## How to View All Activities from PolicyCenter Desktop

## Description

This job aid reviews how to manage the settings on the Desktop screen, so you can view all open activities, submissions, renewals, etc. You only need to change these settings one time, as PolicyCenter retains the most-recent setting selections.

Step 1	
Action	Screen
All open activities display on the "My Activities" screen by default.	PolicyCenter <sup>®</sup> Desktop      Account      Policy      Search      Ieam Administration      Testing      Go to     Activities
Select "My Submissions".	My Activities       All open         My Submissions
Step 2	
Action	Screen
<ul> <li>All open submissions with an activity for the user display on the "My Submissions" screen.</li> <li>Select "All Open" from the drop-down list.</li> </ul>	PolicyCenter** Desktop × Account × Policy × Search × Team Administration × Testing × : © © Go to         Actions       IP         My Activities       Open with activity for me         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Open with activity for me due within 7 days         Created in past 7 days         Completed in last 30 days         My Queues
Step 3	
Action	Screen
"All open" submissions, if any, display on the "My Submissions" screen.	PolicyCenter™ Desktop       ▼       Account       ▼       Bolicy       ▼       Ieam       Administration       ▼       Testing       ▼       :       Image: Control of the state
Select "My Renewals".	My Submissions         Primary Insured \$         Effective Date \$         Quote Needed         Transaction # \$         Type         Status         Issued         Product \$           My Submissions         Insured 1         10/20/2021         XXXXXXXX         Submission         Quoted         No         Personal Arrope           My Remarketing         Insured 2         10/24/2021         XXXXXXXX         Submission         Quoted         No         Personal Arrop



Step 4	
Action	Screen
<ul> <li>All open renewals, if any, display on the "My Renewals" screen.</li> <li>Select "Open with activity for me" from the drop-down list.</li> </ul>	PolicyCenter" Desktop <ul> <li>Account</li> <li>Policy</li> <li>Search</li> <li>Ieam</li> <li>Administration</li> <li>Testing</li> <li>My Renewals</li> <li>My Remevals</li> <li>My Renewals</li> <li>My Renewals</li> <li>My Renewals</li> <li>My Other Policy Transactions</li> <li>My Queues</li> <li>Effective Date 1</li> <li>Current Premium</li> <li>Renewal Premium</li> <li>Premium Diff.</li> <li>No data to display</li> </ul>
Step 5	
Action	Screen
<ul> <li>All renewals with an activity for the user display on the "My Renewals" screen.</li> <li>Select "My Other Policy Transactions".</li> </ul>	PolicyCenter" Desigtop   Account Policy   Search Ieam   Administration Testing   Actions My   My Activities   My Submissions   My Remarketing   My Remarketing   My Remewals   My Other Policy Transactions   My Queues

## Step 6

Action	Screen
<ul> <li>All "Open with activity for me" activities, if any, display on the "My Other Policy Transactions" screen.</li> <li>Select "All open" from the drop-down list.</li> </ul>	PolicyCenter**       Desistop <ul> <li>Account</li> <li>Policy</li> <li>Search</li> <li>Ieam</li> <li>Administration</li> <li>Testing</li> <li>Image: Image: Image</li></ul>

## Step 7

Action	Screen
<ul> <li>"All Open" other policy transactions, if any, display on the "My Other Policy Transactions" screen.</li> <li>Select the "My Queues" link.</li> </ul>	PolicyCenter® Desktop       Account       Policy       Search       Ieam       Administration       Testing       Iesting       Iesting <t< td=""></t<>
	My Queues

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Step 8	
Action	Screen
"All Queues" activities, if any,	FolicyCenter <sup>™</sup> Desktop   ▼ Account   ▼ Policy   ▼ Search   ▼ Ieam Administration   ▼ Testing   ▼ : 📝 🖗 Go to
display on the "My Queues"	Actions 😥 My Queues Assign First To Me Assign Selected To Me   Assign Selected To Me and Open
screen.	My Activities All Queues 💌
	My Submissions           Due Date         Priority         Status         Subject         ID         Account Holder         Product         Policy Type         Assigne
	My Remarketing
	My Renewals
	My Other Policy Transactions
	My Queues

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