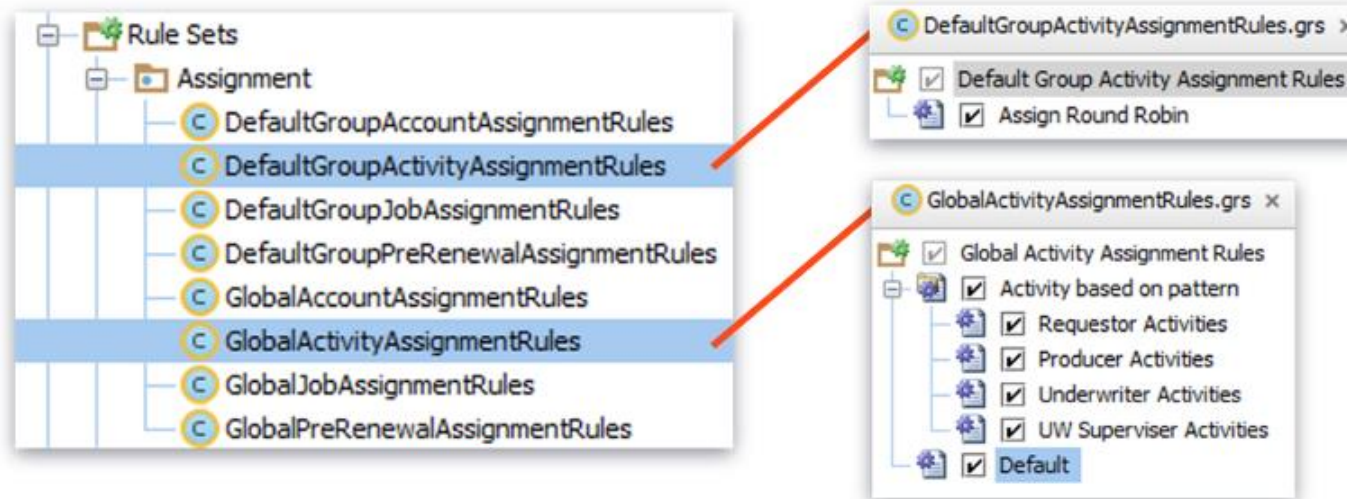


- Assignment classes, or




- Combination of both

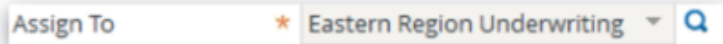

Activity assignment rule sets



- **GlobalActivityAssignmentRules** assign activity to a group and may also assign to a user
 - Has rules that assign an activity by job role
 - OOTB Default rule assigns to the underwriter
- **DefaultGroupActivityAssignmentRules** assigns activity to user in assigned group
 - Has a rule that assigns activity to user in a group using round-robin

Initiating activity assignment from Gosu

- By calling *autoAssign()* methods
 - Invokes activity assignment engine
 - Can cause assignment rules to be run
 - Do not call autoAssign() from within an assignment rule! 
- By calling other activity assignment methods directly in assignment classes

Signature	Assignment rules to be run
<i>Activity.autoAssign()</i>	Global and Default Group
<i>Activity.autoAssign(group, null)</i>	Default Group 
<i>Activity.autoAssign(group, user)</i>	None
<i>Activity.assign(group, user)</i>	None 

autoAssign() example

- Business requirement: *Create an activity informing a user in the account creator group that a participant was updated on the account*
- Solution
 - Add code to PreUpdateHandlerImpl class, which executes logic before saving data to DB
 - Only default group rule set will run since group is specified

```
26 for (bean in context.UpdatedBeans) {
27     addBeansToBePreUpdated(entitySet, bean)
28
29     if(bean.typeis AccountUserRoleAssignment) {
30         var act : Activity
31         var account = bean.Account
32         var actGroup : Group
33         var pattern = ActivityPattern.finder.getActivityPatternByCode("general_reminder")
34         act = account.newActivity(pattern)
35         act.Subject = "Account participant updated"
36
37         for(role in account.RoleAssignments) {
38             if(role.Role == typekey.UserRole.IC_CREATOR)
39                 actGroup = role.AssignedGroup
40         }
41
42         act.autoAssign(actGroup, null)
43     }
44 }
45 }
```

