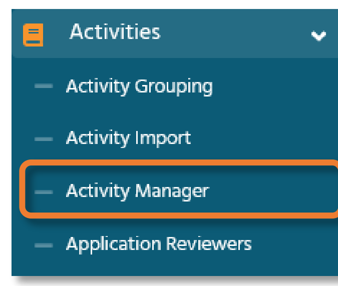
UCSF Continuing Education Portal

CloudCME

Overview of the Activity Manager in CloudCME®

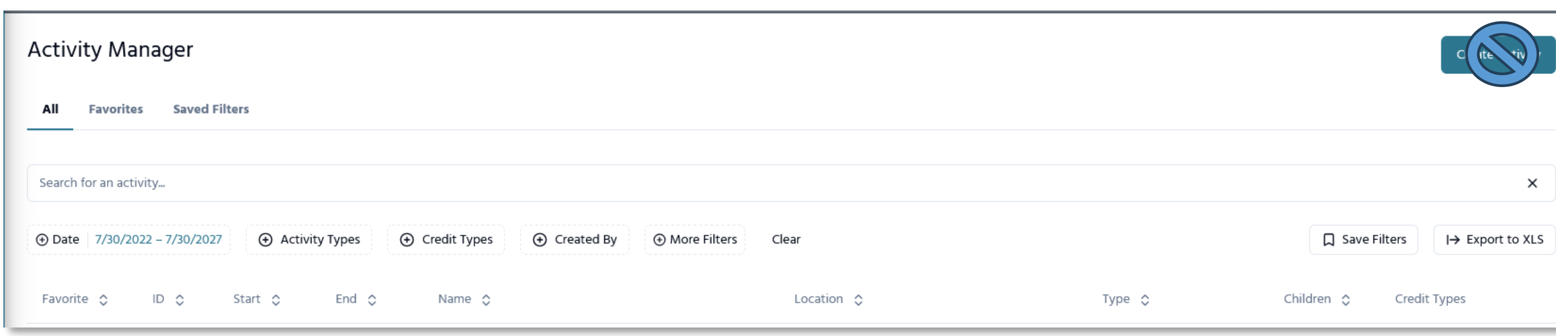
The Activity Manager is used by administrators to manage all continuing education activities. This tool serves as the primary workspace for viewing, editing, approving, and duplicating educational activities. It also supports key functions such as QR code generation, credit assignments, and publication to the Attendee Portal.

First Steps:



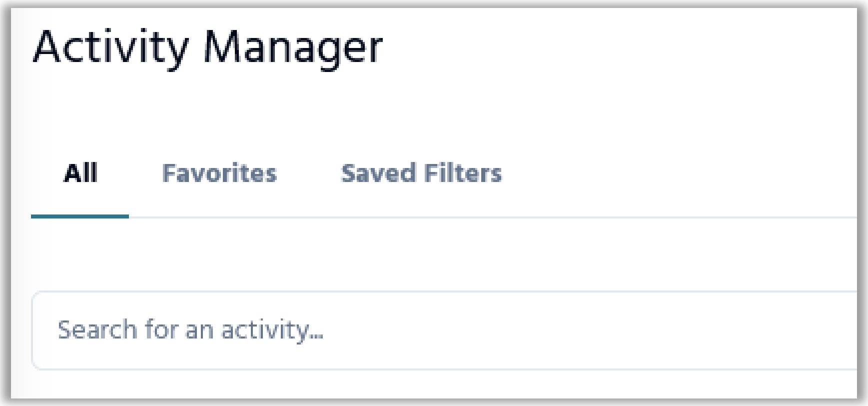
1. **Sign in** to the CE Portal using your UCSF MyAccess credentials or your email and password.
2. Scroll to the bottom of the home page and select the **Administration** link.
3. In the main menu on the left, select **Activities,** then **Activity Manager**.

The Activity Manager screen will display.



The Activity Manager Screen

The Activity Manager has three tabs at the top to help you navigate the list of activities in the system.



All

The *All* tab shows a complete list of all activities to which you have access in the system by default. All columns are sortable, and the search field can be used to locate activities by name.

