

Managing Outreach Activity Sessions

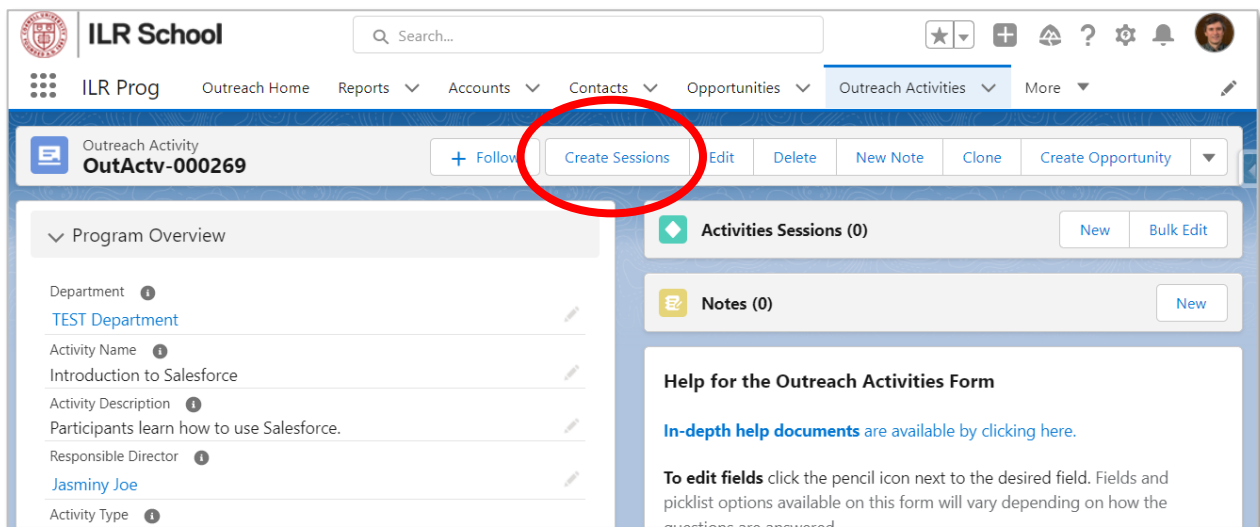
Outreach Activities that are Open Enrollment/Public or Custom, have sessions, which denote specifically when the activity will occur. **Sessions are what appear on the Outreach calendar** and for this reason, they are a critical component of the Outreach Activity Form process.

When you filled out the Outreach Activity form, you added a start and end date and time. Those two fields are the outer boundaries for the activity. The sessions represent each meeting of the class or other activity in between the start and end dates and times. For example, if a start date/time is 3/10/2022 9:00 am and an end date and time is 3/12/2022 4:00 pm, and the activity meets each day during those times, there are 3 sessions, on the 10th, 11th, and 12th. Sessions can start and stop at different times each day, but by default, they will start and end at the same time based on the start and end times.

Prior to creating sessions, it is helpful to note the start and end date of your activity on the Activity Form.

There are two ways to create sessions. The quickest way, which works for the vast majority of activities, is to use the “Create Sessions” button, which can be found at the top of any Activity form. We’ll walk through this process below, and then touch on the other, more manual method to create sessions.

First, open the desired Activity Form and click the Create Sessions button:



The Create Sessions form will appear, with 3 fields. Enter the number of sessions you wish to create (in our example from above, this would be “3”).

Next, select the pattern for the sessions. These can be every day, every other day, or once per week. If you have a different pattern in mind, select “Other” to exit to form in order to create the sessions manually, which will be covered at the end of this document.

Lastly, choose whether or not you want to schedule on weekend days.

Click Next to continue.

The example above was simply a 3 consecutive days. A more complex example would be a Monday/Wednesday/Friday schedule for 2 weeks. In this scenario, before clicking the “Create Sessions” button, you would want to verify that your start date for the activity was the first date of the class, for example, Monday 3/7/2022 at 9:00 am. Click the Create Sessions button, then enter “6” in the first blank (Mon/Wed/Fri for 2 weeks is 6 sessions), select “Every Other Day” as your pattern, and leave the “Schedule on weekend days” checkbox unchecked. Click Next.