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

Common assignment methods

These methods on the Activity entity

- Can be used in assignment rules
- Can be called in assignment classes directly to initiate activity assignment

Context	Method	Assigns to...
<i>Group</i>	<i><u>assignGroup()</u></i>	Named group
<i>Group</i>	<i><u>assignGroupByLocation()</u></i>	Group matching specified location and group type
<i>User</i>	<i><u>assign()</u></i>	Named user (and group)
<i>User</i>	<i><u>assignUserAndDefaultGroup()</u></i>	Named user (default group)
<i>Queue</i>	<i><u>assignActivityToQueue()</u></i>	Named queue

Classes you can configure

Methods you may need to modify activity assignment logic are under gsrc/gw/assignment:

- AuditAssignmentEnhancement
- JobAssignmentEnhancement
 - Example: **createRoleActivity()** method on Job entity
 - Creates activity from a specified ActivityPattern
 - Assigns to a user with a specified role on the job

Always exit rule when configuring assignment rules

- When assignment succeeds
- This avoids reassigning an entity that has just been assigned
- Assignment methods return boolean values
 - `True` → assignment was successful
 - `False` → unsuccessful, appropriate group (or user) could not be found
- Place methods in if/exit wrapper to exit assignment rule set as needed

```
var theGroup = activity.Job.getUserRoleAssignmentByRole( "Underwriter" ).AssignedGroup
if (activity.assign( theGroup, theGroup.Supervisor )) {
    actions.exit()
}
```

**If assignment is successful,
ensures that no other
assignment is done**



Group assignment

Assigning to a specific group

- Assign object to a specified group
- Syntax:

object.assignGroup (group)

```
// Assign activity to Los Angeles Branch UW group
var group = activity.findGroup("Los Angeles Branch UW")
if(activity.assignGroup(group)) {
    actions.exit()
}
```

