Activity Management.

The Firm level Activity Dashboard, Household, Client, and Account Activity views provide activity information with the ability to filter, sort by different criteria, print and export the view.

Home Page portlets (page 2): The SEI Advisor Center Home page provides two activity portlets, which display summary information. The Activity Summary and Activities Submitted by Me home page portlets can be added as one of the four portlets.

Firm level Activity dashboard (page 3): This view shows activities across all clients and accounts.

Household, Client, and Account Activity Summary (page 5): This view shows the activities based on the page level you are viewing.

Activity Preferences (page 5): Select specific activity types to hide from your activity pages

Once an action is submitted, an activity is created. The activity provides an activity ID number, information about the activity submitted, and the status of the activity. Activities are the instructions for the system to follow.

Examples of Activities include:

- Submitting a Disburse Cash action
- Uploading a form through the Manage Forms action

There are some cases when additional activities are created based on the options selected while completing the action. These original or primary activities will also include associate activities when applicable.

Example of a Disburse Cash activity:

- If you submit a Disburse Cash action, while selecting Existing Cash, the system will only create a Cash Distribution activity
- If you submit a Disburse Cash action, while selecting Raise Cash, and the account does not have enough available cash, the system will create a Cash Distribution activity, a Raise Cash activity, and Sell activities

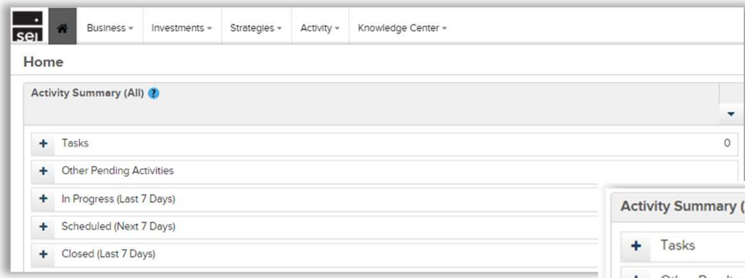
Example of a Submitted Form activity:

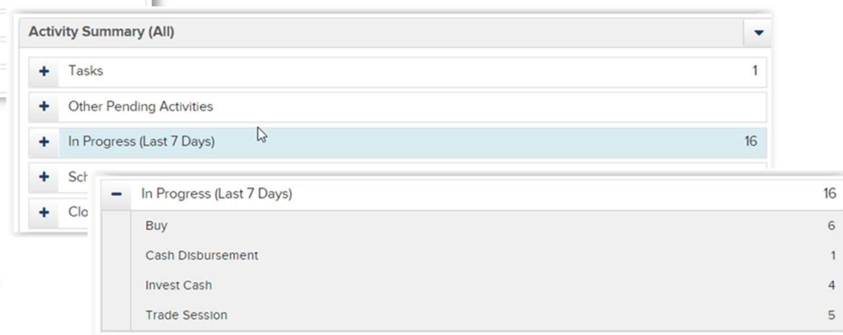
- If you submit a form through the Manage Forms action, the system will only create a Submitted Form activity, and the activity will display as submitted once the form is submitted to SEI.
- Depending on the form that was submitted, the SEI Private Trust Company will enter the action in the system, which will create a separate activity.

Activity Home page Portlets

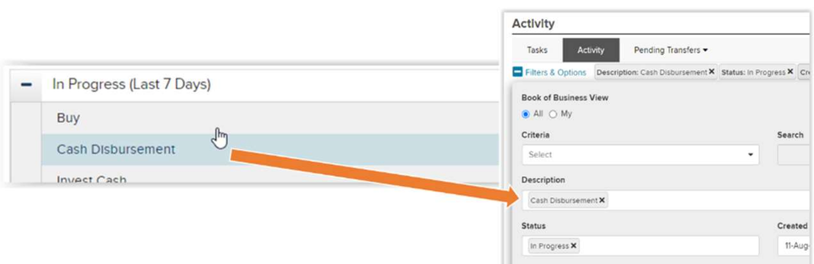
Activity Summary

Displays a summary of Activities based on the activity's status. The total number of activities will display to the right of the activity category. The In Progress, Scheduled, and Closed categories will display based on the Last or Next 7 Days.





