Activity Registration Setup - Study Guide

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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

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.

Propose an Activity (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**

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

Processing Registrations

+ **Video**

Manually Add Students

+ **Documentation**

Remove/Transfer Students

+ **Documentation**

Refund Activity Payments

+ **Documentation**

Manage Waitlists

+ **Documentation**

Post to Course/Section

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Manage Incomplete Registrations

+ **Documentation**

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.

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+ **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**