Activity Monitor and Activity Roster [.2223]

Last Modified on 10/22/2022 10:48 am CDT

You are viewing a previous version of this article. See the Activity Monitor and Activity Roster articles for the most current information.

View Activities | Delete or Cancel an Activity | Copy an Activity | About the Activity Roster | About Field Trip Rosters | Activity Roster Filter Fields for Ad hoc Reporting | Mark Payments and Forms as Complete | Add Students to the Roster | Remove Students from the Roster | View a Student's Emergency Contacts | Manage Form Participants and Details | Post to Course Section | Review a Proposed Activity

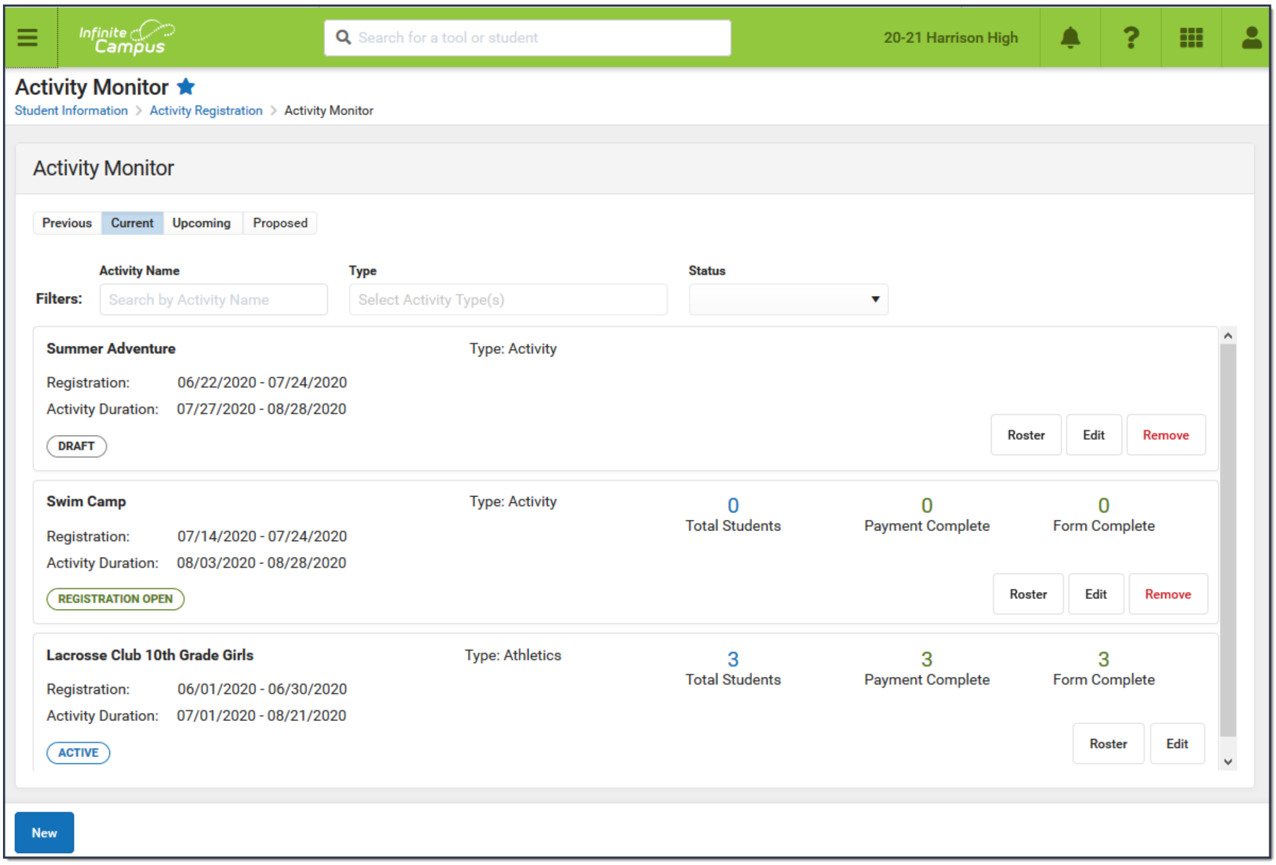
Classic View: Activity Registration > Activity Monitor

Search Terms: Activity Monitor

The Activity Monitor tool can be used by Campus administrators or activity coordinators to manage and monitor existing and upcoming activities. The Activity Roster is accessed on the Activity Monitor tool and provides a detailed view of the students who have registered for an activity.

What can I do?	What do I need to know?

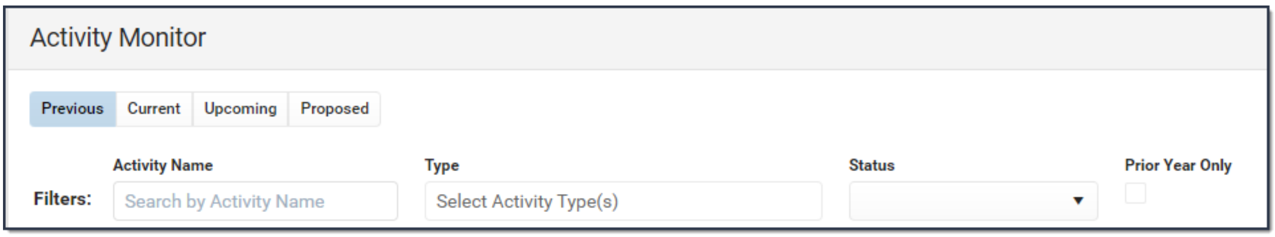
• View Activities
• Delete or Cancel an Activity
• Copy an Activity
• Mark Payments and Forms as Complete
• Add Students to the Roster
• Remove Students from the Roster
• View a Student's Emergency Contacts
• Manage Form Participants and Details
  ◦ Request an eSignature
  ◦ Reassign a Form for eSignature
  ◦ Override an eSignature Request
  ◦ Create a New Contact Log
  ◦ Lock/Complete a Form
• Post to Course Section
• Review a Proposed Activity
	• About the Activity Roster
	• Activity Roster Filter Fields for Ad hoc Reporting
	• About Field Trip Rosters



View Activities

- The initial view provided by the Activity Monitor is a summary view of all activities. This summary view provides a preview of the roster information and the status of each activity.
- To view detailed information about an activity, click the **Edit** button to go to the **Activity Builder**. While editing is limited after registration is open, the Activity Builder still allows you to view all of the details for the activity.

The Activity Monitor allows you to filter activities by using the following options.



Option	Description
Previous	All activities in a **Complete** status.
Current	All activities in a **Draft**, **Registration Open**, **Registration Closed**, or **Active** status.
Upcoming	All activities in **Ready** status.

Option	Description
Proposed	All activities in **Pending**, **In Review**, and **Returned** status. Only users who are given the *Activity Approval* tool right see this option.
Filters	You can further narrow the number of activities that display by using the following filters: • **Activity Name** • **Type** (Activity, Athletics, Field Trip) • **Status**
Prior Year Only	When this checkbox is marked, only activities from the prior calendar year display. This checkbox only displays on the **Previous** tab.

