Activity Monitor

Activity Registration Overview

Classic View: Activity Registration > Activity Monitor

Search Terms: Activity Monitor

On this page

- Activity Roster Filter Fields for Ad hoc Reporting
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Introduction to Activity Registration

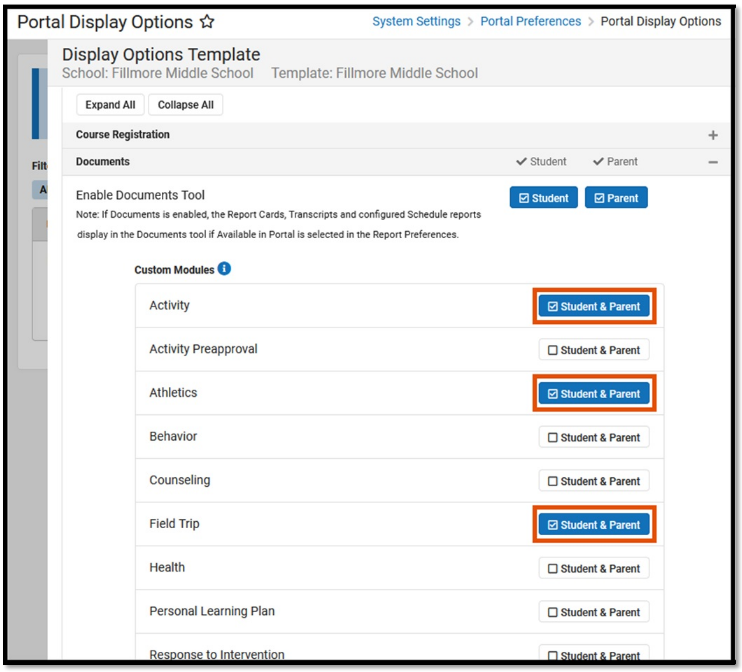
The Activity Registration module provides districts with a tool for managing activities that require a registration process including a registration packet, payment, and a roster. Activity Registration is completed in the Campus School Store based on registration dates you control. Once a student has registered for an activity, that activity no longer appears for them in the School Store.

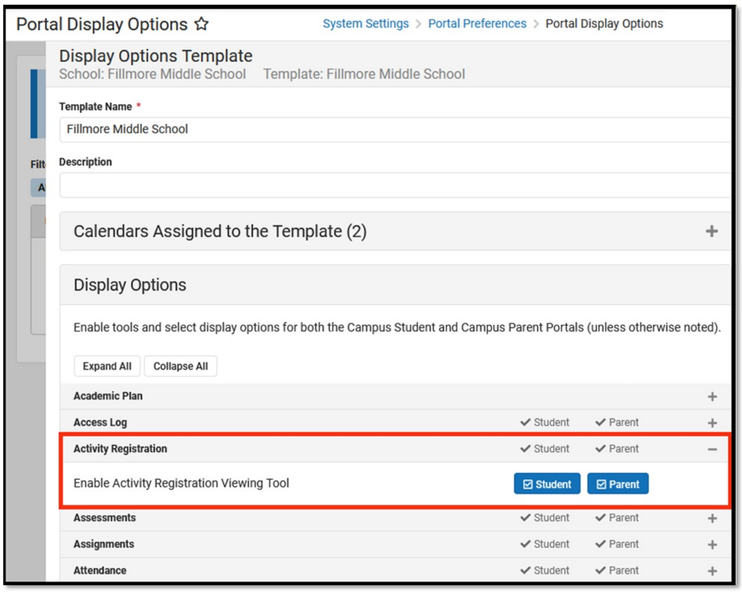
Before You Begin

Be sure you have finished setting up the **School Store** and **Payments** modules.

Activity Registration Setup Workflow

Step		Campus Location
Set Up Custom Forms and Ad Hoc Filters		
1	Upload and manage supplemental Activity Registration documents in the Custom Forms tool. Activities require at least one form but more can be added. The following Activity Registration options are available in the Module field in Custom Forms: Activity, Activity Preapproval, Athletics and Field Trip. Forms created with these options can only be assigned to a student via the Campus School Store and Activity Registration. The Activity Preapproval process can only use custom form types of *Interactive Form with Database Table* and *Interactive Form.* If you use an interactive form, you can also use the following Ad hoc fields to prepopulate the form: *activityName* and *studentFirstLastName*. For prepopulating to work, you must use the Ad hoc fields as the field names in your PDF. These fields are case sensitive.	**Classic View**: System Administration > Custom Forms **Search Terms:** Custom Forms

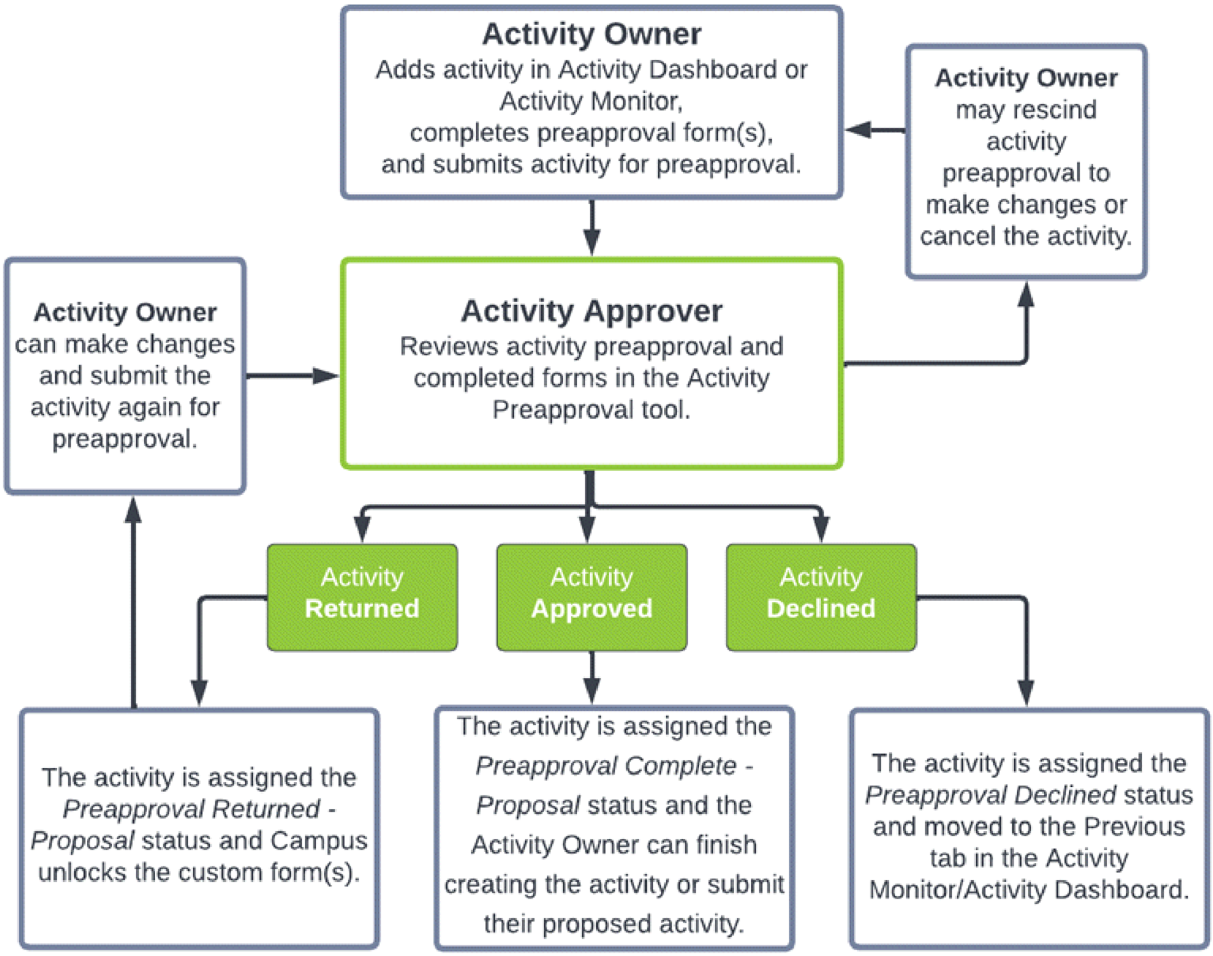
Step		Campus Location
2	Create an Ad Hoc filter for selecting eligible students. Each activity requires an Ad Hoc filter. Campus only allows students who are included in the Ad Hoc filter to register for the activity.	**Classic View**: Ad Hoc Reporting > Filter Designer **Search Terms:** Filter
Set Up Portal Preferences		
3	Make sure the **Activity**, **Athletics**, and **Field Trip** Custom Modules are selected on the Portal Display Options tool. 	**Classic View**: System Administration > Portal > Preferences > Display Options **Search Terms:** Display Options

Step		Campus Location
4	Make sure the **Enable Activity Registration Viewing Tool** option has the **Student** and/or **Parent** checkboxes marked if you want to allow users to see Activity Registration information in Campus Student or Campus Parent. When these options are enabled, users can see the activities for which the student has registered. To be considered "registered" the activity fee must be paid. Any applicable forms and options purchased for the student also display. 	**Classic View**: System Administration > Portal > Preferences > Display Options **Search Terms:** Display Options
Add District Assignments		
5	The following checkboxes display on the District Assignments tool and determine which staff may be assigned to activities. • **Activity Staff**: When this checkbox is marked, the staff member may be assigned as the primary or secondary owner responsible for an activity. • **Activity Preapproval**: When this checkbox is marked, the staff member may be assigned as the School Approver, District Approver, or International Approver for an activity preapproval request.	**Classic View:** Census > People > District Assignments **Search Terms:** District Assignments
Set Up Preapproval Configurations (Optional)		
6	Use the Preapproval Configuration tool to set up the rules, identify the appropriate approvers, and assign the forms that must be completed before an activity can be made available for registration in the School Store.	**Classic View**: Activity Registration > Preapproval Configuration **Search Terms:** Preapproval Configuration
Set Up Activities		

Step		Campus Location
7	Add new activities in the Activity Builder tool.	**Classic View**: Activity Registration > Activity Monitor > Activity Builder **Search Terms:** Activity Monitor
Manage Activities		
8	View the Activity Roster and mark forms as complete.	**Classic View**: Activity Registration > Activity Monitor > Activity Roster **Search Terms:** Activity Monitor
9	Review past activities and monitor upcoming activities in the Activity Monitor.	**Classic View**: Activity Registration > Activity Monitor **Search Terms:** Activity Monitor
10	Use the Activity Monitor to review proposed activities. You can approve, decline, or return activities submitted through the Activity Dashboard.	**Classic View**: Activity Registration > Activity Monitor **Search Terms:** Activity Monitor