Select an Activity category header bar (ex. In Progress), to be taken to the Activity Dashboard, with that status filtered or the "+" icon to expand the section to see all of the activity types included.

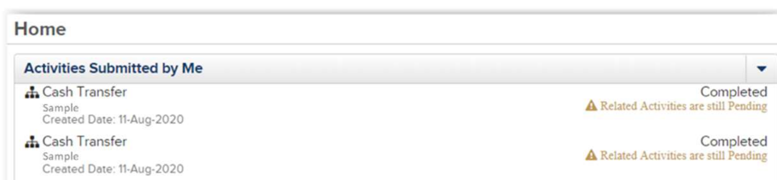


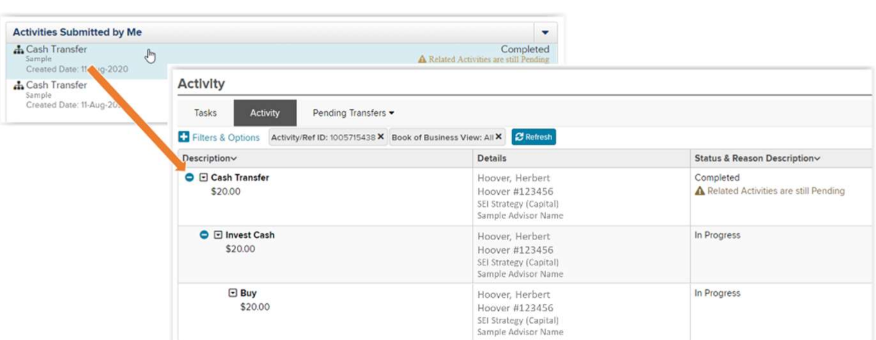
Select any of the activity types (ex. Cash Disbursement), to be taken to the Activity Dashboard with that status and activity type filtered.

Activities Submitted by Me

Displays the activities that were submitted by the firm user that is currently viewing the information.

Select the Activities Submitted by Me status header bar, to be taken to the Activity Dashboard, with that status filtered.



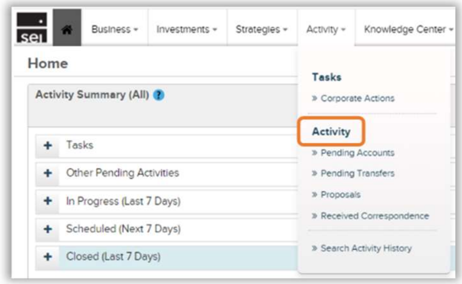


Select a specific activity (ex. Cash Transfer), to be taken to the Activity Dashboard, with that activity filtered.

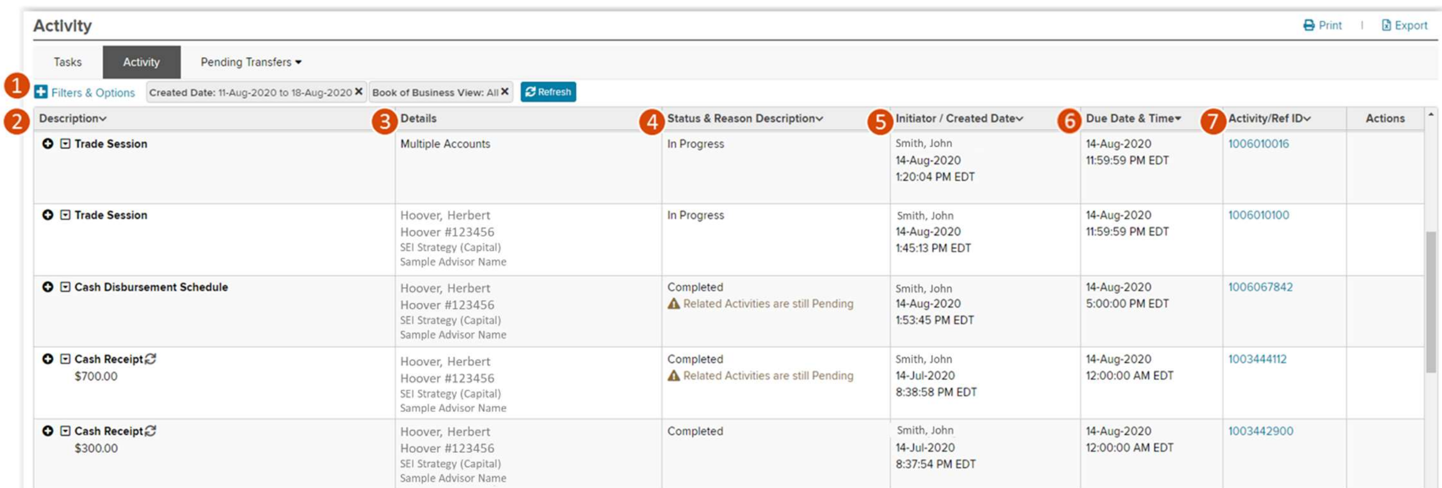
The activity and any associated activities will display with their current status.