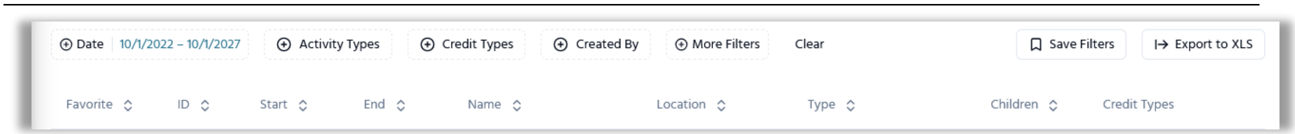
Favorites

The Favorites tab displays activities that have been marked with a blue star in the *All* tab. Click the star icon again to remove the activity from Favorites.

Saved Filters

The Saved Filters tab lists the customized filters you have created and saved using the **Save Filters** button.

Column Descriptions

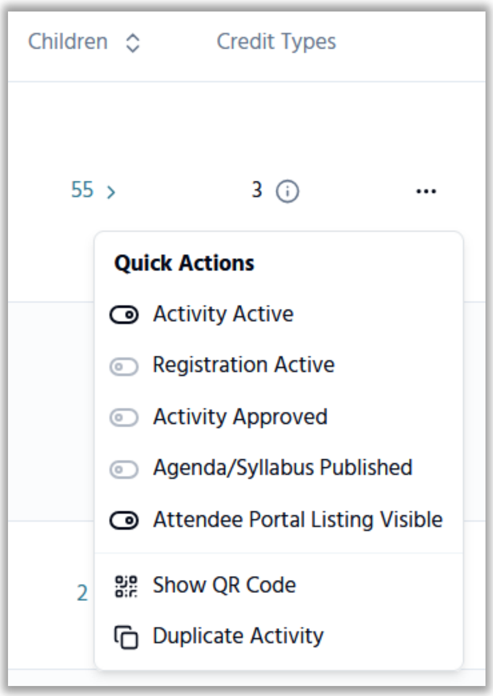


- **Favorite:** Click the star icon to toggle an activity as a favorite. Blue stars appear in the Favorites tab to make it easier to find the activities with which you work the most.
- **ID:** Displays the activity ID. Click the info icon to view who created the activity as well as its "OCME course number."

- **Start/End:** Displays the scheduled start and end date/time of the activity.
- **Name:** Activity name; click the title to open the **Activity Editor** screen for that activity.

- **Location:** The activity location as set in the Activity Editor.
- **Type:** The activity type (for example, RSS, Live Course, or Enduring Material).
- **Children:** Number of associated child activities. (Click the number to view the child activities. This will apply primarily to live serial and regularly scheduled series activities.)
- **Status:** When clicking on the number within the children column in the Activity Manager, this displays the current approval status of the child activities, which could be Incomplete, Pending, or Approved.
- **Credit Types:** Clickable number showing associated credit types.

At the very end of each row is an ellipsis menu, which allows you to access Quick Actions, such as publishing an agenda or publishing the activity to the website, without having to open the activity.