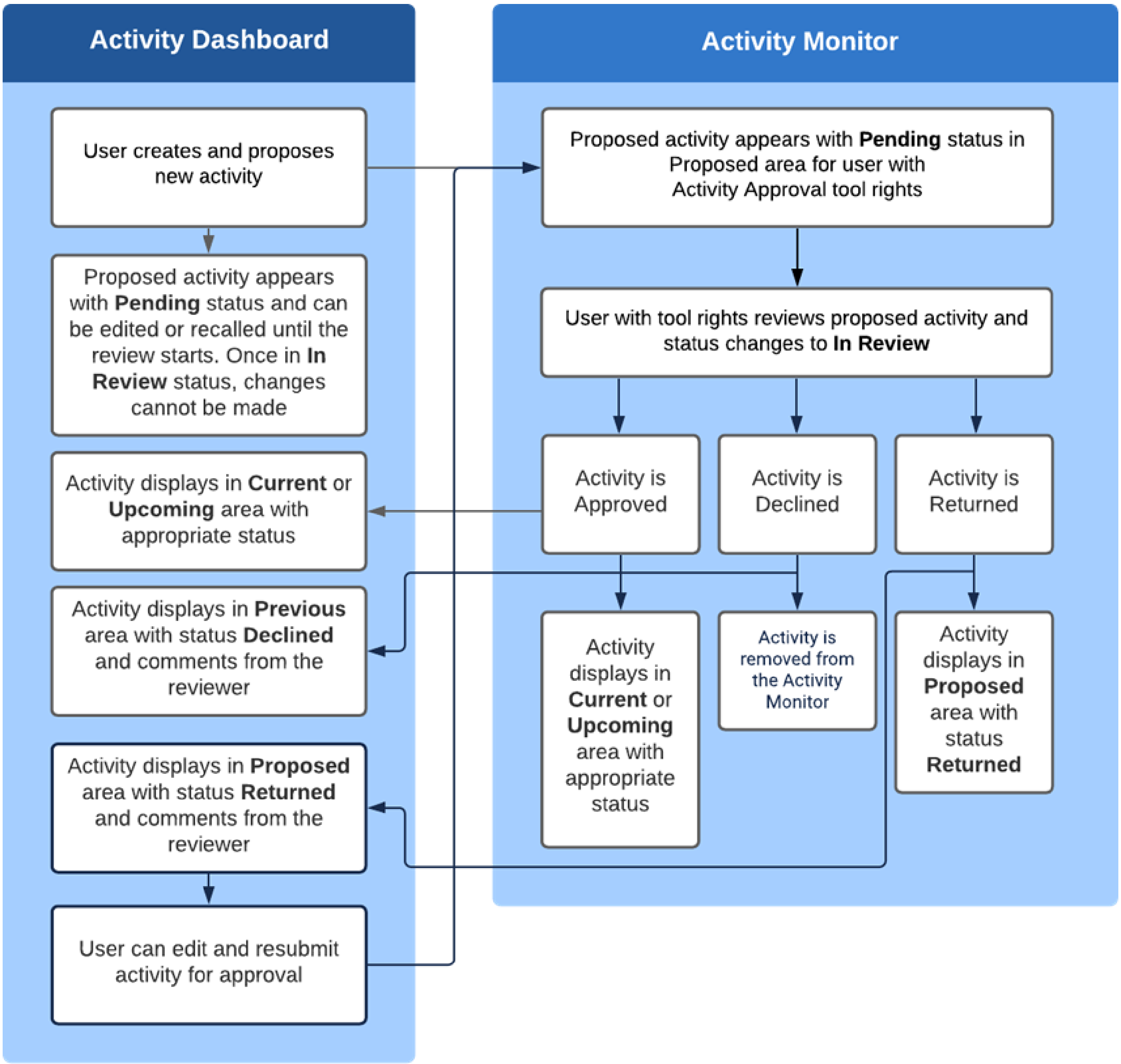
Preapproval Process

The preapproval process is the process in Activity Registration that requires activity owners to request approval before an activity can finish being created and/or is made available for registration in the School Store. The specific rules that trigger the preapproval process and the forms that the activity owner must complete and route to internal approvers are defined in the Preapproval Configuration tool. The Preapproval Process was introduced in Campus.2223.



Activity Proposal Workflow

The following chart provides the basic process a proposed activity goes through in Campus. The ability to propose activities was introduced in Campus.2116.



Tool Rights for Activity Registration

Tool Rights determine the level of access users have to tools throughout Campus. This article refers to tool rights in abbreviated form (i.e., R, W, A, D or any combination of the four). Sub-rights appear as *italicized*.

Right	Description
R (Read)	The **R** right indicates the information on the corresponding tool may be viewed by the user. When applicable, the user is also allowed to print information. The user will **NOT** have access to the Save, Add or Delete icons in the action bar.

Right	Description
W (Write)	The **W** right indicates the user may view and modify the information on the corresponding tool. The Save icon in the action bar will be functional. This right allows the user to modify only existing data in the area since adding new data is controlled by the **A** right. This right includes the ability to change or remove data from a specific field.
A (Add)	The **A** right indicates the user may view, modify and add to the information on the corresponding tool. The New and Add icons in the action bar will be functional. This right allows the user to add new data/records.
D (Delete)	ASSIGN THIS RIGHT WITH CAUTION. The **D** right indicates the information on the corresponding tool may be deleted. The Delete icon in the action bar will be functional. This right provides the ability to completely remove an existing record, including all data contained within the record. The ability to change/remove data from a field is controlled through the **W** right.

RWAD Rights assigned at the module or folder level give those rights to all features within the module. For example, giving RW rights to the System Administration Health folder assigns RW rights to all tools within that folder, including any subrights.

Tool Right Paths

- *Student Information > Activity Registration*
- *School Store > Product Inventory*

Right	R	W	A	D
Activity Registration	View Only	View and Modify	View, Modify, and Add	N/A
Activity Monitor	View Only	View and Modify	View, Modify, Add, and Copy	Users can remove activities that are in the Ready (Upcoming) or Draft (Current) status.
Activity Approval	Allows users to approve, return, and decline proposed activities.	N/A	N/A	N/A

Right	R	W	A	D
Activity Dashboard	Users can view any activities they submit or view activities for which they are listed as the activity owner.	Users may edit proposed activities that they have submitted.	Users may submit proposals for new activities and copy existing activities.	Users can remove activities that are in the Ready (Upcoming) or Draft - Proposal (Proposed) status or recall proposed activities after they are sent for approval.
	Secondary Activity Owners only have a read-only view of the activity to which they are assigned unless they are also the creator of the proposed activity. Secondary owners on an activity do not have the **Remove** button for delete/cancel functions even if the Delete tool right is assigned.			
Activity Roll Forward	N/A	N/A	Users can roll activities forward en masse.	N/A
Preapproval Configuration	View Only	View and Modify	View, Modify, and Add	Delete
Preapproval Requests	View Only	Allows users manage preapproval requests.	N/A	N/A

Previous Versions

Activity Registration Overview [.2124 -.2219]

Activity Monitor

Introduction to Activity Registration | Activity Registration Setup Workflow | Preapproval Process | Activity Proposal Workflow | Tool Rights for Activity Registration | View Activities | Delete or Cancel an Activity | Copy an Activity | Review a Proposed Activity | Step 1 - Create Activity | Step 2 - Build Roster | Step 3 - Form Selection | Step 4 - Link to Portal | Step 5 - Finish | Submit an Activity Request for Preapproval | About the Activity Roster | About Field Trip Rosters | | 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 |

Activity Roster Filter Fields for Ad hoc Reporting

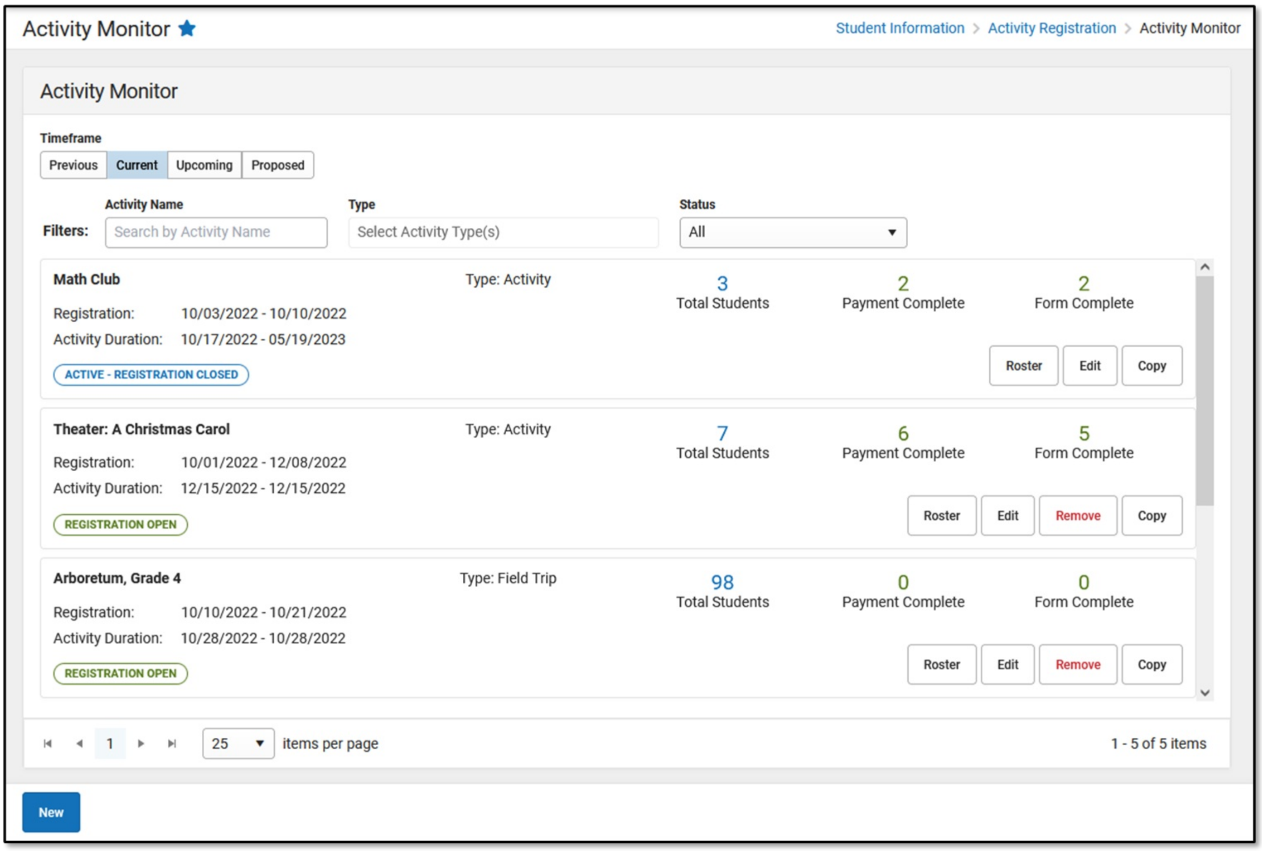
Classic View: Activity Registration > Activity Monitor

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?

- View Activities
- Delete or Cancel an Activity
- Copy an Activity
- Review a Proposed Activity



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.
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** 　◦ All 　◦ Draft 　◦ Preapproval Returned 　◦ Preapproval Required 　◦ Preapproval Pending 　◦ Preapproval Complete 　◦ Registration Open 　◦ Registration Closed 　◦ Active - Registration Open 　◦ Active - Registration Closed
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:

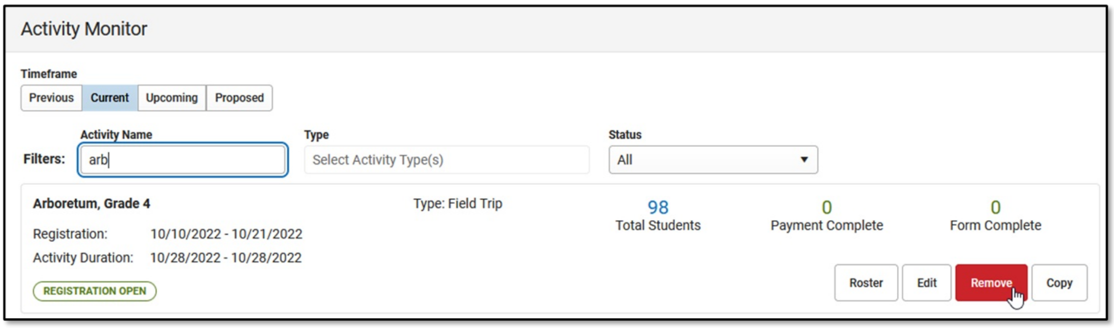
- **Delete** completely removes the activity from the Activity Monitor. You cannot delete an activity if students have already registered. Registered students can be removed from an activity; however, this should only be done after refunds are processed.

