Activities
Creating an Activity

Prerequisites for Creating an Activity

1. **V3**: Users MUST be mapped to a PERSON on the **One** database (usually themselves)
2. Create POSTS - **Tools | Team Structure**
3. Add USERS (Caseworkers etc.) to POST
4. Create ESTABLISHMENT(S) - **Tools | Team Structure**
5. Add POST(S) to ESTABLISHMENTS
6. Create SERVICE TEAM(S) - **Services | CSS Team Administration.** Link SERVICE TEAMS to ESTABLISHMENTS
7. Populate LOOKUPS for use when creating Activities (these can also be added "on the fly")

Create an Activity

1. Access Activities from Links (Student, Person or Involvements) or Home Page | My Activities
2. Click on the New icon

Select a different Owner if necessary, before clicking **Continue**.

You cannot **Continue** unless you have chosen a Service Team.

3. Click **Continue** to open the full Activity Details form and complete all the necessary details:

1. Select Activity Type and add a Description. An Activity **must** have an Owner, Service Team and Activity Type.

2. Enter/edit dates. Not available for Linked Activities.

3. Enter Location Details. Could be a Base, School Site or home address of a Child/Parent/Carer where a meeting will take place.

4. Select any EPM Activities to which this Activity relates.

If the Owner is only in one Service Team this is entered automatically. If they are in more than one Service Team then you can select from the Service Team Chooser.

If there is no End Date, the Activity will be recorded as a **Task**.

☐ = Not part of a recurring series.
✓ = Has a linked Activity or is 1st in recurring series.
X = Is in a recurring series but is not 1st in the series.

This tree view is currently defined in the **One** v3 EPM module.

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05. Activity Focus

Internal Code	Description	External Code	Active

➕ Add
✖ Remove

5 & 6. Choose Focus(es) and Target Group(s).

06. Target Group

Internal Code	Description	External Code	Active

➕ Add
✖ Remove

Choices are limited to those linked to this Service Team in Services Focus | CSS Service Team Administration.

07. Additional Details

Originator	🔍 ✖
Booking Status	🔍 ✖
Group Size	
Follow Up	▼
Travel Miles	

7. Enter any of these as necessary.

Booking Status, Group Size and Follow Up Date are not available for Linked Activities.

08. Activity Time

Description	Activity Time
General	0 Day(s) 0 Hr(s) 0 Min(s).
Travel	0 Day(s) 0 Hr(s) 0 Min(s).

Total Time	0 Day(s)	00:00 Hr(s)-Min(s)
Non Travel Total Time	0 Day(s)	00:00 Hr(s)-Min(s)
Linked Activities Total Time	0 Day(s)	00:00 Hr(s)-Min(s)
All Total Time	0 Day(s)	00:00 Hr(s)-Min(s)

8. Enter time spent on each phase. Totals are updated automatically.

The Time Categories listed are those set for this Service Team on the CSS Service Team Definition page.
Up to six categories may be displayed - Follow-Up, General, Onsite, Preparation, Support Time and Travel.
Mandatory categories are indicated with a red box.

09. Linked Activity

Activity Type	Service Team	Description	Base	Total Time

9. ➕Add, 📝Edit or ✖Remove **Linked Activities**. An Activity with Linked/Recurring Activities is a **Main Activity**.

A Linked Activity cannot have the Activity Owner, Service Team or Dates changed.
It also cannot have other Activities linked to it, or have Recurrences or Linked People added.

10. Recurring Activity

Activity Type	Start Date	Start Time	End Date	End Time	Complete By	Service Team	Description	Base

10. Click the 🖼 **Recurrence** icon in the task bar to create a recurring sequence of Activities.

See additional Reference Guide **Recurring Activities** for more information.

11. Link People

Name	Role	Establishment	Send To Conta	Sens Servi Invol	Pre-Archive Period	Lead Practitioner	Subject	Scheduled	Attendees	Attendan Codes
			☒	☒		☐	☐	☐	☐	

➕ Add
📝 Edit
✖ Remove
👤 Details
ContactPoint Consent

11. ➕Add, 📝Edit or ✖Remove **Linked People**. The Activity Owner is linked automatically.

See additional Reference Guide **Activities and Linked People** for more information.

4. 💾 Save your new Activity. You can now click on the 🖼**Results Organiser** icon in the task bar to link the Activity to **Results Organiser**.

📄 **Other Useful Reference Guides:**

- Activities_Recurring Activities
- Activities_Activities and Linked People
- Activities_Activity Calendar
- Activities_Link to Results Organiser
- Services_Service Teams

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