Activity Registration Overview

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Tool Search: Activity Monitor

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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	

Step		Campus Location
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
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		

Step		Campus Location
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

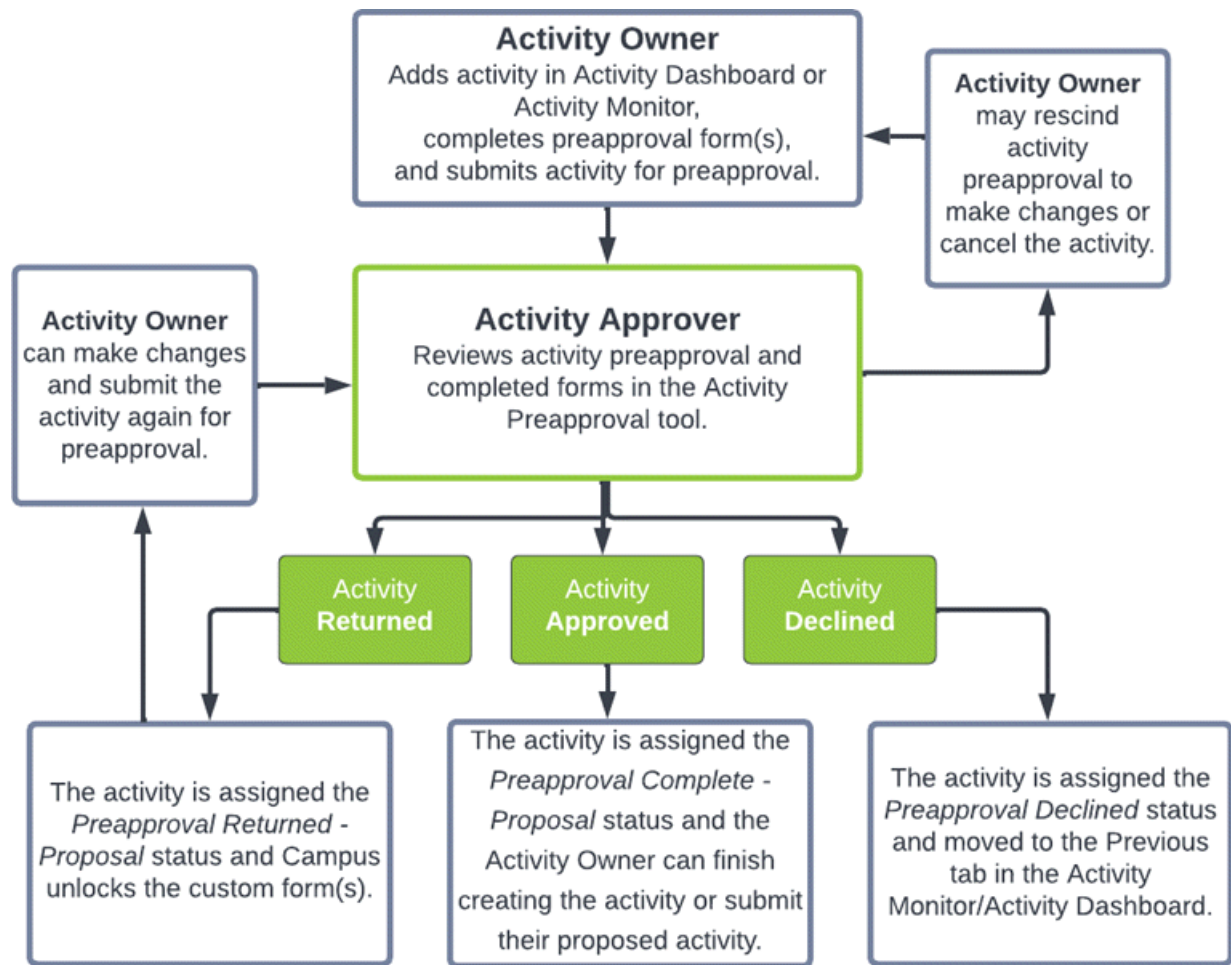| Step		Campus Location
4	Make sure the **Enable Activity Registration Viewing Tool** option has the **Student** and/or **Parent** checkboxes marked if you want to allow users to see Activity Registration information in Campus Student or Campus Parent. When these options are enabled, users can see the 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

Step		Campus Location
Set Up Activities		
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.

Activity Approval Workflow Diagram

Activity Owner
Adds activity in Activity Dashboard or Activity Monitor, completes preapproval form(s), and submits activity for preapproval.

Activity Owner
may rescind activity preapproval to make changes or cancel the activity.

Activity Owner
can make changes and submit the activity again for preapproval.

Activity Approver
Reviews activity preapproval and completed forms in the Activity Preapproval tool.

Activity Returned

Activity Approved

Activity Declined

The activity is assigned the *Preapproval Returned - Proposal* status and Campus unlocks the custom form(s).

The activity is assigned the *Preapproval Complete - Proposal* status and the Activity Owner can finish creating the activity or submit their proposed activity.

The activity is assigned the *Preapproval Declined* status and moved to the Previous tab in the Activity Monitor/Activity Dashboard.

