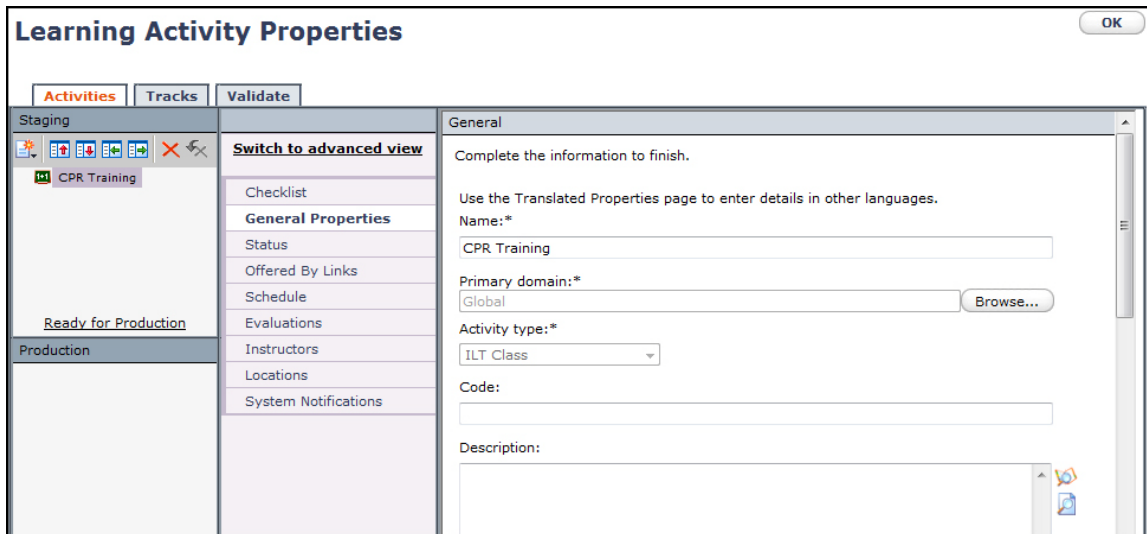


# Back to Basics: Basic Training on the Basic Menu

I've got some good news for you: you may not know it, but the developers of the LMS from SumTotal included a very cool feature in the system that most people don't seem to know or recognize. It will not only save you a lot of time, but will also streamline your learning activity creating process. Lucky for you, however, I know about this feature. I can tell you how to find it and start using it in just a few minutes. This is good, I suppose, because if I didn't, this would be a pretty short article, wouldn't it?

Many administrators I talk with seem to spend a lot of time in the learning management system (LMS) creating learning activities. And, if you are an administrator, you probably already know that the page where they spend the bulk of this time is the Learning Activity Properties page. This page has what we call the "center menu," which you can see below.



Most users seem to automatically just click the "Switch to advanced view" button, but did you know you can easily change which properties are shown in the basic menu and create different settings for each learning activity type? This is terrific because when you are working with an instructor-led class you typically need properties like schedule, location, and instructor. (Note: Instructors are always good to have in an instructor-led class ...) In contrast, however, for something like online training, you don't need any of those properties -- you need properties like web-based training, instead.

## Streamline Learning Activity Creation

Establishing which properties are shown in the basic menu for a learning activity type really streamlines the work for learning activity creators. Instead of wasting time fishing around or wondering if displayed properties apply or not, a basic menu made especially for learning activity creators will keep them focused on just the properties that they need to do their jobs. Oh, and if you want to get some good will, be sure to let them know how many minutes -- er, hours -- changing the menu took you ...

## Preventing Mistakes

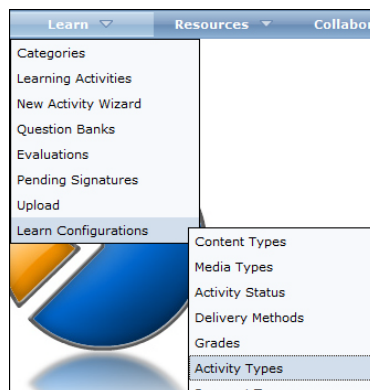
Establishing a basic menu can also help prevent mistakes. Since only the properties that should be set for that specific learning activity type are displayed, there should be no need to switch to advanced view, which makes it much less likely that something will be set incorrectly. In fact, in this scenario, switching to the advanced view should actually become a red flag that they may be trying to set a property they shouldn't.