- **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...

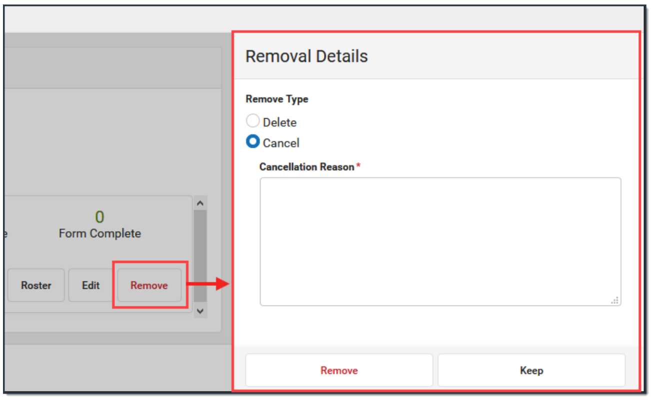
You cannot remove an activity if it is in a *Complete, Active, or Preapproval Pending - Proposal* status.

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**.



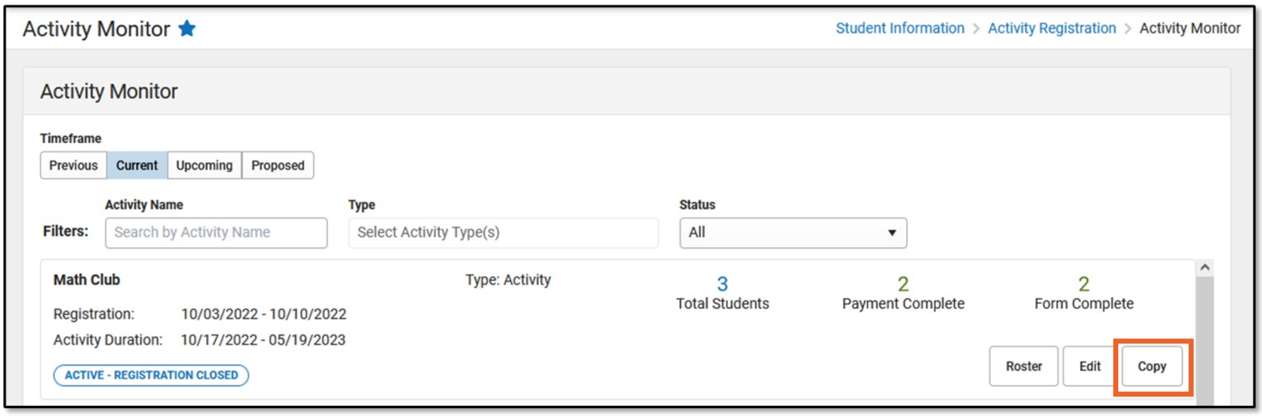
3. Enter a **Cancellation Reason**. This field is required for Cancelled activities.
4. Click **Remove**.
   Result
   A Confirmation message displays.

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.



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

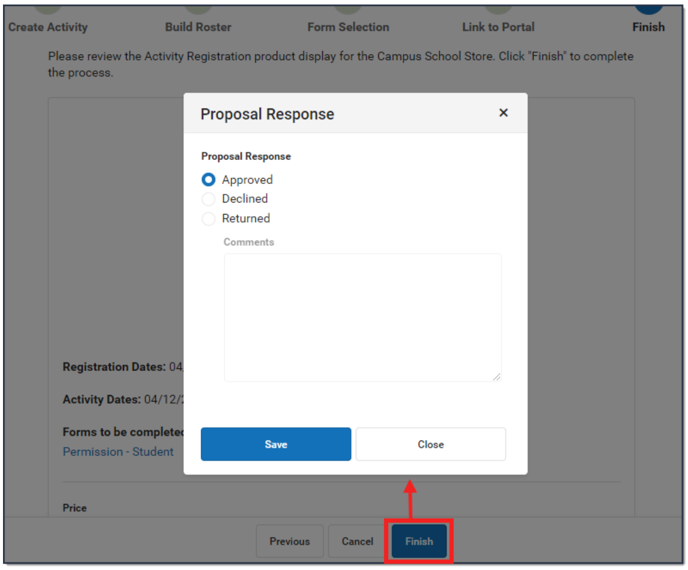
Example Proposed Activity

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 [.2227 - .2239]

Activity Monitor and Activity Roster [.2223]

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

Build an Activity

Classic View: Activity Registration > Activity Monitor > Activity Builder

Search Terms: Activity Monitor

Introduction to Activity Registration | Activity Registration Setup Workflow | Preapproval Process |

Activity Proposal Workflow | Tool Rights for Activity Registration | View Activities | Delete or Cancel an Activity | Copy an Activity | Review a Proposed Activity | Step 1 - Create Activity | Step 2 - Build Roster | Step 3 - Form Selection | Step 4 - Link to Portal | Step 5 - Finish | Submit an Activity Request for Preapproval | About the Activity Roster | About Field Trip Rosters | | 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 | Activity Roster Filter Fields for Ad hoc Reporting

Use the Activity Monitor tool to add new activities to Campus.

Before You Begin

- Add supplemental Activity Registration documents in the Custom Forms tool.
- Create an Ad Hoc filter for selecting eligible students.

This article walks you through the setup process step-by-step.

- Post to Course Section
  - Manual Post to Course Section
  - Auto-Post to Course Section
- Activity Roster Filter Fields for Ad hoc Reporting
  - Activity Monitor - Video

Tip
While using the Activity Builder, click **Save & Hold** to save the activity and return to the Activity Monitor. Click **Save & Next** to continue to the next step in the Activity Builder.

Step 1 - Create Activity

The first step in the Activity Builder is to define parameters for the activity. To add an activity, click the **New** button in the action bar.

Click here to expand...

Use the following field descriptions to complete the Create Activity screen.

Field	Description
Activity Name	A name for the activity you are creating. *This is a required field.* The Activity Name can be changed until registration is closed. If you have already associated a Product with this activity and the product has the same name, Campus gives you the option to change the product name too. Please note that if you change the Activity Name, any completed purchases/registrations that exist when you change the name will still use the original name (name at the time the purchase was made) in School Store reports.
Type	The activity Type is provided by Campus. Options include the following: • Activity • Athletics • Field Trip *This is a required field.*

Field	Description
Activity Level	Activity Levels are another way to identify different kinds of activities. This field only displays if you have added Activity Levels in the Attribute Dictionary and is optional unless the **Required** checkbox is also marked in the Attribute Dictionary. ▸ Click here to expand...
International	The **International** checkbox only displays when the **Activity Type** is *Field Trip*. If the activity needs preapproval, marking this checkbox ensures Campus routes your activity request to the correct approver(s).
Status	The Activities status. This is a read-only field. • **Draft** • **Preapproval Returned** • **Preapproval Required** • **Preapproval Pending** • **Preapproval Complete** • **Ready** • **Registration Open** • **Registration Closed** • **Active - Registration Open** • **Active - Registration Closed** • **Complete** • **Cancelled** **Tip** If the *Registration Closed Date* is after the *Activity Start Date*, the *Status* is Active - Registration Open.
School(s)	The school(s) to which you can associate the Activity. Only schools to which you have tool rights display. *This is a required field.*

Field	Description
Activity Owners (Primary)	The primary person(s) responsible for the Activity. To appear in this field, the person must have an active assignment in the selected school and • the **Activity Staff** checkbox marked on their District Assignment OR • be assigned the **Activity Staff** role on their Work Assignment (HR Only). You may select more than one person in the field. For access to attendance and messaging options, the person must also have **Teacher** marked on their District Assignment or be assigned the **Teacher** role on their Work Assignment (HR Only). When a Primary Owner is not the person who created the activity and changes the Primary Owner to another person, they will not have access to the activity after they save their changes. When a Primary Owner is not the person who created the activity and adds themselves as the Activity Owner (Secondary), they will only have read-only access to the activity after they save their changes. *This is a required field.*

Field	Description
Activity Owners (Secondary)	The secondary person(s) responsible for the Activity. To appear in this field, the person must have an active assignment in the selected school and • the **Activity Staff** checkbox marked on their District Assignment OR • be assigned the **Activity Staff** role on their Work Assignment (HR Only). You may select more than one person in the field. For access to attendance and messaging options, the person must also have **Teacher** marked on their District Assignment or be assigned the **Teacher** role on their Work Assignment (HR Only).
Registration Open Date	The first day on which the Activity displays in the School Store and people can register for the Activity. The date must be prior to the Activity Start Date and Registration Close Date. *This is a required field.*
Registration Close Date	The last day on which the Activity displays in the School Store. The date must be after the Registration Open Date and prior or equal to the Activity End Date. If you do not enter a date, Campus automatically uses the Activity End Date.
Activity Start Date	The date on which the Activity begins. The date cannot be prior to the Registration Open Date or after the Activity End Date. *This is a required field.*
Activity End Date	The date on which the Activity ends. The date cannot be prior to the Activity Start Date or Registration Close Date. *This is a required field.*

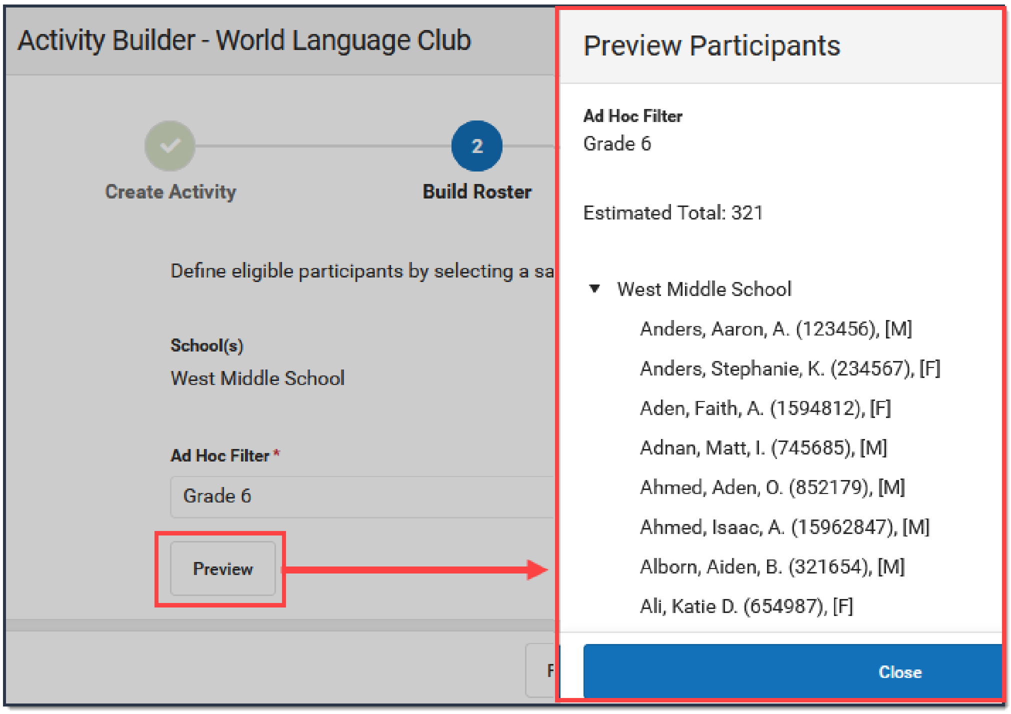
Step 2 - Build Roster

Define eligible participants by selecting a saved Ad Hoc filter.