Delete or Cancel an Activity

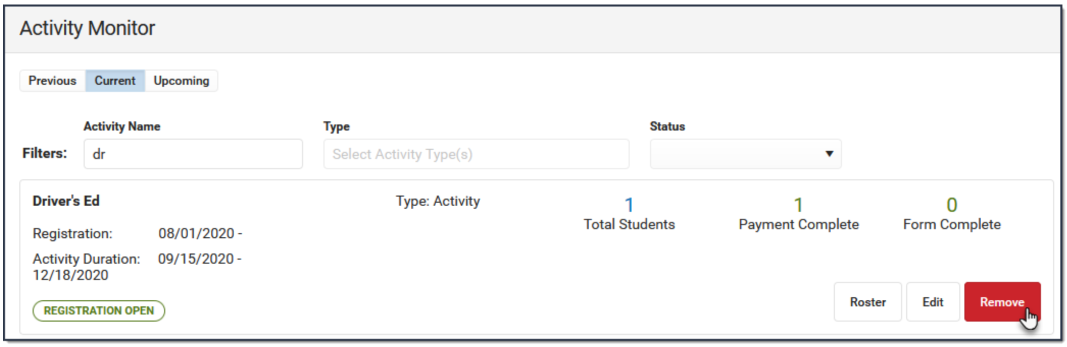
There are two options for removing an activity from the Activity Monitor:

- **Delete** completely removes the activity from the Activity Monitor. You cannot delete an activity if students have already registered. Registered students can be removed from an activity; however, this should only be done after refunds are processed.
- **Cancel** assigns the *Cancelled* status and automatically moves the activity to the **Previous** view on the Activity Monitor. After cancelling an activity, you can see who cancelled the activity, the date on which it was cancelled, and the cancellation reason by clicking the **Edit** button. Cancelled activities can be deleted if the activity does not have any registered students.
  - Click here to expand...

You cannot remove an activity if it is in a *Complete, Active, or Preapproval Pending - Proposal* status.

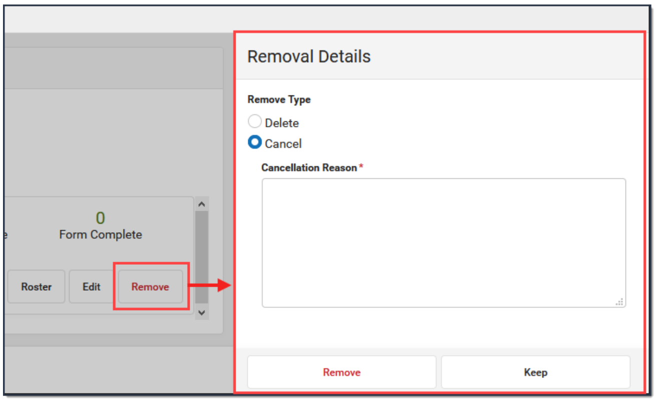
To Delete or Cancel an Activity, you must have Delete tool rights for the Activity Monitor and Calendar rights for the school associated with the activity.

1. Click the **Remove** button.



Result
The Removal Details panel displays.

2. Select **Delete** or **Cancel**.



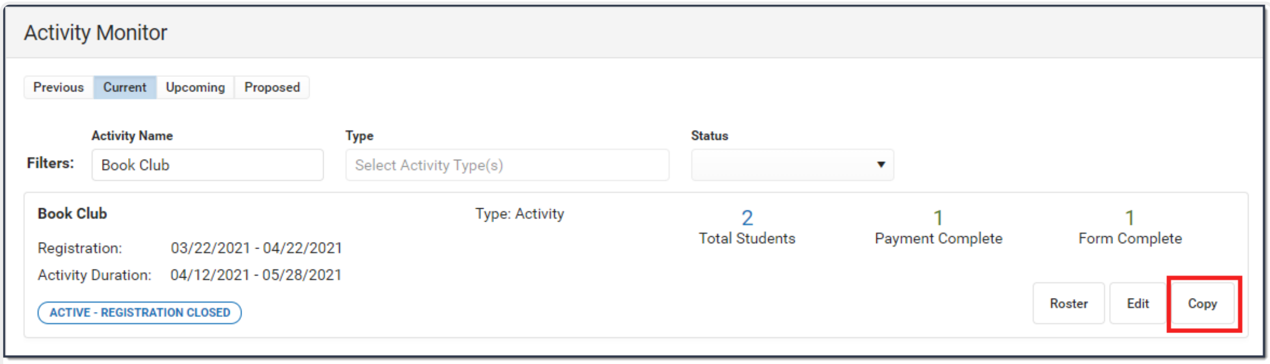
3. Enter a **Cancellation Reason**. This field is required for Cancelled activities.
4. Click **Remove**.
   Result
   A Confirmation message displays.

Copy an Activity

To save time, click the **Copy** button to copy an existing activity. After you click **Copy**, Campus displays the Activity Builder tool in copy mode. See the Activity Builder article for details about each step in the Activity Builder tool.

When you copy an activity, Campus creates a new activity by duplicating most of the information from the existing activity.

- Registration and Activity dates are not copied.
- Campus verifies Activity Owners, Ad Hoc filters and Custom Forms are still active and requires you to update that information if necessary.
- You cannot copy an activity if its Status is Draft, Cancelled, or in any state of Preapproval.
- You must have **Add** rights for the Activity Monitor to copy an activity.
- You can **NOT** finish copying an activity if your activity requires preapproval. See the *Submit an Activity Request for Preapproval* topic in the Activity Builder article for more information.
- Activities that are associated with more than one school and more than one Preapproval Configuration cannot be copied. Instead, create separate activity records for the applicable schools.



Example Copy Button

About the Activity Roster

The Activity Roster provides a detailed view of the students who have registered for an activity. You can see the student's name,ID, and grade, as well as whether their payment and required forms are complete. You can also see the activity option that was purchased. If the student was manually added to the roster, the Option Purchased column will display **Manual**.