For example, an instructor-led *class* needs a start and end date. However, if you accidentally set a start and end date for the instructor-led *course*, the entire course -- and, more importantly, every single one of its classes -- will disappear from Learner mode on the end date. Oopsie! Unfortunately, this is an easy mistake to make when you're bouncing back-and-forth between courses and classes. But, if you set the basic menu properly, the need to switch to advanced view can be a warning that you may be doing something wrong.

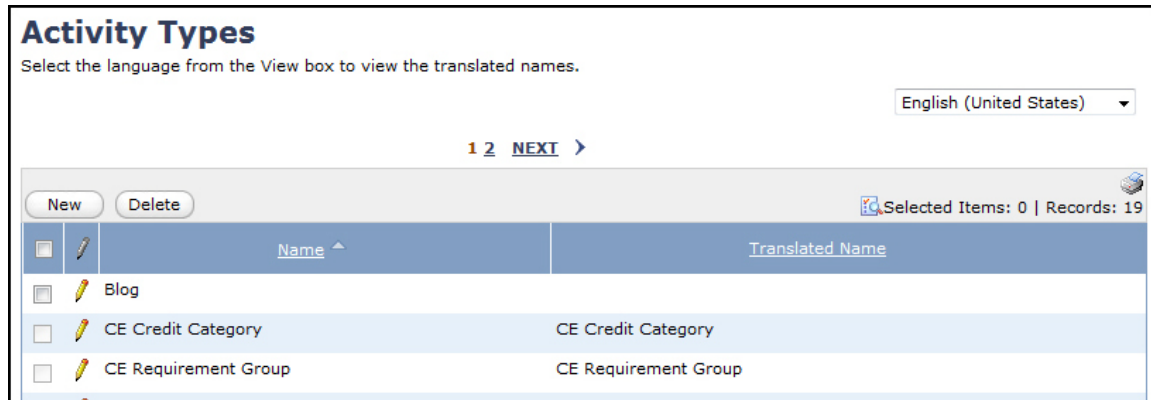
## Establishing the Basic Menu

Now that you know how valuable establishing your basic menus can be, let's talk about the steps needed to actually do it. And now I have even more good news: if you were delighted with the benefits of the basic menu, you'll be even more delighted to find out that establishing it is very easy.

First, you'll need to log in under an account that has permissions to work with learning activity types. Then, in Administrator mode, under the Learn menu, choose Learn Configurations then Activity Types.



On the Activity Types page, you'll see a list of all the learning activity types available in your LMS implementation. Simply click the pencil icon associated with the learning activity type whose basic menu you want to establish.