▸ Click here to expand...

Use the following field descriptions to complete the Build Roster screen.

Field	Description
School(s)	This field displays the school(s) that were selected in Step 1 - Create Activity.

Field	Description
Ad Hoc Filter	The Ad Hoc filter for selecting eligible students. Campus only allows students who are included in the Ad Hoc filter and have an active enrollment in the school(s) associated with the activity to register for the activity. *This is a required field.*
Preview	Click this button to preview roster information in a side panel. The panel displays an estimate of the total number of students listed by school then provides the student's names. If a student has multiple enrollments and Campus cannot identify the primary enrollment, an asterisk (*) displays behind the student's name. **IF** your district includes a school in its Ad hoc filter, verify the **same** school is selected on Step 1 - Create Activity. If the Ad hoc filter and the activity are associated with different schools, the Preview displays irregular results. If you do not have access to the ad hoc filter that is assigned to the activity, the **Preview** button does not display. 

Step 3 - Form Selection

Select the appropriate forms for registration and indicate whether the form is considered required.

▸ Click here to expand...

Use the following field descriptions to complete the Form Selection screen.

Field	Description
Activity Type	This field displays the Activity Type that were selected in Step 1 - Create Activity. • Activity • Athletics • Field Trip
Form Title	This field displays the custom forms associated with the Activity Type. You must select at least one form. You can add multiple forms by clicking the **Add Form** button. *This is a required field.* **Tip**: If the form title is grey and cannot be selected, check the form's active dates. The form must be active for the full time that your activity has registration open.
Required	Mark this checkbox to display a red star next to the form in the School Store. The following image demonstrates how this appears in the store. 

Step 4 - Link to Portal

On this screen, configure how the activity should display in the School Store and set up the associated costs.

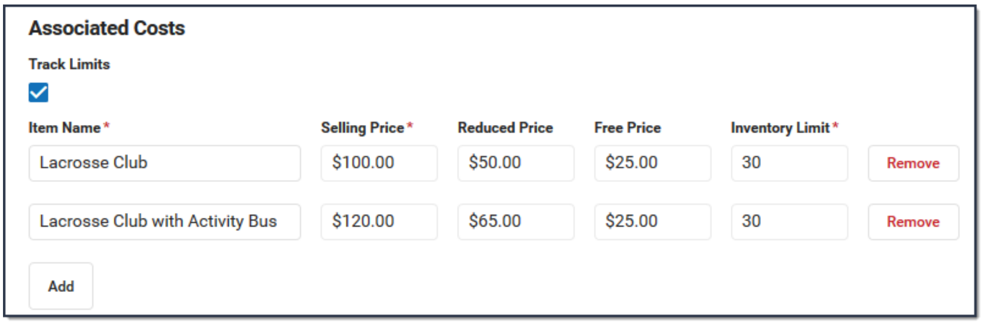
Click here to expand...

Use the following field descriptions to complete the Link to Portal screen.

Field	Description
Category Information	
Category	Categories are how similar products are grouped together in the store. When a portal user selects a category, only the products assigned to that category display. *This is a required field.* See the Categories (School Store) article for more information about managing categories.
Product Information	

Field	Description
Product Name	The name that displays in the store. *This is a required field.*
Product Type	Product Types are assigned to products and to Fund Accounts. When a product is purchased, funds are deposited into the bank associated with the Fund Account that is assigned to the same Product Type. Product Types are set up in the School Store: *System Administration > School Store > Product Types***.** *This is a required field.*
Active	When this checkbox is marked, the product displays on the School Store. However, if this checkbox is not marked, the product is not available even if registration is currently open. This checkbox is most useful for troubleshooting issues in the School Store. If the Category associated to the activity is inactivated, this checkbox is automatically unmarked. The Active checkbox does NOT display when the Activity is in a Draft or Cancelled status. Click here to expand...
Restrict to Associated School Enrollments	When this checkbox is marked, the Recipient dropdown list will only display students who have an enrollment in the active school year at the school to which the activity is attached. This includes primary, secondary, and enrollments with a future end date. **Example** If you have an Activity attached to the High School only and this checkbox is marked, parents will only be able to select their student(s) with primary and secondary High School enrollments in the active school year as well as enrollments with a future end date. Please note that if the same Activity is associated with multiple schools; e.g., a middle school and a high school, parents can select both middle and high school students in both stores.
Image Upload	This option allows you to add a picture of the product.
Product Description and Special Instructions	Detailed information about the product. This description appears below the picture of the product. **Tip** Use this area to provide more information about the activity like meeting times, locations, and contact information. You could also provide special instructions such as how to turn in the forms.
Customer Comments	When this checkbox is marked, customers can add information to their purchase before they check out.
Associated Costs	

Field	Description
Track Limits	Mark this checkbox if you want to track the number of openings or items you have available or if you want to cap the number of students allowed to enroll. When this checkbox is marked, Campus calculates the amount of inventory you have available after a purchase is made through the School Store. Marking this checkbox enables the **Inventory Limit** field and makes it required. Do NOT mark this checkbox if you do not want to limit the number of registrations that can be sold.
Partial Refunds	When this checkbox is marked, partial refunds can be issued in the Payments Reporter for the activity. If this **Partial Refunds** checkbox is marked and the **Track Limits** option is also selected, the Payments Reporter will allow you to increase the number of available openings or items when you make a partial refund.
Item Name	The Product Name automatically displays here but can be changed. *This is a required field.* If more than one option is available for users to select, this is the name of the option that displays under the Product in the School Store.
Selling Price	The price customers see and pay in the School Store. The price can be $0.00. *This is a required field.*
Reduced Price	The price students with reduced eligibility status pay and see in the School Store. The price can be $0.00. To use this feature, the **Allow Free and Reduced Pricing** checkbox must be marked in the School Store setup.
Free Price	The price students with a free eligibility status pay and see in the School Store. The price can be $0.00. To use this feature, the **Allow Free and Reduced Pricing** checkbox must be marked in the School Store setup.
Inventory Limit	This field is only available if you marked the **Track Limits** checkbox. Enter the maximum number that may be purchased. Once this number is reached, the product does not display in the School Store. If you process a refund during registration, Campus returns the inventory for purchase. *This is a required field when tracking limits.*

Field	Description
Add (button)	Click the **Add** button to add another item that may be purchased for this product. In the following example, an option was added that includes an activity bus. 
Receipt Comments	This field allows you to enter comments or special instructions that you want on the customer's receipt. For example, you could add reminders for event times, meeting places, or what to bring.

Step 5 - Finish

Review the Activity Registration product display for the Campus School Store and validate the appropriate Custom Forms are attached. Click **Finish** to complete the process. After you click Finish, the Activity is in a **Ready** or **Registration Open** status. Editing is limited when an activity is in a **Registration Open** status. Most fields cannot be changed.

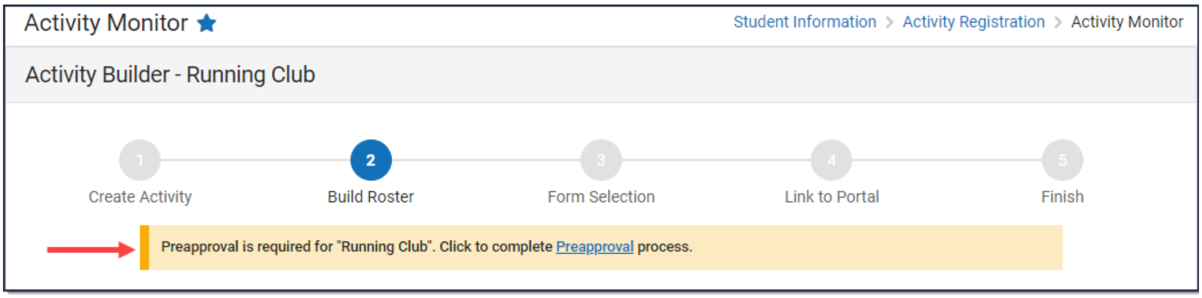
When the **Finish** button is unavailable, you can **NOT** complete this step because your activity requires preapproval.
See the Submit an Activity Request for Preapproval topic for more information.

Click here to expand...

Submit an Activity Request for Preapproval

If your activity requires preapproval before it can be created, a yellow banner displays under the progress tracker after *Step 1. Create Activity* or it displays on the Proposed tab with the status *Preapproval Required - Proposal*. You can submit your activity request for preapproval at any time but the activity must be approved before you can complete Step 5. Finish.

1. Click the **Preapproval** link in the banner.



Result: The Preapproval panel displays.

▸ Click here to expand...

2. Click the links for the **Preapproval Form**(s) (there may be more than one), fill in the required fields, and then click **Save** in the action bar. Repeat this step for each form.
   Result: The status changes to **Pending**.
3. Click **Submit**.
   Result: The form status changes to **Submitted** and the **Submit** button changes to **Rescind**.
4. Click **Close** to close the panel and return to the activity.
   Result: The activity status changes to **Preapproval Pending - Proposal**. You can continue setting up your activity or click **Cancel.** Campus saves your activity and changes color the color of the forms alert based on the preapproval status.

If your activity request is...	Then...
Approved	you will receive a notification that your activity request was approved and you may complete Step 5. Finish. The Activity Proposal is also assigned the *Preapproval Complete - Proposal* status.
Returned	you will receive a notification that your activity request was returned. The activity request is assigned the *Preapproval Returned - Proposal* status and Campus unlocks the custom form(s) so that you can make changes and submit the activity request again for preapproval.
Declined	you will receive a notification that your activity request was declined. The activity request is assigned the *Preapproval Declined* status and moved to the Previous tab in the Activity Monitor.

Previous Versions

Activity Builder [.2124 - .2219]

The Roster Button

Introduction to Activity Registration | Activity Registration Setup Workflow | Preapproval Process | Activity Proposal Workflow | Tool Rights for Activity Registration | View Activities | Delete or Cancel an Activity | Copy an Activity | Review a Proposed Activity | Step 1 - Create Activity | Step 2 - Build

Roster | Step 3 - Form Selection | Step 4 - Link to Portal | Step 5 - Finish | Submit an Activity Request for Preapproval | About the Activity Roster | About Field Trip Rosters | | 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 | Activity Roster Filter Fields for Ad hoc Reporting

Classic View: Activity Registration > Activity Monitor > Activity Roster

Search Terms: Activity Monitor

The Activity Roster provides a detailed view of the students who have registered for an activity and allows you to manage the roster for current and upcoming activities. For each student on a roster, you can see the student's name, ID, and grade, as well as whether their payment and required forms are complete. The Activity Roster is accessed by clicking the **Roster** button for an activity on the Activity Monitor or Activity Dashboard tool.