Activity Proposal Workflow

The following chart provides the basic process a proposed activity goes through in Campus.
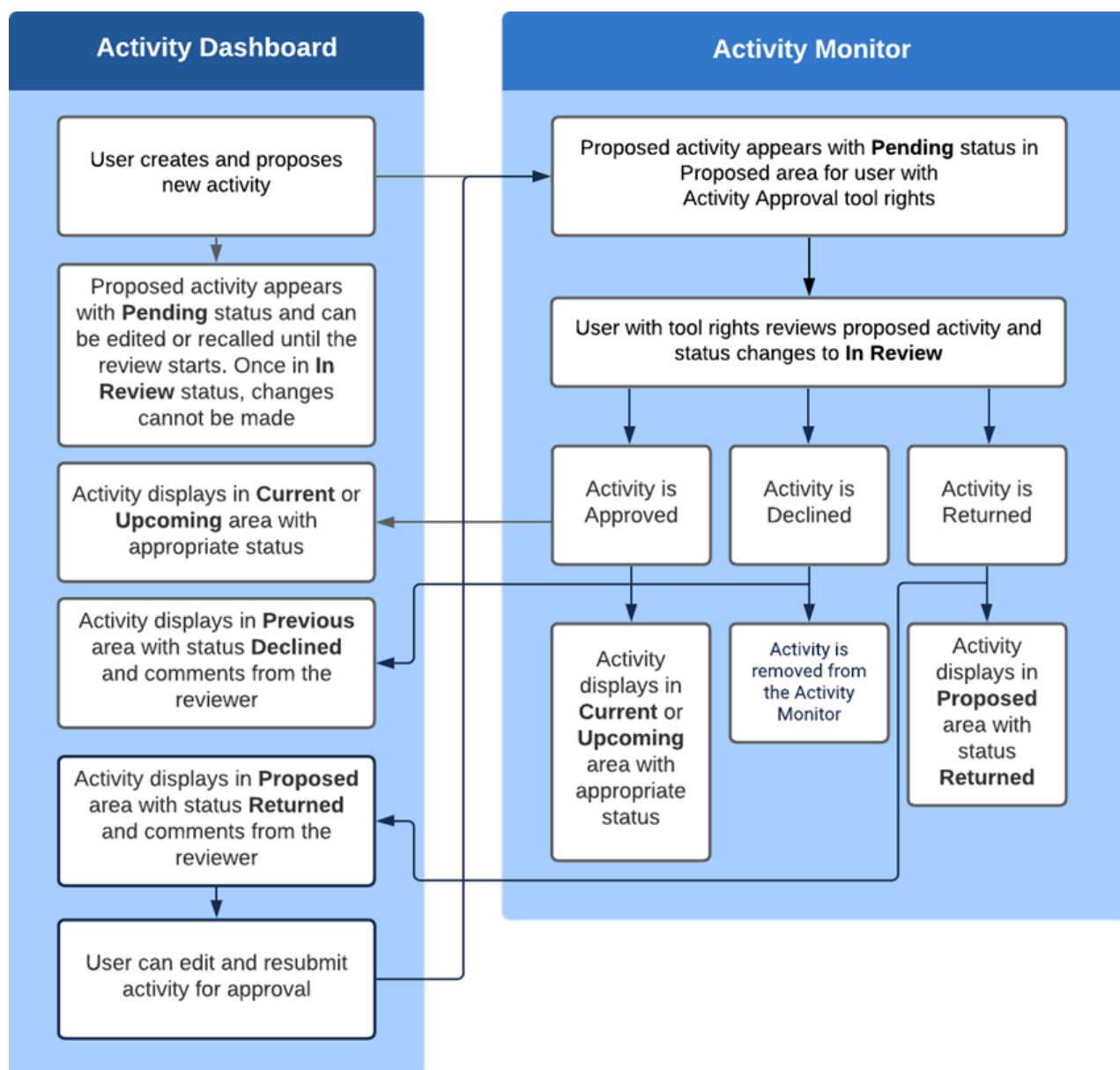
Tool Rights for Activity Registration

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*.

If no Roster Payment rights are granted, manual adds will have no Purchase Option and the registration will be unable to be confirmed by that specific user unless the student completes their registration and pays via the School Store.

You need at least one Payment Option (Cash/Check/Credit) for Roster Payments to be made. If you have no access to one of those, you cannot take a payment.

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.
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 sub-rights.

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

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 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
Activity Roster Payments	Allows users to view receipts and export.	Allows users to add payments, view receipts, and export.	Allows users to add payments, view receipts, and export.	N/A
Payment Options	Allows users to take Cash, Check, or Credit Card payments.	N/A	N/A	N/A
Cash	Allows users to take Cash payments.	N/A	N/A	N/A

Right	R	W	A	D
Check	Allows users to take Check payments.	N/A	N/A	N/A
Credit	Allows users to take Credit Card payments.	N/A	N/A	N/A
Refund	Allows users to issue refunds.	N/A	N/A	N/A
Override	Allows users to Override the cost of a Purchase Option.	N/A	N/A	N/A
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