

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

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#### 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?
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ivity Monitor 🚖 nt Information > Activity Registration > Activity Mo	pnitor					
ctivity Monitor						
revious Current Upcoming Proposed						
Activity Name	Туре	Status				
ters: Search by Activity Name	Select Activity Type(s)		•			
Summer Adventure	Type: Activity					
Registration: 06/22/2020 - 07/24/2020	)					
Activity Duration: 07/27/2020 - 08/28/2020	)			Roster Edit	Remove	
DRAFT				Roster Edit	Remove	
Swim Camp	Type: Activity	0	0	0		
Registration: 07/14/2020 - 07/24/2020	)	Total Students	Payment Complete	Form Co	mplete	
Activity Duration: 08/03/2020 - 08/28/2020	)					
REGISTRATION OPEN				Roster Edit	Remove	
Lacrosse Club 10th Grade Girls	Type: Athletics	3	3	3		
Registration: 06/01/2020 - 06/30/2020	)	Total Students	Payment Complete	Form Co	mplete	
Activity Duration: 07/01/2020 - 08/21/2020	)					
ACTIVE				Ros	ter Edit	

## **View Activities**

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- 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.

Activity	y Monitor						
Previous	Current	Upcoming	Proposed				
	Activity Nam	e		Туре	Status		Prior Year Only
Filters:	Search by	Activity N	lame	Select Activity Type(s)		•	

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



Option	Description
Proposed	All activities in <b>Pending</b> , <b>In Review</b> , and <b>Returned</b> status. Only users who are given the <i>Activity Approval</i> 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 <b>Previous</b> 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* or *Active* 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.

Activity Monitor Previous Current Upcoming				
Activity Name Filters: dr	Type Select Activity Type(s)	Status	•	
Driver's Ed Registration: 08/01/2020 - Activity Duration: 09/15/2020 -	Type: Activity	1 Total Students	<b>1</b> Payment Complete	0 Form Complete
12/18/2020 REGISTRATION OPEN			Roste	er Edit Remove



#### Result

The Removal Details panel displays.

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

	Removal Details	
O Form Complete Roster Edit Remove	Remove Type Delete Cancel Cancellation Reason*	
	Remove Keep	

- 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 or Cancelled.
- You must have **Add** rights for the Activity Monitor to copy an activity.
- Once you start the Copy process, progress is not saved. So, do not stop until you have finished.

Activity Previous	y Monitor				
Filters:	Activity Name Book Club	Type Select Activity Type(s)	Status	•	
			2 Total Students	1 Payment Complete	1 Form Complete Roster Edit Copy
		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. You can choose from the following options: *All, Waiting Signatures Required Forms, Action Needed Required Forms, Optional Forms In Progress, or Required Registration Complete.*

4 otal Stu	dents	3 1 Payment Form Complete Complete							
ecting a	ual Students student will a search by na	dd them to the roster grid ame	Registration Confirm	ation Process	5		Post to Course Se	ection	
🖈 Exp	ort to Excel		Expand Details			ł	Registration Status All	•	
	Select	Student		Student Grade	Payment Complete	Required Forms Complete	Registration Confirmed	Option Purchased	
			T						T
-		Allen, Grace (226414) 🛓		11	<b>~</b>			Film Club	
		Required Forms* <u>Transportation Waiver</u> ACTION RE	Optional Forms QUIRED Holiday Sched	ule					
-		Brown, Noah (238552) 🛋		09				Film Club & Poster	
		Required Forms* <u>Transportation Waiver</u> COMPLET	Optional Forms Holiday Sched	ule					
	e								

# **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.

5th Grade Children's Museum	Type: Field Trip	117	34	0
Registration: 06/18/2020 - 06/25/2020		Total Students	Payment Complete	Form Complete
Activity Duration: 06/22/2020 - 07/13/2020				
ACTIVE				Roster Edit