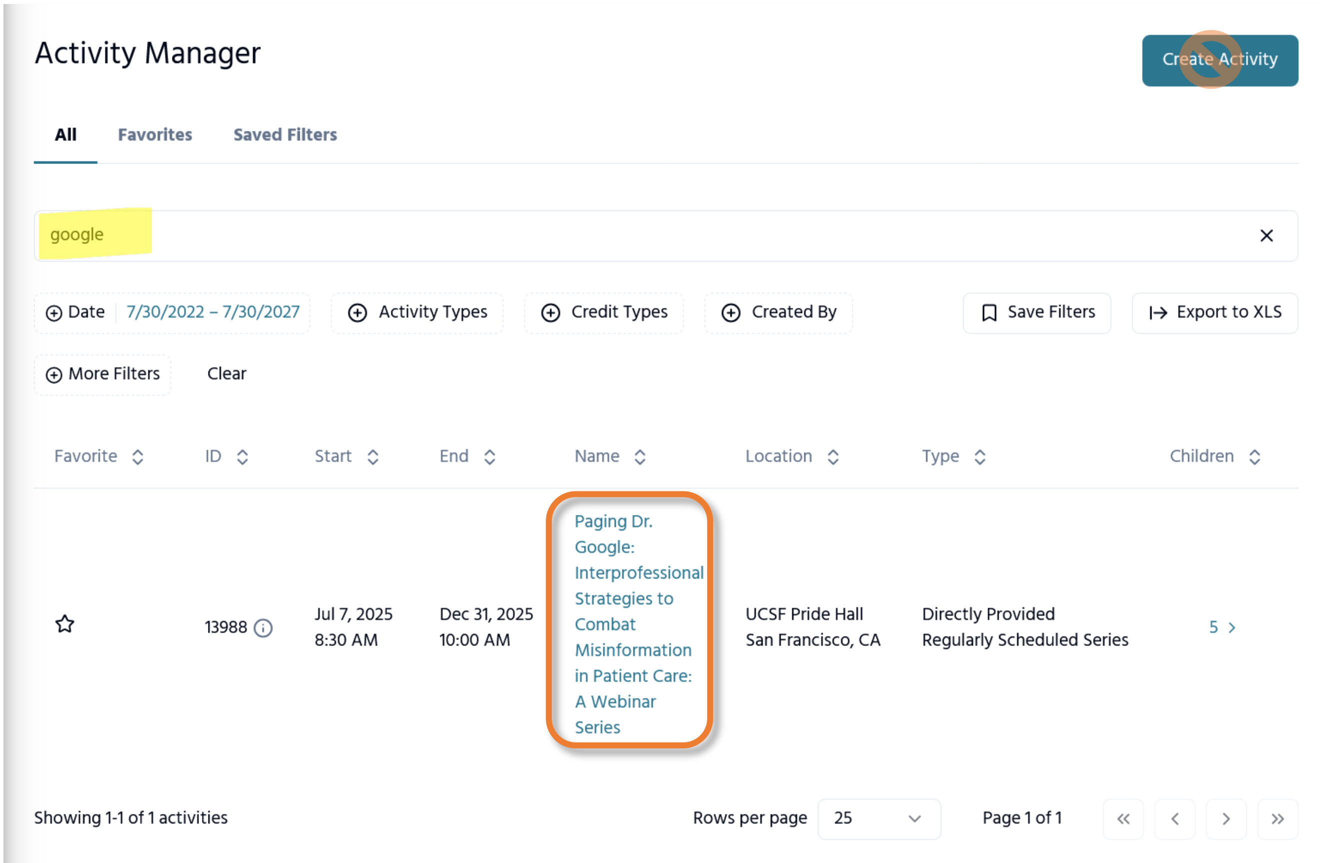
Filtering and Sorting

- **Date:** Filter activities by a specific date range. The default range is three years prior to today and two years after today.
- **Providerships:** Filter by directly- or jointly-provided or Non-accredited activities.
- **Activity Types:** Filter by activity type using the drop-down menu.
- **Credit Types:** Filter by credit type eligibility.
- **Created By:** Filter based on the user who created the activity.
- **More Filters:** Includes inactive activities, child activities, and those with credit request applications in the system.
- **Clear:** Removes all filters to return to the default list of activities.
- **Save Filters:** If there is a set of filters you use often, select this button to save the filter to your **Saved Filters** tab to recall later.
- **Export XLS:** Export the current table view to Excel.

Note: Do not use the **Create Activity** button at the top of the Activity Manager screen. Activities added to the system without the knowledge of the Office of CME will not be reported to our accreditors and may cause confusion with learners. If you need a new activity created without submitting a new credit request, please contact the office for assistance.

