

# Activities

# Lesson Objectives

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

- Describe the functionality of activities
- Create activity patterns
- Create activities
- Review activities associated to a claim
- Take ownership of queued activities
- Edit and complete activities assigned to you

This lesson uses the notes section for additional explanation and information.

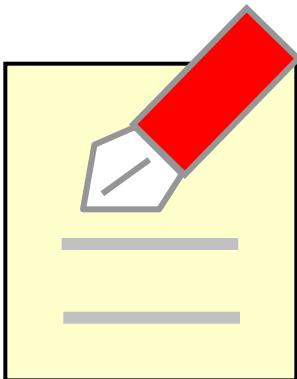
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

# Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

# Review: Activities



**Contact insured**

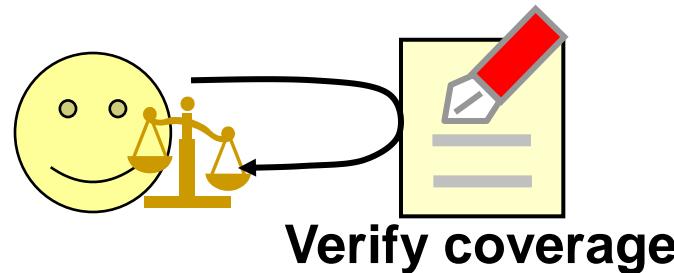
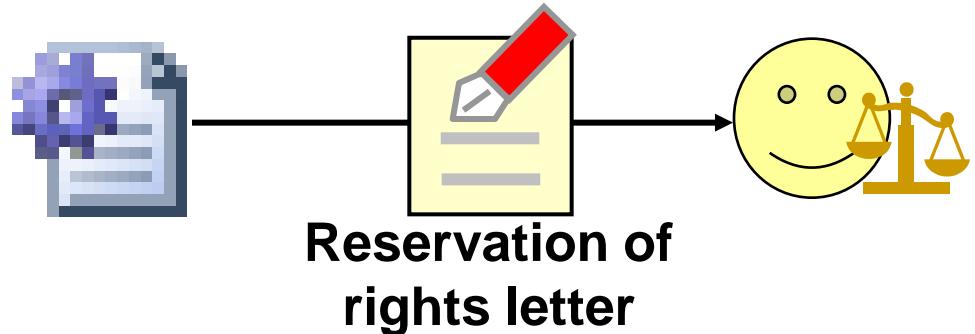


**Dana Evans**

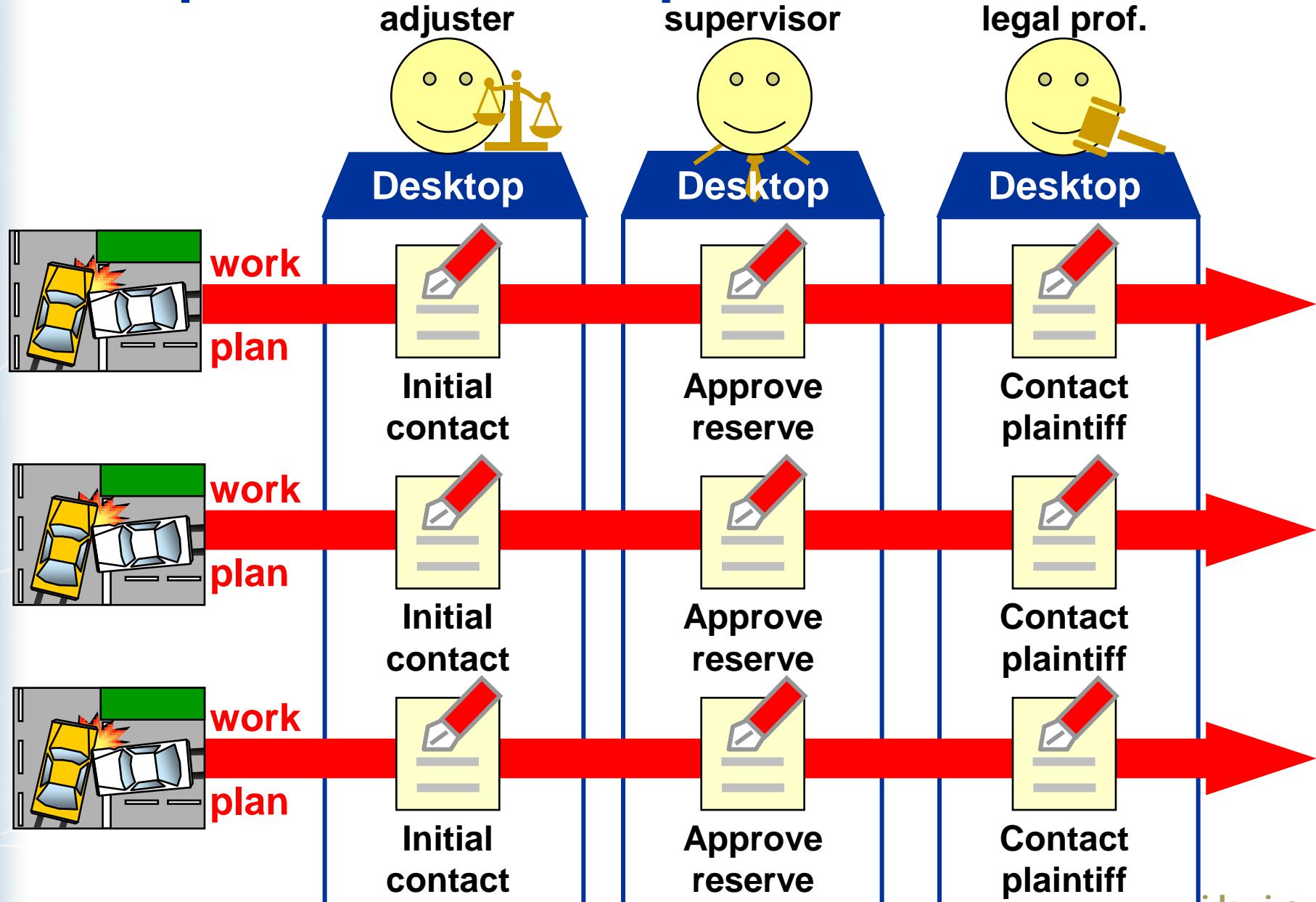
- ▶ An activity is a task required to process a claim
  - Ultimately assigned to a user responsible for completing the task
  - Identifies:
    - When the task is to be completed
    - Whether it has been done or not