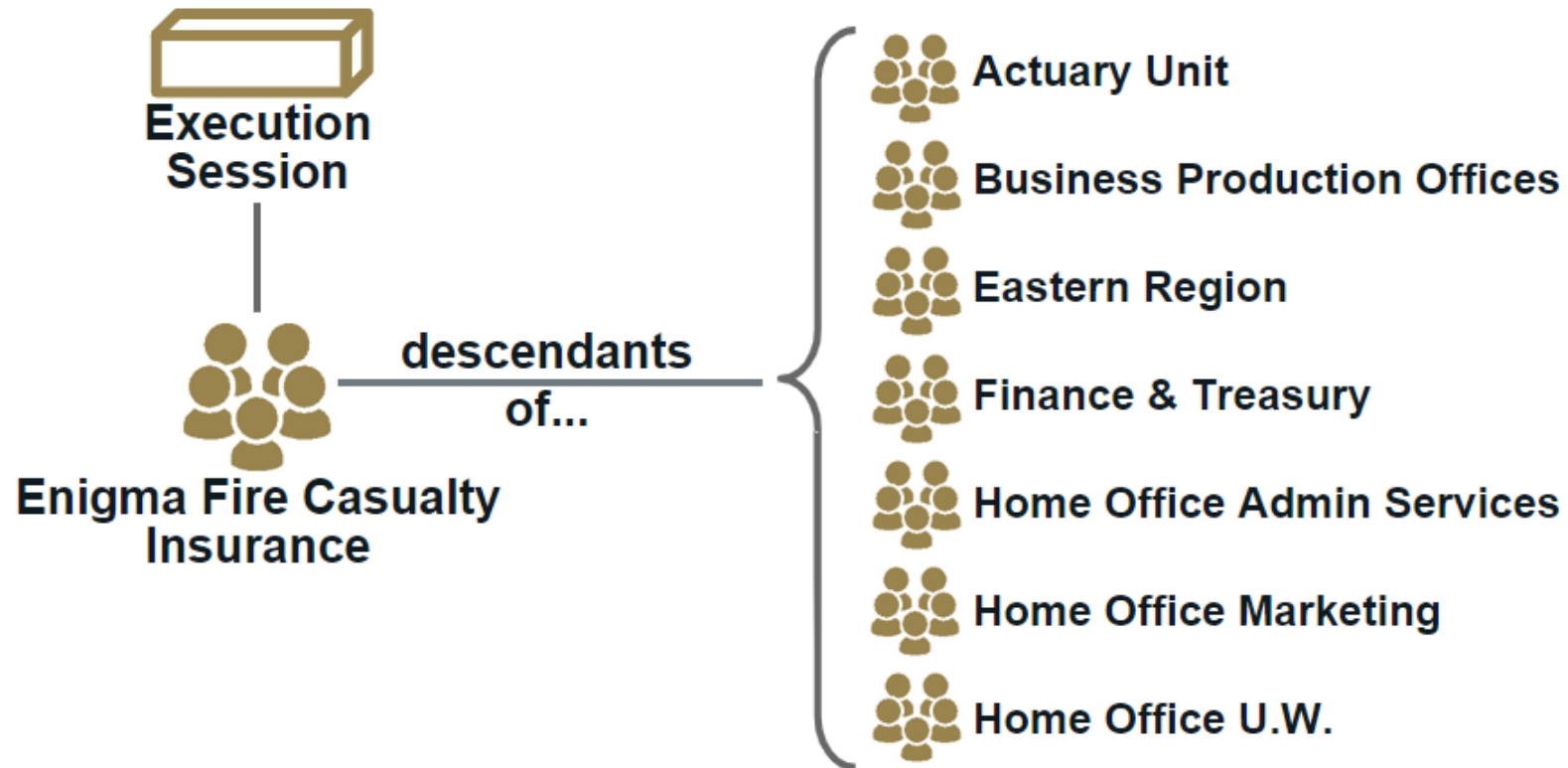
Assigning to group by type and location

- Assigns to group:
 - Of specified group type...
 - ...whose region covers specified address...
 - ...including only direct child groups or all descendent groups...
 - ...beginning with children of specified group
 - Specified group typically set to *null* or *<entity>.AssignedGroup*
 - Using round-robin
- Syntax: *object.assignGroupByLocation (groupType, address, directChildrenOnly, group)*

