

Activity Roll Forward

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Tool Search: Activity Roll Forward

The Activity Roll Forward tool allows you to roll activities forward en masse. When activities are rolled forward, you can update the registration and activity dates as well as make any necessary changes to the activities forms or details. The roll forward process creates new activities and adds them to the *Upcoming* section of the [Activity Monitor](#).

What can I do?	What do I need to know?
<ul style="list-style-type: none"> Roll Activities Forward 	<ul style="list-style-type: none"> Important Information About this Tool

Activity Registration Roll Forward

This is a two-step process that quickly updates and rolls activities forward to the next year. On the first screen, select one or many activities to be updated. Use the Filters to find specific activities. Click the Next button to add dates and optionally add forms or modify details.

Timeframe

Filters:

Activity Name
Type
Status
Prior Year Only OFF

Select All

<input type="checkbox"/>	Archery Type Activity	Activity Owner(s) (Primary) Lifellearn, Alan	School(s) Harrison High
<input type="checkbox"/>	Art Club Type Activity	Activity Owner(s) (Primary) Lifelong, Athena	School(s) Arthur Elementary, Fillmore Middle School, Harrison High

Important Information About this Tool

Filters

Before you begin, use the Filters at the top of the screen to narrow down the number of activities that display. The **Previous** option is selected by default. When the **Prior Year Only** checkbox is marked, only activities from the prior calendar year display. Clearing or changing filters does not change which activities are selected.

▶ [Click here to expand...](#)

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Timeframe

Filters:

Select All

Preapproval Required

Activities marked as **Preapproval Required** must go through the preapproval process after the activity is rolled forward. Use the [Activity Monitor](#) or the [Activity Dashboard](#) to complete the preapproval process. Activities that are associated with more than one school and more than one [Preapproval Configuration](#) cannot be rolled forward. Instead, create separate activity records for the applicable schools.

▶ [Click here to expand...](#)

Activity Registration Roll Forward

Activities marked as "Preapproval Required" must go through the preapproval process after the activity is rolled forward.

Fill All

Activity Name *

Book Club

PREAPPROVAL REQUIRED

Registration Open Date *

MM/DD/YYYY

Registration Close Date

MM/DD/YYYY

Activity Start Date *

MM/DD/YYYY

Activity End

MM/DD

Activity Owners (Primary) *

Administrator, Demo

Activity Owners (Secondary)

Roll Activities Forward

1. Mark the checkbox next to the activities to them roll forward, or mark the **Select All** checkbox to mark all activities.
2. If you are rolling a lot of activities forward and want to quickly remove activities after they are selected, click the **View Selections** button to display the **Selected** panel and clear the checkboxes next to the activities you do NOT want to roll forward.
3. Click the **Next** button.

▶ [Click here to expand...](#)

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Activity Name *
Book Club

Registration Open Date * MM/DD/YYYY **Registration Close Date** MM/DD/YYYY **Activity Start Date *** MM/DD/YYYY **Activity End Date *** MM/DD/YYYY

Activity Owners (Primary) * Albinak, Gina **Activity Owners (Secondary)**

Update Forms
Product Details

Activity Name *
Drama Club

Registration Open Date * MM/DD/YYYY **Registration Close Date** MM/DD/YYYY **Activity Start Date *** MM/DD/YYYY **Activity End Date *** MM/DD/YYYY

Activity Owners (Primary) * Aarons, Mitchell **Activity Owners (Secondary)**

Update Forms
Product Details

- On the second step, update the registration and activity dates, as well as make any changes to activity forms or details.

Tip: To quickly add the same dates to all activities, mark the **Fill All** checkbox to quickly select all activities or mark the checkbox next to the activities you want to update then click the **Fill Information** button. All fields are required except for the Registration Close Date. Click **Update** when you are done.

▶ [Click here to expand...](#)

Registration Open Date * MM/DD/YYYY

Activity Owners (Primary) * Albinak, Gina

Activity Name * Drama Club

Registration Open Date * MM/DD/YYYY

Activity Owners (Primary) * Aarons, Mitchell

Fill Information

Registration Open Date * MM/DD/YYYY

Registration Close Date MM/DD/YYYY

Activity Start Date * MM/DD/YYYY

Activity End Date * MM/DD/YYYY

5. Verify the Primary and Secondary **Activity Owners** are accurate. (optional)
6. Click the **Update Forms** button to display the Forms panel.
From here you can view and remove forms already associated with the activity or add new forms. (optional)

Forms on the original activity that are no longer active based on the registration dates display below the **Add Form** button.

▶ [Click here to expand...](#)

Update Forms - Book Club

Activity Type Activity	Registration Dates 11/15/2022 - 11/25/2022
Form Title(s)* (At least one form is required)	Required i
<input type="text" value="Permission Form (online version) (09/01/2 ..."/> ✕ ▼	<input type="text" value="Yes"/> ▼
<input type="button" value="Add Form"/>	<input type="button" value="Clear"/>
<p>Form(s) no longer valid with dates selected</p> <p>(* ** indicates Required, *** indicates Guardian Registration):</p> <p>Activity Registration (Signature Required) (06/30/2021 - 06/30/2022) *</p>	
<input type="button" value="Update"/>	<input type="button" value="Cancel"/>

1. Click the **Product Details** button to display the Product Details panel.
From here you can configure how the activity should display in the School Store and set up the associated costs. The image can be updated after you save the activity. (Optional)
If you have any questions about the Product Details fields, see the [Field Descriptions](#) provided on the Activity Builder article.

▶ [Click here to expand...](#)

Product Details - Archery

Categories *
 After School Activities (Harrison High) ✕

Product Name * Archery **Product Type *** Activity Registration ✕ ▼

Image Upload

Description and Special Instructions

B i A: ☰ ☷ ¶: 🔗 🖼️ Ω ↶ ↷ ⋮

It is lots of fun learning and practicing the skill of archery. We will be using compound bows to improve our skills. We will play games, shoot 3-D targets, do Olympic style archery, use atl-atl's, all while aiming to have a great time.
 Equipment will be provided.

Characters : 263/2000

Customer Comments

Update Cancel

2. Click the **Save** button.

Result: If there are activities that cannot roll forward because of missing data, a message displays and you can choose to continue by ignoring those activities (and not roll them forward) or return to the Activity Roll Forward tool to complete the missing information. A message also displays if there are records that need attention, for example records that need a preapproval. You can click the Print button on this message to save a copy of the tasks that need to be done.

▶ [Click here to expand...](#)

Records Needing Attention ✕		
The following records have warnings or are in error. Records with errors need attention before they can be processed.		
Activity	Status ↑	Message
Book Club	Warning	Activity created. Please update the activity in the Activity Monitor under "Current" to complete the preapproval process.

Ok Print

Otherwise, the first step of the roll forward process displays. The roll forward process creates new activities and adds them to the *Upcoming* section of the [Activity Monitor](#).