# Who Creates Activities And Why?

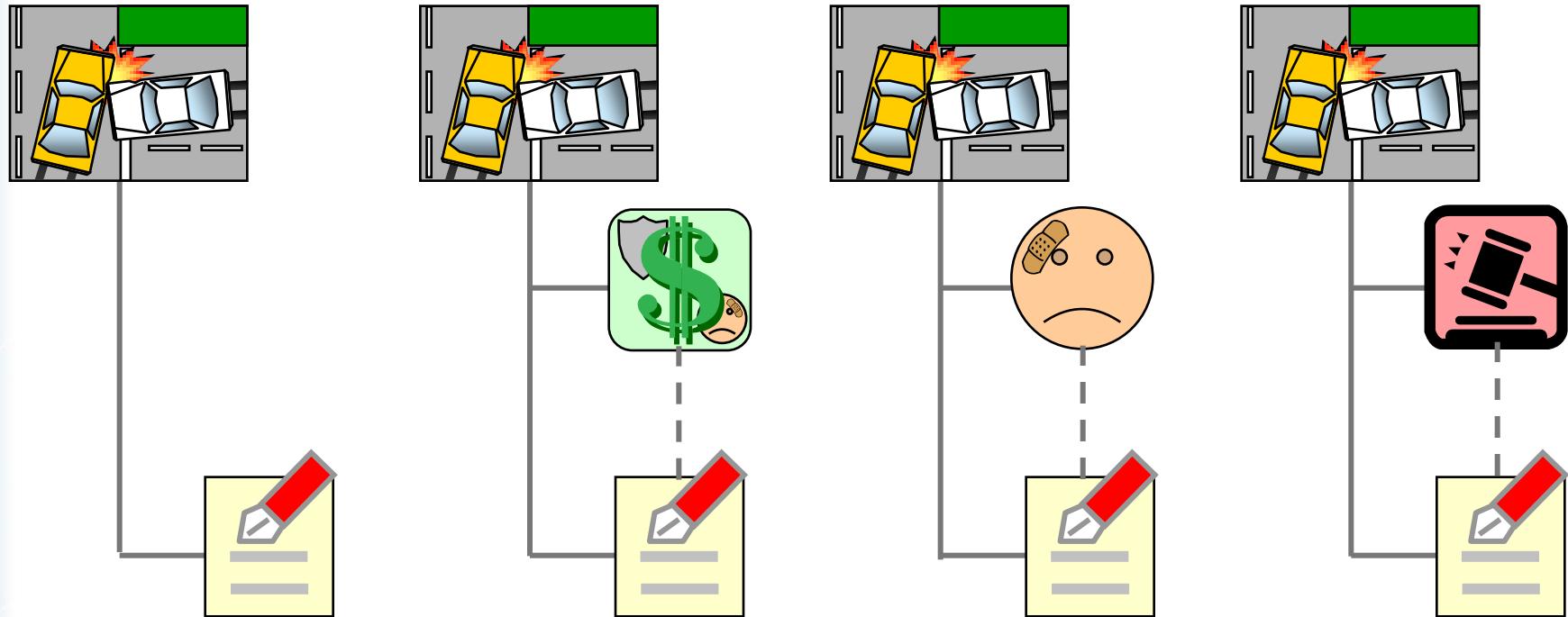
- ▶ Business rules create activities to implement common business practices
- ▶ Users create activities and assign them to themselves as a reminder of work to do
- ▶ Users create activities and assign them to others to request assistance with a claim



# Workplans and Desktops

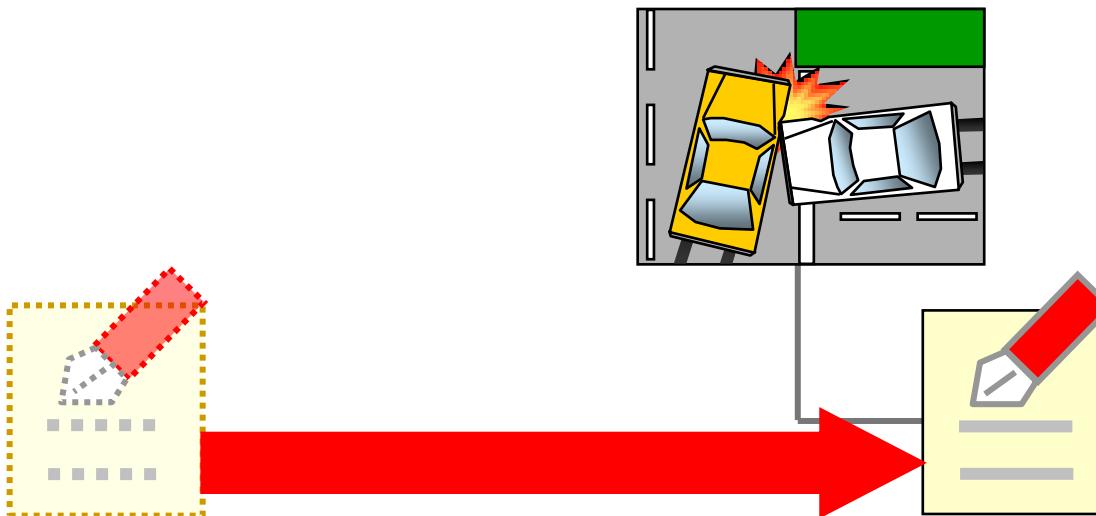


# What Claim Objects Are Activities Associated To?



- ▶ Every activity is associated to a claim
  - Optional additional association to an exposure, contact, or matter on that claim

# How Are Activities Created?



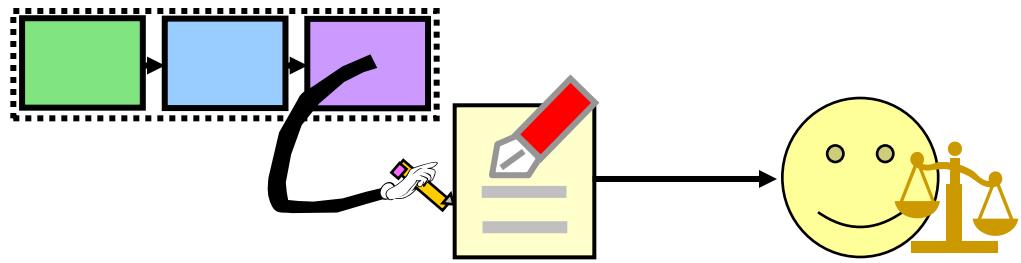
**Verify Coverage Pattern**  
priority: medium  
due days: 5

**Verify Coverage**  
priority: medium  
due: Oct. 12, 2009

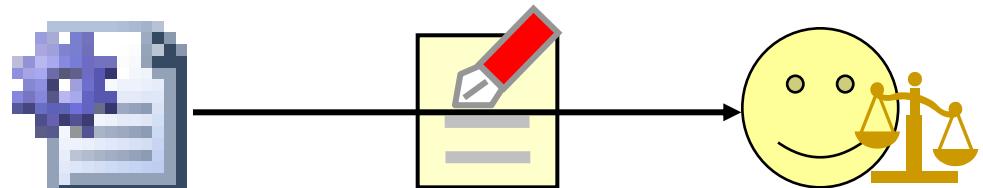
- ▶ Created from an "activity pattern"
  - An activity pattern is a template which specifies details about the activity (subject, priority, number of days until due, and so on)

