

Activity Roll Forward [.2223 - .2243]

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Classic View: Activity Registration > Activity Roll Forward

Search Terms: 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 to 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.

Filters: Activity Tab: Previous ▾ Activity Name: club Type: Activity ✕ Status: Complete ✕ Prior Year Only:

Select All View Selections (2)

<input checked="" type="checkbox"/>	<p>Book Club</p> <p>Type Activity</p>	<p>Activity Owner(s) (Primary) Albinak, Gina</p>	<p>School(s) Harrison High</p>
<input checked="" type="checkbox"/>	<p>Drama Club</p> <p>Type Activity</p>	<p>Activity Owner(s) (Primary) Aarons, Mitchell</p>	<p>School(s) Harrison High</p>

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Example Activity Roll Forward

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...](#)

Activity Registration Roll Forward

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Filters:

Activity Tab	Activity Name	Type	Status	Prior Year Only
Previous ▼	club	Activity ✕	Complete ✕	<input type="checkbox"/>

Select All View Selections (2)

View Selections

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.

▶ [Click here to expand...](#)

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.

Filters:

Activity Tab	Activity Name	Type	Status	Prior Year Only
Previous ▼	Search by Activity Name			<input type="checkbox"/>

Select All View Selections (39)

Activity	Type	Activity Owner(s)
<input checked="" type="checkbox"/>	Activity	Johnson, Gary
<input checked="" type="checkbox"/>	Activity	Proposer, JJ

[Next](#)

Selected

39 Selected

- Apple Elementary Book Club
- Apple Elementary Drama Club
- Apple Elementary Running Club
- Apple Elementary Singing Club
- Apple Elementary Winter Club
- Apple Elementary School FT
- All types of forms
- Approved FT thru proposal
- BA-UI (FF, 3 tier created)
- Benton Activities (Par-fill)
- Benton Actvty (Par-fill)-2
- Benton HS Valley Fair
- Benton/Skyline FT
- Both sig/fill=on, form req.
- Field Trip w/multiple options
- Field Trip All Grades
- FT Active chg Reg close date
- FT Par sign/fill, stud nothing
- Game Club
- Harrison HS April FT

[Update](#)
[Cancel](#)

Preapproval Required

Activities marked as **Preapproval Required** must go through the preapproval process after the

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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

<p>Activity Name *</p> <input style="width: 95%;" type="text" value="Book Club"/>	<p>PREAPPROVAL REQUIRED</p>		
<p><input type="checkbox"/> Registration Open Date *</p> <input style="width: 95%;" type="text" value="MM/DD/YYYY"/>	<p>Registration Close Date</p> <input style="width: 95%;" type="text" value="MM/DD/YYYY"/>	<p>Activity Start Date *</p> <input style="width: 95%;" type="text" value="MM/DD/YYYY"/>	<p>Activity End Date *</p> <input style="width: 95%;" type="text" value="MM/DD/YYYY"/>
<p>Activity Owners (Primary) *</p> <input style="width: 95%;" type="text" value="Administrator, Demo"/>	<p>Activity Owners (Secondary)</p> <input style="width: 95%;" type="text"/>		

Roll Activities Forward

1. Mark the checkbox next to the activities to roll forward or mark the **Select All** checkbox to quickly mark all activities.
2. Click the **Next** button.

Result: The second step displays. This is where you can update the registration and activity dates as well as make any necessary to changes to the activities forms or details.

▶ [Click here to expand...](#)

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.

<input type="checkbox"/>	Activity Name *	Registration Open Date *	Registration Close Date	Activity Start Date *	Activity End Date *	Update Forms
	Book Club	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	Product Details
	Activity Owners (Primary) *	Activity Owners (Secondary)				
	Albinak, Gina X					

<input type="checkbox"/>	Activity Name *	Registration Open Date *	Registration Close Date	Activity Start Date *	Activity End Date *	Update Forms
	Drama Club	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	Product Details
	Activity Owners (Primary) *	Activity Owners (Secondary)				
	Aarons, Mitchell X					

Save Fill Information Cancel

3. Add the registration and activity start and end dates.

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...](#)

Fill Information

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

Update Cancel

Save **Fill Information** Cancel

4. Verify the Primary and Secondary **Activity Owners** are accurate. (optional)

5. 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

<p>Activity Type Activity</p>	<p>Registration Dates 08/30/2021 - 09/17/2021</p>
<p>Form Title (required forms indicated with **)</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> Club Transportation Permission (11/02/2020 -) ▼ </div>	<p>Required</p> <div style="display: flex; align-items: center; gap: 10px;"> <input type="checkbox"/> Clear </div>
<div style="display: flex; justify-content: space-around; gap: 20px;"> Add Form </div>	
<div style="display: flex; justify-content: space-around; gap: 20px;"> Update Cancel </div>	

6. 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 - Book Club

Categories *
Clubs (Harrison High) X

Product Name * Book Club **Product Type *** Clubs

Restrict to Associated School Enrollments

Image Upload
Current File Name: BookClub.png

Product Description and Special Instructions

Format **B I U** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **☰ ☷ ☹ ☺** **A** **</>**

Join our online book club! We'll be meeting twice a week on Tuesdays and Thursdays.

Customer Comments

Track Limits **Partial Refunds**

Item Name *	Selling Price *	Reduced Price	Free Price	Inventory Limit
Book Club	\$15.00			

7. 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](#).