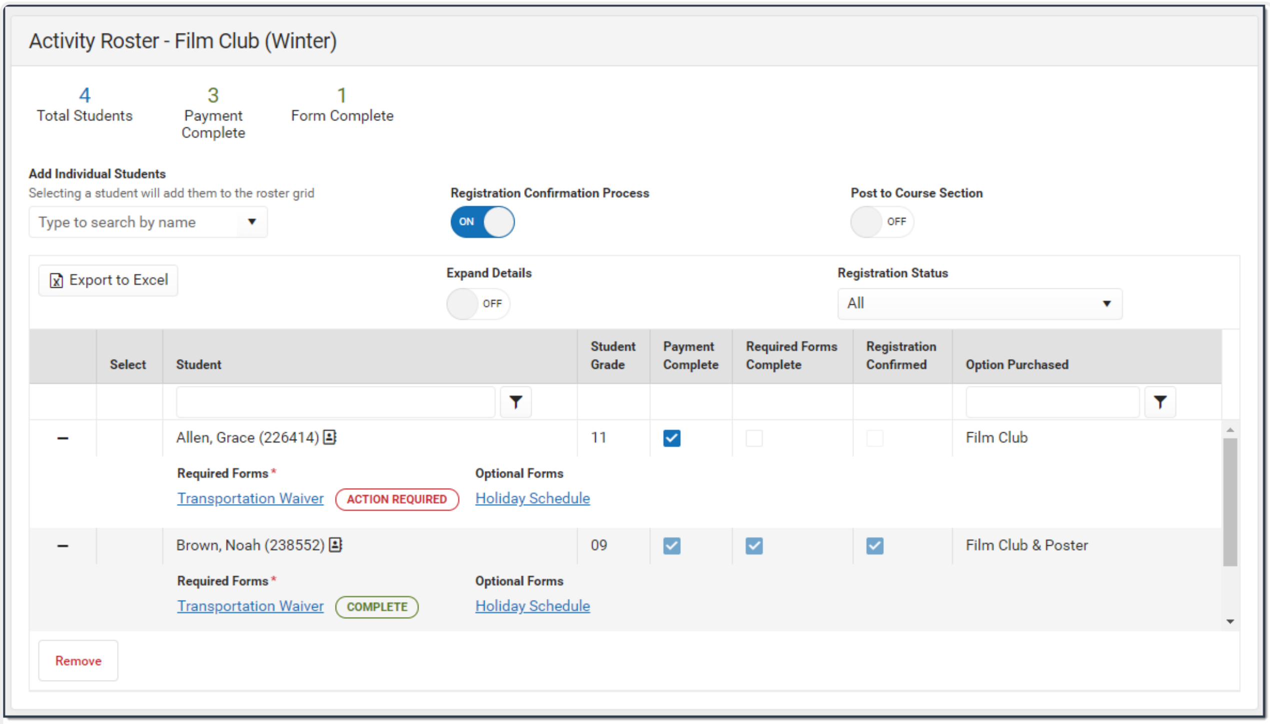
▸ Click here to expand...

Students are added to the Activity Roster and the **Total Students** field is incremented as purchases for Activity or Athletic activity types are made through the School Store. Field Trip Rosters are created differently. See the following About Field Trip Rosters topic for more information.

Once a student has registered for an activity, that activity no longer appears for them in the School Store.

Tips

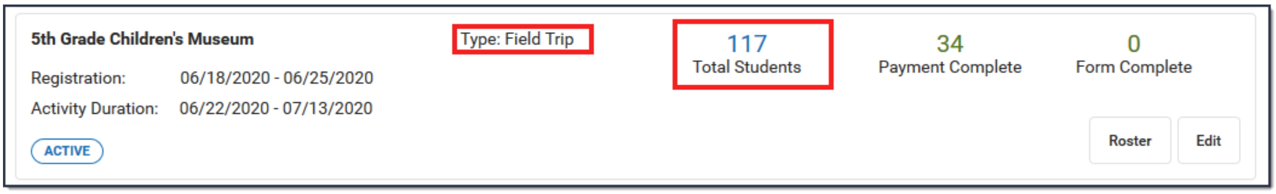
- Click the **Export to Excel** button to save a copy of the roster.
    - The Excel file includes a column for each required and/or optional form. Forms are marked as TRUE when they are complete and FALSE when they are incomplete. Required forms include an asterisk (*) in front of the form name.
- Use the **Registration Status** dropdown list to limit which registrations display.



Example Activity Roster

About Field Trip Rosters

When purchases are made in the School Store for Activity or Athletic activity types, Campus increments the **Total Students** field. This does not occur for Field Trip activities. Instead, Campus displays the number of students returning from the Ad Hoc filter associated with the field trip. If you use the Query Wizard or a Pass-Through SQL Query filter, Campus updates the number of Total Students based on the filter's results. If you use the Selection Editor to create your filter, the number of Total Students does not change.



Activity Roster Filter Fields for Ad hoc Reporting

The Ad hoc Reporting tools allow users to create custom queries and reports on various types of information stored within the Campus database. The following Activity Roster fields are available for creating queries with the Filter Data Type of Student (Student > Activity Registration > Roster)

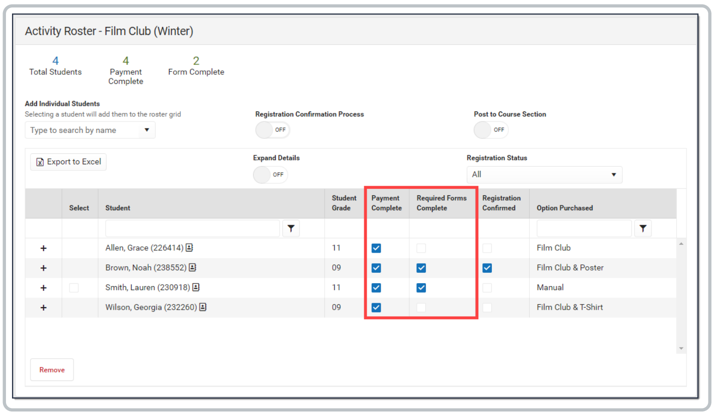
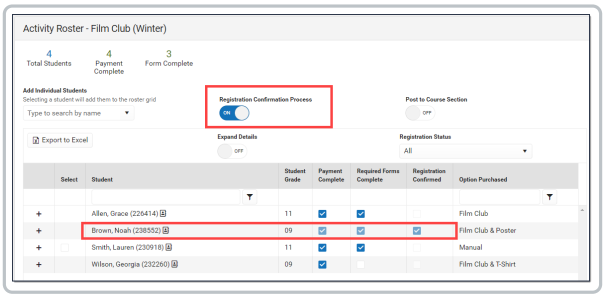
Roster Data	Ad hoc Field Name
Person ID	actRegRoster.personID
Activity Type	actRegRoster.activityType
Activity Name	actRegRoster.activityName
Item Name	actRegRoster.itemName
Activity Start	actRegRoster.activityStart
Activity End	actRegRoster.activityEnd
Registration Start	actRegRoster.regStart
Registration End	actRegRoster.regEnd
Sign Up Date	actRegRoster.signUpDate
Payment Complete	actRegRoster.paymentComplete
Forms Complete	actRegRoster.formsComplete
Registration Complete	actRegRoster.registrationComplete
Posted to Course Section	actRegRoster.postedToCourseSection

Mark Payments and Forms as Complete

As purchases are made through the Campus School Store the **Payment Complete** number will increment. This number will also increment when you manually mark the **Payment Complete** checkbox.

The **Payment Complete** and **Required Forms Complete** checkboxes can be manually marked as complete or can be automatically marked complete if the **Registration Confirmation Process** is turned ON.

Process	Description

<table>
<tr><th>Process</th><th>Description</th></tr>
<tr><td>Manual</td><td>To manually mark the Payment Complete or Form Complete checkbox, click the Roster button to display the Activity Roster screen. From here you can mark the necessary checkboxes. Click Save to complete your changes.

