Outreach Activities Form Walkthrough

This video is a short walkthrough of filling out an Outreach Activity form for creating an Open Enrollment/Public activity. Assuming you already know how to access Salesforce, login, and navigate around. If you do not, there is an introductory video found in the knowledgebase that goes over all that.

Other types of activities such as custom programs or consulting are similar to this process, but where the differences will be pointed out.

Starting on the Outreach Activity Home page.

On this page click the "New" button. Note that you could also click the "New" button on any list view that shows Outreach Activities.

Let's take a look at the form.

We've included built-in help for every field on the form. To access the help, hover over the "i" in the circle next to the field. Remember that we have had to select field naming nomenclature that fit in a wide range of situations, but which may not fit in every situation. The help bubbles may help clarify if you're uncertain as to the nature of a particular field.

The only required field on the form is the name. You can literally come in here, enter a name, and save the form. This allows you to start a form with minimal information. Of course the expectation is that you will complete enough of the fields that ultimately the activity will be able to be displayed on a calendar, in reports, and be useful for any support entities that you need to engage. But initially, all you need is a name.

The form is divided into several sections.

Program Overview Section

The first field is **Department**. All ILR departments should be in Salesforce and can be looked up using this field. Click in the field and type a few letters of your department. They do not necessarily need to be the first few letters. For example, to see all the departments with the word "institute" in the name, type "institute" and choose the desired item. More likely you will type the first few letters of the department, such as "Sche".

Enter a short but meaningful **Activity Name**. If this will ultimately become a class, choosing a name that mirrors what you will want to call the class would be a good idea. Note that you can easily change the name at a later date.

Enter a **Description** of the activity, in particular to tell the registrar and/or support team members more about the activity.

Select a **Responsible Director**. This is just for reference and to have a secondary contact. This person will not get notifications. If you would like to transfer ownership of this activity to them so that they get notifications, that can be done, but only after you save the activity.

Like departments, all ILR staff are already entered in Salesforce as Contacts, so all you need to do here is enter a few letters of the person's last name and then select them. (You could also enter a few letters of the person's first name if you wish, though the search may turn up more results.)

Select an **Activity Type**. Your choice for this field controls what appears in some other fields below. Your options are *Open Enrollment/Public*, *Custom/Contract Training*, and *Consulting Services/Technical Assistance*. There are likely other options, but if what you're doing doesn't clearly fit into one of these three options, some guidance is, if a portion of the activity will be open to the public, even if it is not formally using an Open Enrollment mechanism, select "Public/Open Enrollment" and then add additional detail about the nature of the activity in other fields such as the description field above.

Remember - If a contract is involved, that's a Custom/Contract Training.

The next field is **Existing Course Number if Applicable**. If this activity will be based on an already existing course, you can provide that course number here. This will help the registrar set up the new course. If you aren't sure, feel free to leave this field blank. Also this field is an open text field, so you can enter part of all of the course name, or a statement about a particular course if you wish.

Next is **Activity Format**. This field will only appear for an Open Enrollment/Public type of activity. Select the most appropriate delivery method for your activity. If none of the options seem to fit, you can leave the field blank and contact the registrar or send email to ilractivityform@cornell.edu for guidance. Note that if you choose an Activity Type of "Consulting Services/Technical Assistance", that is considered an Activity Format unto itself, and so the Activity Format field will not display on a "Consulting Services/Technical Assistance" activity. Note also that you can choose multiple formats.

If you choose either Contract/Custom Training or Consulting Services and Technical Assistance, you will be asked **Has an Opportunity has been created**, and if so, you'll be given a chance to link the form to the **Existing Opportunity if Applicable**. You'll also be asked to enter the **Client Account**, which is their company name. You can find it in the Account lookup. If it isn't there, you can contact the registrar or send an email to ilractivityform@cornell.edu to request that it be added. In the case of a Contract/Custom Training or Consulting Services and Technical Assistance activity, you will have the option to create an Opportunity using data from this form if one does not already exist, but you must first fill out the form and save it.

Capacity tells the registrar what the maximum number of registrations should be allowed on the web-based registration system, and also helps with space planning, and reporting. Remember that this field, along with every other field, can be changed at a later date.

The **Minimum number of registrants** helps the registrar and support teams properly prepare, and is also used in reporting.