Firm Level Activity Dashboard

From within the Activity dropdown of the SEI Advisor Center blue header bar select Activity. The Activity Dashboard will open within its own separate browser tab to allow for additional research within the SEI Advisor Center, if needed.



1. **Filters & Options** allows for entering a specific search criteria, one or multiple activity types, a specific status, and different date ranges. Select Search to apply the changes.
2. **Description** displays the activity name and depending on the activty, additional amounts.
3. **Details** displays the firm name, client name, account number, and primary advisor when applicable.
4. **Status & Reason** provides the current staus of the activity and in some cases, the reason the activity is in that status.
5. **Initiator / Created Date** displays the user that submitted the activity and the date it was submitted.
6. **Due Date & Time** displays a system generated date and time, however these dates are not utilized at this time.
7. **Activity ID** displays the identifaction number assigned to the activity. This number can be searched and referenced. In the case of a Submitted Form activity, you may also see a paperclip icon, which will display the actual form submitted.

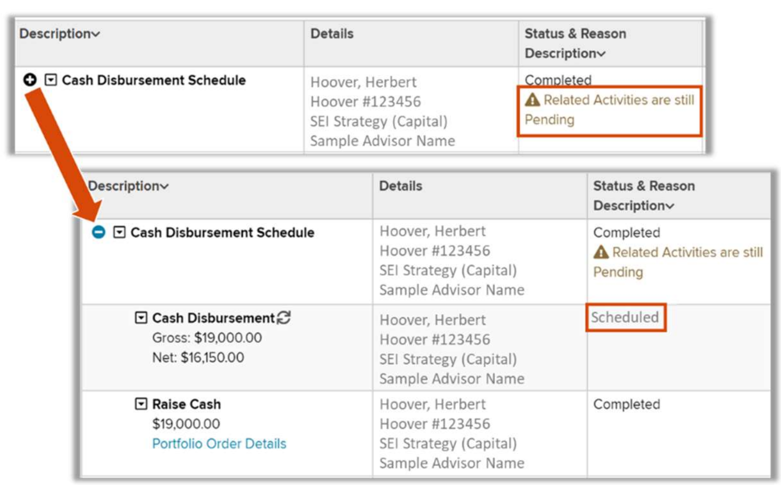


The Activity Dashboard can be printed or Exported by selecting either of the options in the upper right

Related Activities

A message will display within the Status & Reason Description column, of the originally submitted activity, which will indicate that associate activities are still in progress/scheduled.

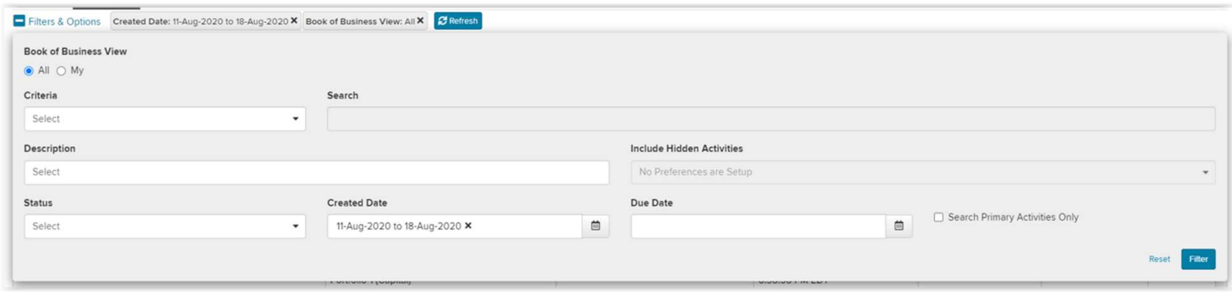
Expanding the "+" icon will display the associated activities and provide the current status.