# When Are Activities Created?

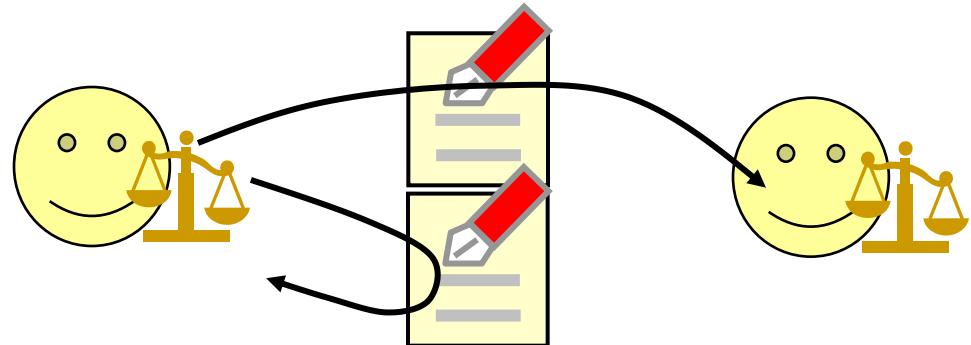
- ▶ Automatically during workplan step of claim setup



- ▶ Automatically in response to a specific business event

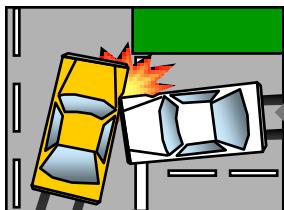


- ▶ Manually by a user at any time



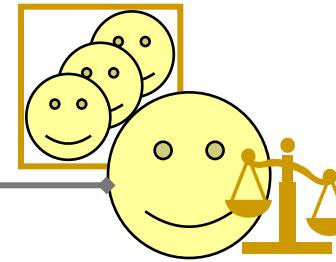
# Activity Assignment

**Claim 10-0027**



**Contact  
Claimant**

**Assignment Rules**  
**Assign "Contact  
Claimant" activities  
to claim owner**



**Peter  
Beebe**

- ▶ Assigned to a user and group, which is selected either by:
  - Assignment rules, or
  - User creating or reassigning activity

# Activity Ownership



Betty  
Baker

Activity Detail for Claim 000-00-000304

<b>Details</b>	<b>Subject</b>	Make initial contact with insured
<b>Description</b>		
<b>Related To</b>	none (Claim-level)	
<b>Due Date</b>	05/12/2008	
<b>Escalation Date</b>	05/16/2008	
<b>Priority</b>	Urgent	
<b>Calendar Importance</b>	Not On Calendar	
<b>Mandatory</b>	No	
<b>Status</b>	Open	
<b>Externally Owned</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<b>External Owner</b>	<none selected>	
<b>Activity Assignment</b>		
<b>Assigned To</b>	Betty Baker	

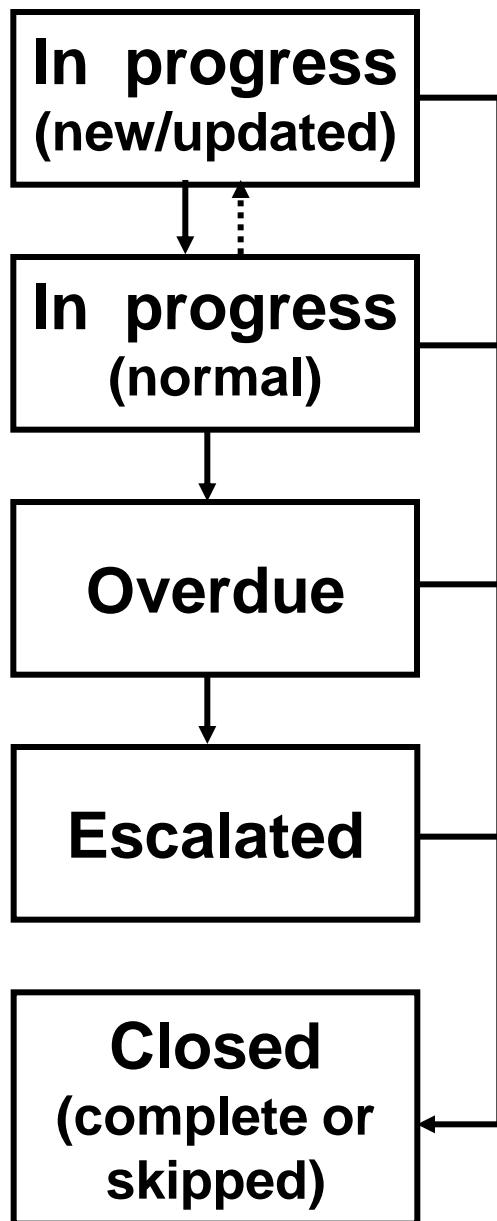


activity  
assigned to  
Betty Baker

Activity Detail for Claim 000-00-000304

<b>Assign</b>	<b>Cancel</b>	<b>View Notes</b>
<b>Details</b>		
<b>Subject</b>	Make initial contact with insured	
<b>Description</b>		
<b>Related To</b>	none (Claim-level)	
<b>Due Date</b>	05/12/2008	
<b>Escalation Date</b>	05/16/2008	
<b>Priority</b>	Urgent	
<b>Calendar Importance</b>	Not On Calendar	
<b>Mandatory</b>	No	
<b>Status</b>	Open	
<b>Externally Owned</b>	No	
<b>External Owner</b>		

# The Life Cycle of an Activity



	Due	Priority	Status	Subject
	05/20/2008	High	Open	<a href="#">Verify coverage</a>

	Due	Priority	Status	Subject
	05/20/2008	High	Open	<a href="#">Verify coverage</a>

	Due	Priority	Status	Subject
	05/20/2008	High	Open	<a href="#">Verify coverage</a>

	Due	Priority	Status	Subject
	05/20/2008	High	Open	<a href="#">Verify coverage</a>

	Due	Priority	Status	Subject
	05/20/2008	High	Complete (Carlos Oppley: 05/21/2008)	<a href="#">Verify coverage</a>

# Overdue and Escalated Activities

<input type="checkbox"/>			Due	Priority	Status	Subject
<input type="checkbox"/>			05/20/2008	High	Open	<a href="#">Verify coverage</a>

**Activity Pattern Detail - Verify coverage** ([Up to Activity Patterns](#))

[Edit](#) [Delete](#)

<b>Activity Pattern</b>	
Subject	Verify coverage
Short Subject	
Class	Task
Type	General
Category	Reminder
Code	coverage
Priority	High
Mandatory	Yes
Calendar Importance	Not On Calendar