# 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

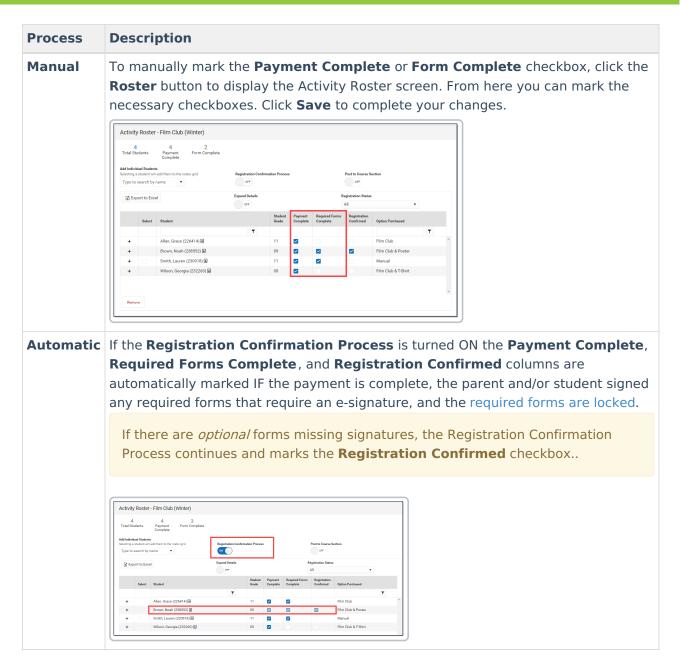
### Mark Payments and Forms as Complete

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





# **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.

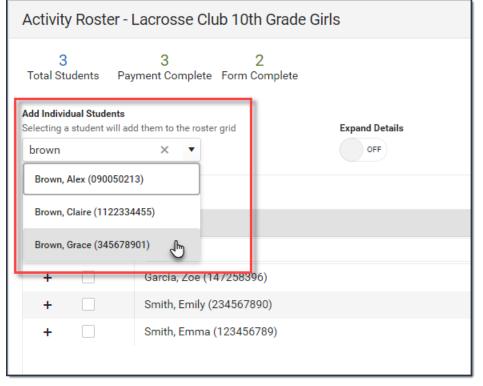
When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. First, district staff must fill out any fields on the form that are marked for staff and then the form can be filled out in the Campus Student and/or Campus Parent Portal. (Fields can be marked 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.

- Click the **Roster** button on the activity. Result
  - The Activity Roster displays.
- 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.

	Select	Student		Payment Complete	Required Form Complete
			T		
+		Garcia, Zoe (147258396)			
+		Smith, Emily (234567890)			
+		Smith, Emma (123456789)		$\checkmark$	$\checkmark$

3. Click the **Remove** button.

#### Result

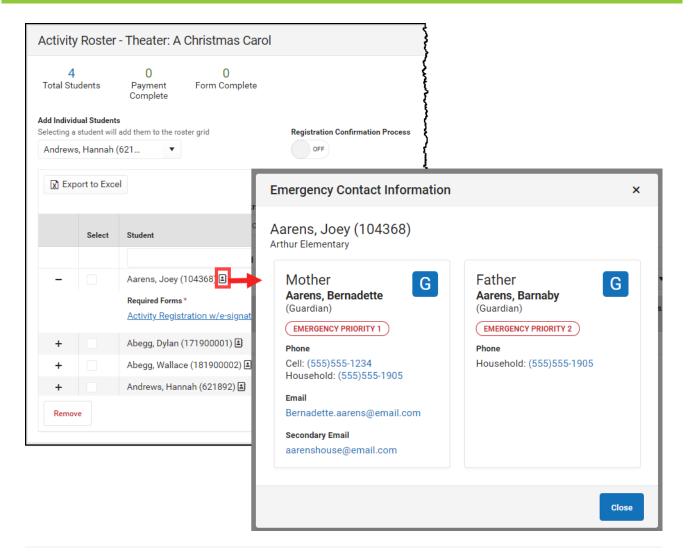
Campus remove the student from the table.

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.

