

Outreach Activities Coordination Form Informational Guide

Introduction

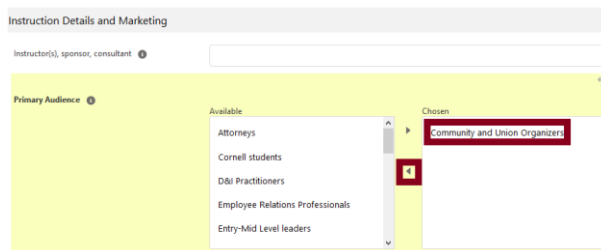
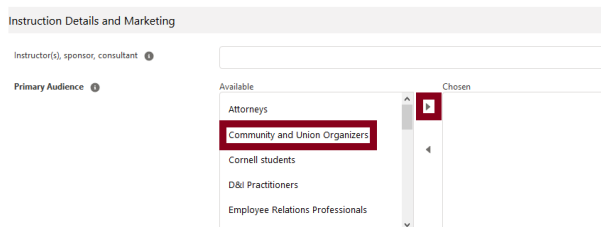
The purpose of this informational guide is to provide a systematic approach on entering data to record events, programs, and activities into the Outreach Activities Coordination Form. You will find instruction on how to login to Salesforce, create a new activity, add sessions to an existing activity, cancel or reschedule an activity, view the calendar in real-time, access reports, and use the chatter function to communicate with Outreach Support Groups.

Create a New Outreach Activity

- A. On the Outreach Activities Home Page View, select the “New” button on the top right hand corner, above the list of activities.
- B. On the New Outreach Activity pop up, begin to enter the information for the activity.
 - a. Note: on the left hand side next to each field, you will see an icon with the letter “i”. That icon serves as an information tool to assist you in filling out the form. Simply scroll over the icon with your mouse and the description will appear.
- C. Starting with the Department, type the first few letters of the department or unit name in the field.
- D. Select the department or unit from the drop down menu.
 - a. Note: all of the units across ILR Outreach are pre-populated on the list. Please do not create a new department name. If you do not see your unit name, please email ILRActivityFormHelp@cornell.edu.
- E. Type the name of the class, event, or program in the “Activity Name” field.
- F. Type the description of the activity (this field is optional)*.
 - a. Note: every field after this step is optional. You do not need to fill out the field if it does not apply.*
- G. Select the Activity Type using the drop down menu, if applicable.
 - a. Note: your selection will determine activity format options (i.e. workshop, conference, podcast, etc.)
- H. Type the course number that corresponds to the activity, if applicable.
- I. Select the Activity Format from the “Available” column and place it under the “Chosen” column by using the arrow button in between the columns. You may also remove items from the “Chosen” column by clicking on the item to highlight the activity format then clicking on the arrow to transfer back to the “Available” column.
- J. Type the maximum or minimum number of registrants in the corresponding fields, if applicable.
- K. Using the “Available” and “Chosen” columns, select the delivery method by clicking on the item under the “Available” column then clicking on the arrow facing the “Chosen” column. You may also remove

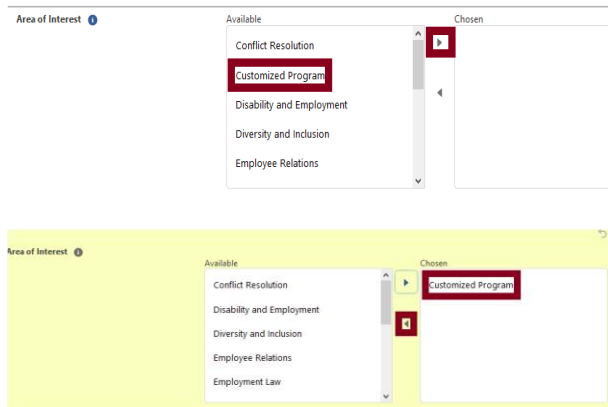
items from the “Chosen” column by clicking on the item to highlight the delivery then clicking on the arrow facing the “Available” column.