**Activity Pattern Dates**

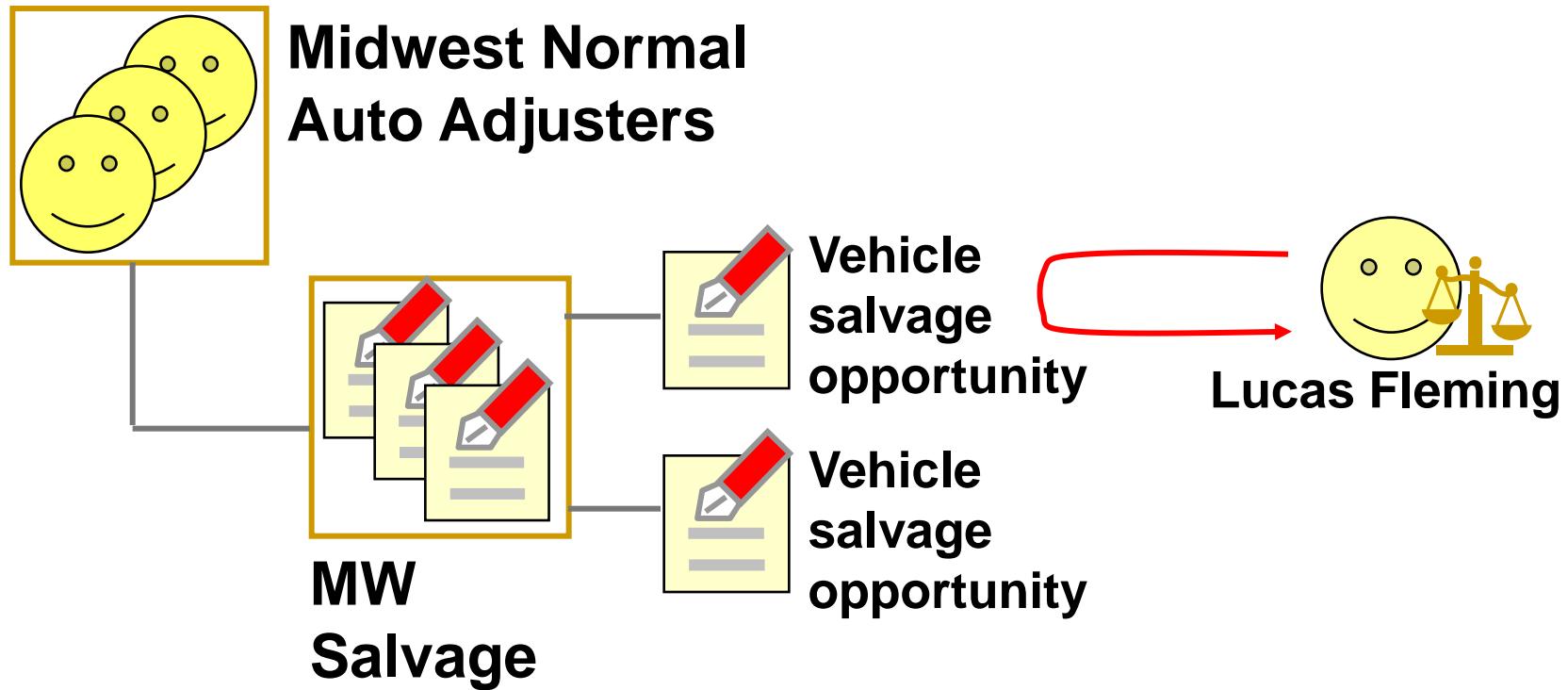
Target days	2
Target hours	
Target start point	Activity creation date
Include these days	Business days
Business calendar type	Federal Holidays

**Escalation**

Escalation days	10
Escalation hours	
Escalation start point	Claim notice date
Include these days	Calendar days

- ▶ Activity patterns can specify when an activity is overdue or escalated

# Review: Queues



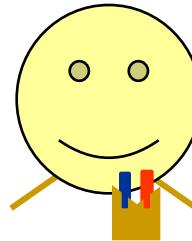
- ▶ A repository associated to a group which contains activities assigned to the group but not to any user in that group
  - Users in group can take ownership of activities in queue

# Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

# Activity Patterns

administrator



The screenshot shows a user interface for managing activity patterns. On the left is a sidebar menu with various options like 'Search For Users', 'Activity Patterns' (which is highlighted with a red box and has a red arrow pointing to it), and 'Attributes'. The main area has a toolbar with tabs: Team, Dashboard, Administration (which is selected and has a dropdown menu), Address Book, Claim, etc. Below the toolbar is a table titled 'Activity Patterns (1 - 15 of 79)'. The table has columns for Subject, Class, Category, Type, and Priority. The data in the table is as follows:

Subject	Class	Category	Type	Priority
<a href="#">30 day diary</a>	Task	Reminder	General	Normal
<a href="#">60 day diary</a>	Task	Reminder	General	Normal
<a href="#">90 day diary</a>	Task	Reminder	General	Normal
<a href="#">Arbitration Date</a>	Event	Litigation	Litigation	Urgent
<a href="#">Assign nurse to case</a>	Task	Reminder	General	Normal
<a href="#">Check Denied</a>	Task	Request	General	Normal
<a href="#">Check on medical clearance for light duty work</a>	Task	Reminder	General	Normal
<a href="#">Check with employer about temp light duty work</a>	Task	Reminder	General	Normal
<a href="#">Claim Catastrophe Related Changes</a>	Task	Reminder	General	Normal
<a href="#">Closed File Review</a>	Task	Reminder	General	Low

# Attributes of an Activity Pattern

Activity Pattern Detail - Get initial medical report (Up to Activity Patterns)

Update Cancel

**Activity Pattern**

Subject	* Get initial medical report
Short Subject	
Class	* Task
Type	General
Category	Request
Code	* initial_med_report
Priority	* High
Mandatory	* Yes <input type="radio"/> No <input checked="" type="radio"/>
Calendar Importance	* Medium
Claim loss type	Workers' Comp
Automated only	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Available for closed claim	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Externally Owned	* <input checked="" type="radio"/> Yes <input type="radio"/> No
Document Template	
Email Template	
Recurring	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Description	Get initial medical report for WC claims

**Activity Pattern Dates**

Target days 4

New Activity in Claim 312-36-368889

Update Cancel

Subject \* Get initial medical report

Description Get initial medical report for WC claims

Related To none (Claim-level)

Due Date 02/04/2008

Escalation Date .....

Priority \* High

Mandatory Yes

Calendar Importance \* Medium

Recurring No

Externally Owned \*  Yes  No

External Owner <none selected>

Document Template

Email Template

Assign To Use automated assignment

The diagram illustrates the mapping of attributes from an 'Activity Pattern' to a 'New Activity'. Red boxes and arrows highlight the corresponding fields between the two screens. The 'Activity Pattern' screen on the left shows fields like Subject, Class, Type, Category, and Priority. The 'New Activity' screen on the right shows fields like Subject, Description, Related To, Due Date, Escalation Date, and various mandatory and calendar importance settings. The priority, mandatory status, and calendar importance are explicitly mapped, while other fields like Due Date and Escalation Date are also present in both forms.

# Creating New Activity Patterns

The screenshot shows the Guidewire software interface for creating new activity patterns. The top navigation bar includes Team, Dashboard, Administration (selected), Address Book, Claim, and other administrative links. A red box highlights the "Add Activity Pattern" button in the top right of the main content area.