<table>
<tr><th>What can I do?</th><th>What do I need to know?</th></tr>
<tr><td>

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

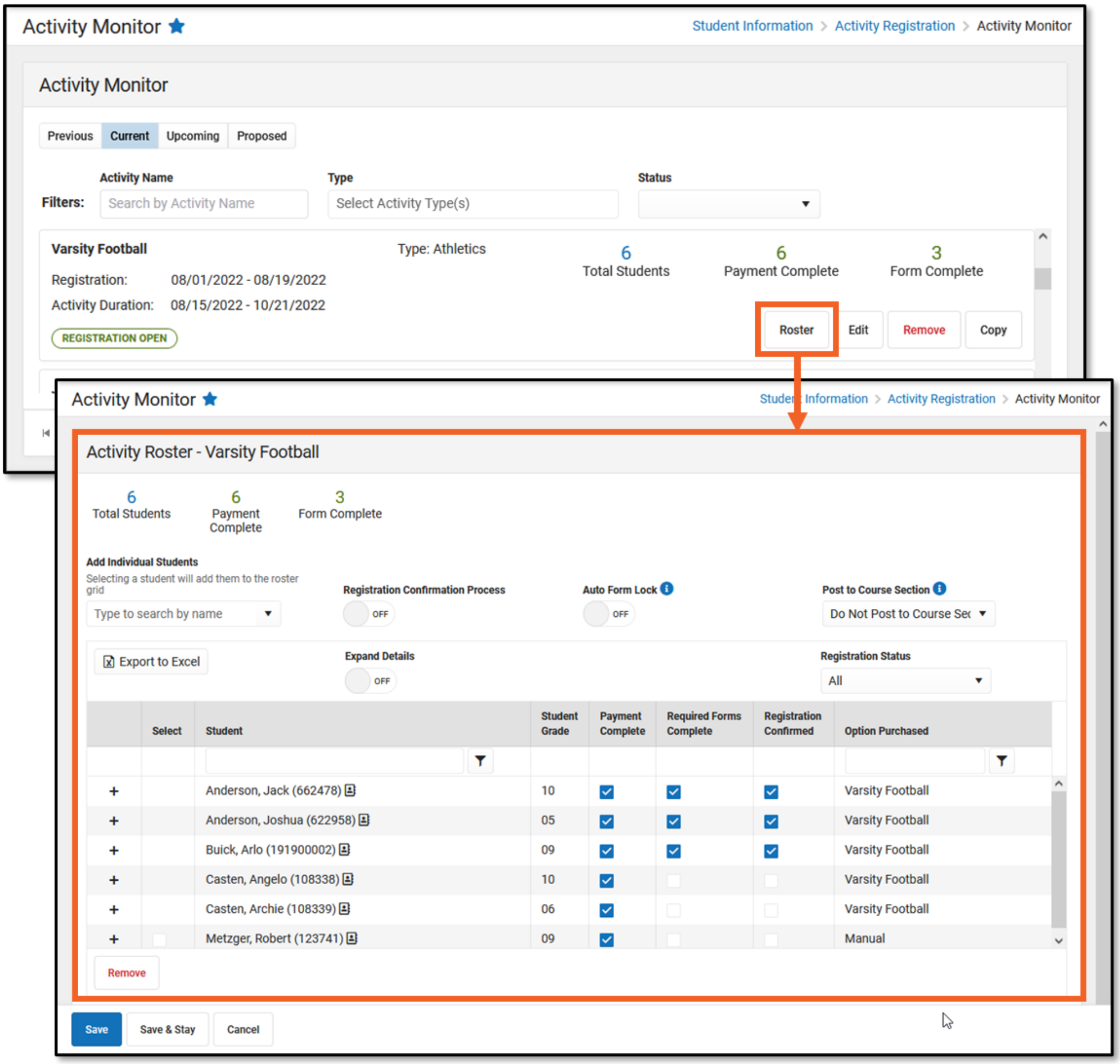
Post to Course Section

Manual Post to Course Section
Auto-Post to Course Section

</td><td>

About the Activity Roster
Activity Roster Filter Fields for Ad hoc Reporting
About Field Trip Rosters

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



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...

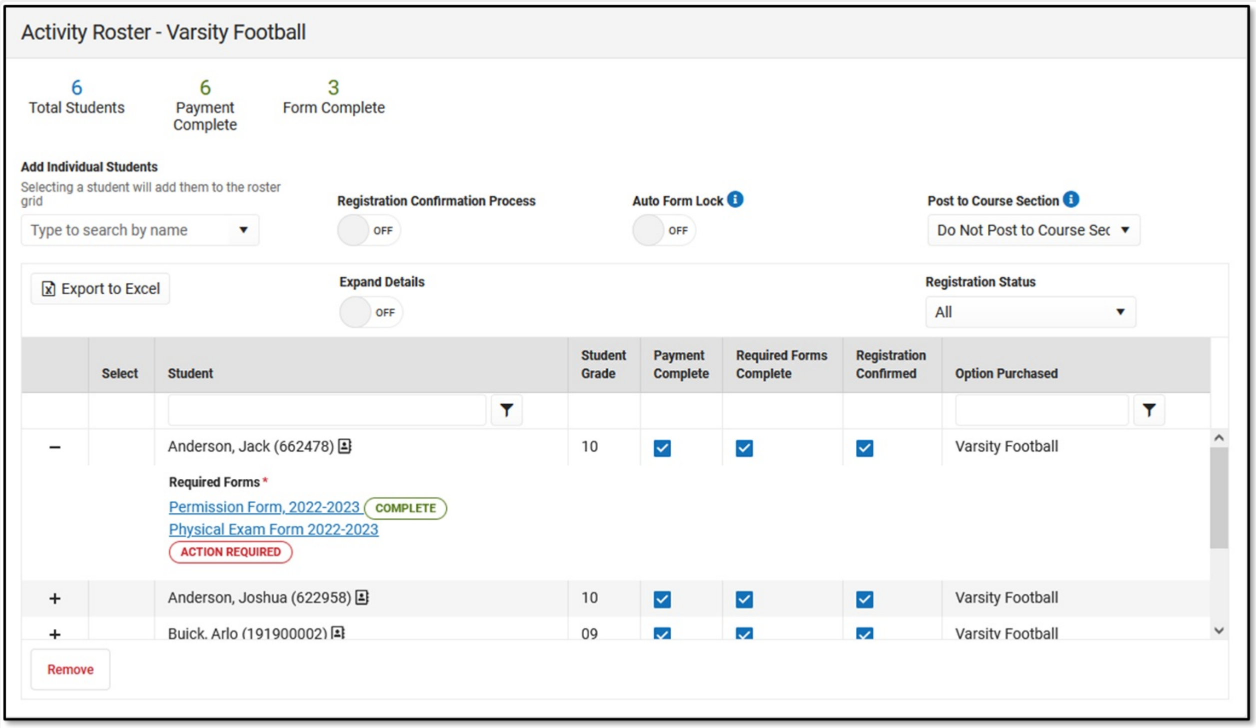
Students are added to the Activity Roster and the **Total Students** field is incremented as purchases for Activity or Athletic activity types are made through the School Store. Field Trip Rosters are created differently. See the following About Field Trip Rosters topic for more information.

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

School Store.

Tips

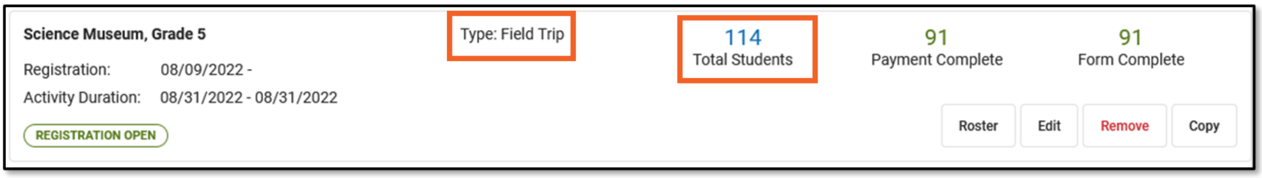
- Click the **Export to Excel** button to save a copy of the roster.
  - The Excel file includes a column for each required and/or optional form. Forms are marked as TRUE when they are complete and FALSE when they are incomplete. Required forms include an asterisk (*) in front of the form name.
- Use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



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.

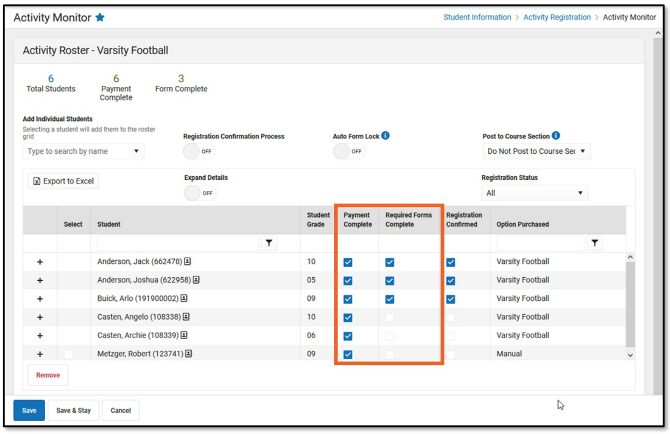


Mark Payments and Forms as Complete

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.

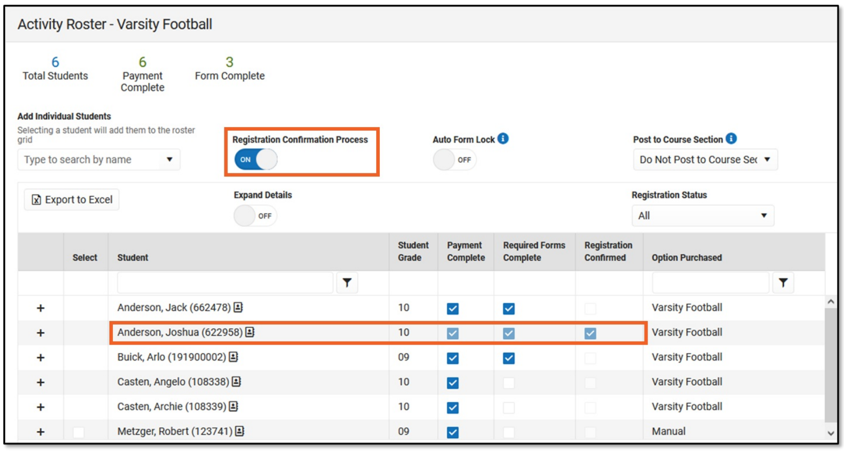
<table>
<tr><th>Process</th><th>Description</th></tr>
<tr><td>Manual</td><td>To manually mark the Payment Complete or Form Complete checkbox, click the Roster button to display the Activity Roster screen. From here you can mark the necessary checkboxes. Click Save to complete your changes.



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

<table>
<tr><th>Process</th><th>Description</th></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.