Filters & Options

Provides the ability for the user to filter the data in the table view based on the following:

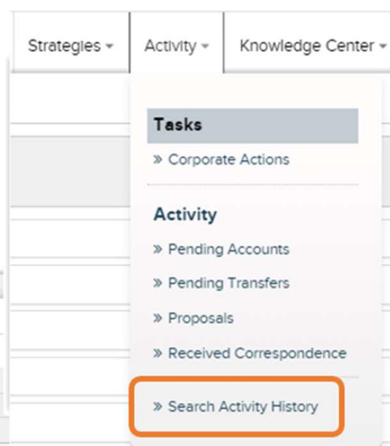
- **Book of Business View:** Select between All activities you have access to or My activities that you have submitted
- **Criteria and Search:** Select between different search options and input specific values within the search field
- **Description:** Select one or multiple activity types
- **Status:** Select on or more activity statuses
- **Created Date:** Search between different dates

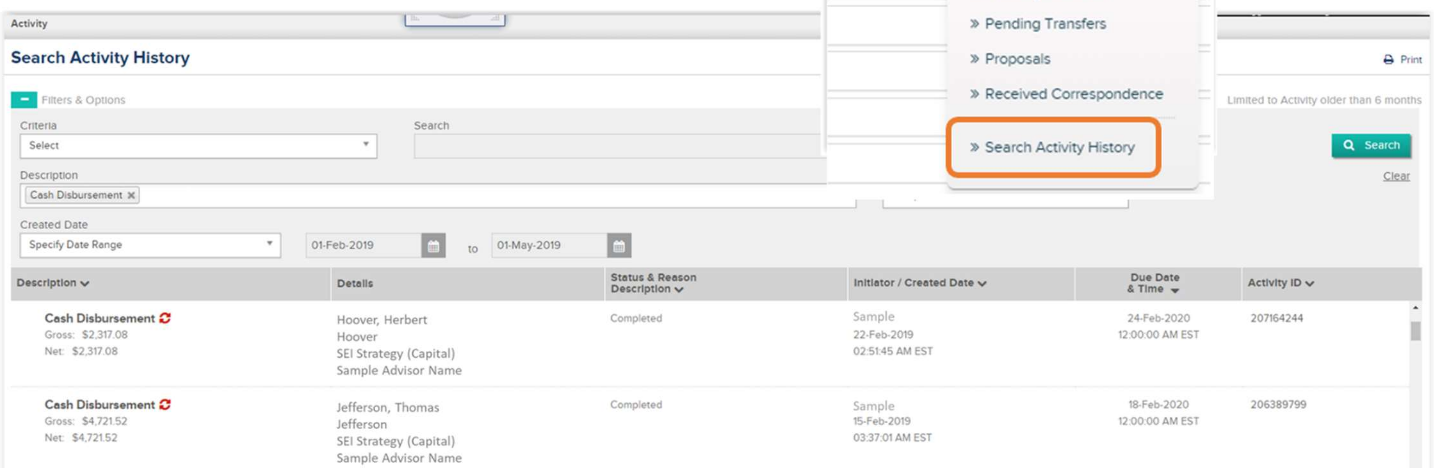


The filters display as crumbs above the table. The user can clear the filter by simply clicking the "x".