**New Activity Pattern (Up to Activity Patterns)**

**Activity Pattern**

- Subject:
- Short Subject:
- Class:  Task
- Type: General
- Category: <none selected>
- Code:
- Priority:  Normal
- Mandatory:  Yes  No
- Calendar Importance:  <none selected>
- Claim loss type:  <none selected>
- Automated only:  Yes  No
- Available for closed claim:  Yes  No
- Externally Owned:  Yes  No
- Document Template:
- Email Template:
- Recurring:  Yes  No
- Description:

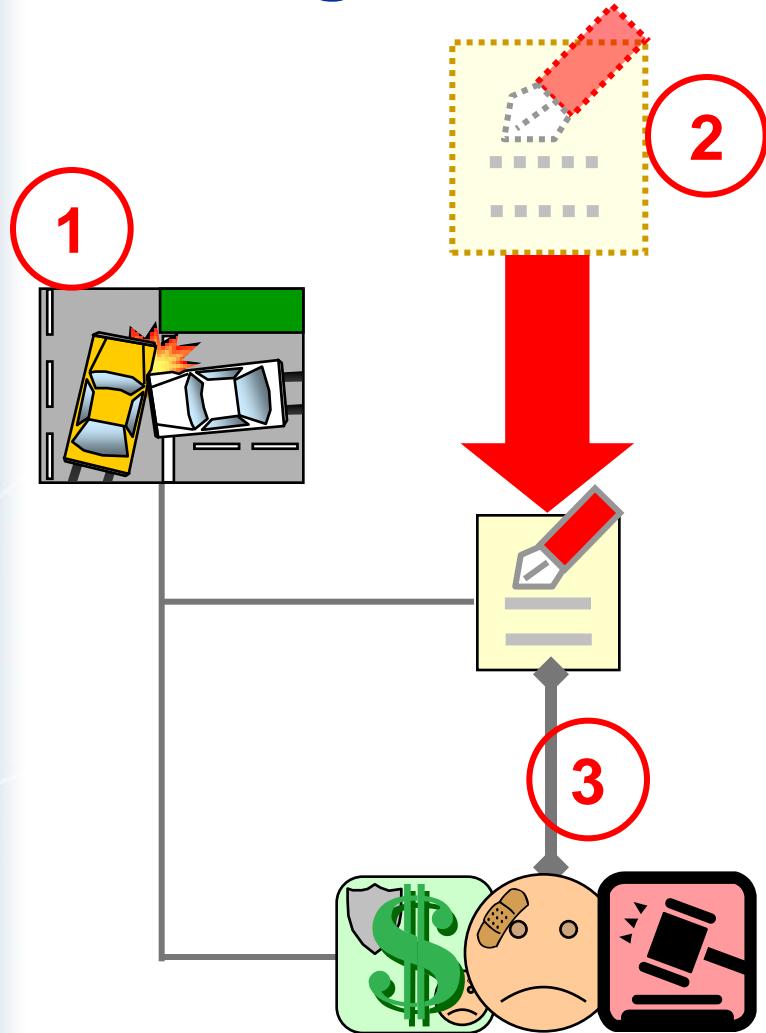
**Activity Pattern Dates**

- Target days:
- Target hours:
- Target start point: <none selected>
- Include these days: <none selected>
- Escalation days:
- Escalation hours:
- Escalation start point: <none selected>
- Include these days: <none selected>

# Lesson Outline

- ▶ Activity Basics
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- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
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# Creating Activities



1. Navigate to parent claim
2. Select appropriate activity pattern
3. Identify associated exposure, claimant, or matter, if necessary
4. Specify additional information as needed (including assignment method)

# Creating New Activities 1 and 2: Navigate to the Claim and Specify the Activity Pattern

The screenshot shows a software interface for creating new activities. On the left, a sidebar lists options: Note, Email, Matter, Evaluation, and Negotiation. The main area is titled "New Activity" and lists several activity types: Correspondence, Interview, New Mail, Reminder, and Request. The "Interview" option is highlighted with a blue background. To the right, a vertical stack of cards represents activity patterns, categorized under "Financials". The visible cards are: "Get a statement from witness", "Make initial contact with claimant", and "Make initial contact with insured".

New ...	New Activity	Financials
Note	Correspondence	
Email	Interview	Get a statement from witness
Matter	New Mail	Make initial contact with claimant
Evaluation	Reminder	Make initial contact with insured
Negotiation	Request	

- ▶ Activity patterns are grouped into related categories

# Creating New Activities 3: Related To Object

New Activity in Claim 000-00-000203

Update Cancel

Subject	<input type="text" value="Get a statement from witness"/>
Description	<input type="text"/>
Related To	<input type="text" value="none (Claim-level)"/> 
Due Date	<input type="text" value="05/14/2008"/> 
Escalation Date	<input type="text" value=".../.../..."/> 
Priority	<input type="text" value="Normal"/> 
Mandatory	<input type="radio"/> Yes <input checked="" type="radio"/> No
Calendar Importance	<input type="text" value="Not On Calendar"/> 
Recurring	No
Externally Owned	<input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<input type="text" value="&lt;none selected&gt;"/> 
Document Template	<input type="text"/>  
Email Template	<input type="text"/>  
Assign To	<input type="text" value="Use automated assignment"/>  

# Creating New Activities 4: Additional Info (Including Assign To Logic)

New Activity in Claim 000-00-000304

Update Cancel

Subject	* Get a statement from witness
Description	
Related To	none (Claim-level) ▾
Due Date	05/20/2008
Escalation Date	05/27/2008
Priority	* Normal ▾
Mandatory	No
Calendar Importance	* Not On Calendar
Recurring	No
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<none selected> ▾
Document Template	
Email Template	
Assign To	Use automated assignment ▾

A red box highlights the "Assign To" dropdown menu. A red arrow points from the "Assign To" dropdown in the main form down to the expanded list in the dropdown menu.

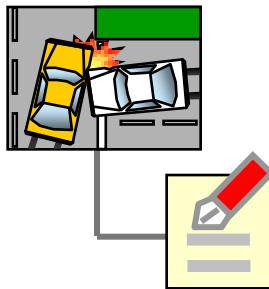
The expanded "Assign To" list contains:

- Use automated assignment
- Use automated assignment
- Claim/Exposure Owner
- Andy Applegate (Auto1 - TeamA)
- Jill Randolph (Western Salvage Unit)
- Isabel Harkin (LA Auto Adjusters)

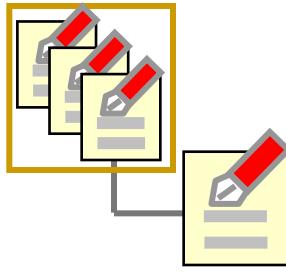
# Creating New Activities: The New Activity

Workplan (1 - 4 of 4)							
All open activities			Priority	Status	Subject	Exposures	Assigned To
<input type="checkbox"/>			Due				
<input type="checkbox"/>			05/20/2008	Normal	Open	<a href="#">Get a statement from witness</a>	Betty Baker
<input type="checkbox"/>			05/20/2008	High	Open	<a href="#">Verify coverage</a>	Betty Baker
<input type="checkbox"/>			05/12/2008	Urgent	Open	<a href="#">Make initial contact with insured</a>	Betty Baker
<input type="checkbox"/>			05/21/2008	Urgent	Open	<a href="#">Special Investigation Claim Review</a>	Rick Ralston

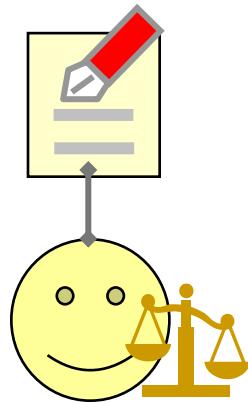
# What Can You Do With Activities?



