# Activity Type Settings

New Activity Type

This guide will show you how to create Activities. Activity is container used to track Project phases or customer requests, etc. Activity may store communication, tasks, time sheet records, documents and it is possible to assign Custom Form to Activity Type.

Create new Activity Type
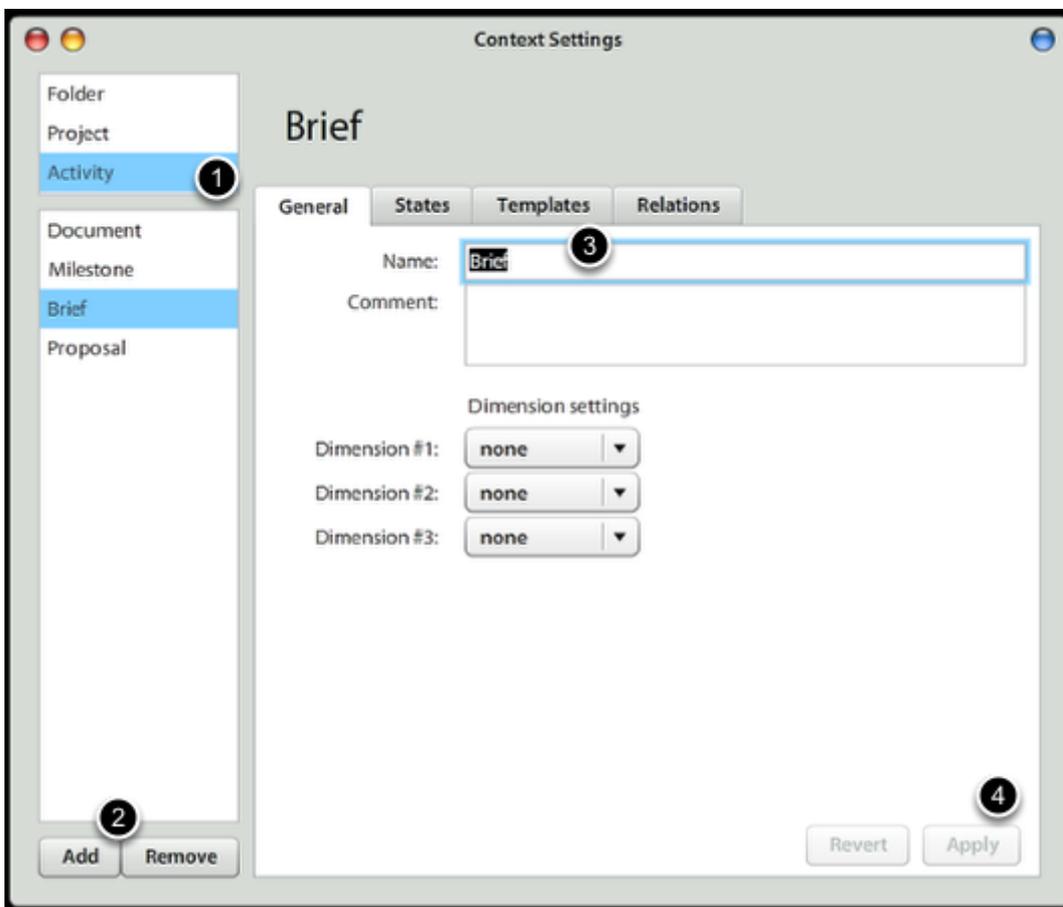
Go to Options & Tools > Context Settings to create new Activity Type.