```
if(activity.assignGroupByLocation(  
    typekey.GroupType.TC_HOMEOFFICEADMIN, policyPeriod.PolicyAddress.Address, false, null)) {  
    | actions.exit()  
}
```

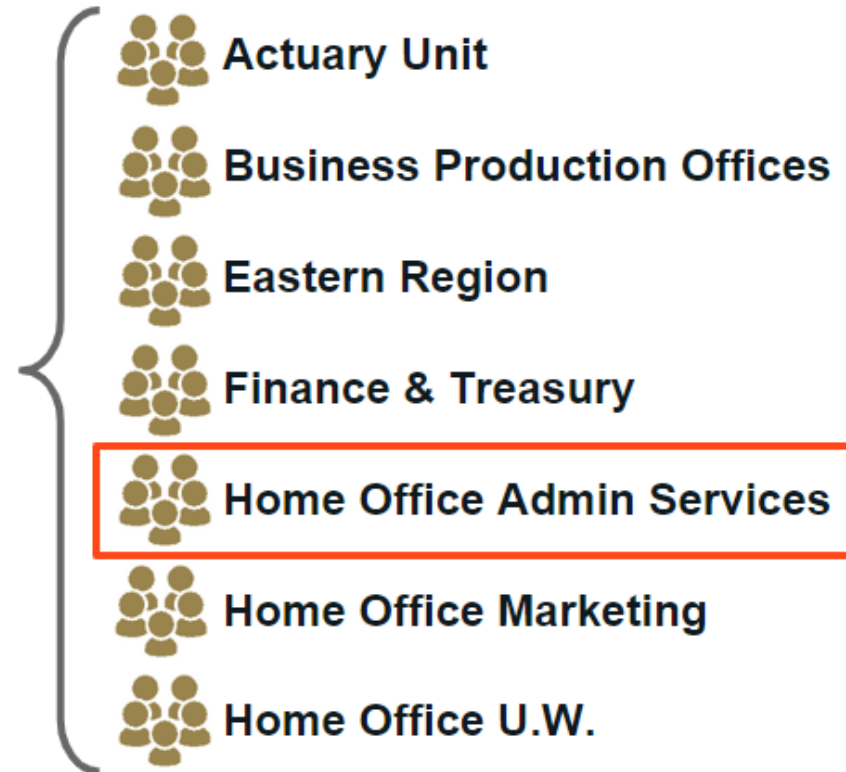
Step 1: Identify candidate groups

```
if(activity.assignGroupByLocation(  
    typekey.GroupType.TC_HOMEOFFICEADMIN, policyPeriod.PolicyAddress.Address, false, null)) {  
    actions.exit()  
}
```