Form Detail eSignatures	
Campus Parent	-
Anderson, Bonnie (Mother)	
Campus Student	-
Anderson, Jack (Student)	
Request eSignatures	Close

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

Select	Student	Student Grade	Payment Complete	Required Forms Complete
	Abegg, Dylan (171900001)	11		
	Required Forms*         Club Transportation       ACTION REQUIRED         COVID-19 Liability Waiver       COMPLETE			

#### 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.

Form Detail eSignatures	
Campus Parent	-
Abegg, Donald (Father)	
Campus Student	-
Abegg, Dylan (Student)	
Override eSignature Request	-
Select Person(s) *	
🗹 Abegg, Dylan (Student)	
Override Comment *	
Student will not be attending events off campus.	
Save Override	

4. Click Save Override.

#### Result

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A confirmation message displays as the status changes to Overridden.

Form Detail eSignatures
Campus Parent
Abegg, Donald (Father)
Campus Student
Abegg, Dylan (Student) OVERRIDDEN Student will not be attending events off campus.

### **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

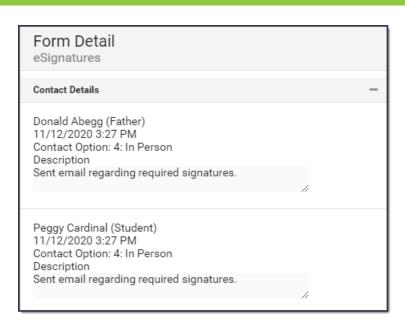
The Form Details displays.

Form Detail eSignatures	
Create New Contact Log	-
Select Person(s) * ✓ Abegg, Donald (Father) ✓ Cardinal, Peggy (Student)	
Date*	Time *
11/12/2020	3:27 PM 🕒
Contact Options* 3: email Description * Sent email regarding required s	signatures.
Save Contact Log	
	Close

- 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.



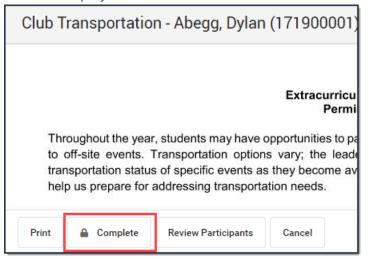
### Lock/Complete a Form

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.

ampus



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.

Preview Section Roster	×
Roster Check Complete.	
Update Section Roster	Cancel Roster Update

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.

Confirm Roster Update	×
Please confirm the section roster update as this change cannot be undone.	e
Confirm Update Cance	I

5. Click the **Confirm Update** button.

#### Result

Campus updates the Section Roster.

Section Roste Scheduling & Courses		es > Secti	on Roster							
📄 Print Options										
					Active Students					
Active Students: 3 Males:0 Grade 10: 3 Females:3										
Name	Gender	DOB	Start Date	End Date	Home Phone, Address and Guardian(s)	Flags	Health	IEP	PLP	Documents
11 Carlson, RuthAnn #201900002	F	01/01/2002								
11 Dettling, Ivy #110072	F	07/06/2004			(555)555-3465 Frankie Dettling 8300 Cedarwood Blvd Laurna Dettling Blaine, MN 55449	2				
10 Newberry, Alcia #181900004	F	10/16/2004			(555)952-0010 Russell Newberry⊠ 1998 Bensen Rd Blaine, MN 55555					
Section Rost Scheduling & Courses	> Cour	ses > Sect		Setup						

Copy student from this section:

#### Current Roster(29/30)

Carlson, RuthAnn (10) 201900002 Dettling, Ivy (10) 110072 Newberry, Alcia (10) 181900004

# **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

Previous	Current Upcoming Prop	sed	
	Activity Name	Туре	Status
ilters:	club	Select Activity Type(s)	Pending
Roboti	cs Club	Type: Activit	ty
Registr	ration: 04/05/2021 -		
Activity	y Duration: 04/05/2021 - 06	/30/2021	Review

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.

the process.	Propos	al Response		×	
	Proposal R Proposal R Declin Return Comm	esponse wed ned ned			
Registration Activity Date Forms to be Permission -	s: 04/12/: completed	Save	Close	6	
Price			1		

- 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.