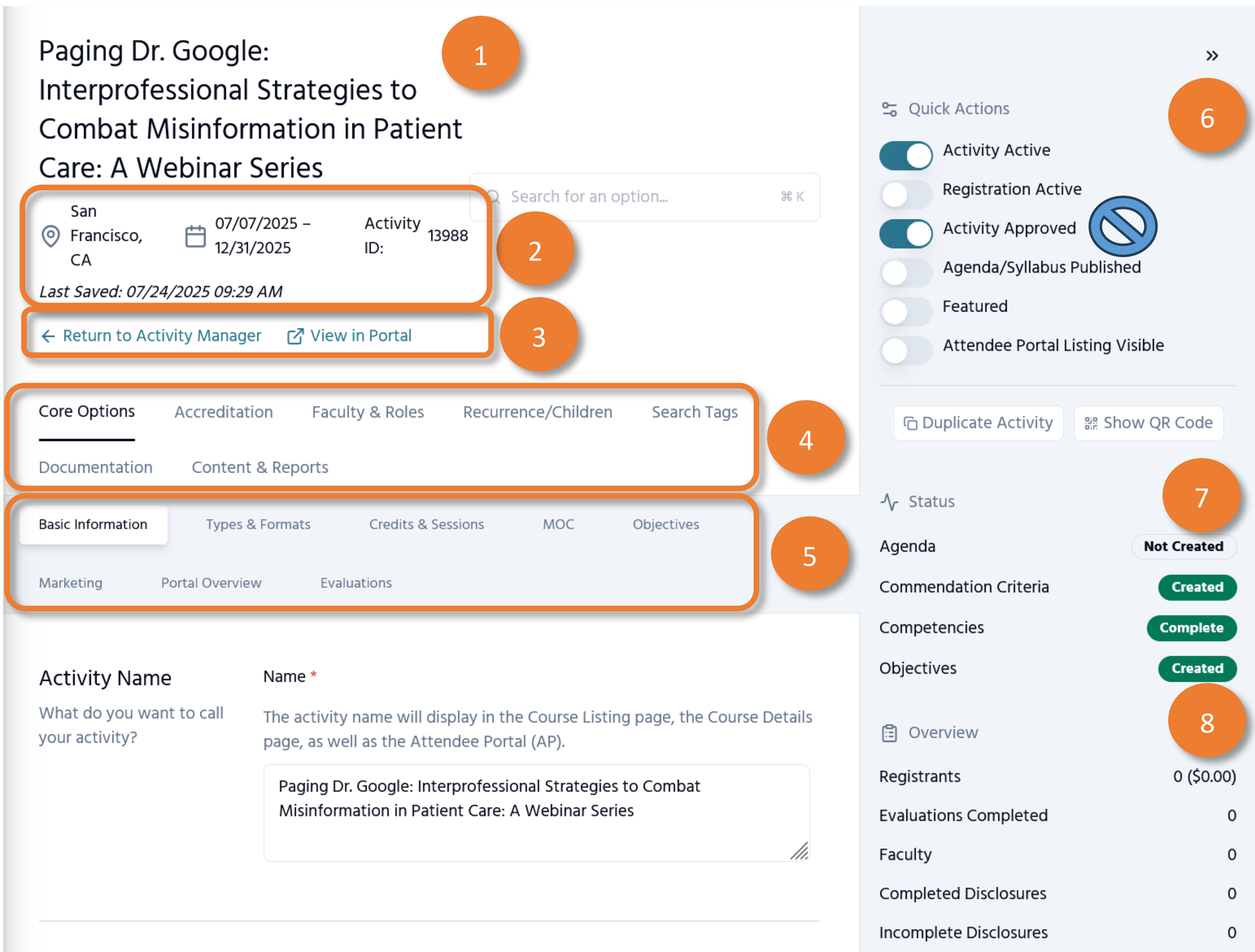
Editing an Activity

In the Activity Manager screen, locate your activity using the search bar, the available filters, or by selecting it from your Favorites tab. You can search for an activity by a word in the activity name, the CE Portal activity ID, or the assigned OCME course number. Select the activity title to open the Activity Editor.



