

Activities — Learning Path

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This learning path is for users who need to create, review, and maintain activity records in the Activities app. After completing it, learners will be able to use the activities list to find work, create new activity records, update existing records, and verify that activity information is ready for ongoing operational use.

Learning objectives

- By the end of this path you can locate activity records from the Activities workspace.
- By the end of this path you can open and review an existing activity record.
- By the end of this path you can create a new activity record.
- By the end of this path you can update an activity record when its details need to change.
- By the end of this path you can use the appropriate record entry point for new versus existing activities.

Prerequisites

- Access to the Activities app.
- Permission to view activity records.
- Permission to create and edit activity records, if you will be maintaining activities.
- Familiarity with your organization's process for deciding when an activity should be created or updated.

Module 1: Find and understand activity records

Goal: Learn how to begin work in Activities and open the correct record for review.

Lesson 1.1: Start from the activity workspace

When you need to review or maintain activity information, begin from the central list of available activities. Open [Activities](#) to access the Activities workspace and use it as your starting point for identifying the activity you need to work with.

Practice task: Open [Activities](#) and identify an activity record you could review.

Lesson 1.2: Review an existing activity before making changes

Before changing an activity, open its existing record so you can review the current information and confirm that you selected the intended activity. From [Activities](#), open the relevant record in [Activities](#), then review the record before deciding whether an update is needed.

Practice task: Open one existing record using [Activities](#) and review its current information.

Module 2: Create activities for new work

Goal: Create a new activity record when the work or event does not already exist in the activity list.

Lesson 2.1: Decide whether to create or update

A common activity-management decision is whether a request represents a new activity or a change to one already recorded. First check [Activities](#) for the activity. If the activity already exists, open it through [Activities](#); if it does not exist, use the new-record entry point instead.

Practice task: From [Activities](#), decide whether a sample activity should be created as new or handled as an existing record.

Lesson 2.2: Create a new activity record

When you confirm that an activity is not already represented, create it from [List](#). Enter the information required by your organization's activity process, then complete the record so it can be managed with the other activities.

Practice task: Create a new activity using [List](#).

Module 3: Maintain activities through their lifecycle

Goal: Keep activity records accurate by updating existing records and confirming the result in the activity list.

Lesson 3.1: Update an activity when information changes

When an activity's recorded information needs correction or revision, work from the existing record rather than creating a duplicate. Locate the activity in [Activities](#), open [Activities](#), and make the required changes according to your organization's process.

Practice task: Open an existing activity in [Activities](#) and make an approved update.

Lesson 3.2: Confirm that activity maintenance is complete

After creating or updating an activity, return to [Activities](#) to confirm that the activity is available in the workspace. This final check helps ensure that you worked on the intended record and that it is ready for future review or maintenance.

Practice task: Return to [Activities](#) and confirm the activity you created or updated is present.

Final assessment

1. You receive a request to revise information for an activity that may already exist. What should you do first, and which screen should you use?
2. A team member asks you to record an activity that is not present in the Activities workspace. Which record entry point should you use?
3. You find an activity in the Activities workspace and need to inspect its current information before deciding on changes. Which screen should you open?
4. You have completed an approved update to an existing activity. What should you do to verify that your maintenance work is complete?
5. A user creates a second record for an activity that was already listed. What step in the recommended process would have prevented this duplication?

Answers

1. Open [Activities](#) first to check for the activity, then open [Activities](#) if it exists.
Why: Existing activities should be reviewed and updated through their existing record.
2. Use [List](#).
Why: This is the entry point for creating a new activity record.

3. Open [Activities](#).

Why: The existing-record screen is used to review and maintain an activity already in the list.

4. Return to [Activities](#) and confirm the activity is present.

Why: The workspace provides a final confirmation that the record is available for ongoing work.

5. The user should have checked [Activities](#) before creating a new record.

Why: Checking the list first helps determine whether the activity already exists and should be updated instead.