



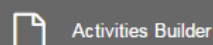
Session 3: Building Custom Activities – Quick Reference Guide

Activities Builder Overview

Activities Builder is a powerful application that helps platform managers tailor activities to meet their organization specific needs. **Activities** can serve many different purposes, but are most commonly used three ways:

1. Deliver Custom Training
2. Track Events/Tasks
 - a. External Training
 - b. Internal Instructor Led Training
 - c. Meetings (i.e. Tailgates)
 - d. In-Person Tasks (i.e. daily drills, physical fitness)
3. Information Gathering
 - a. Surveys
 - b. Inspections
 - c. Investigations

You can access **Activities Builder** from your **Administration** page by selecting



In the middle of the page you can see an alphabetical list of **All Activities** for your site.

You can search these activities in a couple of different ways.

- ① Type a search word into the **Search Activities** field
- ② Scroll down the alphabetical list

ACTIVITIES BUILDER

①

All Activities

Cell Phone Review

Company Vehicle

Health Fair

Makeup Training for Weekly Staff Safety Meeting

New Hire Onboarding Solutions - Template - Version 1

Tailgate Template

Week 1 - The Benefits of Breakfast

Week 1 - Wellness Program Challenge

Weekly Staff Safety Meeting

②




Managing Categories

Similar to **File Center**, **Activities Builder** can and should be organized to make it easy to manage.

Instead of folders, **Activities Builder** uses **Categories** to group and segment your various activities. The **Activities Builder** comes pre-built with standard categories created by TargetSolutions. These categories are:

- Inspections
- License/Certification
- Policy Review
- Surveys
- Training

Keep in mind, categories can easily be added, removed or modified as needed.

- To add a **Category**, click on .
- Enter the **Category** name.
- After naming your category, click the Submit button.

In addition to adding new categories, platform managers can also change the names of previously created categories by clicking on the category they wish to edit.

- To do this, we click on the category name we want to change.
- Next we click on the Gear icon.

Surveys




- Change the name of the category by typing in the Category Name field and clicking the Submit button.
- Delete the category by clicking on the Delete button.



Create a New Activity – Select Settings

Create a New Activity

Click  in the upper right hand corner of the screen.

1. Select a **Category** from the drop down box.
2. Enter a **Name** for the **Activity**.
3. Enter a **Description** for the **Activity** (optional).
4. Select the **Option(s)** to apply to this activity.

- **Allow self-assign** makes the activity available at all times for users to complete without having it assigned by a platform manager.
- **Allow recording as complete** allows an Administrator (or Supervisor with rights to the Record Completed Activities application) to record the activity as complete for an individual or group of users. For example, if the activity contained a PowerPoint presentation that was viewed by a group of people at an in-person training session, a platform manager could record that it was completed for all attendees at one time on their behalf.
- **Require validation upon completion** requires an Administrator (or Supervisor with rights to the Validate Completed Activities application) to verify that the information provided by the user is completed to standard before it is recorded in the users' history.

NEW ACTIVITY

Category	New Hire
Name	Handbook
Description	This field is optional, but can be used to describe the purpose of the activity. This text will show up as part of the activity, but can be easily removed.
Options	<input checked="" type="checkbox"/> Allow self assign <input type="checkbox"/> Allow recording as complete for <input checked="" type="radio"/> Administrators and Supervisors or <input type="radio"/> Administrators only <input type="checkbox"/> Require validation upon completion
Privacy	<input type="radio"/> Default (Recommended) <input checked="" type="radio"/> Custom Other supervisors and administrators can <input checked="" type="checkbox"/> Edit the components in this activity <input checked="" type="checkbox"/> Assign the activity <input checked="" type="checkbox"/> Run reports on the activity
Certificate	<input checked="" type="checkbox"/> Attach custom certificate of completion Select certificate template: TSA Certificate Preview Enter text that will appear in the body of the certificate: has successfully completed the New Hire Handbook activity.

If you would like to add certificate templates, please click [here](#)

5. Choose your **Privacy** setting.
 - The **Default Privacy Setting**, which comes recommended, allows anyone with access to **Activities Builder** to edit, assign and report on this activity.
 - This **Custom Privacy** setting gives the creator of the activity more control over who has access to make changes.
 - Edit the components in this activity allows: the creator to restrict others from being able to manage the components that are currently in an activity.
 - Assign the activity: allows the creator to decide if others with access to this activity are able to assign it to users.
 - Run reports on the activity: allows the creator to determine if the data entered into the activity is reportable by anyone other than the creator.