- L. If you are choosing a registration system for the activity, use the drop down menu next to the Registration Field and select the corresponding system.
- M. If the activity is grant-funded, check the box next to Sponsored Research.
- N. Select the cost model using the drop down menu next to Cost Model, if applicable.
- O. Under the “Location” section, use the drop down menu to select a location, if applicable.
- P. Type the number of breakout rooms, if applicable and location details.
- Q. Under the “Scheduling” section:
 - a. Select the status of the activity using the drop down menu next to “Activity Status”.
 - i. Note: the activity status is automatically set to “Tentative”. Please select the appropriate status when completing the form.
 - b. To enter the start/end date, left click on your mouse in the “Date” field and select the date of the activity.
 - c. To enter the start/end time, left click on your mouse in the “Time” field and select the time for the activity using the drop down menu.
 - d. Type notes for the activity schedule in the field next to “Date and Time Notes”.
- R. Under the “Instruction Details and Marketing” section:
 - a. Type the name of the instructor (s), sponsor, or consultant.
 - b. Select the primary audience by clicking on the item under the “Available” column then clicking on the arrow facing the “Chosen” column. You may also remove items from the “Chosen” column by clicking on the item to highlight the audience then clicking on the arrow facing the “Available” column.



- c. If you do not find your primary audience in the list, type the audience in the field next to “Other Primary Audience”.

- d. Select the area of interest by clicking on the item under the “Available” column then clicking on the arrow facing the “Chosen” column. You may also remove items from the “Chosen” column by clicking on the item to highlight the area of interest then clicking on the arrow facing the “Available” column.



- e. If you do not find your area of interest in the list, type the area of interest in the field next to “Other Area of Interest”.

S. Under the “Support” section:

- a. Select the appropriate support team to request assistance for the activity by checking the box next to the support group.
- b. If the activity involved eCornell, please check the box.
- c. Include any additional information for support in the field next to “No or any other information”.

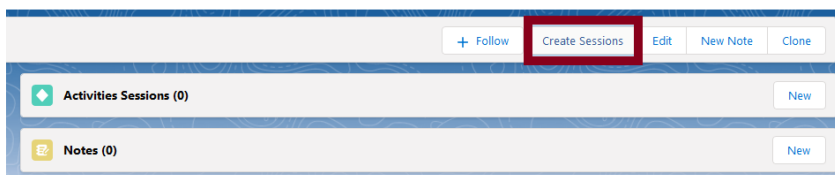
T. Select your form status using the drop down menu next to “Form Status”.

- a. Note: the form status will automatically be set to “Form In Progress”. Please update the status of the form when reviewing.
- b. When you finalize all of the information on the form, select “Form Complete” in the drop down menu. (You can still edit this response by returning to the form at a later time and selecting the pencil icon next to the field).

U. When complete, select “Save”.

Create Sessions on an Existing Activity

- There are two ways to create sessions. To create a single session at a time click the “New” button in Activities Sessions section. To bulk-create multiple sessions at a time, click the “Create Sessions” button.
- To create sessions for an activity, click on the “Create Sessions” button on the top right corner above the Activities Sessions section.



- Type in the number of sessions to create in numerical form.
- Select the button that corresponds to the pattern of the dates.
 - a. Note: if you select any of the top two options, a check box will appear to indicate whether the sessions are scheduled on weekends.

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:

3

*Choose the pattern for the dates (every day, every other day, or once a week)

Every Day

Every Other Day

Once per Week

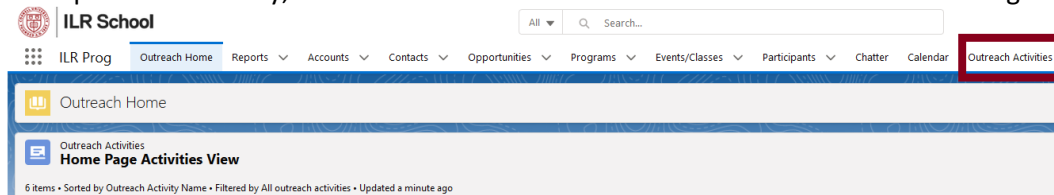
Other

Schedule on weekend days

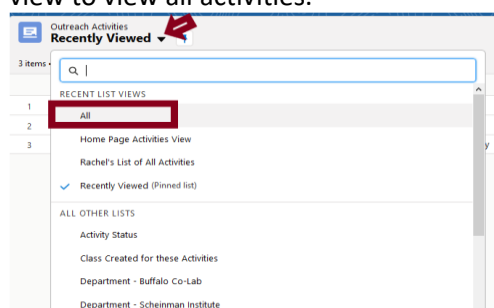
- Select “Next” on the bottom right.
- Select “Finish” on the pop up box.
 - b. Note: to edit a session, left click on the down arrow next to the session and select the edit button to make the necessary changes. If you need to delete a session, please email ILRActivityFormHelp@cornell.edu for assistance.


Clone an Activity

- To duplicate an activity, click on the “Outreach Activities” tab on the Salesforce Navigation bar.



- Select the down arrow next to “Recently Viewed” and click on “All” in the drop down menu.
 - a. Note: the list view is automatically set to your recently viewed activities. You need to change the view to view all activities.