- ▶ For activities associated to a claim, you can:
  - View them (and filter them)
  - Search for them



- ▶ For activities in a queue, you can:
  - View them
  - Take ownership of them



- ▶ For activities you own, you can:
  - View them
  - Modify them
  - Reassign them
  - Complete or skip them

# Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

# Viewing the List of Claim Activities

The screenshot illustrates the 'Claim Activities' screen in a software application. On the left, a sidebar lists navigation options: Summary, Workplan, Loss Details, Exposures, Parties Involved, Policy, Financials, Notes, and Documents. The 'Summary' and 'Workplan' buttons are highlighted with red boxes and arrows pointing to their corresponding sections on the right.

**Summary**

Loss Date: 05/01/2008 12:00 AM  
Notice Date: 05/10/2008  
Loss Location: 2563 West Ave., Orange, CA 91357  
Description: Head on collision at blind corner

**Exposures**

#	Type	Coverage	Claimant	Adjuster	Status

**Parties Involved**

Name	Roles	Phone
Karen Egertson	Agent	213-457-6378
Angel Ramirez	Witness	
Scott Shiu	Covered Party	619-275-2346
Brittany Turner	Insured, Main Contact, Reporter	213-457-6378

**Workplan (1 - 4 of 4)**

All open activities

Due	Priority	Subject	Assigned To
05/12/2008	Urgent	Make initial contact with insured	Betty Baker
05/21/2008	Urgent	Special Investigation Claim Review	Rick Ralston
05/20/2008	High	Verify coverage	Betty Baker
05/20/2008	Normal	Get a statement from witness	Betty Baker

**Planned Activities**

Due	Priority	Subject	Assigned To
05/12/2008	Urgent	Make initial contact with insured	Betty Baker
05/21/2008	Urgent	Special Investigation Claim Review	Rick Ralston
05/20/2008	High	Verify coverage	Betty Baker
05/20/2008	Normal	Get a statement from witness	Betty Baker

# Viewing an Activity in Detail

The screenshot shows a software application for managing activities. On the left, a sidebar lists categories: Summary, Workplan, Loss Details, Exposures, Parties Involved, Policy, Financials, and Notes. The 'Workplan' category is selected and highlighted in blue. To the right is a grid titled 'All open activities' with columns: Due, Priority, Status, and Subject. The grid contains six rows of activity data. A red arrow points from the 'Subject' column of the third row ('30 day diary') down to the 'Subject' field in the 'Activity Detail' form below. Another red box highlights the '30 day diary' entry in the grid.

All open activities					
	Due	Priority	Status	Subject	
<input type="checkbox"/>	05/20/2008	High	Open	<a href="#">Verify coverage</a>	
<input type="checkbox"/>	05/21/2008	Urgent	Open	<a href="#">Special Investigation Claim Review</a>	
<input type="checkbox"/>	05/12/2008	Urgent	Open	<a href="#">Make initial contact with insured</a>	
<input type="checkbox"/>	05/20/2008	Normal	Open	<a href="#">Get a statement from witness</a>	
<input type="checkbox"/>	06/18/2008	Normal	Open	<a href="#">30 day diary</a>	

**Activity**

Activity Detail for Claim 000-00-000304

[Update](#) | [Complete](#) | [Complete and Create New](#) | [Skip](#) | [Assign](#) | [Link Document](#) | [Cancel](#) | [View](#)

<b>Details</b>	<b>Documents</b>
Subject * <input type="text" value="30 day diary"/>	<a href="#">Remove</a> <a href="#">Name</a> <a href="#">View</a> <a href="#">Type</a> <a href="#">Status</a>
Description <input type="text"/>	
Related To <input type="text" value="none (Claim)"/>	
Due Date <input type="text" value="06/18/2008"/> <a href="#">Calendar</a>	
Escalation Date <input type="text" value="....."/> <a href="#">Calendar</a>	
Priority * <input type="text" value="Normal"/>	
Calendar Importance * <input type="text" value="Not On Calendar"/>	
Mandatory No	
<b>New Note</b>	
Topic <input type="text" value="none selected"/>	
Security Type <input type="text" value="none selected"/>	
Subject <input type="text"/>	
Related To <input type="text" value="none"/>	
Confidential <input checked="" type="radio"/> Yes <input checked="" type="radio"/> No	
Text <input type="text"/>	

# Viewing Claim Activities Via the Calendar

The screenshot shows the Guidewire Claim Calendar interface. At the top, there are three dropdown menus: 'Assigned To' set to 'Anyone (All Activities)', 'Priority' set to 'Anyone (All Activities)', and 'Jump To' set to 'May 2008'. Below these are two additional dropdown menus: 'Me (My Activities)' (highlighted with a red dashed box) and 'Anyone (All Activities)'. The main calendar grid spans from April 28 to June 1, 2008. A specific activity is highlighted on May 20, 2008, with a red dashed box around the cell. The activity details are shown in a tooltip: '1 : Verify cover...' and '1 : 000-00-000304 Brittany Turner'. A red arrow points from this tooltip to a larger callout box at the bottom right containing the same information. On the right side of the calendar, a vertical navigation bar lists the days of the week (Mon-Sun). A large red dashed box highlights the week of May 19-25, 2008. A secondary callout box for this week shows a detailed list of events:

- Mon, May 19, 2008**  
-- No Events --
- Tue, May 20, 2008**
  - + • Brittany Turner : Verify coverage
- Wed, May 21, 2008**
  - + • Brittany Turner : Special Investigation Claim Review
- Thu, May 22, 2008**  
-- No Events --
- Fri, May 23, 2008**  
-- No Events --
- Sat, May 24, 2008**  
-- No Events --
- Sun, May 25, 2008**  
-- No Events --

# Filtering Activities in an Activity List

**Workplan (1 - 6 of 6)**

All activities		Assign	Skip	Complete	Approve	Reject
<input type="checkbox"/>			Due	Priority	Status	Subject
<input type="checkbox"/>			05/18/2008	Urgent	Open	<a href="#">Contact insured</a>
<input type="checkbox"/>			05/21/2008	Urgent	Skipped (Isabel Harkin: 05/19/2008)	<a href="#">Make initial contact with claimant</a>
<input type="checkbox"/>			05/21/2008	High	Open	<a href="#">Verify coverage</a>
<input type="checkbox"/>			05/21/2008	High	Complete (Isabel Harkin: 05/19/2008)	<a href="#">Send claim</a>