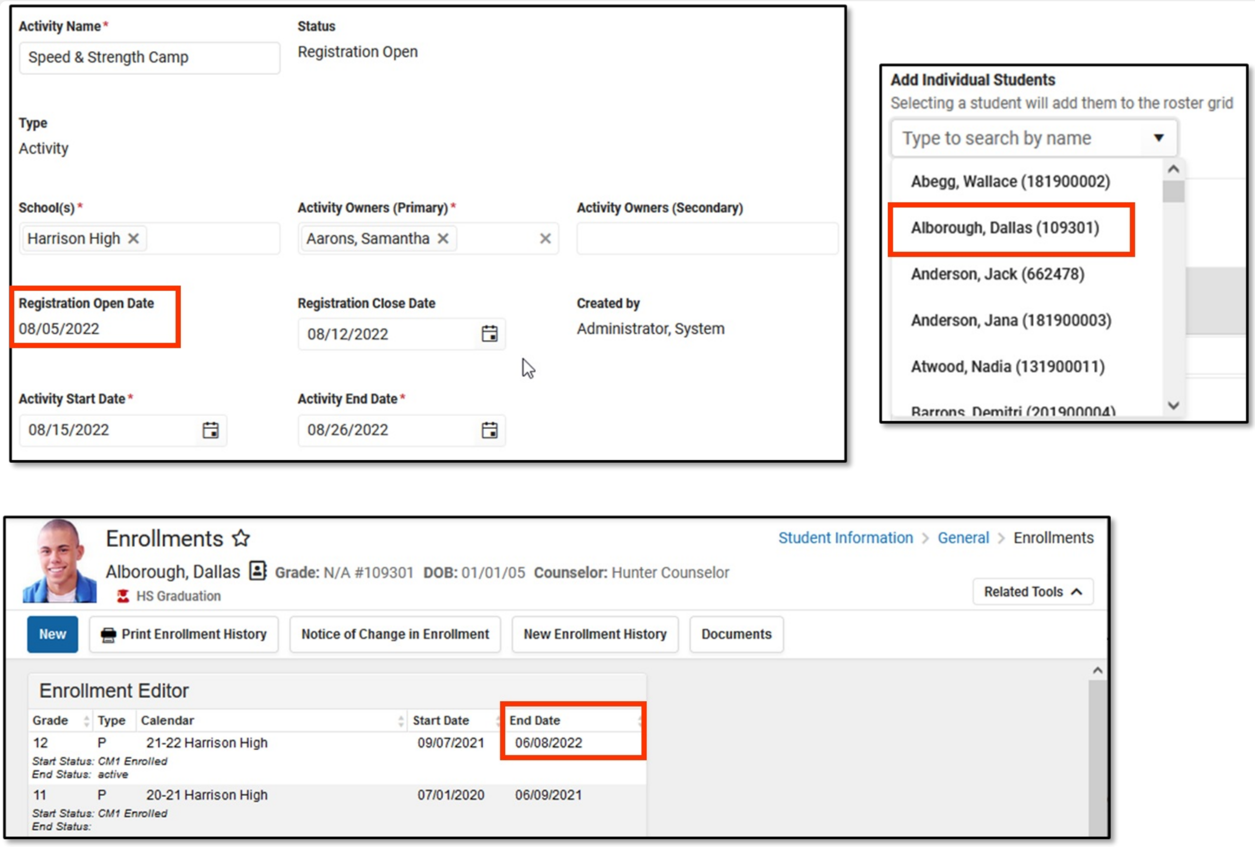

</td></tr>
</table>

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.

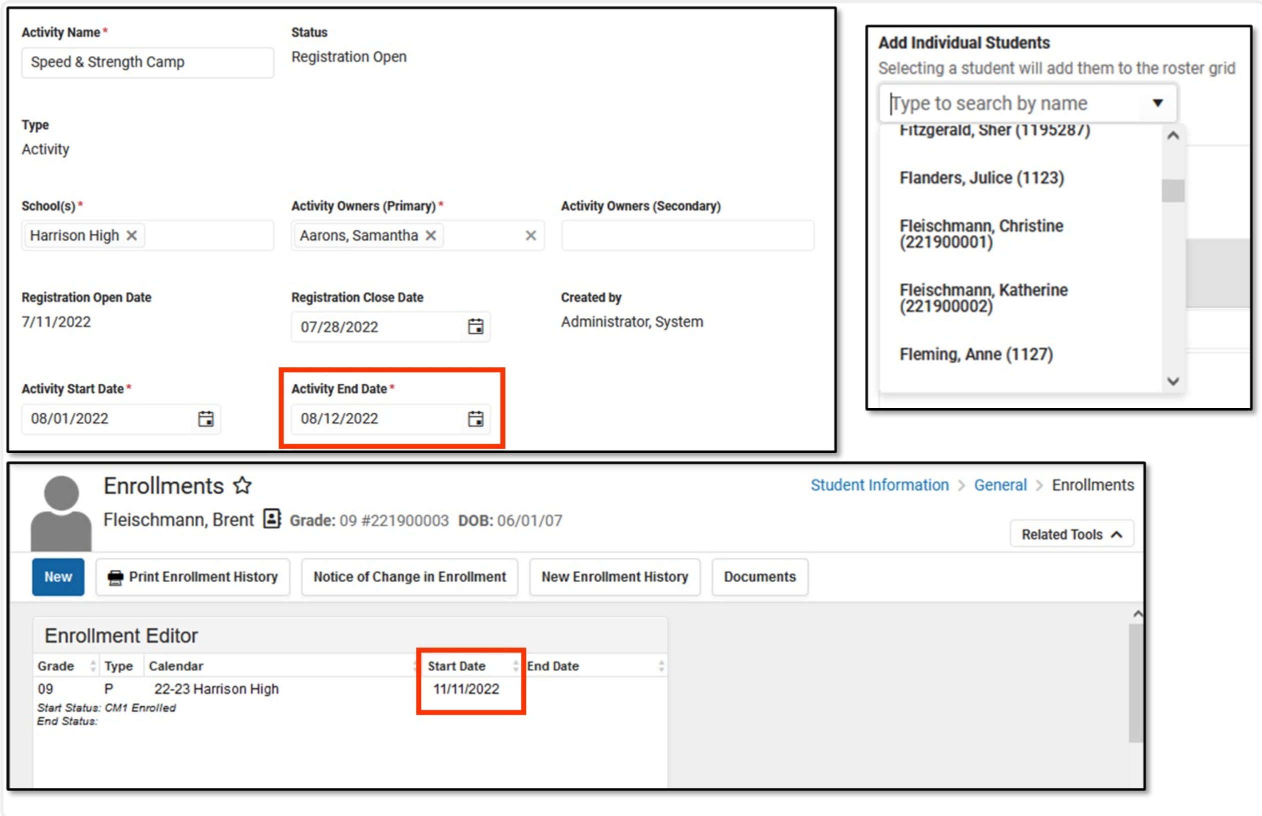
Students with past and future enrollments in addition to current enrollments can be manually added to an activity. When the **Add Individual Students** dropdown list is selected, Campus checks for enrollments 90 days in the past based on the **Registration Open Date** of the activity and enrollments 90 days in the future based on the **Activity End Date**.

The example below shows the activity's registration open date is 08/05/2022. Students with a past enrollment end date of 05/07/2022 (08/05/2022 minus 90 days) or later can be manually added to this activity.



Example Past Enrollment: Student Can be Added Manually

The next example shows the activity's end date is 08/12/2022. Students with a future enrollment date of 11/10/2022 (08/12/2022 plus 90 days) or earlier can be manually added to the activity. This student's enrollment date is *after* the 90 days, so his name does **NOT** appear on the Add Individual Students dropdown list.

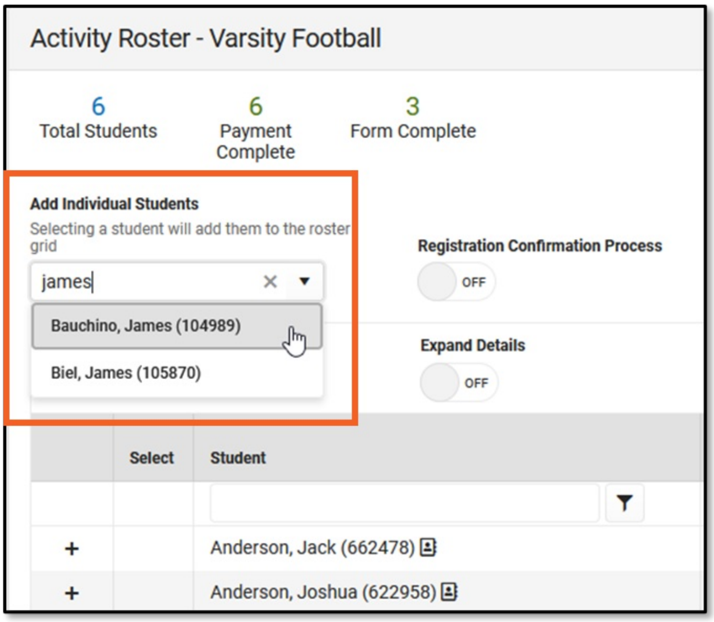


Example Future Enrollment: Student Cannot be Added Manually

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.



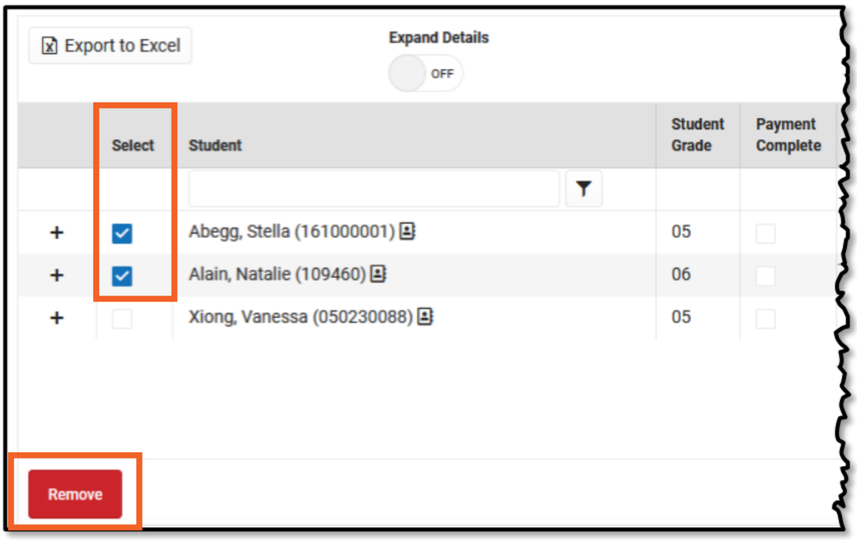
Result
Campus adds the student to the roster. The roster displays names in alphabetical order.

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.



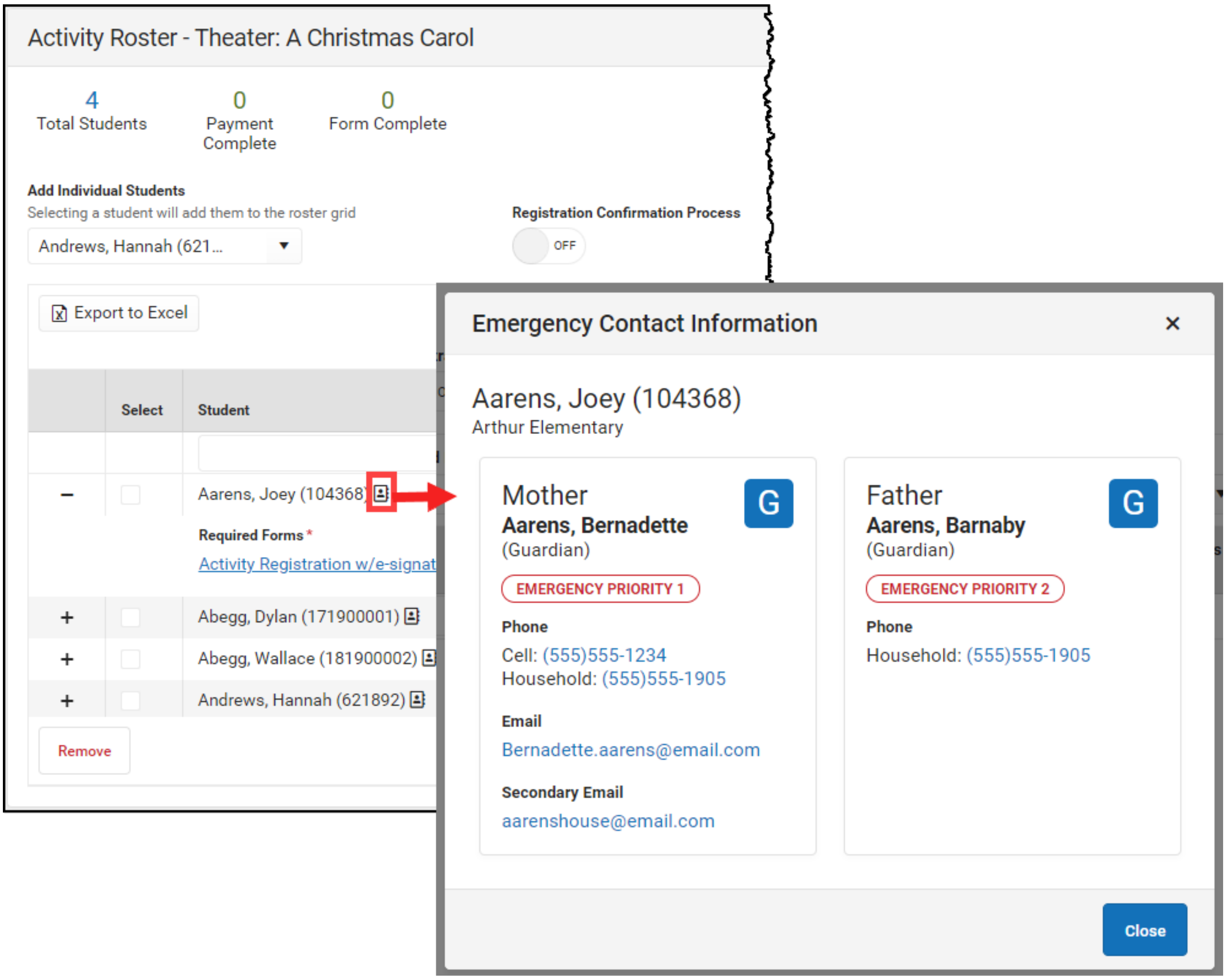
3. Click the **Remove** button.
   Result

