

Activity Registration Setup - Study Guide

Last Modified on 07/15/2024 1:35 pm CDT

The Activity Registration tool provides districts with a way to manage 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.

- [Workflow and Setup](#)
 - [Understand the Activity Registration Workflow and Tool Rights](#)
 - [Allow Pictures to be Added in Activity Registration](#)
 - [Create a Store for Each School](#)
 - [Set Up Product Types](#)
 - [Set Up Fund Accounts](#)
 - [Create Custom Forms](#)
 - [Set Up Preapproval Configurations](#)
- [Creating Activities](#)
 - [Submit Forms for an Activity Requiring Preapproval \(Activity Monitor\)](#)
 - [Propose an Activity, No Preapproval \(Activity Dashboard\)](#)
 - [Build an Activity, No Preapproval \(Activity Monitor\)](#)
 - [Preapproving Activities](#)
- [Activity Registration Use](#)
 - [Manage Account - My Accounts Tool](#)
 - [Process Payments - My Cart Tool](#)
- [Managing Activities, Rosters and Payments](#)
 - [Managing Activity Rosters Using the Roster Button](#)
 - [Payments Reporter](#)
 - [Pick List](#)
 - [Sales Report](#)

Workflow and Setup

This section of the study guide explains the setup that needs to be done before using Activity Registration.

Understand the Activity Registration Workflow and Tool Rights

Use the workflow as an overview for setting up ad hoc filters, custom forms, portal options, and assigning the proper rights.

+ [Documentation](#)

Allow Pictures to be Added in Activity Registration

School Store needs to be enabled in Digital Repository Preferences so pictures can be added

within the Activity Registration module. See Step 1 of the article below to enable School Store.

+ [Documentation](#)

Create a Store for Each School

If schools are going to use the Activity Registration module, each school needs to establish a School Store.

+ [Documentation](#)

+ [Video](#)

Set Up Product Types

Product Types are assigned to Products and aligned to Fund Accounts in the Payments module. When a product is purchased, funds are deposited into the bank associated with the Fund Account to which you assigned the Product Type. Watch the video or refer to Step 3 of the documentation.

+ [Documentation](#)

+ [Video](#)

Set Up Fund Accounts

Fund Accounts identify which bank accounts are used for items purchased in the School Store and Activity Registration. Product Types and Fee Types are tied to fund accounts.

+ [Documentation](#)

+ [Video](#)

Create Custom Forms

The Custom Forms tool is used to create documents such as a permission form for a field trip, or a brochure for an activity.

+ [Documentation](#)

Set Up Preapproval Configurations

Certain activities may need preapproval based on rules determined by a school or the district. These activities require forms to be completed and submitted. The Preapproval Configuration tool is used to create rules and associate forms for activities requiring a preapproval process.

+ [Documentation](#)

+ [Video](#)

Creating Activities

Now that the setup is done, an activity can be created using the Activity Monitor tool, or proposed by staff members using the Activity Dashboard.

Submit Forms for an Activity Requiring Preapproval (Activity Monitor)

Some activities need preapproval before they can be created. This requires the activity creator to submit forms, and an administrator approves or declines them. If the forms are approved, the activity creator can build the activity for parents and students to see in the School Store. The Activity Monitor tool tells the creator when an activity requires preapproval.

+ [Documentation](#)

+ [Video](#)

Propose an Activity, No Preapproval (Activity Dashboard)

The Activity Dashboard can be used by staff members to propose an activity, such as a field trip or club and submit it for approval. Staff members can also use the activity dashboard to view information about activities they are associated with. Learn how to create a proposal, define eligible students, selecting related forms, and submit the proposal for approval.

+ [Documentation](#)

+ [Video](#)

Build an Activity, No Preapproval (Activity Monitor)

The Activity Monitor tool can be used to create activities such as a field trip or sporting event without having to start with a proposal; as well as to review activities proposed by staff in the Activity Dashboard. Learn to complete forms, export the list of participants, and review a proposed activity.

+ [Documentation](#)

+ [Video](#)

Preapproving Activities

After an activity creator submits the forms needed to get approval, an administrator reviews them and approves, declines, or returns the forms using the Preapproval Requests tool.

+ [Documentation](#)

+ [Video](#)

Activity Registration Use

This section shows how parents/guardians and students can manage payment methods, setup recurring payments, make payments, and view payment history.

Manage Account - My Accounts Tool

The My Account tool lets parents, guardians, or students manage payment methods, set up recurring payments, and view payment history.

+ [Documentation](#)

Process Payments - My Cart Tool

The My Cart tool lets parents, guardians, or students make payments on a fee, an item from School Store, or an event from Activity Registration.

+ [Documentation](#)

Managing Activities, Rosters and Payments

Managing Activity Rosters Using the Roster Button

The following topics in this video show how student registrations for activities are added and managed using the Roster button.

- Introduction to the Roster Button
- Manually Add Students
- Interactive Forms
- Confirm/Complete Registration
- Post to Course Section

+ [Video](#)

Payments Reporter

The Payments Reporter tool shows which payments were made, perform refunds, export results, and modify the look of the report with Column Display.

+ [Documentation](#)

+ [Video](#)

Pick List

The Pick List report provides a comprehensive list of purchased items. Use the report to mark off items that have been picked up.

+ [Documentation](#)

+ [Video](#)

Sales Report

The Sales Report provides a comprehensive record of sales activity across all of your district's school stores.

+ [Documentation](#)

+ [Video](#)