</td></tr>
<tr><td>Automatic</td><td>If the Registration Confirmation Process is turned ON the Payment Complete, Required Forms Complete, and Registration Confirmed columns are automatically marked IF the payment is complete, the parent and/or student signed any required forms that require an e-signature, and the required forms are locked.
If there are optional forms missing signatures, the Registration Confirmation Process continues and marks the Registration Confirmed checkbox..

</td></tr>
</table>

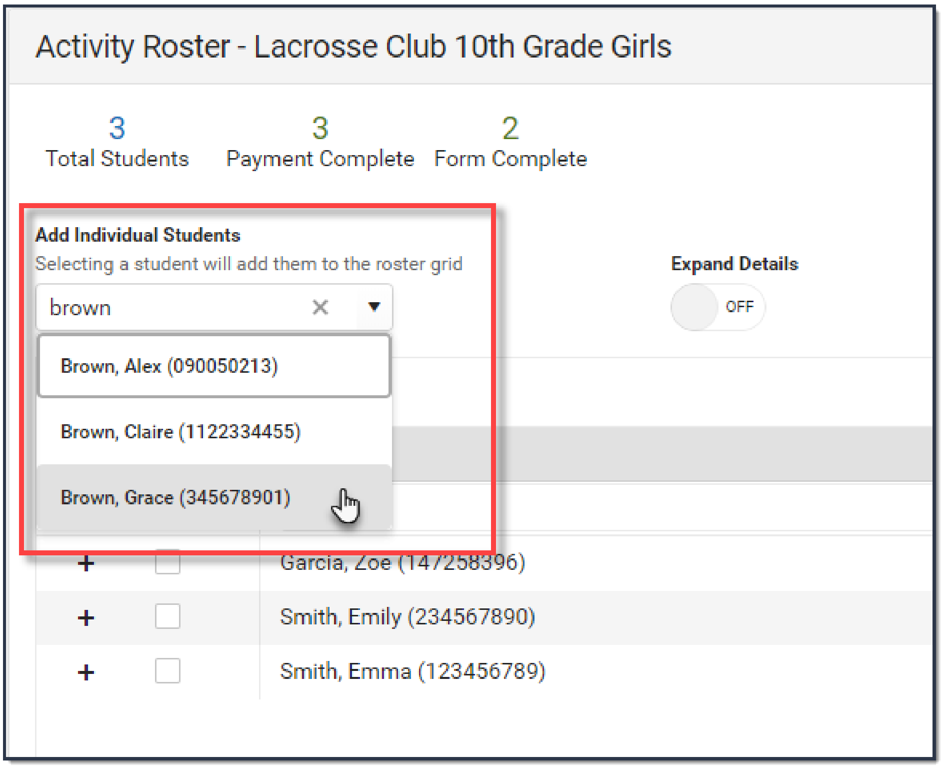
Add Students to the Roster

You can manually add students to an activity roster if they are enrolled in the school associated with the activity. This feature is useful if you would like to allow a student to participate, but they do not match the criteria in the Ad Hoc filter selected on the activity.

When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. First, district staff must fill out any fields on the form that are marked for staff and then the form can be filled out in the Campus Student and/or Campus Parent Portal. (Fields can be marked for staff when you define rules for an interactive form. See the Custom Forms article for more information.) The only exception to this process is if you manually mark the *Payment Complete* checkbox and do NOT open the forms. In this scenario, district staff do not need to fill out any fields on the form that are also marked for portal users or request an eSignature. The exception only applies if the Activity Registration viewing tool is enabled in the Display Options.

District staff can also override the eSignature in the Activity Roster as needed. See the following topic on this page for more information: Manage Form Participants and Details.

1. Click the **Roster** button on the activity.
   Result
   The Activity Roster displays.
2. Type the student's name in the **Add Individual Students** field and select the student when their name displays.

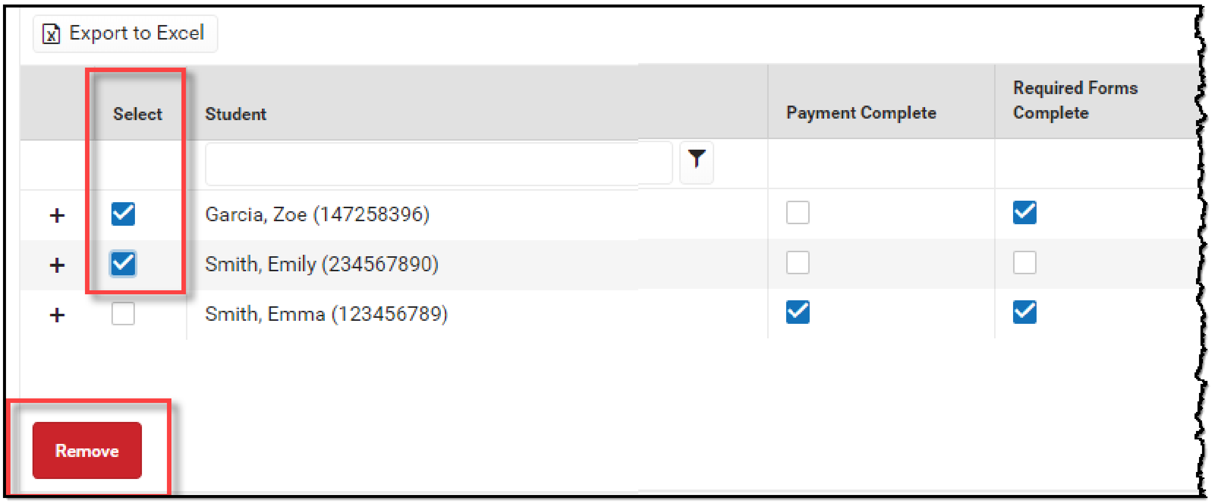


   Result
   Campus adds the student to the roster. The roster displays names in alphabetical order.
3. Mark the **Payment Complete** and/or **Required Forms Complete** checkboxes. *Optional*
4. Click **Save** to save your changes.

Remove Students from the Roster

You can manually remove students from the roster if the student was manually added and has not paid. If the Payment Complete checkbox is not marked, the student can be removed.