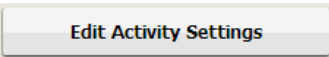


TIME SAVING TIP: Use the default setting for activity privacy setting to prevent having to chase down the activities creator for minor changes.



6. Select a **Custom Certificate** (optional).
 - **Custom Certificates** do not come preloaded with a TargetSolutions Certificate of Completion. To set up a Custom Certificate(s), please provide your Account Manager the following:
 - a. A copy of your existing certificate, if available
 - b. Department logo
 - c. Electronic copy of the signature needed on the document
 - d. This same person's full name and title
 - e. CE provider name and number if applicable

Once you have selected your settings, click **Save** to save your activity, which will take you to the **Activities Builder**.

To make changes to an Activity's settings, Click on . This is also where you can delete an activity you no longer want.

NOTE:

Create a New Activity – Add Components

There are two different types of **Components** – Reportable and Free Form.

Reportable Components are a set of defined components that can be added to activities to collect information in a site specific and reportable fashion. A standard set of **Reportable Components** are available in every site, including:

- Date Complete
- Duration
- Request a File
- Training Type
- Training Category
- Method of Instruction
- Instructor
- Agency
- Location
- Units Involved
- Additional Information

You can work with your Account Manager to add, edit or delete the **Reportable Components** for your site.

*Please note: Administrators can manage their components in **Activities Builder**. This can be found on the main **Activities Builder** page by clicking on the **Manage Components** link. This is an advanced application functionality that is linked to your overall training strategy. We highly recommend consulting with your Account Manager before making changes.

In addition to reportable components, you also have the ability to add **Free Form Components**.

- Question
- Resource
- Test
- Text

Reportable Components
Date Complete
Duration
Request File
Training Type
Training Category
Method of Instruction
Instructor
Agency
Location
Units Involved
Additional Information
Free Form Components
Question
Resource
Test
Text

You cannot report on the data contained in these components within the **Completions** or **Components Reports**. If you are interested in learning more about how to run reports for **Free Form Components**, please contact your Account Manager.



1. To add a **Component** to your **Activity**, click on the desired **Component** (i.e. Training Type).
2. Enter the question you'd like for this component (i.e How did they complete this training)
3. Choose from the **Options** to allow user input and whether it's required, or have them select from the component options that have been pre-set.



TIME SAVING TIP: You can cut and paste information from another location into the text box.

Create a New Activity - Edit Components

To modify **Component**s in your **Activity**, click on the icons to the right of the component.

- Gear Icon = Modify Text: This icon allows you to edit the component to reflect changes in text.
- Trash Can = Delete: This icon allows you to "trash" or delete the component.
- Blue Arrow = This icon allows you to move the component around within the activity.

Create a New Activity – Add a Resource

To add a **Resource** from the **File Center** to an **activity** and require an e-signature from our user:

1. Choose the **Resource** component listed under **Free Form Components**, to attach a **resource**.
2. When the **resource component** is added to the Activity, you are able to see the main folders in your **File Center**.
3. Find resource by clicking on the folder or folders until finding the correct resource.
4. Next, you will be required to enter text into the **Instructions** field.
5. There is an option to require an e-signature for this resource. The default setting will automatically have the box checked next to **Require E-signature**. To not require an e-signature, simply uncheck the box.
6. **Agreement Text** comes pre-populated, but can be edited as you see fit. Choose to use the default message, or create your own by typing directly into the agreement text field.



- When finished, click **Submit**.

Import Example Activity

TargetSolutions offers a large number of pre-built activity templates. You can add, review and import these templates into your site.

- Click on **Import Example Activities** in the upper right hand corner of the screen.



- By clicking on the blue link in the example activities list, you can review the template.
- If you find that this is a great starting point after reviewing, click on the green **Import Example** button.
- Once you click on the button to import the activity, you will see a screen that asks what you want to name the activity and what category it should be placed in. If you want to make changes, type directly in the **Name** field or select a different category from the drop down box.

IMPORT

[Activities Builder](#) > [Import Example Activities](#) > [New Hire Onboarding Solutions - Template - Version 1](#) > Import

Name

Category

- Click **Import**.