The Activity Editor Screen

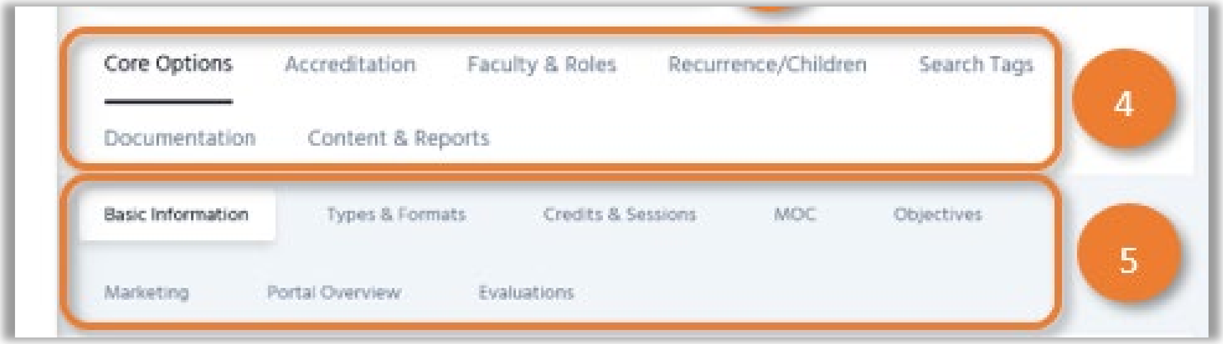
A quick overview of the Activity Editor is shown in the screenshot and legend below.



Legend:

1. Activity Title
2. Location, start and end dates, and the unique system ID.
3. Links to return to the Activity Manager or preview the activity on the website.
4. Editor Tabs
5. Editor Sub-tabs; not all tabs have sub-tabs.
6. Quick Actions Panel
7. Status Panel
8. Overview Panel

The Editor Tabs (4-5)



The editor tabs organize the information about your activity. Some menu tabs also have sub-tabs with additional but related information. How to complete each section is described in the ***Managing your Live Activity*** module. Following is a brief description of each of the main editor tabs. Note that if your activity was added to the system through the credit request application process, much of this information will be completed for you, and you will likely not need to edit it in any significant way.

Core Options (Required)
This section includes general settings such as activity title, type, format, department, location, and contact information. It is often the first tab completed when creating or editing an activity and serves as the foundation for the rest of the activity configuration.

Accreditation (Required)
Use this tab to assign credit types and identify accreditation requirements. It is likely you will not need to make any entries or adjustments to this tab as OCME will have confirmed this information for you.

Faculty & Roles (Required)
Assign faculty, coordinators, and other contributors to the activity. This section allows administrators to link users with specific roles.

Recurrence/Children (As Needed)
Configure recurring activity rules for regularly scheduled series (RSS) or repeat events (live, serial activities). Administrators can define a recurrence pattern and generate child activities that inherit settings from the parent. See the ***Recurrence/Child*** module for more details.

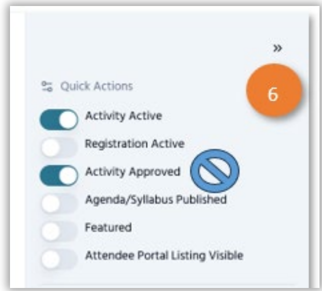
Search Tags (Optional)
Customize the data shown on the Attendee Portal. This includes the *Target Audience*, *Curriculum*, and other flags that affect how the activity appears in search filters or groupings.

Documentation (Informational)
Upload or link files and documents related to the activity. Common uses include agendas, slides, and handouts. Uploaded files can be used throughout other tabs. This is used for internal document management only.

Content & Reports (Informational)
Use this section to link online content and view and generate reports associated with the activity. This screen has a list of shortcuts to other parts of the system for convenient reporting purposes.