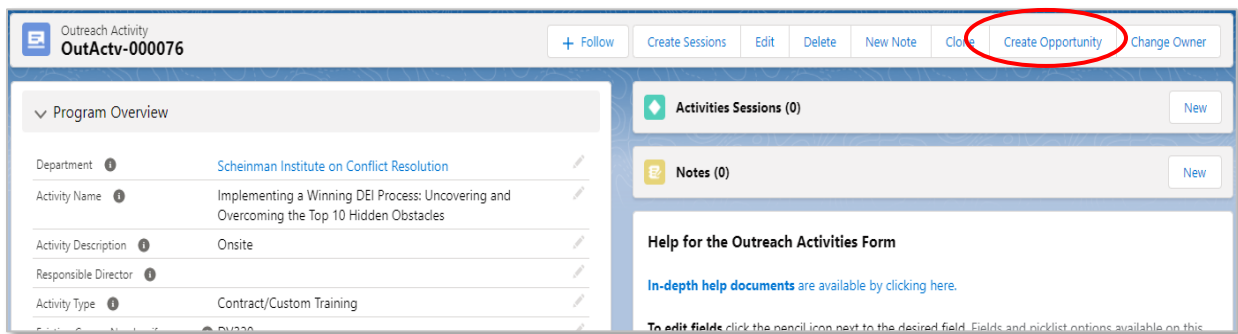
- Click on the down arrow next to the gear icon  and select “Clone” from the drop down list.
- Rename the view and click “Save”.

Cancel, Reschedule, or Postpone an Activity

1. Find the activity form (one way to do this is by using the search bar at the top of the page, above the navigation tabs).
2. Scroll to the “Scheduling” section and update to the status using the drop down menu next to “Activity Status” and select “Cancel”, “Reschedule”, or “Postponed”.
3. Click Save at the bottom of the screen.

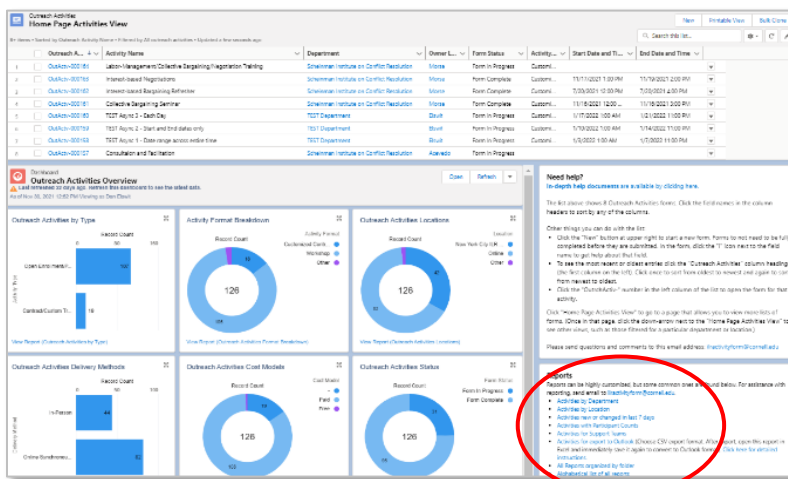
Create an Opportunity from an Activity Form

1. To create an Opportunity from a custom or consulting activity, open the desired Activity Form and click the “Create Opportunity” button at the top.
2. A pop-up will appear allowing you to fill in a few bits of additional information that are not in the form. Only the first three items are required.



View Reports

1. There are quick links to common reports on the Outreach Home Page at lower right



2. Alternatively, click on the “Reports” tab on the Navigation bar.

3. Select the hyperlink “Outreach Activities Form Reports”.
4. Click on the desired report from the list.

Report: Outreach Activities with Department
Outreach Activities by Status

Total Records
6

Form Status	Outreach Activity: Outreach Activity Name	Activity Name	Start Date and Time	End Date and Time	Location	Outreach Activity: Owner Name
Form In Progress (5)	OutActv-000008	Dan's Worker Institute Test Activity	11/2/2021 9:00 AM	11/3/2021 4:00 PM	New York City ILR Conference Center	Dan Elswit
	OutActv-000009	Intro to Testing Stuff 1	9/10/2021 9:00 AM	9/15/2021 2:00 PM	Online	Dan Elswit
	OutActv-000012	Intro to Salesforce	9/24/2021 9:00 AM	9/28/2021 4:00 PM	New York City ILR Conference Center	Rachel Joseph
	OutActv-000010	Introduction to Salesforce	9/24/2021 9:00 AM	9/28/2021 4:00 PM	New York City ILR Conference Center	Dan Elswit
	OutActv-000011	RuthAnn test page	11/19/2021 8:51 AM	11/23/2021 4:00 PM	Ithaca ILR Conference Center	RuthAnn Rushmer
Form Complete (1)	OutActv-000007	Implementing and Sustaining A Successful Diversity and Inclusion Strategy	9/20/2021 10:00 AM	9/21/2021 5:00 PM	Online	Dan Elswit

Note: Salesforce has a report generator and training will be provided at a later time.

