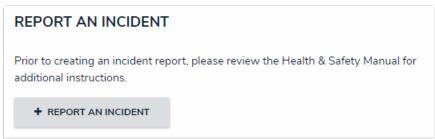


Add an Action to an Activity

Last Modified on 12/20/2024 4:36 pm EST

An action is where a user can create objects or assessment objects or export data from within an activity. An action is displayed in its own section with a button that, when clicked, will display a selected form for users to enter and save data into an object.

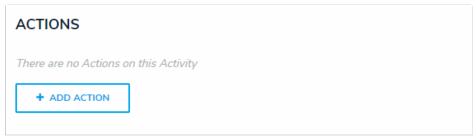
Actions are saved to <u>activities</u> within an application. See the Create an Application & Activity section for more information.



A create object type action as it appears to end users in an activity.

To create an action:

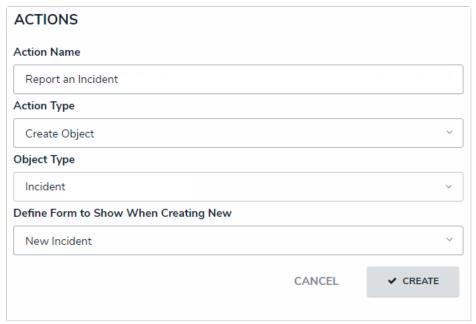
- If needed, open the activity you wish to add the action to by clicking the icon in the top bar > Applications in the Application Management section, then clicking the application and activity to show the Edit Activity page.
- 2. Click the Add Action in the Actions section.



The Actions section on the Edit Activity page.

- 3. Enter the name of the action in the **Action Name** field, which will appear as a clickable button when the user views the activity.
- 4. To create an object type action:
 - a. Select **Create Object** from the **Action Type** dropdown menu.
 - b. Select the object type the user will input data into from the **ObjectType** dropdown menu.
 - c. Select either the <u>default form</u> or a <u>configurable form</u> to display when the user opens the action from the **Define Form to Show When Creating** New dropdown menu.



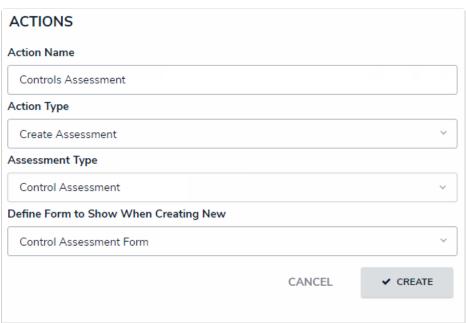


A new object type action.

- 5. To create an assessment action:
 - a. Select Create Assessment from the Action Type dropdown menu.
 - Select the assessment the user will create objects for from the **Assessment** Type dropdown menu.
 - c. Select a configurable form to display for the action from the **Define Form to**Show When Creating New dropdown menu.



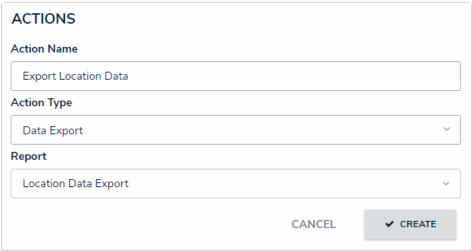
You must select a configurable form that includes the Assessment Context element in the **Define Form to Show When Creating New** dropdown menu. You cannot select the assessment's default form as it will not display the required focus or dimensions fields.



A new assessment action.



- 6. To create a data export action:
 - a. Select **Data Export** from the **Action Type** dropdown menu.
 - b. Select an export report from the **Report** dropdown menu.



A new data export action.

- 7. Click Create.
- 8. Follow steps 2-7 above to continue creating more actions as needed.
- 9. To modify the order of the actions in the activity, click and drag the $_{\parallel}$ icon beside an action.
- 10. To edit the action's name or form, click the __ icon.
- 11. To delete the action, click the $_{\widehat{\boldsymbol{m}}}$ icon, then \boldsymbol{Yes} to confirm.