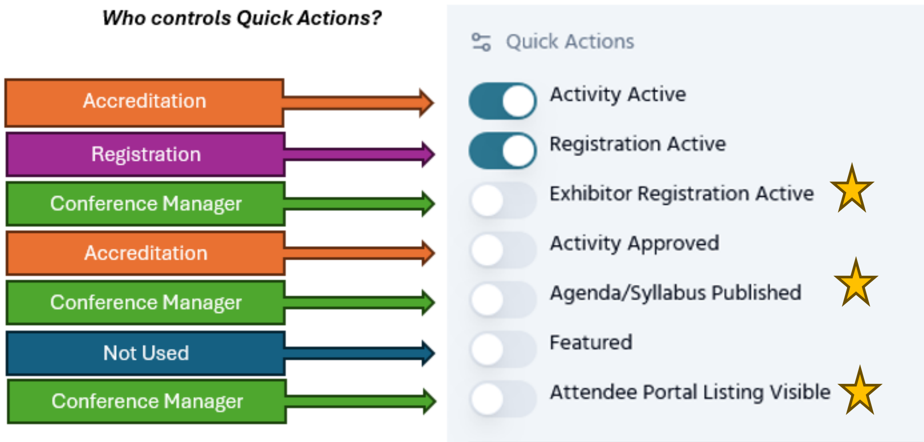
Quick Actions Panel (6)

This section allows rapid updates to approval, registration, and visibility settings. Quick Actions include:



- **Activity Active:** Toggle the activity as Active/Inactive in the system. Note that deactivating an activity will prevent it from showing in search results or editors. This option will be managed by OCME.
- **Registration Active:** Toggle registration form availability. This will display the Registration button on the course webpage when registration is open. This option will be managed by OCME.
- **Exhibitor Registration Active**: Toggle a button for exhibitors to register and pay for promotional opportunities within the system. *Note this will only show when promotional packages/products are set up in the system.*
- **Activity Approved:** Approve or unapprove the activity. This is for the Office of CME use only! Adjusting this setting will affect the application process and display options for your activity. Do not change this toggle.
- **Agenda/Syllabus Published:** Control display of agenda/syllabus in the Attendee Portal.
- **Attendee Portal Listing Visible:** Show or hide the activity from public view.

The infographic below summarizes who does/should control each of the Quick Action toggles:

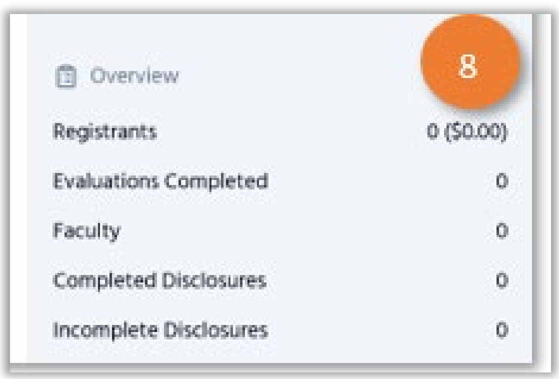


Status Panel (7)

The Status Panel indicates the progress for activity build-out by measuring the completion of key elements required for reporting to our accreditors. Status indicators include *Not Created/Created* or *Incomplete/Complete*. Be sure to visit any section marked *Not Created* or *Incomplete* to ensure your activity is reported properly.

Overview Panel (8)

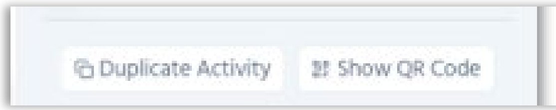
The Overview Panel gives you a quick look at some statistics regarding your activity while it's active.



Registrants – shows the number of registrants and revenue collected to date.
Evaluations Completed – shows the number of respondents to evaluation surveys.
Faculty – indicates the number of faculty assigned to the activity.
Completed Disclosures – shows the number of disclosures that have been completed.
Incomplete Disclosures – indicates the number of disclosures pending.

Links

Between the Quick Actions Panel and the Status Panel, there are two buttons.



- **Show QR Code:** Opens a QR code for the activity, which can be scanned for attendance tracking. This can be downloaded as an image or copied and pasted into a document or slide deck. Note that learners can only record attendance by QR code using the CloudCME® Mobile App; a regular phone camera will not work.
- **Duplicate Activity:** Opens a modal to duplicate the activity. Allows you to enter a new name and start date. Registration products, faculty, and agenda are not copied. Using this functionality may create duplicate entries in the CME calendar and unreported information for the accreditors. Please contact the Office if you need to duplicate an activity for some reason and do not use this button without advisement.