**Workplan (1 - 3 of 3)**

My open activities		Assign	Skip	Complete	Approve	Reject	
<input type="checkbox"/>	05/26/2008			Due	Priority	Status	Subject
<input type="checkbox"/>	06/18/2008			05/18/2008	Urgent	Open	<a href="#">Contact insured</a>
<input type="checkbox"/>				05/21/2008	High	Open	<a href="#">Verify coverage</a>
				05/19/2008	Normal	Open	20 day file review

**Workplan (empty)**

All open external activities		Assign	Skip	Complete	Approve	Reject
<input type="checkbox"/>	Due	Priority	Status	Subject	Exposures	
All open external activities			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Searching for Activities

**Search Activities**

**Specify at least one of the following**

Claim #	.....
Assigned To Group	LA Auto Adjusters
Include Child Groups	<input type="radio"/> Yes <input type="radio"/> No
Assigned To User	<none selected>
Created By	<none selected>
External Owner	<none selected>

**Optional parameters**

Status	Open
Priority	Urgent
Completed Late	<none selected>
Overdue Now	<none selected>
Pending Assignment	No
Description	Text area
Search For Date	Due date
	<input type="radio"/> Since Today
	<input checked="" type="radio"/> From 05/01/2008
	To 06/30/2008
Subject	<input checked="" type="radio"/> <none selected>
	<input type="radio"/> Contains

**Search Results (1 - 4 of 4)**

**Assign** | **Print/Export**

	Subject	Claim	Insured	Due	Closed	Priority	Status	External	External Owner	Assigned To
<input type="checkbox"/>	<a href="#">Make initial contact with claimant</a>	<a href="#">000-00-000103</a>	Robert Farley	05/08/2008		Urgent	Open	No		Scott Arthur
<input type="checkbox"/>	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000203</a>	Allen Robertson	05/05/2008		Urgent	Open	No		Isabel Harkin
<input type="checkbox"/>	<a href="#">Contact insured</a>	<a href="#">000-00-000505</a>	Allen Robertson	05/18/2008		Urgent	Open	No		Isabel Harkin
<input type="checkbox"/>	<a href="#">Special Investigation Claim Review</a>	<a href="#">000-00-000203</a>	Allen Robertson	05/21/2008		Urgent	Open	No		Wesley Roosevelt

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# Viewing Queued Activities

The screenshot shows the Guidewire desktop interface with the following elements:

- Top Navigation Bar:** Desktop, Search, Address Book, Claim, Vacation, Go to (Alt+/)
- Left Sidebar (Actions):** Activities (0), Claims (0), Exposures (0), **Queues (3)** (selected), Calendar, Bulk Invoices.
- Central Content Area:** Title "Queued Activities (1 - 3 of 3)", Subtitle "Salvage Actions - Western Salvage Unit (3)".
- Table:** Displays three queued activities with columns: Star, Recycle, Queued (link), Due (05/14/2008), Priority (Normal), Subject (Salvage Vehicle), Claim (000-00-000103), and Insured (Robert Farley).

		Queued	Due	Priority	Subject	Claim	Insured
		<a href="#">05/14/2008</a>	<a href="#">05/06/2008</a>	Normal	<a href="#">Salvage Vehicle</a>	<a href="#">000-00-000103</a>	<a href="#">Robert Farley</a>
		<a href="#">05/14/2008</a>	<a href="#">05/06/2008</a>	Normal	<a href="#">Vehicle salvage opportunity</a>	<a href="#">000-00-000203</a>	<a href="#">Allen Robertson</a>
		<a href="#">05/14/2008</a>	<a href="#">02/06/2008</a>	Normal	<a href="#">Salvage Vehicle</a>	<a href="#">235-53-373906</a>	<a href="#">Larry Gamney</a>

- ▶ Activities assigned to queues that you have access to can be viewed by clicking the Queues page link on the Desktop tab

# Taking Ownership of a Queued Activity

Queued Activities (1 - 3 of 3)

Salvage Actions - Western Salvage Unit (3)  Refresh

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Queued	Due	Priority	Subject	Claim	Insured
	<input type="checkbox"/>	<input type="checkbox"/>	05/14/2008	05/06/2008	Normal	<a href="#">Vehicle salvage opportunity</a>	<a href="#">000-00-000203</a>	<a href="#">Allen Robertson</a>
	<input type="checkbox"/>	<input type="checkbox"/>	05/14/2008	02/06/2008	Normal	<a href="#">Salvage Vehicle</a>	<a href="#">235-53-373906</a>	<a href="#">Larry Gamney</a>
	<input type="checkbox"/>	<input type="checkbox"/>	05/14/2008	05/06/2008	Normal	<a href="#">Salvage Vehicle</a>	<a href="#">000-00-000103</a>	<a href="#">Robert Farley</a>

Activities (1 - 1 of 1)

My activities today

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Due	Priority	Subject	Claim	Insured
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05/06/2008	Normal	<a href="#">Vehicle salvage opportunity</a>	<a href="#">000-00-000203</a>	<a href="#">Allen Robertson</a>

# Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

# Viewing Your Activities Via Desktop List

The screenshot shows the Guidewire desktop interface. The top navigation bar includes links for Desktop, Search, Address Book, Claim (selected), and Vacation. On the left, a sidebar titled 'Actions' lists 'Activities (6)' which are further broken down into 'Claims (2)', 'Exposures (0)', 'Queues (0)', 'Calendar', and 'Bulk Invoices'. The main content area is titled 'Activities (1 - 6 of 6)' and displays a grid of activities. The columns include: a checkbox column, a star icon, a clipboard icon, a due date field ('Due'), a priority dropdown ('Priority'), a subject field ('Subject'), a claim number field ('Claim'), an insured name field ('Insured'), and an edit link ('Edit'). One activity in the list, 'Make initial contact with insured' due on 05/21/2008, is highlighted with a red box and a red arrow points from it to the text 'navigate to claim and activity'.

Activities (1 - 6 of 6)								
All open			Assign	Skip	Complete	Approve	Reject	Print/Export
<input type="checkbox"/>			Due <a href="#">05/12/2008</a>	Priority ▲	<a href="#">Subject</a>	<a href="#">Claim</a>	<a href="#">Insured</a>	<a href="#">Edit</a>
<input type="checkbox"/>			<a href="#">05/12/2008</a>	Urgent	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	
<input type="checkbox"/>			<a href="#">05/20/2008</a>	Urgent	<a href="#">Verify coverage</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	
<input type="checkbox"/>			<a href="#">05/21/2008</a>	Urgent	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000508</a>	<a href="#">Larry Gamney</a>	
<input type="checkbox"/>			<a href="#">05/20/2008</a>	Normal	<a href="#">Get a statement from witness</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	
<input type="checkbox"/>			<a href="#">06/18/2008</a>	Normal	<a href="#">30 day diary</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	
<input type="checkbox"/>			<a href="#">06/19/2008</a>	Normal	<a href="#">30 day diary</a>	<a href="#">000-00-000508</a>	<a href="#">Larry Gamney</a>	

navigate to claim and  
activity

- ▶ Clicking activity subject:
  - Displays associated claim in screen area
  - Opens activity in workspace frame