1. Select Activity section
2. Click on Add button
3. Write in the Name of the Activity
4. Press on Apply

Add one or more Custom States to Activity Type
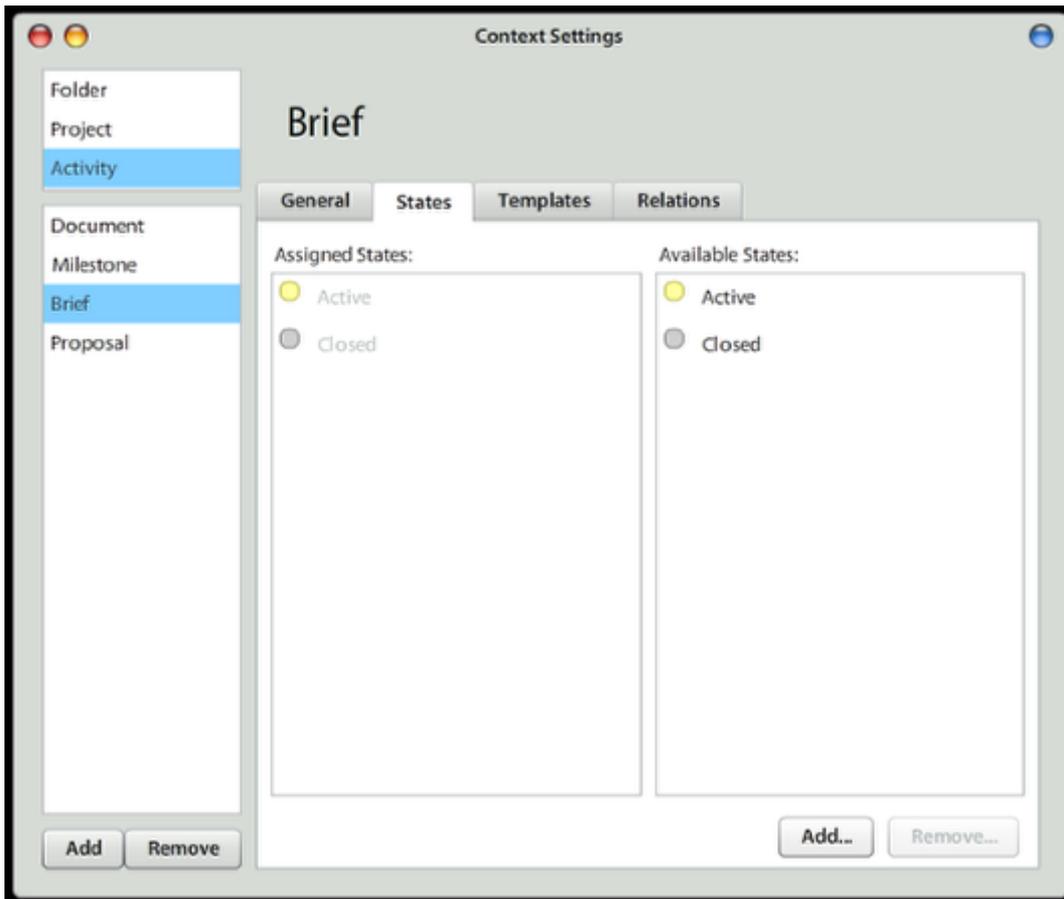
You can add one or more Custom States to Activity Type in order to track the Activity Status.

Create new Activity Template
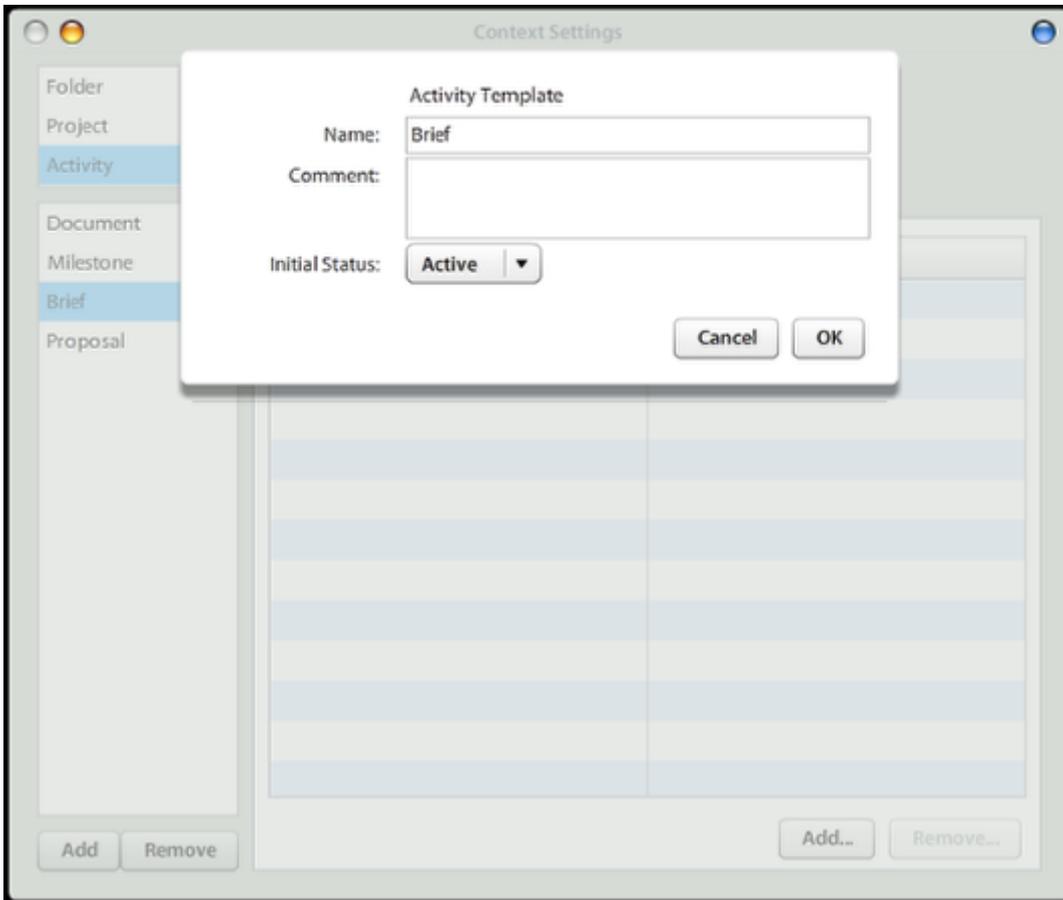
On Templates Tab, create at least one Activity Template. It is currently used only to set the Initial Status, but it needed to set-up Relations with Project Type properly and in order to create new Activity manually by users.