Create Sessions

Sessions will be created beginning on the start date of the activity. Enter the following information in order to create sessions:

- * Enter the number of sessions to create:
- * Choose the pattern for the dates (every day, every other day, or once a week)
 - Every Day
 - Every Other Day
 - Once per Week
 - Other
- Schedule on weekend days

Next

After sessions are created, they will appear at the upper right on the Activity Form:

ILR School | Search... | ILR Prog | Outreach Home | Reports | Accounts | Contacts | Opportunities | Outreach Activities | More

Outreach Activity OutActv-000269 | + Follow | Create Sessions | Edit | Delete | New Note | Clone | Create Opportunity

Program Overview

- Department: TEST Department
- Activity Name: Introduction to Salesforce
- Activity Description: Participants learn how to use Salesforce.
- Responsible Director: Jasminy Joe
- Activity Type: Open Enrollment/Public
- Activity Format: Workshop
- Capacity (maximum number of registrants): 100
- Minimum number of registrants: [unspecified]

Activities Sessions (3) | 3 items • Sorted by Start • Updated a minute ago

	Activities Se...	Start ↑	End ↓
1	<input type="checkbox"/> ASID-0000743	3/14/2022 9:00 AM	3/14/2022 4:00 PM
2	<input type="checkbox"/> ASID-0000744	3/15/2022 9:00 AM	3/15/2022 4:00 PM
3	<input type="checkbox"/> ASID-0000745	3/16/2022 9:00 AM	3/16/2022 4:00 PM

[View All](#)

Notes (0) | [New](#)

Help for the Outreach Activities Form

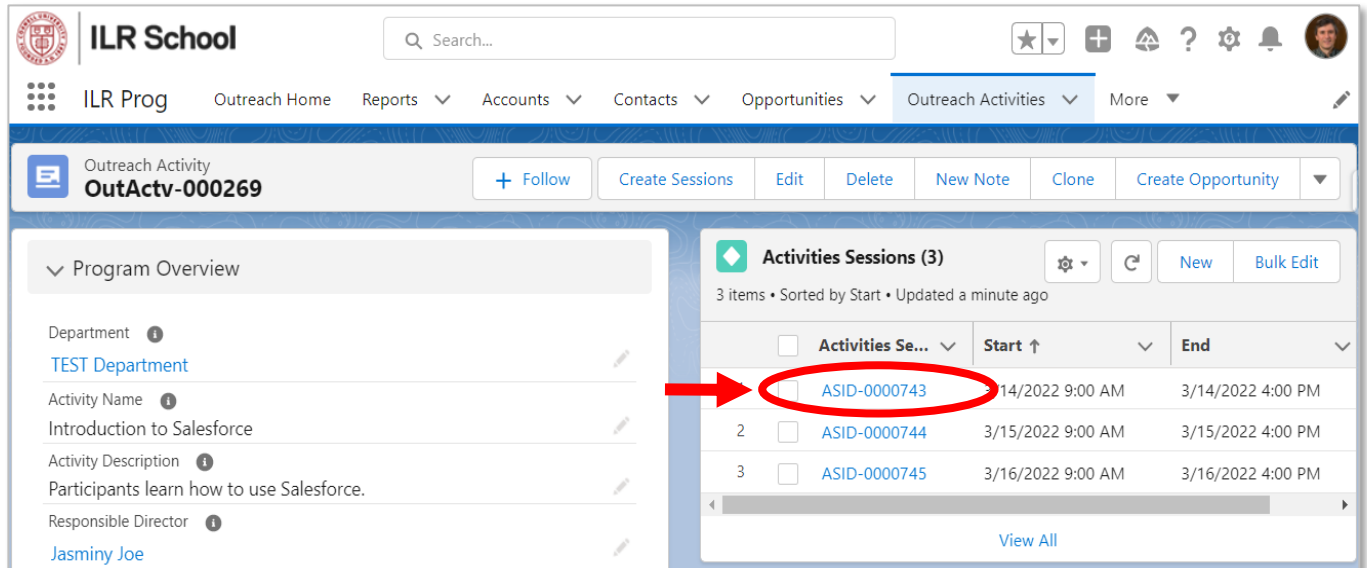
[In-depth help documents](#) are available by clicking here.

To edit fields click the pencil icon next to the desired field. Fields and picklist options available on this form will vary depending on how the questions are

Editing Sessions One at a Time

There are two ways to edit sessions: manually for editing sessions one at a time, or bulk-editing for multiple sessions at once.