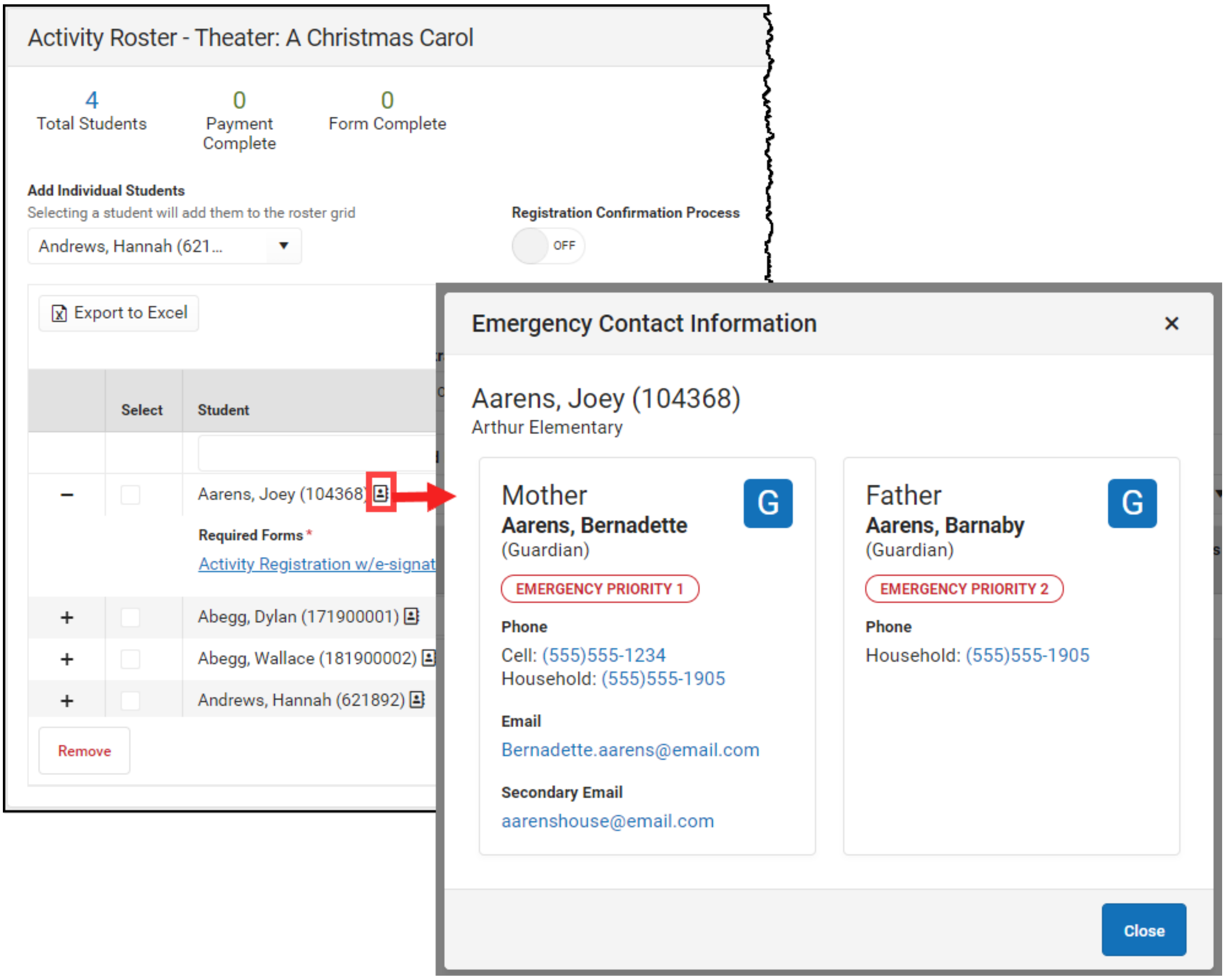
1. Click the **Roster** button on the activity.
   Result
   The Activity Roster displays.
2. Mark the checkbox in the **Select** column for the student(s) you want to remove.



3. Click the **Remove** button.
   Result
   Campus remove the student from the table.
4. Click **Save** to save your changes.

View a Student's Emergency Contacts

Emergency contact information for each student is available on the Roster screen. Click the button next to the student's name to quickly access contact information that is already stored in Campus.



Manage Form Participants and Details

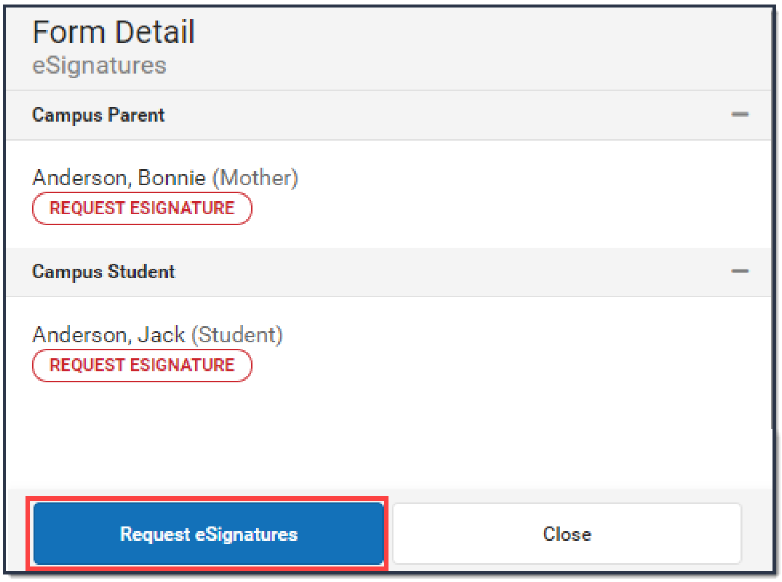
Request an eSignature | Reassign a Form for eSignature | Override an eSignature Request | Create a New Contact Log | Lock/Complete a Form

Activity Registration supports interactive custom forms. Interactive forms allow users to enter data directly into the PDF and electronically sign when registering for an activity. You can use the Activity Roster to review these forms and ensure everything is filled out correctly and/or signed.

When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool. District staff can also fill out forms (except for the eSignature) in the Activity Roster if necessary.

Request an eSignature

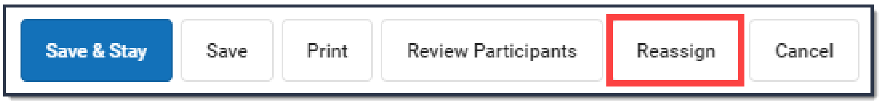
After you manually add a student to a roster and complete forms as necessary, you can request an eSignature from parent/guardians and students when the form requires an eSignature. Requesting eSignatures makes the form read-only; i.e., you cannot make additional changes.

1. Select the form that requires an eSignature.
   Result
   The Form displays.
2. Click **Review Participants**.
   Result
   The Form Details panel displays.
3. Click the **Request eSignatures** button.
   

   Result
   A confirmation message displays.
4. Click **Request eSignatures**.
   Result
   A confirmation message displays and the Form Detail panel closes. The eSignature statuses change to **Pending** on the Form Detail panel. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool.

Reassign a Form for eSignature

This option allows you to reassign a custom form to a user who did not have an active Campus Student or Campus Parent account when the student was registered for an activity.

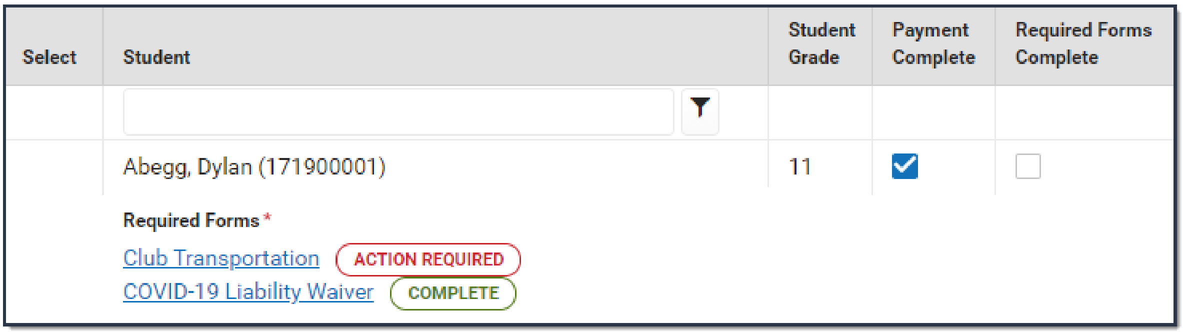
1. Select the form that requires a signature.
   Result
   The form displays in a side panel.
2. Click the **Reassign** button.
   