Enable Sub-activities
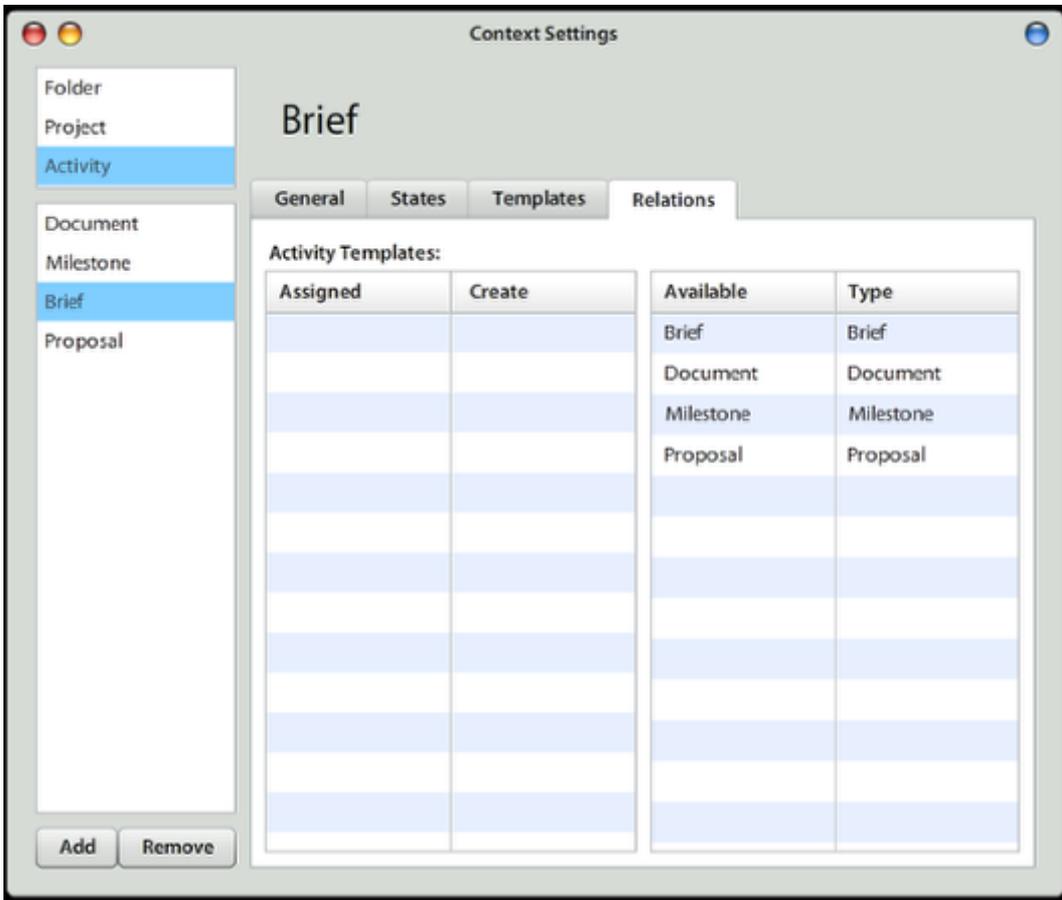
Decide on whether or not to allow creating Sub-activites under this newly created Activity Type.