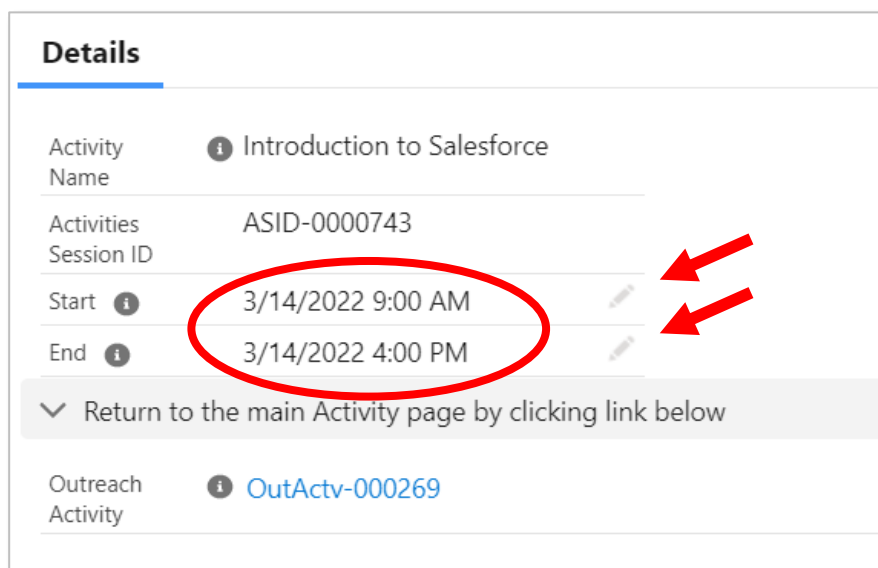
To manually edit sessions one at a time, in the Activities Sessions window at the upper right of the Activity Form in question, click the session ID link to open the session:



The screenshot shows the ILR School Outreach Activities interface. On the left, the 'Program Overview' section displays details for the activity 'Introduction to Salesforce' in the 'TEST Department', managed by 'Jasminy Joe'. On the right, the 'Activities Sessions (3)' window shows a table of sessions. The first session, with ID 'ASID-0000743', is circled in red, and a red arrow points to it from the left. The table lists three sessions with their respective start and end times.

Activities Se...	Start ↑	End ↓
ASID-0000743	3/14/2022 9:00 AM	3/14/2022 4:00 PM
2 ASID-0000744	3/15/2022 9:00 AM	3/15/2022 4:00 PM
3 ASID-0000745	3/16/2022 9:00 AM	3/16/2022 4:00 PM

This will open the session detail page. Click the pencil icons next to the start and/or end date/time fields:



The screenshot shows the 'Details' page for the session. The 'Start' and 'End' fields are circled in red, and red arrows point to the pencil icons next to them. Below the fields, there is a link to return to the main Activity page.

Details

Activity Name: Introduction to Salesforce

Activities Session ID: ASID-0000743

Start: 3/14/2022 9:00 AM

End: 3/14/2022 4:00 PM

Return to the main Activity page by clicking link below

Outreach Activity: [OutActv-000269](#)

After clicking the pencil icons, the session editing screen will appear. Change the dates and times as needed and click Save.

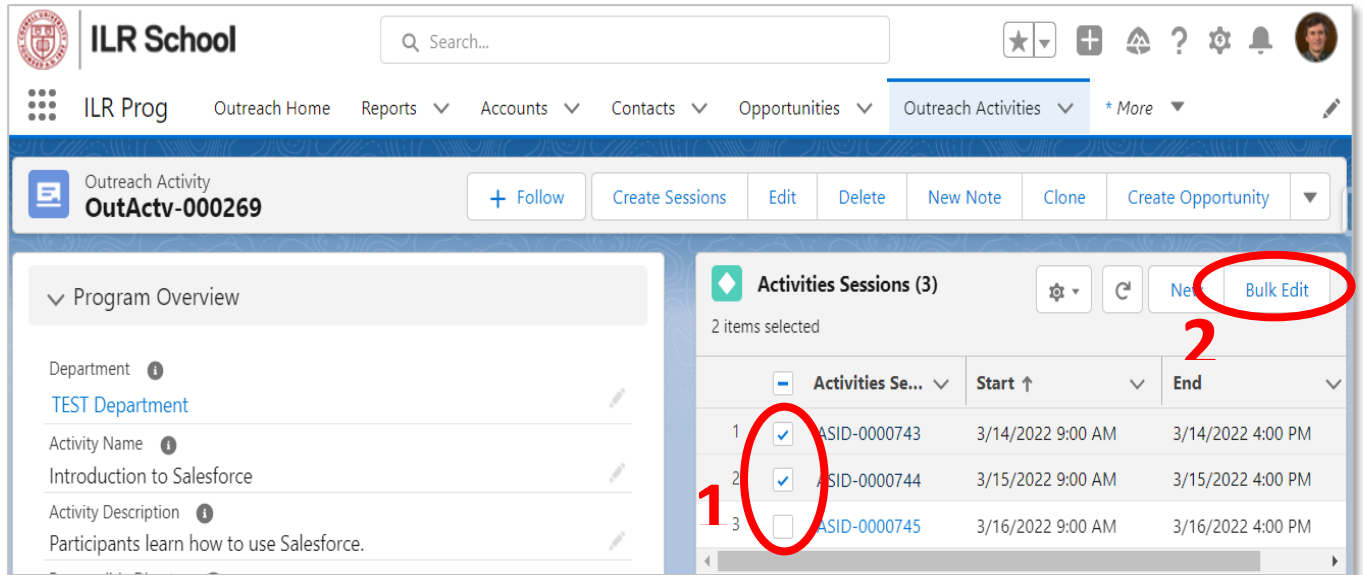
The screenshot shows a session editing interface. At the top, the activity name is 'Introduction to Salesforce' with a note 'This field is calculated upon save'. Below this, the session ID is 'ASID-0000743'. The 'Start' section has a date of '3/14/2022' and a time of '9:00 AM'. The 'End' section has a date of '3/14/2022' and a time of '4:00 PM'. A grey bar contains the text 'Return to the main Activity page by clicking link below'. Below this, there is an 'Outreach Activity' section with the ID 'OutActv-000269'. At the bottom, there are 'Cancel' and 'Save' buttons. A red circle highlights the 'Save' button.