**Activity Types**  
Select the language from the View box to view the translated names.

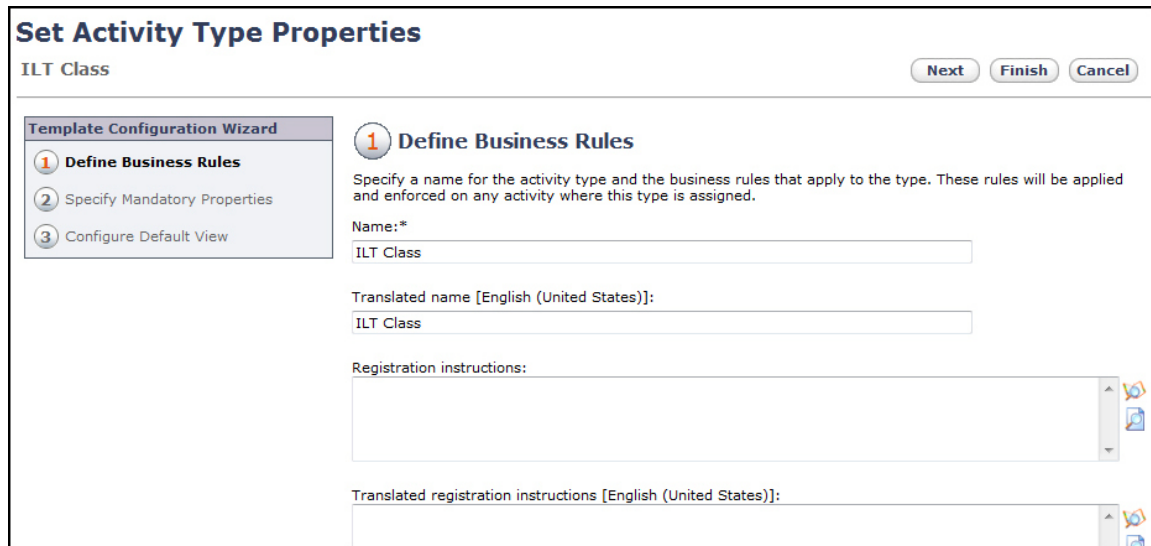
English (United States) ▾

1 2 **NEXT** >

New Delete Selected Items: 0 | Records: 19

<input type="checkbox"/>		Name ^	Translated Name
<input type="checkbox"/>		Blog	
<input type="checkbox"/>		CE Credit Category	CE Credit Category
<input type="checkbox"/>		CE Requirement Group	CE Requirement Group

In this example, we've selected ILT Class. On the first Set Activity Type Properties page, simply click Next.



**Set Activity Type Properties**  
ILT Class Next Finish Cancel

**Template Configuration Wizard**

- 1 Define Business Rules**
- 2 Specify Mandatory Properties
- 3 Configure Default View

**1 Define Business Rules**  
Specify a name for the activity type and the business rules that apply to the type. These rules will be applied and enforced on any activity where this type is assigned.

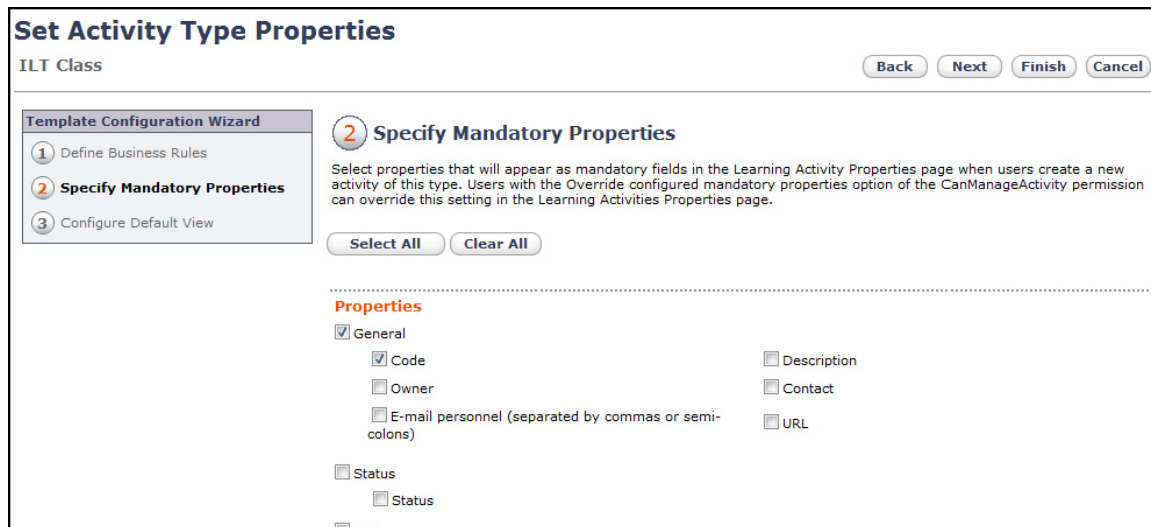
Name:\*

Translated name [English (United States)]:

Registration instructions:

Translated registration instructions [English (United States)]:

On the second Set Activity Type Properties page, select the properties you want to specify as mandatory (if any), and then click Next.