Allow creating the Activity under Project
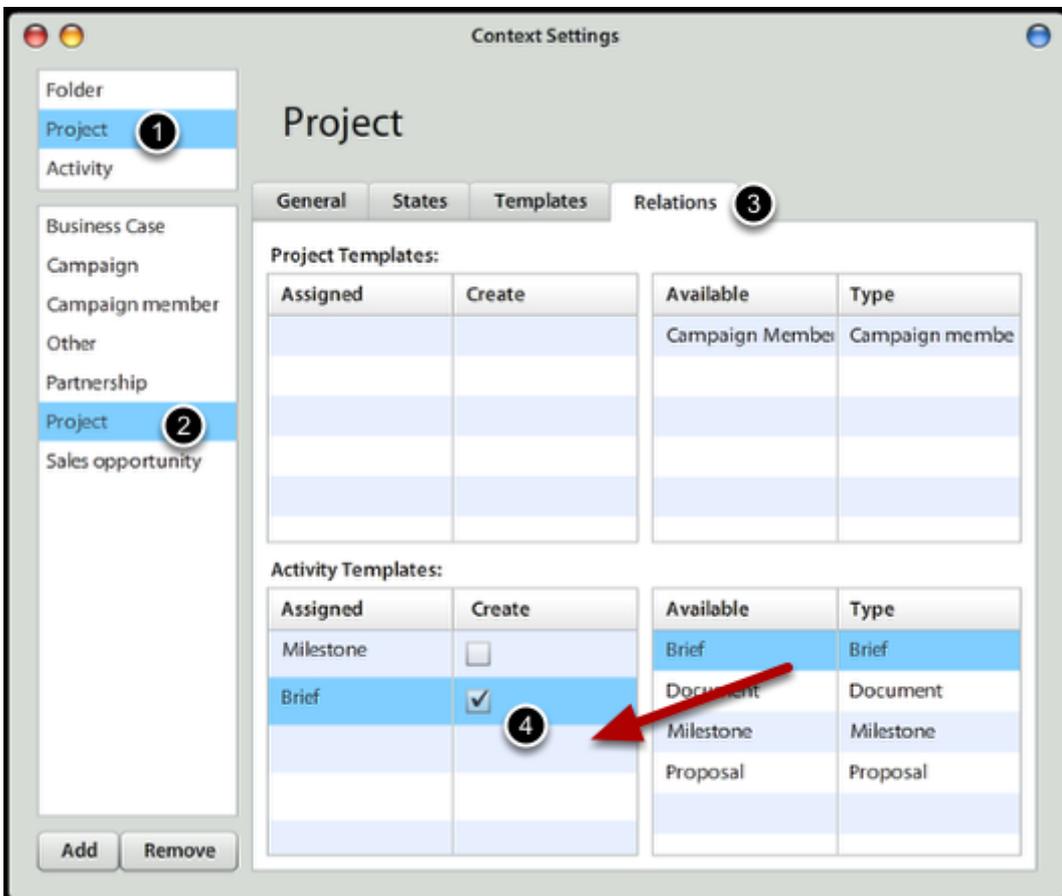
In order to be able to create new Activity under Project, you must assign Activity Template to Project Type. For example allow creating "Brief" Activity under "Project" Project Type. In this case, you can also click on Create option to create new Activity ("Brief") under new Project based on this Project Type.

1. Select Project section
2. Select the Project Type
3. Select Relations Tab
4. Under Activity Templates, drag & drop the Activity Template and click on Create checkbox, once you want this Activity to be created automatically when creating new Project

Assign Custom Form to Activity

To add Custom Form fields to Activity Type, you must open Atollon Win administration client, go to Settings > Account & Project > Activity Types.

