

Activity Types

To create a new activity type, complete the fields for 'Activity Type Name', 'Parent', 'Color', 'Default Responsible', and 'Description', then click 'Submit' to save.

When adding or editing a Activity Type, you typically fill out the following fields:

Activity Type Name – The title or name of the activity.

Parent – The main or higher-level category that the activity type belongs to (useful for organizing related activities).

Color – A visual identifier to easily distinguish activity types in dashboards or calendars.

Default Responsible – The person or team automatically assigned to this type of activity.

Description – Additional details explaining the purpose or nature of the activity type.

Please find attached the video for the Activity Types.

Follow these Steps to navigate and use Activity Types:

Click "Administrative Task"

Click "New Activity Type"

Navigate to the 'Activity Type Name' field, and either select an existing activity type or enter the desired name for the new activity type.

Navigate to the 'Parent' field, and either select an existing activity type or enter the desired name for Parent.

You may select your preferred color for the color-coding scheme

Assign the appropriate individual as the "Default Responsible".

Enter a description, if applicable.

Click "Submit"

Please find the link to the **Step-By-Step reference guide for Activity Types. [Activity Type.png](#)**

? **Tips for Activity Types:**

Use Clear and Descriptive Names - Ensure each activity type has a name that clearly reflects the task or action it represents.

Categorize with Parent Types - Organize activity types under parent categories for easier tracking and reporting.

Assign Default Responsibilities - Set a default responsible person or team to streamline task assignment.

Utilize Color Coding - Apply distinct colors for each activity type to enhance visual organization and quick identification.

Provide Relevant Descriptions - Add concise descriptions to clarify the purpose and scope of each activity type.

Review and Update Regularly - Periodically check activity types to ensure they remain accurate, relevant, and aligned with current workflows.

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