To return to the Outreach Activity Form, click the blue link to it in the middle of the session page:

The screenshot shows a 'Details' page for the session. It lists the activity name 'Introduction to Salesforce', session ID 'ASID-0000743', start time '3/14/2022 9:00 AM', and end time '3/14/2022 4:00 PM'. A grey bar contains the text 'Return to the main Activity page by clicking link below'. Below this, there is an 'Outreach Activity' section with a blue link 'OutActv-000269' circled in red.

Bulk Editing Session times

If you have a number of sessions that you need to change the time on, use the checkboxes in the Activities Sessions section to select the sessions to edit, then click the “Bulk Edit” button, also found in the Activities Sessions section of the Activity Form:



The screenshot shows the ILR School Outreach Activity form for 'OutActv-000269'. The 'Activities Sessions (3)' section is active, showing a table with 3 sessions. Two sessions are selected, indicated by red circles and a red '1'. The 'Bulk Edit' button is circled in red and labeled with a red '2'.

	Activities Se...	Start ↑	End ↓
1	<input checked="" type="checkbox"/> ASID-0000743	3/14/2022 9:00 AM	3/14/2022 4:00 PM
2	<input checked="" type="checkbox"/> ASID-0000744	3/15/2022 9:00 AM	3/15/2022 4:00 PM
3	<input type="checkbox"/> ASID-0000745	3/16/2022 9:00 AM	3/16/2022 4:00 PM

Now enter the new start and end times. Be sure to use either “AM” and “PM” or 24-hour time. Even if you are only changing one of the two times, you must enter both times. For the time you are not changing, just enter the original time. When finished, click the “Submit” button.

Enter new Start and/or End Time for all selected Sessions.

Note: use either AM/PM or 24-hour time notations to enter time below.

Start Time:

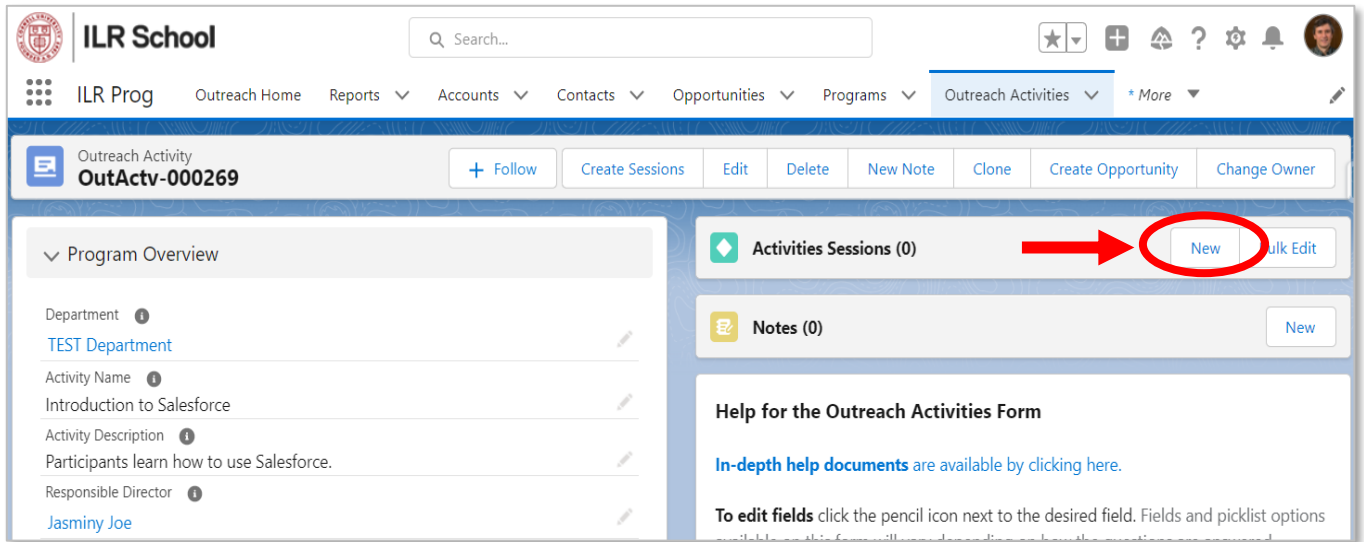
End Time:

Note that you cannot change dates of sessions this way. There is no way to bulk-edit the session dates in the user interface, and for a small number, you can manually edit them as described earlier in this document. But if you have a significant number of dates to change, contact ilractivityform@cornell.edu.

Creating Activity Sessions Manually

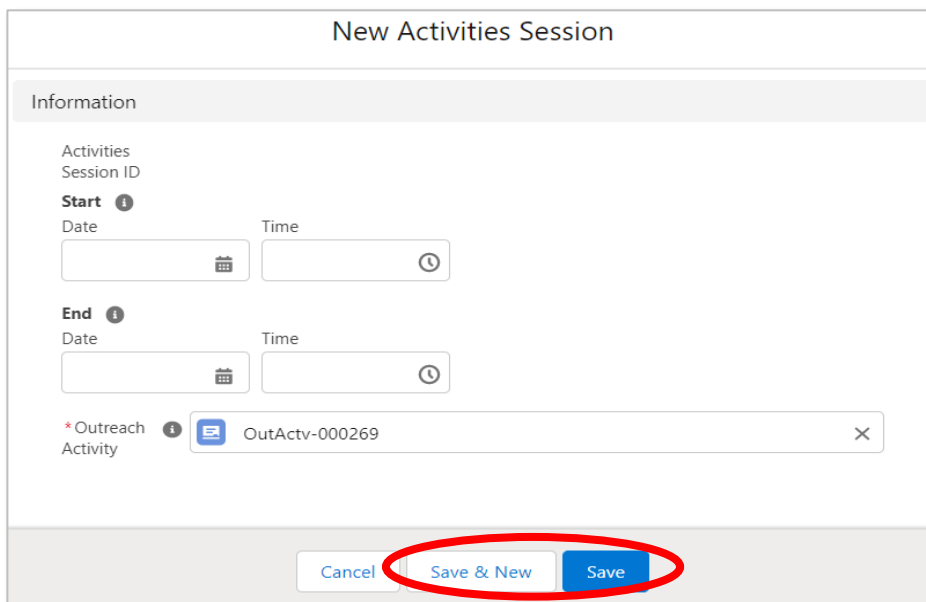
It is also possible to create Activity Sessions from scratch, one at a time, manually. This may be helpful if the activity has an unusual schedule that does not follow a predictable pattern. (Note that it is also fine to use a combination of the Create Sessions button and this manual method if an activity follows a mostly predictable schedule, with just a few sessions that do not follow the pattern.)

To enter create sessions manually, click the “New” button inside the Activities Sessions box at upper right in the Activity Form:



The screenshot shows the ILR School Outreach Activity form for 'OutActv-000269'. The 'Activities Sessions (0)' section is highlighted with a red circle, and a red arrow points to the 'New' button within that section. The form includes a search bar, navigation tabs, and a 'Program Overview' section with fields for Department (TEST Department), Activity Name (Introduction to Salesforce), Activity Description (Participants learn how to use Salesforce.), and Responsible Director (Jasminy Joe).

Enter the start and end dates and times and either click “Save” if finished, or “Save & New” if you wish to immediately create another session:



The 'New Activities Session' form includes the following fields:

- Activities Session ID
- Start: Date and Time
- End: Date and Time
- * Outreach Activity: OutActv-000269

At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save & New' button is highlighted with a red circle.

Multiple Sessions per Day

If you want to create multiple sessions per day, there are a couple ways to do that. You could manually create all the sessions if there aren't many. Another option is to use the create sessions button twice and then bulk-edit half the sessions to be the mornings and half as the afternoons. Note that you CANNOT create all the sessions at once using Create Sessions because you can only create a maximum of 1 session per day with each Create Sessions operation. But you can run Create Sessions as many times as you wish to create duplicate entries and then edit them with bulk-edit.