   Result
   An error message displays if the users does not have an active portal account. Otherwise, a confirmation message displays and the user can go to the Documents tool in the portal and complete the form.

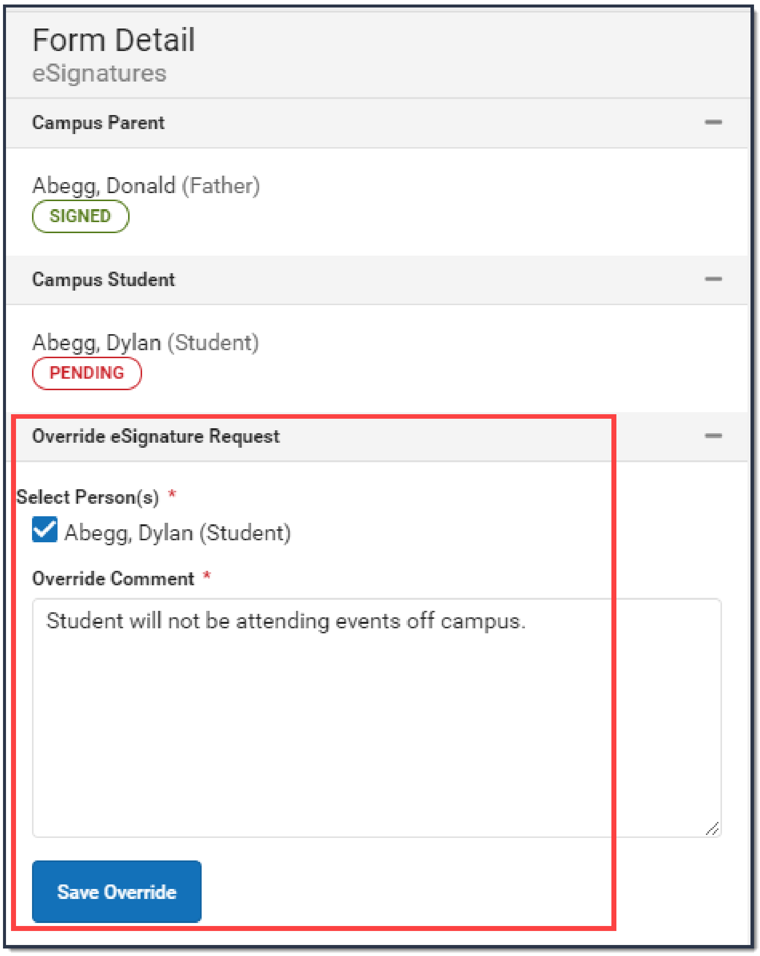
Override an eSignature Request

District staff cannot sign for students/parents; however, the eSignature can be overridden. As a best practice, create a new contact log to document any communication that resulted in overriding the eSignature.

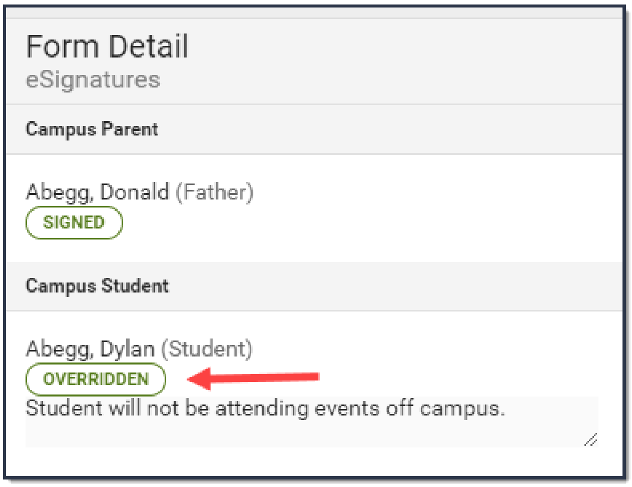
Click here to expand...

1. Select the form that requires a signature.
   It will say **Action Required** next to the form.
   

   Result
   The form displays.
2. Click **Review Participants**.
   Result
   The Form Details panel displays.
3. Select the checkbox next to the person's name then enter Comments explaining why you are overriding the eSignature.



4. Click **Save Override**.
   Result
   A confirmation message displays as the status changes to Overridden.



Create a New Contact Log

The Activity Roster allows you to record an communication you have with participants by phone, mail, email or in person.

1. Select the form where you want to add a Contact Log.

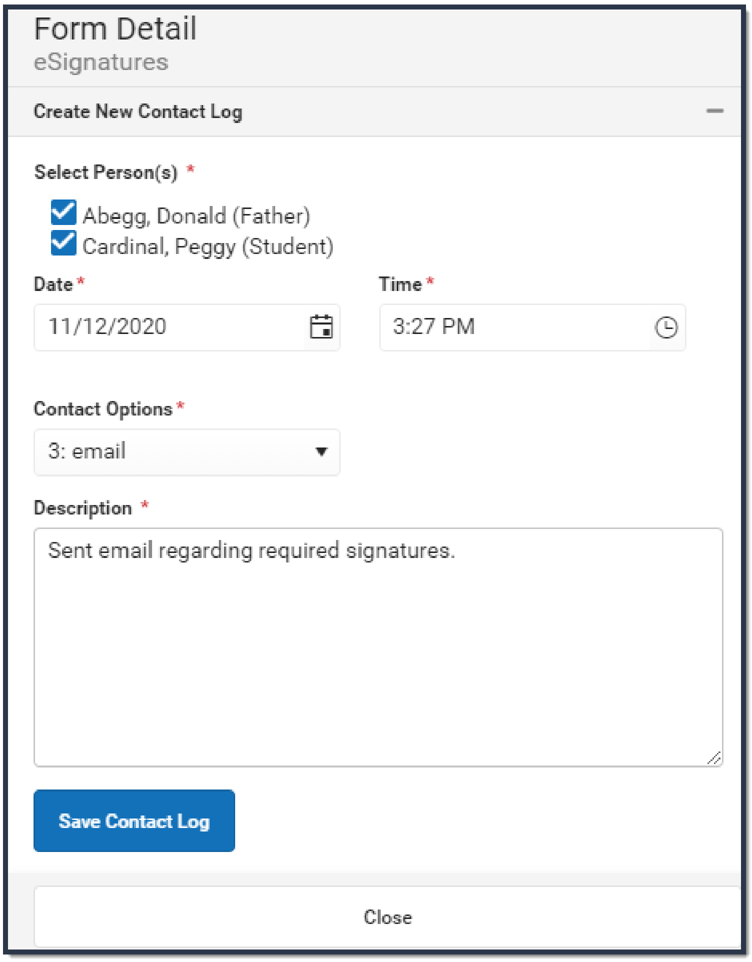
Result

The form displays.