1. Select the Activity Type
2. Press on Edit
3. Click on Form (...) button
4. Click on Activities folder
5. Click on New Form button
6. Write Form's descriptive Name
7. Press Ok
8. Select the newly created Custom Form
9. Save Activity Type

Please note that it is not possible to assign Custom Form to Activity using Activity Template (which is possible for Projects and Folders).

Add numbering to Activities

Please follow similar procedure indicated when creating new Project Type.

Activity Overview

1. Create Custom Form

1a. Open FormDesigner and create CustomForm:
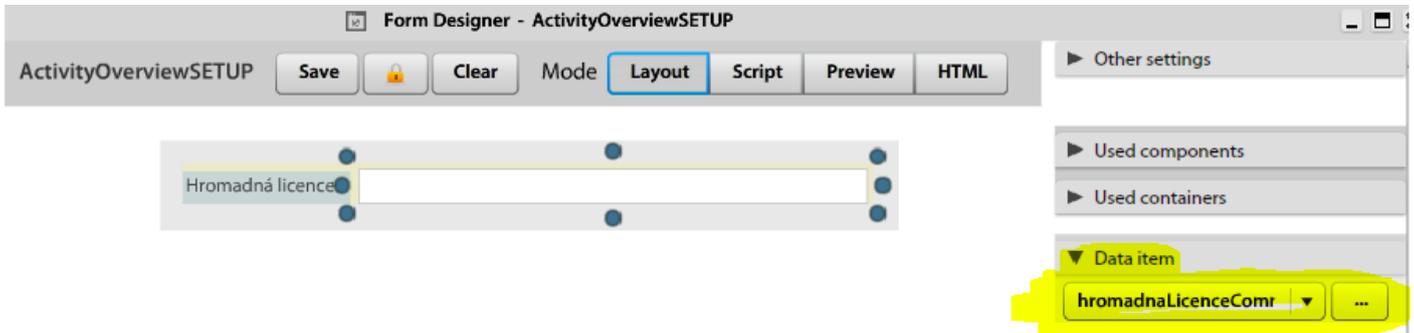
1b. Create and **copy** your DataItem name (From Value Name)

2. Setup Layout Designer

2a. Open ActivityPanel's Layout Designer and add ActivityOverview application: (1)
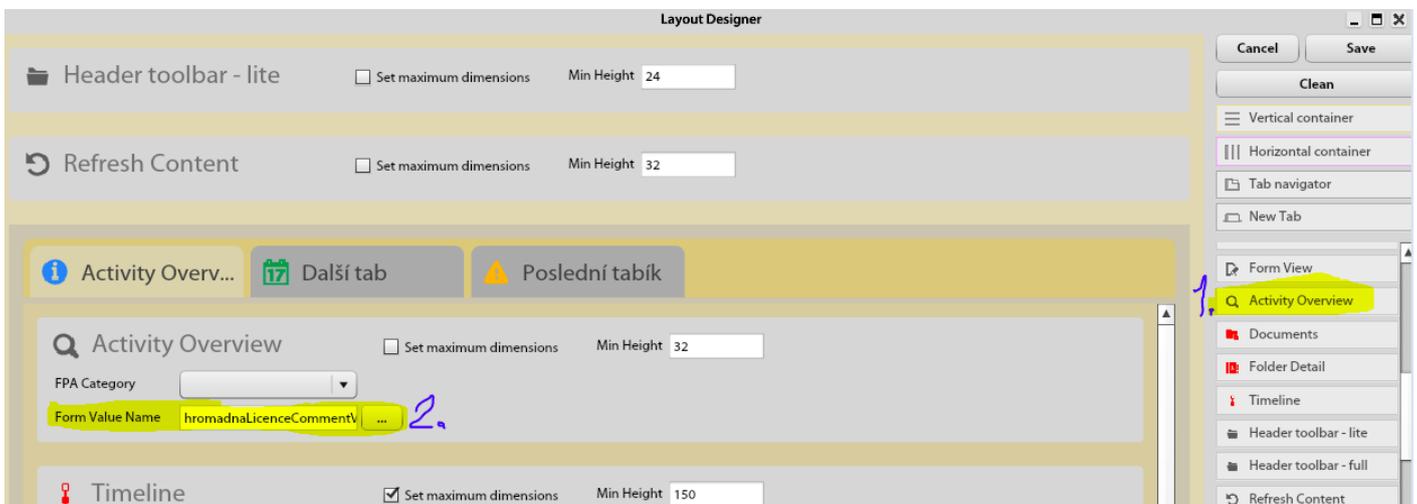
2b. Set "From Value Name" (2) - check **1b** step