Search Activity History

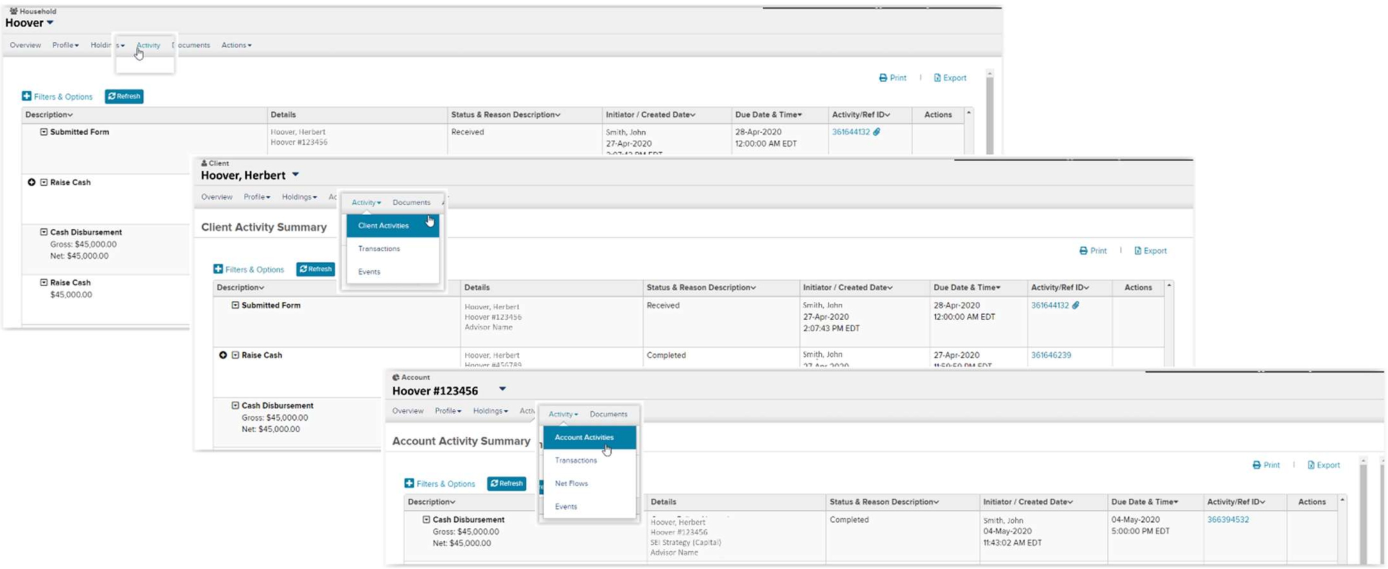
Completed and cancelled activities older than six months are available from a separate **Search Activity History** page.





Household, Client, and Account Activity Summary

Depending on the level you are viewing the activity page from, it may include multiple clients, accounts, or just a single account. This page will open within the SEI Advisor Center and provide the same Filters & Options and table view as the firm level activity dashboard.

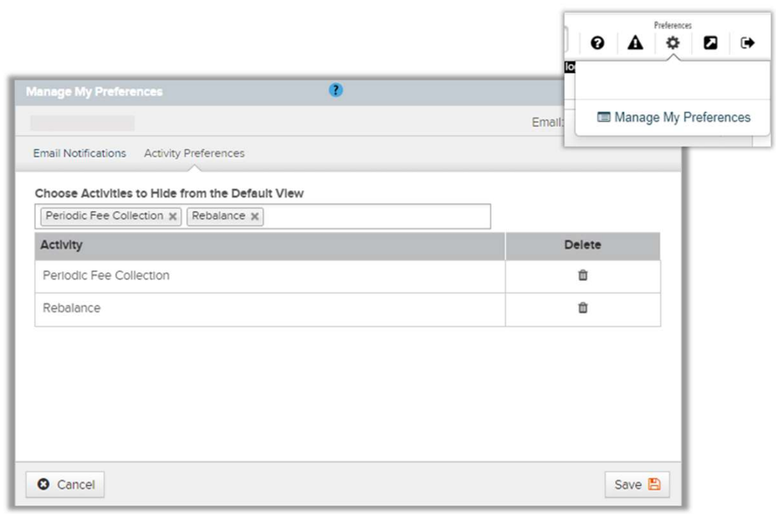


Activity Preferences

You can Hide Activities from the firm level Activity Dashboard.

Launch the Preferences icon and select Manage My Preference from the drop down. On the Activity Preferences tab search and select any activities that you would like to hide from your view.

These activities will be hidden from the firm level Activity Dashboard, but will still display on the Household, Client, and Account Activity Summary pages.



The Hidden Activities can still be included by selecting any of the hidden activity types from within the Filters & Options.