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

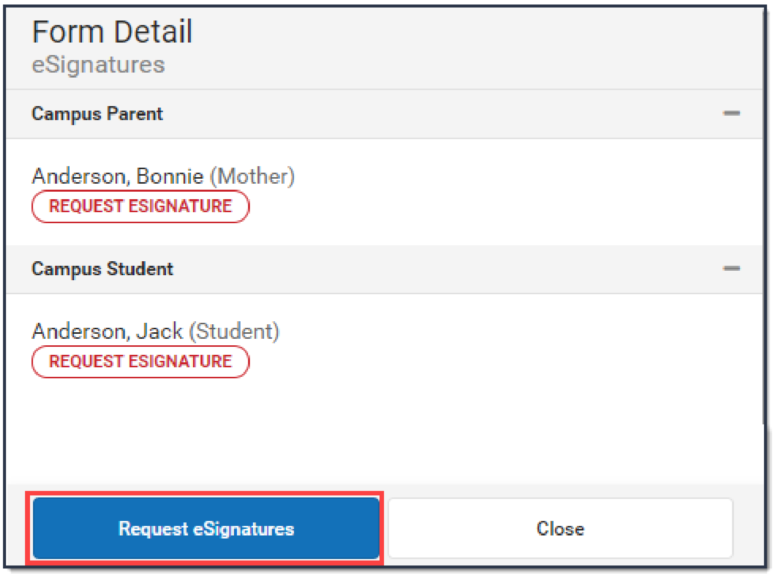
Request an eSignature | Reassign a Form for eSignature | Override an eSignature Request | Create a New Contact Log | Lock/Complete a Form

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.
   

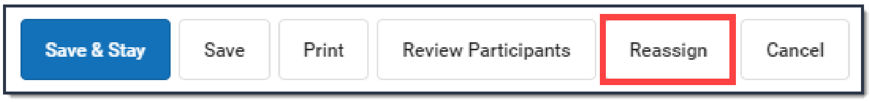
   Result
   A confirmation message displays.
4. Click **Request eSignatures**.
   Result
   A confirmation message displays and the Form Detail panel closes. The eSignature statuses change to **Pending** on the Form Detail panel. Forms can then be filled out in the Campus Student and/or Campus Parent Portal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



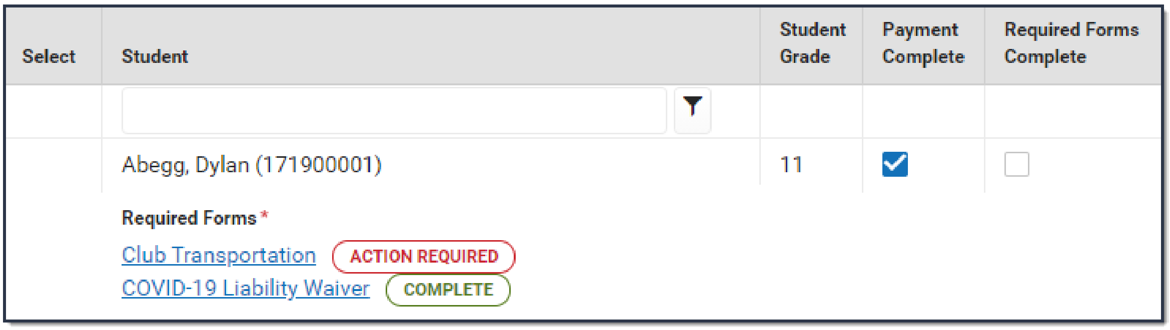
Result
An error message displays if the users does not have an active portal account. Otherwise, a confirmation message displays and the user can go to the Documents tool in the portal and complete the form.

Override an eSignature Request

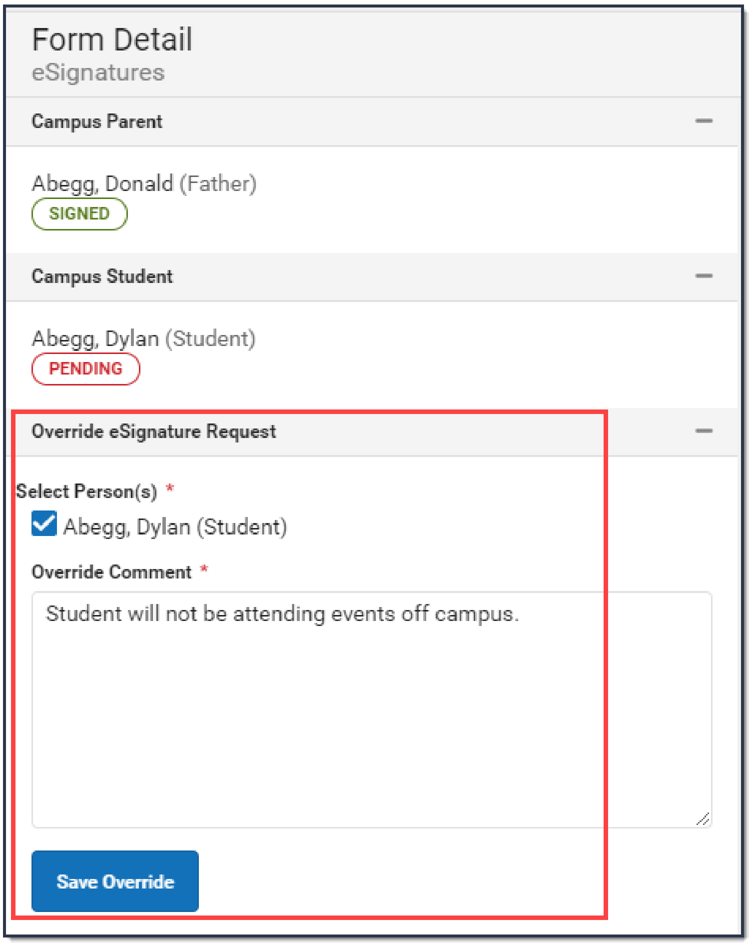
District staff cannot sign for students/parents; however, the eSignature can be overridden. As a best practice, create a new contact log to document any communication that resulted in overriding the eSignature.

▸ Click here to expand...

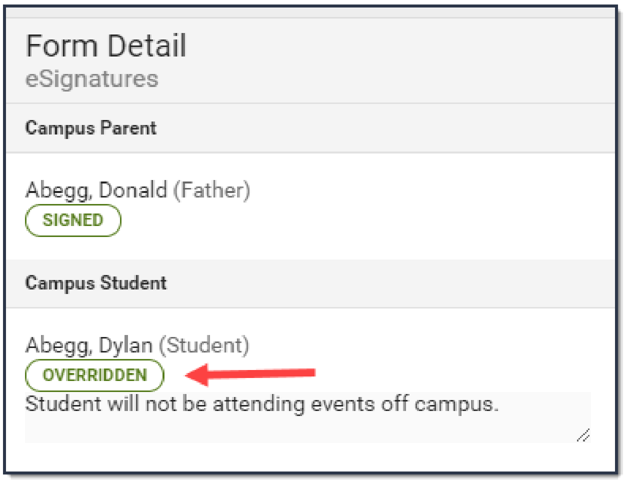
1. Select the form that requires a signature.
   It will say **Action Required** next to the form.



   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.

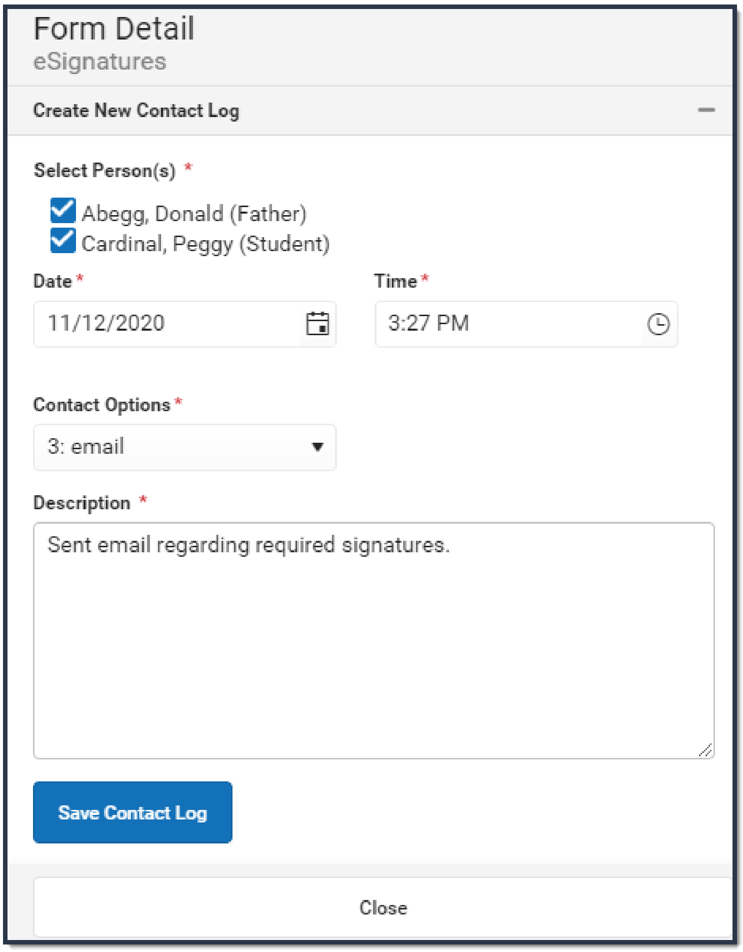


Create a New Contact Log

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.

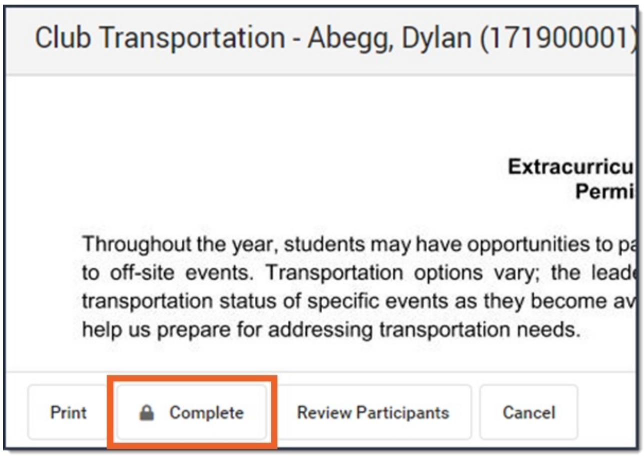
Locking and completing forms can be done manually or automatically.