Send Messages Using Chatter

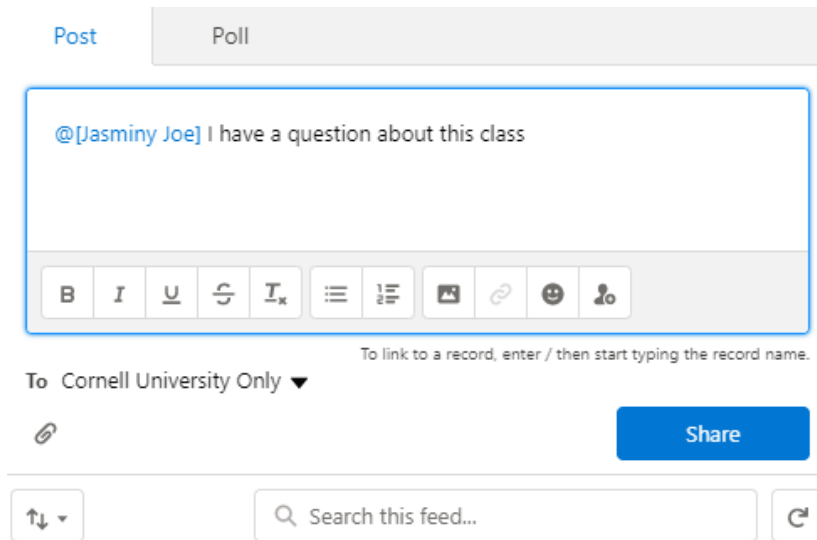
Salesforce has enabled a chat feature built into it that allows you to engage in dialogue with Support Groups (i.e. Learning Innovation, Fiscal, Marketing, Conference Center, and IT) or other ILR Salesforce users. Someone does not need to be logged into Salesforce to interact with Chatter (though they must be a Salesforce user).

To use chatter:

- Find the desired form.
- Go to the Chatter box at the lower right of the form page that you want to have a conversation about.
- Use the Update box to start a new thread. Use the Comment boxes to comment further on existing threads.
- Type the “@” sign and the first few letters of the desired person first or last name. You will be presented with a list of people who fit the search.
- Alternatively, type the “@” sign and “ILR” to see a list of support entities you can contact this way. Note that other entities unrelated to support will also appear in the list. The five support entities tied to the form are:
 - a. Fiscal
 - b. Marketing
 - c. Conference Center
 - d. NYC Classroom Support
 - e. Learning Innovation
- Select the correct person and type your message.
 - a. Note that if someone @mentions you, you will be notified in email, but you cannot @mention yourself. Notifications that @mention you also appear in Salesforce, wherever you are, by putting a number in red on the bell icon at upper right:



- After typing your message, press share. Chatter will send an email notification to a recipient, who can then reply via email into the Chatter feed.



Comments vs Updates in Chatter

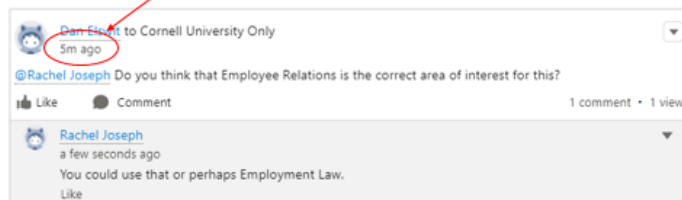
There are two ways to interact with Chatter - Comments and Updates. Conversations are threaded, and once you start a thread in Chatter, replies will continue to notify everyone who was @mentioned. To start a new thread use the comment box that is not associated with an existing thread.

Mute a Thread in Chatter

If you are getting too many email notifications from Chatter, you have two options:

1. Mute the offending thread(s); OR
2. Go into your personal profile and set up digest notifications (which will send batch notifications on a schedule).

- Go to the top of thread
- Click the date (or if very recent, where it says so-many-minutes-ago, for instance "5m ago")



- Click the down-arrow to the right
- Choose "Mute"