**Set Activity Type Properties**  
ILT Class

Back Next Finish Cancel

**Template Configuration Wizard**

- Define Business Rules
- Specify Mandatory Properties**
- Configure Default View

**2 Specify Mandatory Properties**

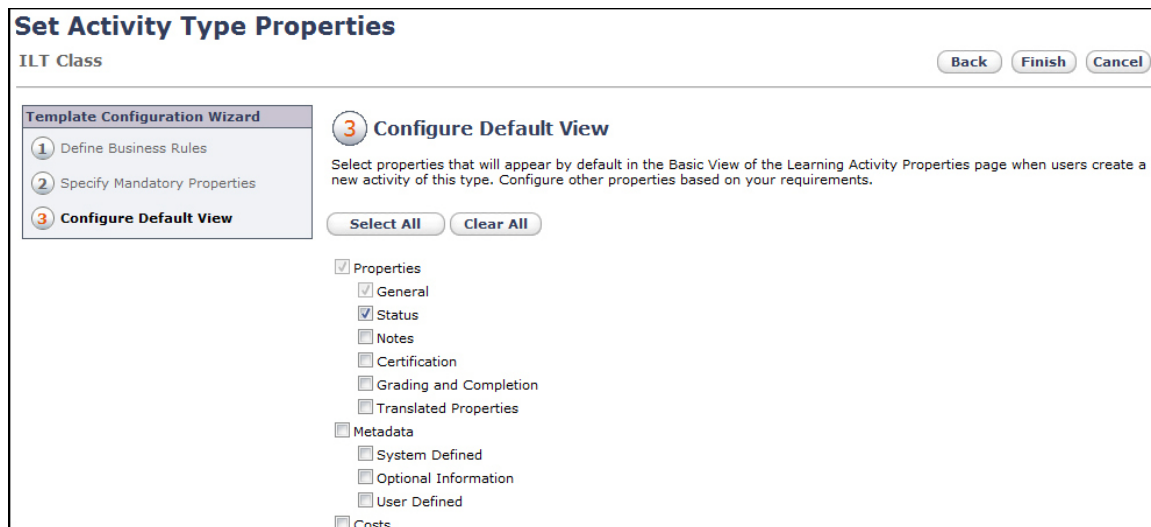
Select properties that will appear as mandatory fields in the Learning Activity Properties page when users create a new activity of this type. Users with the Override configured mandatory properties option of the CanManageActivity permission can override this setting in the Learning Activities Properties page.

Select All Clear All

**Properties**

- General
  - Code
  - Owner
  - E-mail personnel (separated by commas or semi-colons)
  - Status
  - Status
- Description
- Contact
- URL

On the third Set Activity Type Properties page, select the properties you want to appear in the ILT Class-specific basic menu, and then click Finish.



**Set Activity Type Properties**  
ILT Class

Back Finish Cancel

**Template Configuration Wizard**

- Define Business Rules
- Specify Mandatory Properties
- Configure Default View**

**3 Configure Default View**

Select properties that will appear by default in the Basic View of the Learning Activity Properties page when users create a new activity of this type. Configure other properties based on your requirements.

Select All Clear All

- Properties
  - General
  - Status
  - Notes
  - Certification
  - Grading and Completion
  - Translated Properties
- Metadata
  - System Defined
  - Optional Information
  - User Defined
- Costs

Next ... oh wait, there is no "next". That's it! I told you it was simple, didn't I?

## Showing the Proper Properties

So which properties should you show in the basic menu? There is no set answer for that -- it really just depends on the business processes you've established within your organization. But don't sweat it; make your best guess, work with those settings for a while, and then go ahead and make changes as you discover what needs to be altered.

Also, for a detailed guide on how all learning activity properties should be set, depending on the learning activity type, we offer the "Creating Learning Activities and Structures in the LMS." We don't like to brag -- well, we don't like to brag TOO much -- but this guide has been extremely well-received. In fact, folks who have used it tell us this guide "significantly increased our learning", "we use it regularly", and "is something you'd never find elsewhere". Let us know if you're interested; otherwise, have fun going back to basics!

*Irene Campbell has spent countless hours in the Learning Activity Properties page and basically just loves this basic menu feature. She's been working with SumTotal products for over 20 years and enjoys helping clients figure out how to best use their LMS. Her clients range from companies with small, phased-approach rollouts to clients with huge projects involving international LMS rollouts in multiple languages to hundreds of thousands (and sometimes millions) of learners.*

*If you have any comments, questions, or suggestions on this article, please establish the properties of the email then send it to [articles@terrabia.com](mailto:articles@terrabia.com). And that's it. Basically ...*