Step 2: Filter by group type

```
if (activity.assignGroupByLocation(  
    typekey.GroupType.TC_HOMEOFFICEADMIN, policyPeriod.PolicyAddress.Address, false, null)) {  
    actions.exit()  
}
```



Step 3: Select by location

- Assume policy address is in California
- Based on zone-config.xml (see next slide), activity is assigned to based on zip, then county, then state

```
if(activity.assignGroupByLocation(  
    typekey.GroupType.TC_HOMEOFFICEADMIN, policyPeriod.PolicyAddress.Address, false, null)) {  
    actions.exit()  
}
```



Home Office Admin Services



Eastern Mid-West Clerical



Eastern Region Clerical



Western Mid-West Clerical



Western Region Clerical

Configuring location selection

- Selection by location uses zones and regions
- A zone is a type of geographic area
 - Examples: State/province, county, city, postal code
 - Configured in zone-config.xml
- A region is a collection of specific zone values, configured through Administration tab
 - Western States
 - San Diego Local Area
 - State of Michigan plus Chicago



```

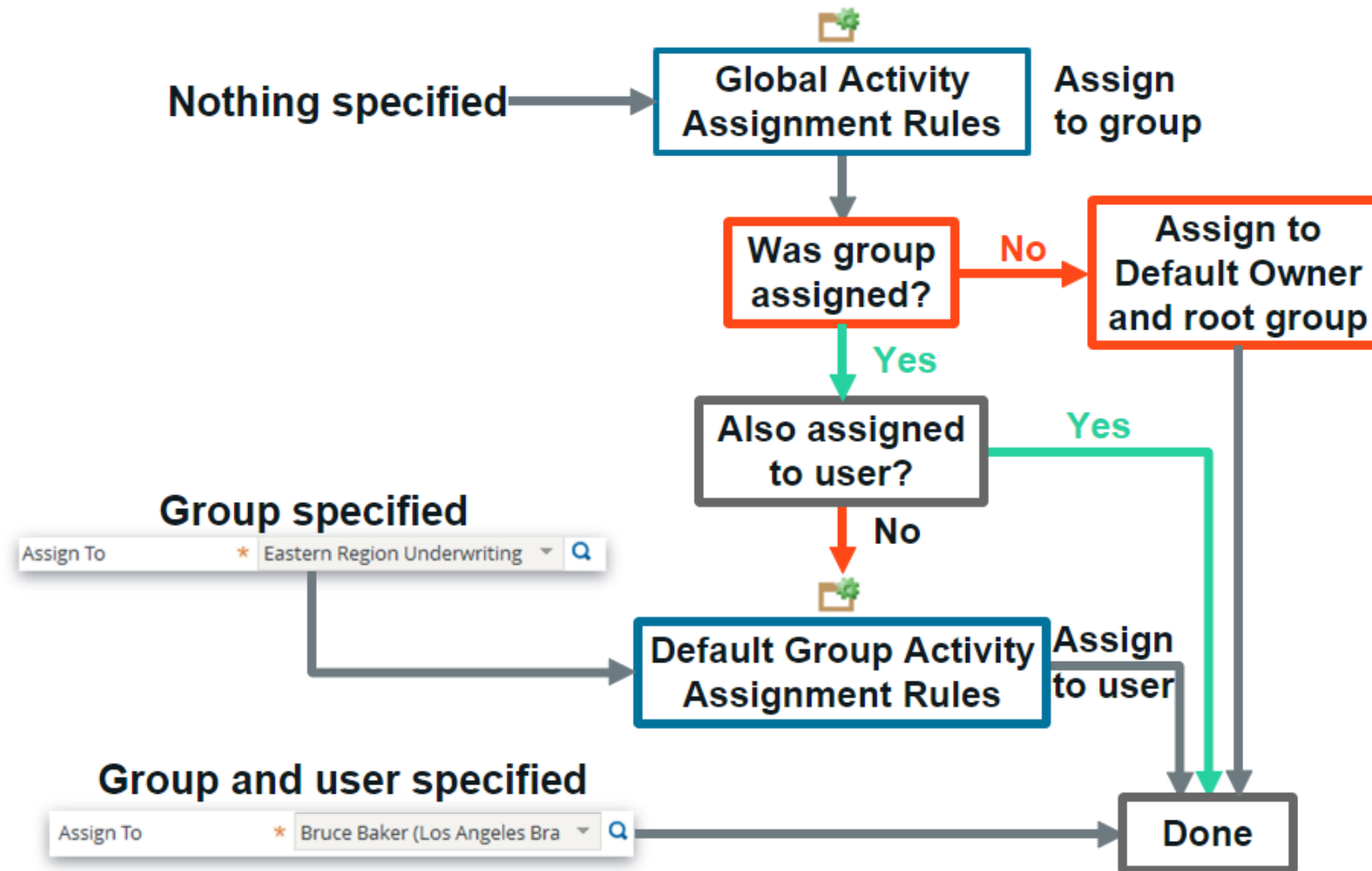
12 <Zones countryCode="US">
13   <Zone code="zip" fileColumn="1" regionMatchOrder="1" granularity="1" unic
14     <AddressZoneValue>
15       Address.PostalCode.substring(0,5)
16     </AddressZoneValue>
17     <Links>
18       <Link toZone="city"/>
19     </Links>
20   </Zone>
21
22   <Zone code="state" fileColumn="2" regionMatchOrder="3" granularity="4" >
23     <AddressZoneValue>
24       Address.State.Code
25     </AddressZoneValue>
26     <Links>
27       <Link toZone="zip" lookupOrder="1"/>
28       <Link toZone="county"/>
29       <Link toZone="city"/>
30     </Links>
31   </Zone>
32
33   <Zone code="city" fileColumn="3" granularity="2">
41
42   <Zone code="county" fileColumn="4" regionMatchOrder="2" granularity="3">
54 </Zones>
  
```

San Diego Local Area [Up to Regions](#)

Region

Name	San Diego Local Area
Areas Covered	CA:Imperial, CA:San Diego

What if group assignment fails?





User assignment

Assigning to a specific user

- Assigns object to both a group and user
- Syntax:

object.assign(group, user)