2. Click **Review Participants.**

   Result

   The Form Details displays.



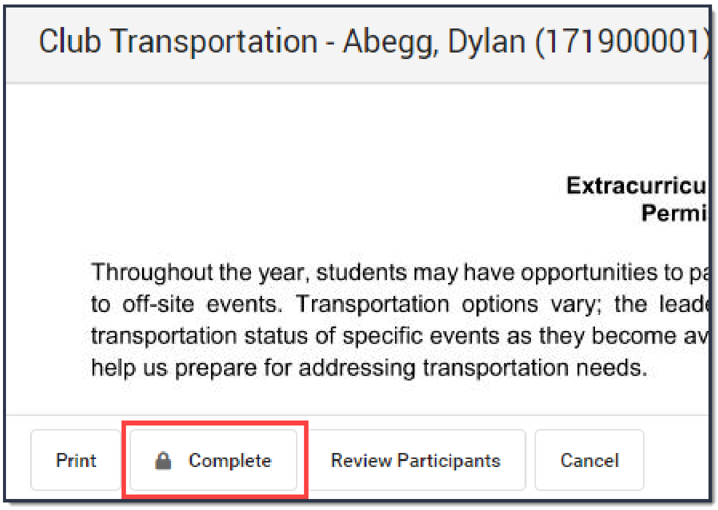
3. Mark the checkboxes next to the appropriate person(s).
4. Adjust the Date and Time as necessary.
5. Select one of the following **Contact Options**: *1:Telephone, 2: U.S. Mail, 3: email, 4: In Person***.**
6. Enter a **Description**.
7. Click **Save Contact Log**.

   Result

   Campus creates a contact log for each person you selected.

Lock/Complete a Form

Required forms display the status **Action Required** until the form is locked. (Forms for manually added students do not display that status until the form is first opened.) A locked form indicates no additional changes can be made.

1. Select the form that you want to Lock. It will say **Action Required** next to the form.
   Result
   The form displays.
   

2. Click the **Complete** button.
   Result
   The Complete Form confirmation message displays.
3. Click **Complete**.
   Result
   A confirmation message displays saying the form is locked and the form's status changes to *Complete*.

Post to Course Section

The Post to Course Section feature allows you to associate an activity with a Course and Section and update the roster once the activity is in the Registration Closed, Active - Registration Open, or Active - Registration Closed status. Posting registered students to a Course Section allows you to track attendance using Campus Instruction and puts the activity on the student's schedule.

For access to attendance and messaging options, the employee must have **Teacher** marked on their District Assignment or be assigned the **Teacher** role on their Work Assignment (HR Only).

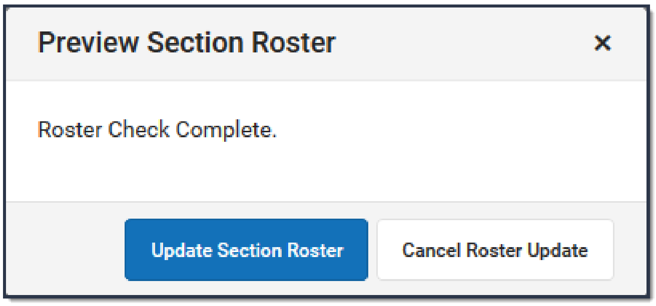
Only students who have the Payment Complete and Required Forms marked as Complete can be added to a Course Section roster.

If students are added to the Activity Registration roster after the initial section roster is updated, you can complete the following steps again and Campus will update the section roster with the newly added students.

This process only adds students to the Course Section Roster. If you need to remove a student from this roster, you must remove them manually using the Section Roster Setup tool.

1. Once registration is closed, slide the **Post to Course Section** toggle to **ON**.
   Result
   The Post to Course Section area displays.
   ▸ Click here to expand...
2. Select the **Calendar**, **Course** and **Section**.
3. Click the **Preview Section Roster** button.

   This button is enabled when registration is closed.

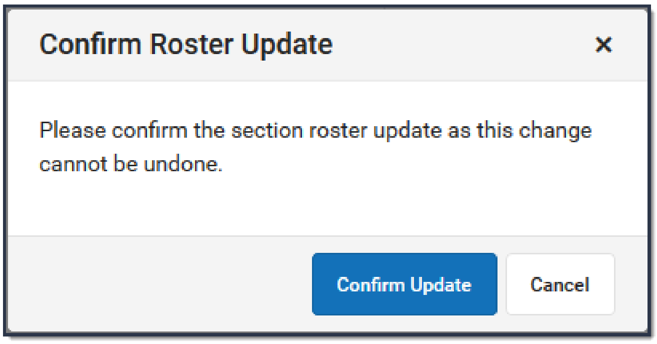
   Result
   A preview message displays.
   

   If there are students who cannot be added to the roster, their names display on the preview message. This could include students who do not have an enrollment record or a primary

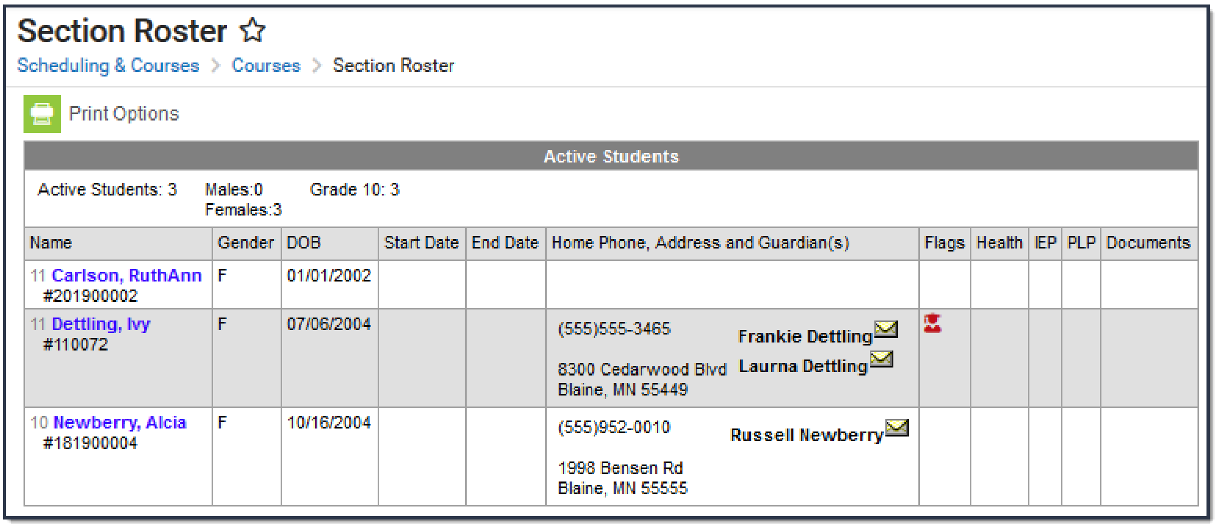
enrollment is missing. After reviewing these students and correcting any issues, you can complete these steps again to the append these students to the section roster.