Note that if you were creating a custom training or consulting activity, the Capacity and Minimum Number of Registrants would not appear. For Consulting Services and Technical Assistance, a field called "**Projected Number of Registrants**" would appear.

Now, select an appropriate **Delivery method**. This refers to how the class will be delivered to the participants. If you wish to use a delivery method not included here, please leave the field blank and contact the registrar or send email to the ilractivityform@cornell.edu address for guidance. You can choose multiple delivery methods.

Selecting a **Registration system** allows you to select the desired registration system for an open enrollment/public type of activity. If this is not applicable, if for instance, it's free and open to anyone, or if you aren't sure, leave it blank.

Fiscal Section

Sponsored Research (Grant-funded) is a checkbox where you can select whether or not an activity is of this type.

Cost model is basically asking whether participants will pay for the activity. If you choose "Paid", a field will appear asking the cost to participants of the activity. In other words, what is the price the participants will pay.

Enter the **KFS Account** when you know it. You will likely not have this information when you first start filling out the form. Note that this field will be more important the second time we fill the form out for a custom training.

Location Section

Next, select a **Location**. If you select either Ithaca or New York City, you will be given the option to choose one or more preferred room numbers. If you choose "Onsite or Other", you will be given the option to enter an address.

If you would like to have breakout rooms for the activity, enter the **Number of breakout rooms** here, to help with space planning.

Enter any other notes about the location or the space in **Location Notes**.

Scheduling Section

There are two status fields on these forms. One is here - the **Activity Status**. This is the field that relates to the activity itself. When first created, the Activity Status will default to "Tentative". But once dates have been confirmed, select "Dates Confirmed", which will automatically contact all related support teams and the registrar to let them know that they can start working on various aspects of creating and supporting the activity as appropriate to the type of activity. Other options in the Activity Status allow you to choose to cancel, reschedule, or postpone an activity. Selecting any of these options will immediately inform the registrar of the change in status so that further arrangements can be made.

Now, select a **Start Date and Time** and an **End Date and Time**. Remember you do NOT need to enter this information right away. But when you do determine this information, it is very important that you come back to the form and enter it here. After you do that, you will be able to create the individual sessions that will appear on the calendar, but we'll talk about that after we finish with the main form.

If there is anything unusual about the schedule, you can enter that in the **Date and Time Notes** field.

Instruction Details and Marketing Section

Enter the name of the Instructor, speaker or consultant. This is not a look up or picklist. Just enter the person or peoples' name(s).

The next few fields help provide the MarComm department with crucial linkages between marketing campaigns and courses and feed into marketing intelligence to help assure the most effective marketing campaigns. These include the **Primary Audience** and **Area of Interest**. You can select multiple items in these lists. If there is an audience or interest not listed, enter it in the "**Other**" fields or, again, email ilractivityform@cornell.edu.

Support Section

In the Support section, we have a list of checkboxes that allow you to request different types of support. Checking these checkboxes will send emails to the appropriate support teams, alerting them to this activity. They will likely reach out to you either via Chatter in Salesforce, which will send you an email, or via their own communication systems to get more information.

Note that selecting either the Marketing or Administrative support checkboxes will display further fields allowing you to be more specific about the support requested. The additional **Marketing Detail** field is quite long and allows you to paste information and a blurb of up to 5,000 characters into the field.

If the activity involves eCornell in any way, select the checkbox **Does this activity involved eCornell**. If selected, a text box will appear allowing you to explain further the nature of the eCornell interaction.

If there is anything else you would like to document about the activity, you can do so in the Notes field. Remember that further notes can be added to the form after it has been initially saved.

Have you finalized the information on this form Section

Lastly, is the second status field, the **Form Status**. If you recall, the first status field was related to the activity. This status field is related to the completeness of the form, and there are only two options: In Progress and Complete. When you feel you have a high level of confidence in the information entered in the form, mark it as complete. Once a form is marked complete, any related support teams as well as the registrar are alerted that the form is now complete. Note that the form cannot be marked complete unless at least one session has been created. Sessions can be created after the form is saved, by clicking the "Create Sessions" button at the top. Another video will cover that aspect of using the Outreach Activities Form.

Now, click "Save" at the bottom of the form. Or, if you wish to immediately start another form, click "Save & New".

You will now see your newly minted form and can interact with it.

Other videos show how to add Activities Sessions using the "Create Sessions" button so that your activities appear on the calendar, and how to convert certain types of forms to Opportunities.