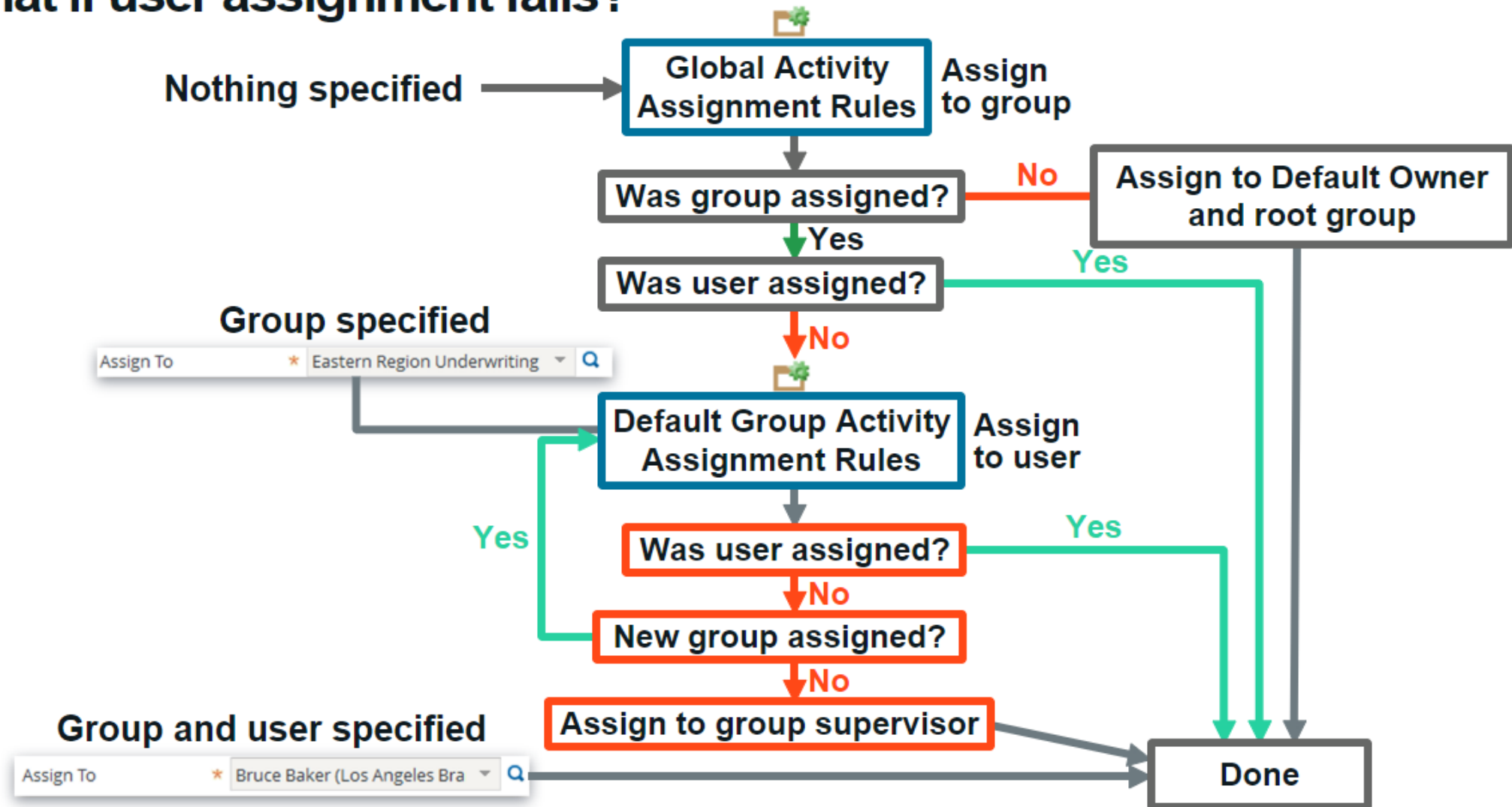
```
// Assign activity to Los Angeles Branch UW group and Steve Smith
var group = activity.findGroup("Los Angeles Branch UW")
var user = activity.findUser("ssmith")
if(activity.assign(group, user)) {
    actions.exit()
}
```

Assigning to a user and any group

- Assigns object to a user and any group that the user belongs to
- Syntax:
object.assignUserAndDefaultGroup (User)

```
// Assign activity to Steve Smith  
var user = activity.findUser("ssmith")  
if(activity.assignUserAndDefaultGroup(user)) {  
    actions.exit()  
}
```

What if user assignment fails?





Review

Lesson objectives review

You are now able to:

- Describe primary assignment
- Assign an activity



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