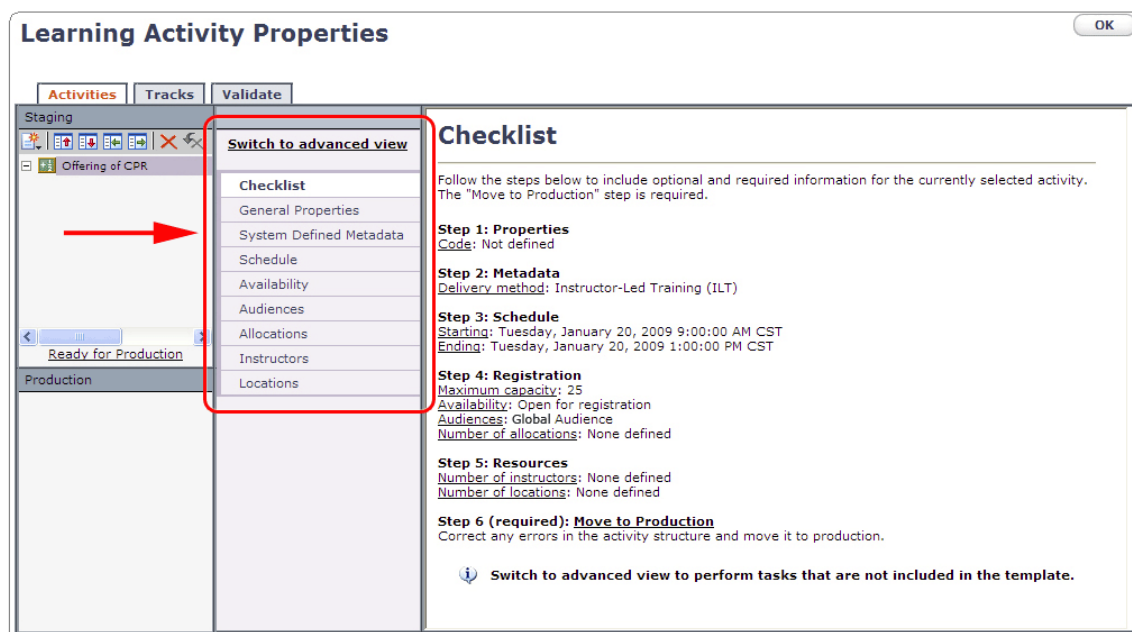




## Back to Basics: Basic Training on the Basic Menu

I've got some good news for you: you may not know it, but the developers of TotalLMS™ 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.

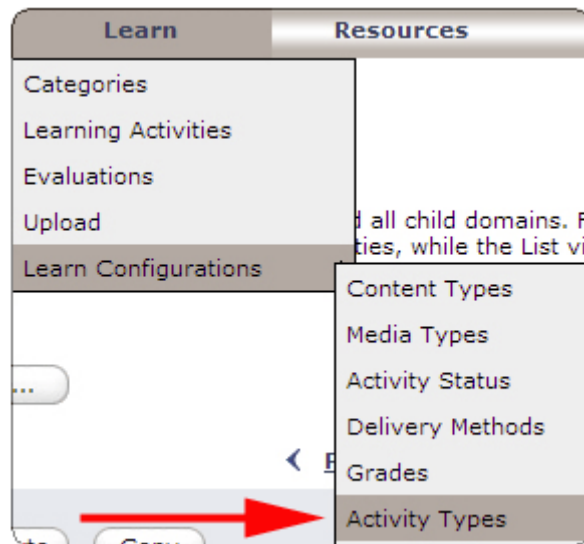
For example, an instructor-led *class* needs a start and end date. However, if you accidentally set a start and end date for the instructor-led *course*, the entire course -- and, more importantly, every single one of its classes -- will disappear from Learner mode on the end date. Oopsie!

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.

View: English (United States) ▾

1 2 NEXT >

New Delete Selected Items: 0 | Records: 11

<input type="checkbox"/>		Name ▲	Translated Name
<input type="checkbox"/>		Class	Class
<input type="checkbox"/>		Conference	Conference
<input type="checkbox"/>		Course	Course
<input type="checkbox"/>		Curriculum	Curriculum
<input type="checkbox"/>		Document	Document
<input type="checkbox"/>		ILT Class	ILT Class
<input type="checkbox"/>		ILT Course	ILT Course
<input type="checkbox"/>		Objective	Objective

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 Select Important Properties

**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:\*  
ILT Class

Translated name [English (United States)]:  
ILT Class

An activity type template currently exists for this type. You may update information in this template or delete the template.

Delete Template



On the second 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**  
1 Define Business Rules  
**2 Select Important Properties**

Indicate which properties are important for this activity type. The selected properties will be displayed by default in the staging editor when creating new activities of this type. All other properties will be available on demand.

Select All Clear All

<input checked="" type="checkbox"/> Properties	<input checked="" type="checkbox"/> Schedule	<input type="checkbox"/> Skills
<input checked="" type="checkbox"/> General	<input checked="" type="checkbox"/> General	<input type="checkbox"/> Skills
<input checked="" type="checkbox"/> Status	<input type="checkbox"/> Web Based Training	<input checked="" type="checkbox"/> Notifications
<input type="checkbox"/> Notes	<input type="checkbox"/> General	<input checked="" type="checkbox"/> System
<input type="checkbox"/> Certification	<input type="checkbox"/> NETg	<input type="checkbox"/> User Defined
<input type="checkbox"/> Grading and Completion	<input type="checkbox"/> WebEx	<input type="checkbox"/> Management
<input type="checkbox"/> Translated Properties	<input checked="" type="checkbox"/> Registration	<input type="checkbox"/> Users
<input type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Availability	<input type="checkbox"/> Domains
<input type="checkbox"/> System Defined	<input type="checkbox"/> Audiences	<input type="checkbox"/> Organizations
<input type="checkbox"/> Optional Information	<input checked="" type="checkbox"/> Allocations	<input type="checkbox"/> Jobs
<input type="checkbox"/> User Defined	<input type="checkbox"/> Prerequisites	<input type="checkbox"/> Categories
<input type="checkbox"/> Costs	<input checked="" type="checkbox"/> Evaluations	<input type="checkbox"/> Remote Content Server
<input type="checkbox"/> General	<input checked="" type="checkbox"/> Resources	<input type="checkbox"/> General
<input type="checkbox"/> Charges	<input checked="" type="checkbox"/> Instructors	
<input type="checkbox"/> Related Activities	<input checked="" type="checkbox"/> Locations	
<input type="checkbox"/> Child Activities	<input type="checkbox"/> Vendors	
<input type="checkbox"/> Fulfillment Links	<input type="checkbox"/> Equipment	
<input type="checkbox"/> Subscription Links		
<input type="checkbox"/> Offered By Links		

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 TotalLMS™." 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 14 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 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@terrabria.com](mailto:articles@terrabria.com). And that's it. Basically ...*