# View Your Activities Via Desktop Calendar

Desktop | Search | Address Book | Claim | Vacation

Actions

Activities (7)  
Claims (2)  
Exposures (0)  
Queues (0)

**Calendar**

Show : All Activities  
Activity : All Activity Type  
Type :  
Priority : All Priorities

◀ May 2008 ▶

June 2008 July 2008

26	27	28	29	30	31/1	30	1	2	3	4	5/6
2	3	4	5	6	7/8	7	8	9	10	11	12/13
9	10	11	12	13	14/15	14	15	16	17	18	19/20
16	17	18	19	20	21/22	21	22	23	24	25	26/27
23	24	25	26	27	28/29	28	29	30	31	1	2/3
30	1	2	3	4	5/6						

Monday Tuesday Wednesday Thursday Friday Sat/Sun

April 28 29 30 May 1 2 3/4

5 6 7 8 9 10/11

12 13 14 15 16 17/18

19 20 21 22 23 24/25

26 27 28 29 30 31/June 1

1 : Make initial co...  
1 : Verify cover... 2 : Contact insur... 2 : Reservation r...

Tue, May 20, 2008

- Brittany Turner  
Claim # 000-00-000304  
Insured Brittany

Wed, May 21, 2008

- Larry Gamney

Thu, May 22, 2008

- Larry Gamney

Fri, May 23, 2008

-- No Events --

Sat, May 24, 2008

-- No Events --

Sun, May 25, 2008

-- No Events --

Mon, May 26, 2008

-- No Events --

**May 20 - 26, 2008**

**Tue, May 20, 2008**

- [Brittany Turner : Verify coverage](#)

Claim # 000-00-000304  
Insured Brittany Turner

**Wed, May 21, 2008**

- [Larry Gamney : Contact insured](#)

**Thu, May 22, 2008**

- [Larry Gamney : Reservation rights letter](#)

**Fri, May 23, 2008**

-- No Events --

**Sat, May 24, 2008**

-- No Events --

**Sun, May 25, 2008**

-- No Events --

**Mon, May 26, 2008**

-- No Events --

22  
2 : Reservation r...

1 : 000-00-000304 Brittany Turner 2 : 000-00-000508 Larry Gamney

# Editing Your Activities

**Activity**

**Activity Detail for Claim 000-00-000508**

**Update** | Complete | Skip | Assign | Link Document | Cancel | View Notes

<b>Details</b>	<b>Documents</b>
Subject Description	* Make initial contact with insured
Related To	Larry Gamm
Due Date	* 05/21/2008
Escalation Date	05/27/2008
Priority	* Urgent
Calendar Importance	* High
Mandatory	No
Status	Open
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<none selected>
<b>New Note</b>	
Topic	<none selected>
Security Type	<none selected>
Subject	
Related To	none
Confidential	<input type="radio"/> Yes <input checked="" type="radio"/> No
Text	

**Activity Assignment**

Assigned To Carlos Oppley

# Reassigning Your Activities

**Activity**

Activity Detail for Claim 000-00-000304

Update | Complete | Skip | **Assign** | Link Document | Cancel | View Notes

**Assign Activities** (Return to Workplan)

Select how you would like to do the assignment

Select from list:

Find a user, group, or queue:

Search For

Last Name

First Name

User name

Group Name

Role

Attribute Name

Location

City

State

ZIP Code

Country

# Closing Your Activities

Activity

Activity Detail for Claim 000-00-000304

Update Complete Skip Assign Link Document Cancel View Notes

Workplan (1 - 10 of 10)

All activities					Assign	Skip	Complete	Approve	Reject
<input type="checkbox"/>			Due ▲	Priority	Status	Subject			
<input type="checkbox"/>		05/12/2008	Urgent	Open		<a href="#">Make initial contact with insured</a>			
<input type="checkbox"/>		05/14/2008	Normal	Skipped (Betty Baker: 05/19/2008)		<a href="#">Get a statement from witness</a>			
<input type="checkbox"/>		05/20/2008	High	Complete (Betty Baker: 05/19/2008)		<a href="#">Verify coverage</a>			

Red arrows point from the 'Complete' and 'Skip' buttons in the top banner to the corresponding 'Complete' and 'Skipped' rows in the Workplan table.

# Creating an Activity Note



**Activity**

Activity Detail for Claim 000-00-000203

Update | Complete | Skip | Assign | Link Document | Cancel | View Notes

**Details**

Subject: \* Vehicle salvage opportunity

Description: Salvage Vehicle

Related To: none (Claim)

**New Note**

Topic: <none selected>

Security Type: <none selected>

Subject: Vehicle in impound yard

Related To: (1) 1st Party Vehicle - Allen Robertson

Confidential:  Yes  No

**Text**

Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.

**Documents**

Remove Name View Type Status Author Date Modified

New Note Topic

<none selected>

<none selected>

Vehicle in impound yard

(1) 1st Party Vehicle - Allen Robertson

Yes  No

Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.

No

# Viewing the Notes for a Given Activity

Activity Detail for Claim 000-00-000203

[Update](#) | [Complete](#) | [Skip](#) | [Assign](#) | [Link Document](#) | [Cancel](#) | [View Notes](#)

[View Notes](#) is highlighted with a red box and a red arrow points down to the notes list.

**Activity Notes**

Find Text:  Author: Any Related To: Any Topic: Any

Date Range:  Since Any  From  To

Sort By: Date  Ascending  Descending

[Search](#) [Reset](#)

**Notes (1 - 2 of 2)**

<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Print</a> <b>Author</b> Jill Randolph <b>Topic</b> Salvage <b>Related To</b> (1) 1st Party Vehicle - Allen Robertson	<b>May 20, 2008</b> <b>Vehicle released from impound yard</b> Insured has secured release of vehicle from impound yard. The impound yard has been added to the claim file along with its address, and the towing service which moves the car to the scrap yard should pick up the vehicle from this address.	10:37 AM
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Print</a> <b>Author</b> Jill Randolph <b>Topic</b> <b>Related To</b> (1) 1st Party Vehicle - Allen Robertson	<b>May 20, 2008</b> <b>Vehicle in impound yard</b> Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.	10:28 AM

# Lesson Objectives Review

You should now be able to:

- Describe the functionality of activities
- Create activity patterns
- Create activities
- Review activities associated to a claim
- Take ownership of queued activities
- Edit and complete activities assigned to you

# Review Questions

1. Every activity is associated to a claim. What are the three sub-objects that an activity could optionally be associated to?
2. What is an activity pattern?
3. What do the following mean?
  - a) An activity in a list has a star icon in the first column.
  - b) An activity in a list has an activity-with-clock icon in the second column.
  - c) An activity in a list has a due date in red.
4. Name one similarity and one difference between the Desktop Activities list and a claim's Workplan list.
5. What are the two ways an activity can be closed? What is the difference between the two?

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