

Create an activity

September 10, 2026

Create an activity

Create a Visit, Meeting, or Call from the Add new routes, enter its details, and save it.

Create an activity

An activity records planned follow-up work as a Visit, Meeting, or Call. Choose the type

that matches the work you are arranging.

If you need to...	Go to
Open the activity workspace	My Desk activities
Create a Visit, Meeting, or Call	Find the activity form
Understand activity statuses after saving	Activity status
Work with files attached to an activity	Libraries and files

Mail activities use a different creation path.

Before you start

Prerequisites

- Your Activities subscription is included.
- You know whether you are creating a Visit, Meeting, or Call.
- You have the details needed for the selected activity, including its required dates.
- You are creating a new activity rather than editing an existing activity.

Reach the form through the **Add new** menu. Leaving the form is protected by an unsaved-changes warning.

Find the activity form

Use the **Add new** menu to open a form for the activity type you are arranging.

Prerequisites

- You have the Activities feature available.

Steps

1. Open the **Add new** menu.
2. Select the activity type you need.

If you need to create...	Select
A visit with a destination and visit type	Visit
A meeting with participants and a location	Meeting
A call with a call use and description	Call

3. Confirm that the heading matches the selected activity type.

The screenshot shows the 'New Visit' form in the PAMS system. The form is titled 'My Desk > Visit > New'. It includes fields for 'Visit Purpose' (with a placeholder 'Enter...'), 'Priority' (set to 'Medium'), 'To' (with a plus icon), 'Tags' (with a plus icon), 'Visitors' (with 'Ramy Othman' and a plus icon), 'Discussion partner' (with a plus icon), 'Start Date' (09 Sep 2026 - 17:13 +00:00), 'End Date' (09 Sep 2026 - 19:13 +00:00), 'Prevent other participants to make changes' (checkbox), 'Visit type' (dropdown menu), and 'Prepared By' (Ramy Othman). The bottom right corner has a 'Tickets' button.

Result: The form for the selected activity type is open.

To change an existing activity, open it from the activity workspace. To create a new activity, use the **Add new** menu.

Understand the activity form

The form keeps the common activity details together and changes the type-specific fields for Visit, Meeting, or Call.

Visit fields

Field	Type	Required in the form
Priority	Select	Yes
Title	Text	Yes
Start Date	Date	Yes
End Date	Date	Yes
Participant edit option	Boolean	No
Visit type	Select	No

On the Visit form, **Visit Purpose**, **Priority**, **To**, and **Visit type** have no required marker; **Start Date** and **End Date** do. The form also labels **Prepared By**.

Meeting fields

Field	Type	Required in the form
Priority	Select	Yes

Field	Type	Required in the form
Title	Text	Yes
Start Date	Date	Yes
End Date	Date	Yes
Member restriction option	Boolean	No
Participant edit option	Boolean	No

On the Meeting form, **Meeting Purpose**, **Priority**, and **Location** have no required marker; **Start Date** and **End Date** do.

Call fields

Field	Type	Required in the form
Priority	Select	Yes
Title	Text	Yes
Call To	Text	No
Call Use	Select	No
Call Number	Text	No
Start Date	Date	Yes

Field	Type	Required in the form
Description	Text	No

Use **Call To**, **Call Use**, **Call Number**, **Start Date**, and **Description** for the corresponding Call details.

Note: The Call form uses the same required **Priority**, **Title**, and **Start Date** rules as the other activity forms, while **Call Use** and **Description** are optional.

Controls on a new activity

When creating a new activity, the form shows **Save** and **Save and Close** before the activity is saved. After saving, use **Attachment** to work with files and **Last Modifications** to review the activity's modification history.

The extra Priority controls and print options are not part of the usable form.

Enter the activity details

Enter the details for the activity type you selected. The form checks the required fields for Visit, Meeting, and Call before saving.

Prerequisites

- The selected activity form is open.
- You have the required details for that activity type.

Steps

1. Complete the fields for the selected activity type.

Activity type	Complete these fields
Visit	Priority , Start Date , End Date , and, when applicable, Visit type . Enter a value in Title .
Meeting	Priority , Start Date , and End Date . Enter a value in Title .
Call	Priority , Call To , Call Use , Call Number , Start Date , and, when needed, Description . Enter a value in Title .

2. Set **End Date** to a date that is not earlier than **Start Date** for a Visit.
3. Review each required field before saving.

Result: The selected activity form contains the details needed for its activity type and is ready for a save choice.

Save the activity

Use the save choice that matches whether you want to remain on the activity form.

Prerequisites

- The selected activity form contains its required details.

Steps

1. Choose one save action.

If you need to...	Select
Save while staying with the activity form	Save
Save and leave the activity form	Save and Close

Result: The selected save action starts the form's validation before the save request.

When activity creation goes wrong

Use the message on screen to choose the corresponding correction.

Message	What it means	What to do
This action is only allowed if you belong to that branch	The action is restricted to your branch.	Use the activity from the branch to which you belong.
One topic and at least one note is required	The activity cannot be marked done without a topic and a note.	Add one topic and at least one note before selecting Done .
There is no topic to print	There is no topic available for the minutes.	Add a topic before selecting Print Minutes Of Activity .
An error occurred while processing your request	The request was not completed.	Review the required fields for the selected activity before selecting Save again.

The Activities list can also show these messages while you work with list actions:

Message	What to do
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters from the list search value.
Action not allowed	Use an action available for the selected activity.
Your request was completed successfully	Continue with the updated activity list.

Use the available controls shown for the selected activity type. Extra Priority controls and print options are unavailable during activity creation. Mail activities use a different creation path.

After creating the activity

An activity with a saved activity ID can carry follow-up work in its saved activity tabs.

Prerequisites

- The activity is saved.

Steps

1. Choose the follow-up area you need.

If you need to...	Select
Work with files	Attachment
Review the activity's modification history	Last Modifications

Result: The selected follow-up area is open for the saved activity.

For status meanings and existing-record status actions, continue with [Activity status](#).

For the Activities workspace and list navigation, open [My Desk activities](#).

For file procedures, open [Libraries and files](#).

The activity status values are Planned, Overdue, Done, Due, and Cancelled.