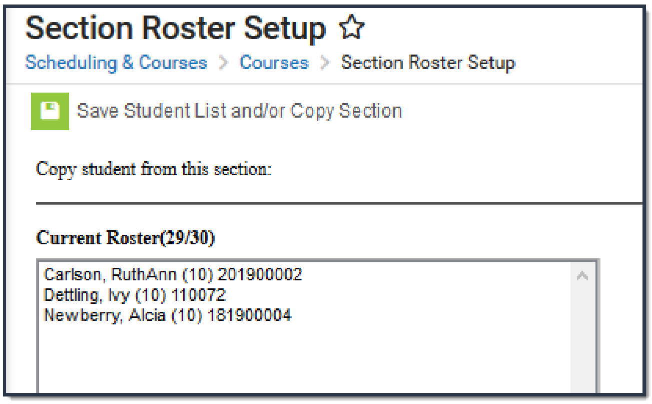
‣ Click here to expand...

4. Click the **Update Section Roster** button.
   Result
   A confirmation message displays.



5. Click the **Confirm Update** button.
   Result
   Campus updates the Section Roster.



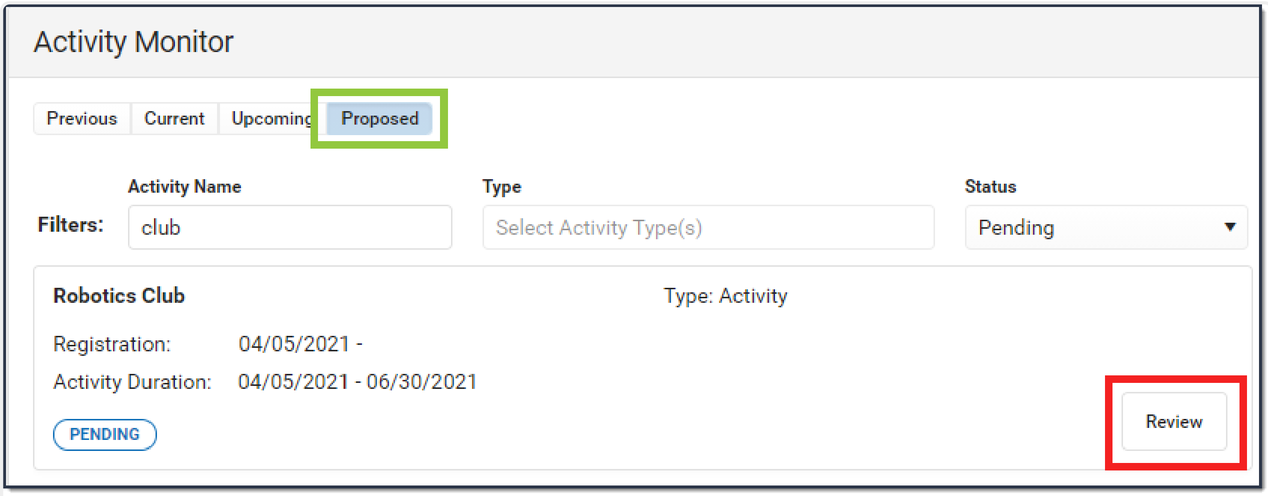


Review a Proposed Activity

Using the Activity Dashboard, users can create and submit activities for approval. Once an activity is submitted for approval, it displays in the Activity Monitor in the Proposed area. Only users who are given the *Activity Approval* tool right, can review proposed activities.

When reviewing, keep the following items in mind.

- You cannot review your own proposed activity.
- If an Ad Hoc filter is not provided by the user, you can add one on the Build Roster screen.
- If the user who submitted the activity does not have access to Ad hoc, a description of the group they want for the activity may be included.
  - Click here to expand...
- On Step 4. Link to Portal, the **Restrict to Associated School Enrollments** checkbox is automatically marked.
  - Click here to expand...
- If someone Recalls an activity that they submitted, there is no notification that this occurred. Campus just removes the proposed activity from the Proposed screen.
- Not all fields are required during the review; however, for an activity to be eligible for approval, the following fields must be filled in.
  - Adhoc Filter
  - Form Title
  - Categories
  - Product Type

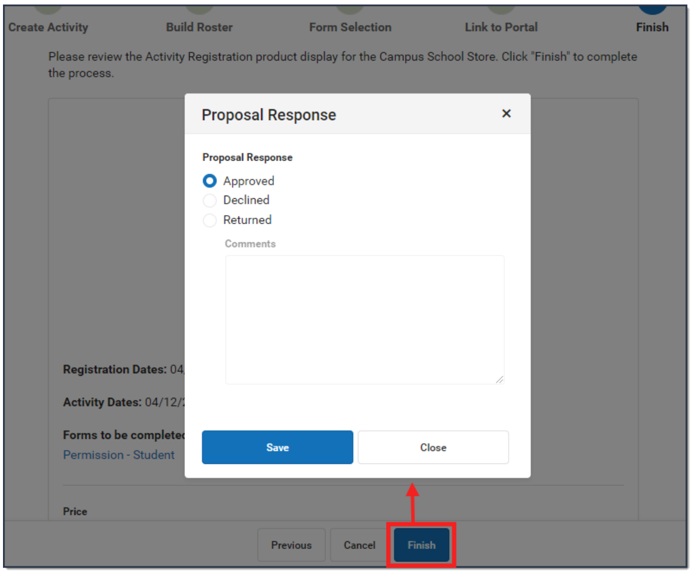


Example Proposed Activity

Use the following steps to review Activities that are in a **Pending** or **In Review** status.

1. Click the **Review** button.
   Result
   The Activity Builder displays on Step 1 Create Activity.
2. Review each screen in the Activity Builder and make any necessary changes.

   > **Tip**: You can skip screens by clicking the number at the top of the page. You might want to skip to Step 5 Finish if you already know the proposed activity must be declined or returned.

3. On Step 5 Finish, click **Finish**.
   Result
   The Proposal Response options display.
   

4. Select one of the following options.
   - **Approved** - The activity will display in the Current or Upcoming area with the appropriate status.
   - **Declined** - The activity is removed from the Activity Monitor and displays in the Previous area of the Activity Dashboard with a status of *Declined*. When you select this option, the Comments text box is enabled and you must leave notes for the user who submitted the activity.
   - **Returned** - The activity displays in the Proposed area with the status *Returned*. When you select this option, the Comments text box is enabled and you must leave notes for the user who submitted the activity. The activity displays in the Activity Dashboard with the status *Returned*. The user who submitted the activity can review your comments, make changes, and re-submit the activity for approval.
5. Click the **Save** button when you are finished.
   Result
   A Notification is sent to the user who submitted the proposed activity.

Previous Version

Activity Monitor and Activity Roster [.2124 - .2219]