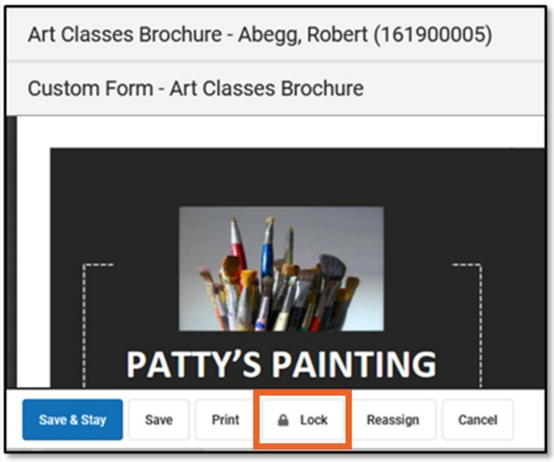
> If a form is interactive and it is marked as Required, then the **Complete** button appears. If the form is **NOT** interactive, but it is marked as Required, the **Lock** button appears. Both buttons perform the same function.

Manually Lock/Complete a Form

Manually locking and completing forms gives you the chance to review a form and ensure the necessary information has been supplied and/or it has been signed.

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

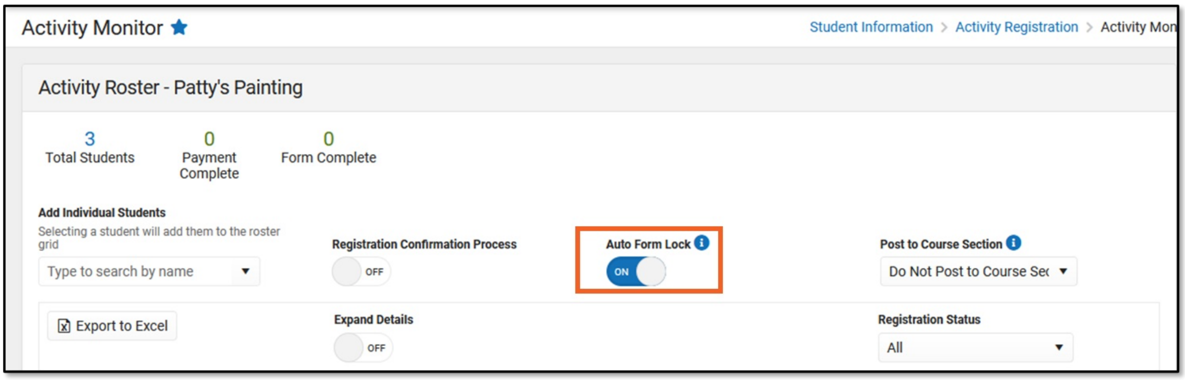




2. Click the **Complete** or **Lock** button.
   Result
   The Complete Form or Lock Form confirmation message displays.
3. Click **Complete** or **Lock**.
   Result
   A confirmation message displays saying the form is locked and the form's status changes to *Complete*.

Automatically Lock/Complete a Form

Locking and completing forms is done automatically when you slide the **Auto Form Lock** toggle to **ON**. When a form has been completed and/or signed, the form is automatically locked and marked as Complete; the form does not require manual completion.



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 one of these statuses:

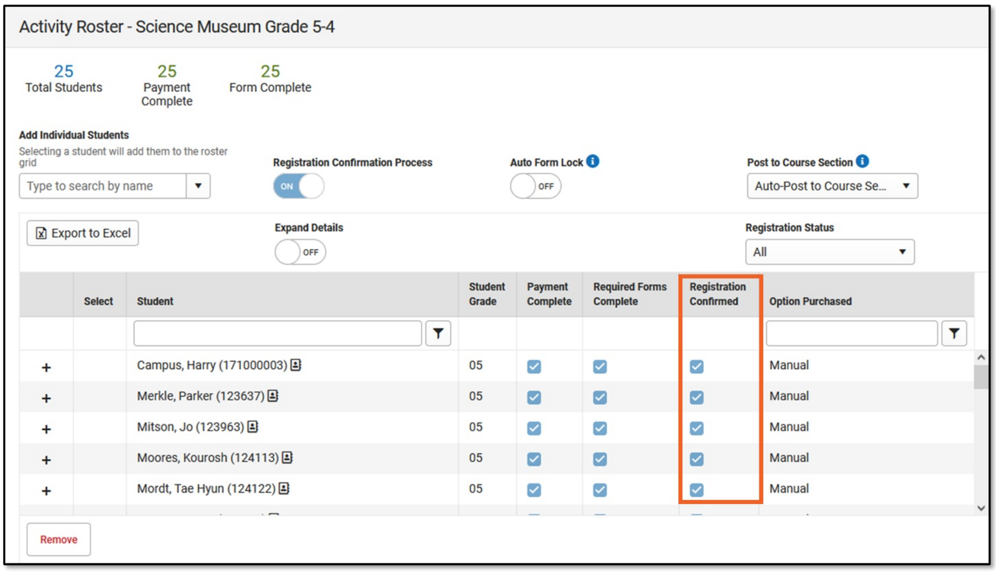
- Registration Open
- Registration Closed
- Active - Registration Open
- Active - Registration Closed

- Ready
- Approved

Posting to a Course Section is done for activities appearing on the Current or Upcoming tabs of the Activity Monitor.

Posting registered students to a Course Section allows you to track attendance using Campus Instruction and puts the activity on the student's schedule.

Only students who have the Registration Confirmed checkbox marked can be added to a Course Section roster. The students must have just one primary enrollment.



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.

Posting to a Course Section can be done manually or automatically.

Manual Post to Course Section

Students are manually added to a section roster by selecting Manual Post to Course Section from the Post to Course Section dropdown list.

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.

1. Once the activity has the proper status, choose **Manual Post to Course Section** from the Post to Course Section dropdown list.

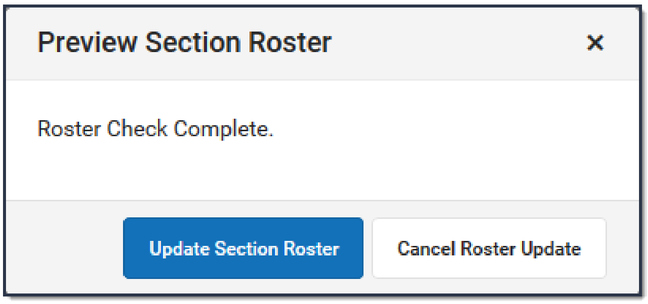
Result

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.

   A preview message displays.

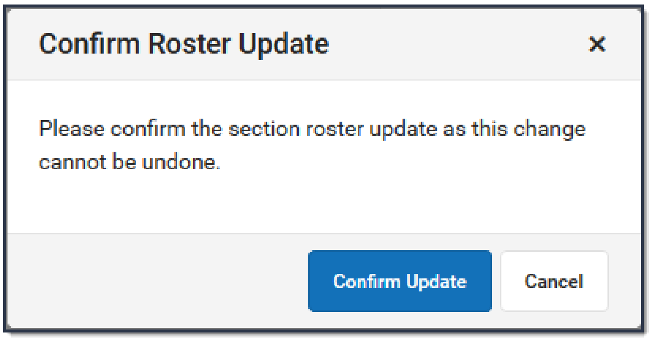
   If there are students who cannot be added to the roster, their names display on the preview message. This could include students who do not have a primary enrollment. After reviewing these students and correcting any issues, you can complete these steps again to append these students to the section roster.

   ▸ 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.

   ▸ Click here to expand...

Auto-Post to Course Section

If the option Auto-Post to Course Section is selected, students are automatically added to the section as soon as the Registration Confirmed checkbox is marked and the activity has been saved.

> It may take up to a minute after the Registration Confirmed checkbox is marked AND the roster has been saved before the student appears in the section roster.

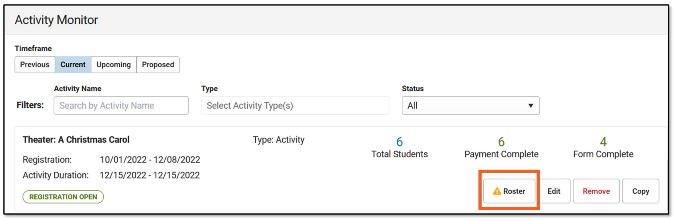
When Auto-Post to Course Section is selected, the Registration Confirmation Process toggle is automatically turned on. The Registration Confirmed checkbox will be marked for those participants who have made payment and have all forms completed (the Payment Complete and Required Forms Complete checkboxes will be marked).

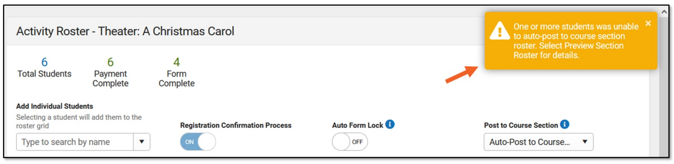
1. Once the activity has the proper status, choose **Auto-Post to Course Section** from the Post to Course Section dropdown list.
   Result
   The Registration Confirmation Process toggle is turned ON and the Post to Course Section area displays.
   ▸ Click here to expand...
2. Select the **Calendar**, **Course** and **Section**.
3. Click the **Save** or **Save & Stay** button.
   Result
   Students who already have the **Registration Confirmed** checkbox marked are automatically placed in the section roster.
   As students are added to the activity and their registrations are confirmed, they will be added to the section roster.

Preview Section Roster

If students' names appear on the preview message after clicking the **Preview Section Roster** button, it means there is an issue with their enrollment, or their registration has not been confirmed.

Issue	**How do I fix it?**
The registration has not been confirmed.	1. Ensure payment has been made for the student and the **Payment Complete** checkbox is marked. 2. The forms for the student have a status of **Completed** and the **Required Forms Complete** checkbox is marked. The **Registration Confirmed** checkbox will be marked automatically if **Auto-Post to Course Section** is selected from the **Post to Course Section** dropdown list.

<table>
<tr>
<td>
A student does not have a primary enrollment or has two or more primary enrollments. The Warning symbol appears on the Roster button in Activity Monitor...


...and a warning message appears after clicking the Roster button.


</td>
<td>

Resolve the enrollment issue.
Choose the Activity Monitor tool and click the Roster button for the activity with the warning.
If the Payment Complete and the Required Forms Complete checkboxes are marked, the student will NOT be automatically appended to the section roster even though Auto-Post to Course Section is selected.
Scroll down to the Post to Course Section area. Click the Preview Section Roster button, click Update Section Roster and then click Confirm Update.
Save.

After all enrollment issues have been resolved and the students have been posted manually, the warning messages no longer display.
</td>
</tr>
</table>

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

Roster Data	Ad hoc Field Name
Sign Up Date	actRegRoster.signUpDate
Payment Complete	actRegRoster.paymentComplete
Forms Complete	actRegRoster.formsComplete
Registration Complete	actRegRoster.registrationComplete
Posted to Course Section	actRegRoster.postedToCourseSection

Previous Version

- Activity Roster [.2235 - .2239]
- Activity Roster [.2231]
- Activity Roster [.2223 - .2227]
- Activity Monitor and Activity Roster [.2223]
- Activity Monitor and Activity Roster [.2124 - .2219]

Activity Monitor - Video

The Activity Monitor tool is used to create an activity, add participants, attach forms, and link the activity to the portal, online payments, and School Store.

Previous Versions

- Activity Monitor - Video [.2104 -.2108]
- Activity Monitor - Video [.2048 - .2052]
- Activity Monitor - Video [.2040 - .2044]