3. Setup Custom Form

3a. Set CustomForm to your context (Context settings)

3b. (restart Lagoon maybe required)

3c. Try to set some values:
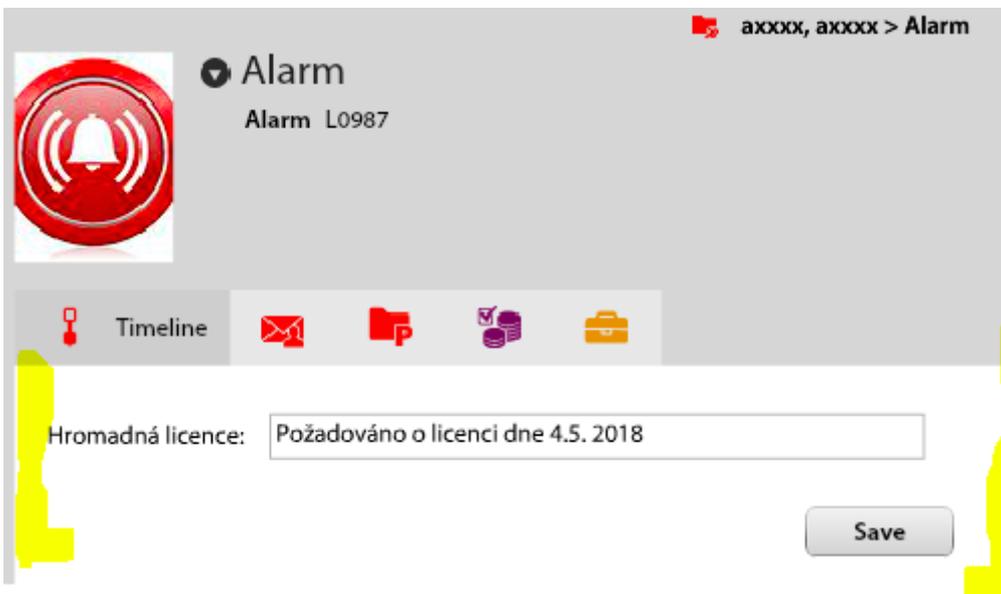
4. Show activity overview on project
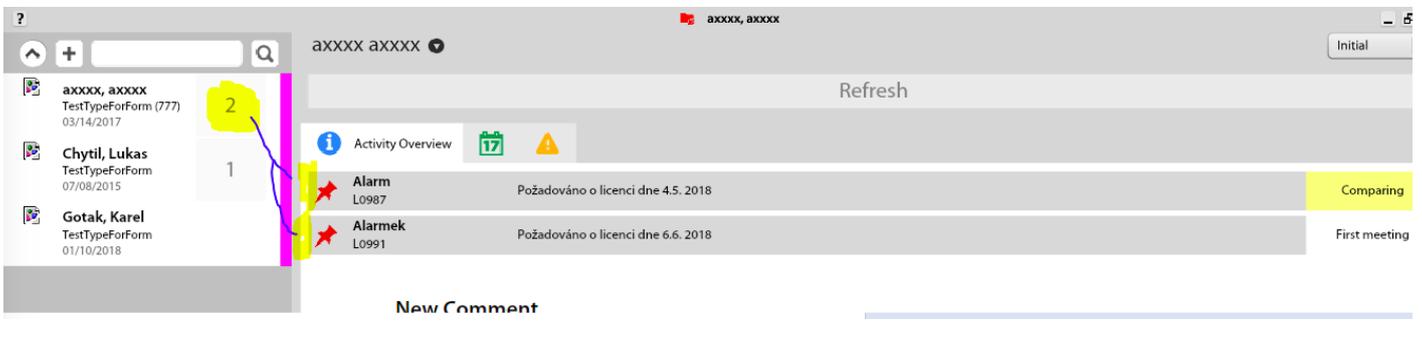
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