

Add an Action to an Activity

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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 [activities](#) within an application. See the [Create an Application & Activity](#) section for more information.


REPORT AN INCIDENT

Prior to creating an incident report, please review the Health & Safety Manual for additional instructions.

+ REPORT AN INCIDENT

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

To create an action:

1. 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.

ACTIONS

There are no Actions on this Activity

+ ADD ACTION

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 **Object Type** dropdown menu.
 - c. Select either the [default form](#) or a [configurable form](#) to display when the user opens the action from the **Define Form to Show When Creating New** dropdown menu.

ACTIONS

Action Name

Action Type

Object Type

Define Form to Show When Creating New

A new object type action.

5. To create an [assessment](#) action:
- Select **Create Assessment** from the **Action Type** dropdown menu.
 - Select the assessment the user will create objects for from the **Assessment Type** dropdown menu.
 - 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.

ACTIONS

Action Name

Action Type

Assessment Type

Define Form to Show When Creating New

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.

ACTIONS




Action Name

Action Type

Report

CANCEL

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  icon beside an action.
10. To edit the action's name or form, click the  icon.
11. To delete the action, click the  icon, then **Yes** to confirm.