Activity Builder [.2235 - .2243]

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Step 1 - Create Activity | Step 2 - Build Roster | Step 3 - Form Selection | Step 4 - Link to Portal | Step 5 - Finish | Submit an Activity Request for Preapproval

Use the Activity Monitor tool to add new activities to Campus.

Before You Begin
- Add supplemental Activity Registration documents in the Custom Forms tool.
- Create an Ad Hoc filter for selecting eligible students.

This article walks you through the setup process step-by-step.

- Step 1 - Create Activity
- Step 2 - Build Roster
- Step 3 - Form Selection
- Step 4 - Link to Portal
- Step 5 - Finish
- Submit an Activity Request for Preapproval

Tip
While using the Activity Builder, click **Save & Hold** to save the activity and return to the Activity Monitor. Click **Save & Next** to continue to the next step in the Activity Builder.

Step 1 - Create Activity

The first step in the Activity Builder is to define parameters for the activity. To add an activity, click the **New** button in the action bar.

▶ Click here to expand...
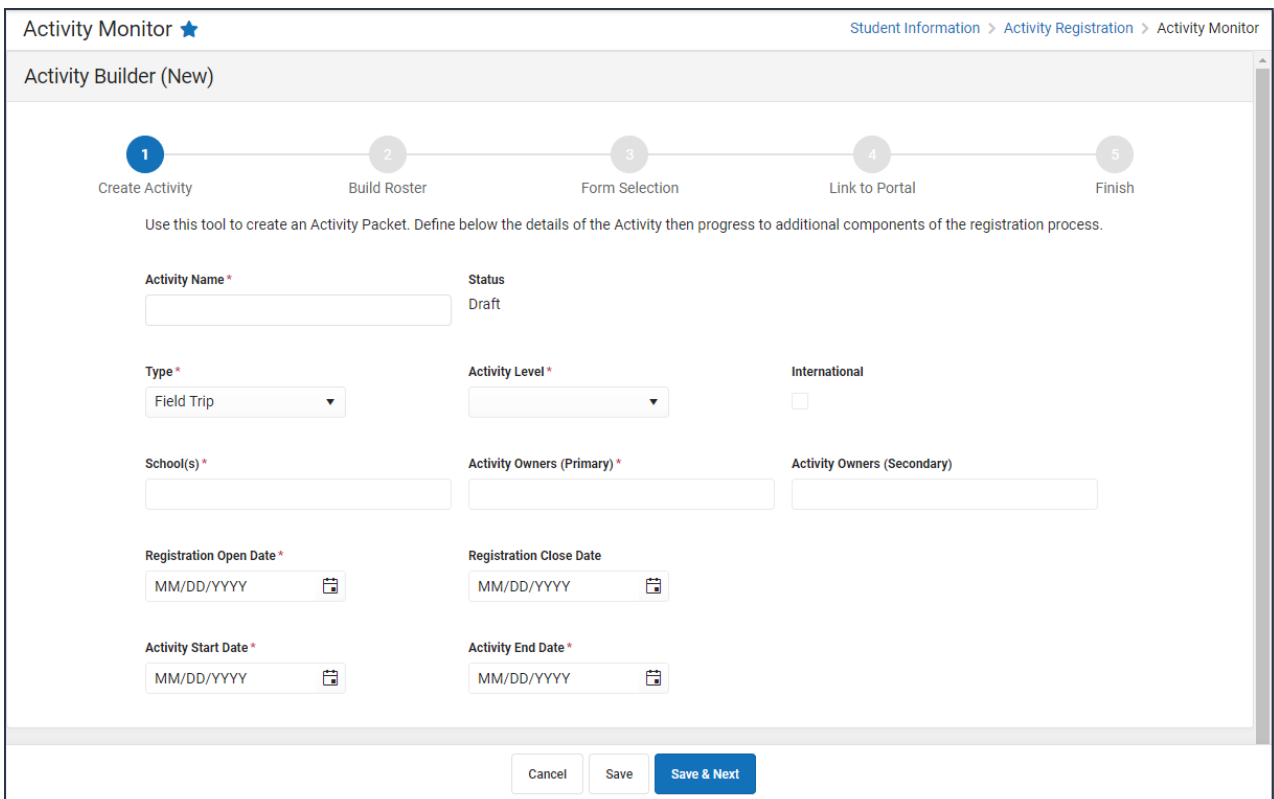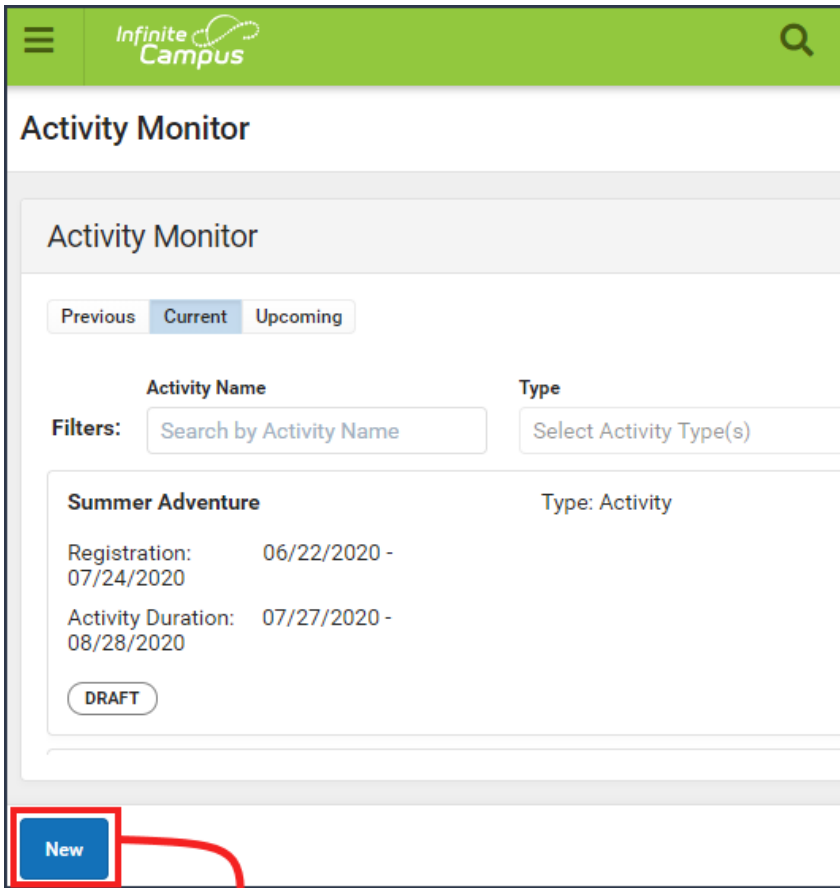
Use the following field descriptions to complete the Create Activity screen.

Field	Description
Activity Name	A name for the activity you are creating. *This is a required field.* The Activity Name can be changed until registration is closed. If you have already associated a Product with this activity and the product has the same name, Campus gives you the option to change the product name too. Please note that if you change the Activity Name, any completed purchases/registrations that exist when you change the name will still use the original name (name at the time the purchase was made) in School Store reports.
Type	The activity Type is provided by Campus. Options include the following: • Activity • Athletics • Field Trip *This is a required field.*
Activity Level	Activity Levels are another way to identify different kinds of activities. This field only displays if you have added Activity Levels in the Attribute Dictionary and is optional unless the **Required** checkbox is also marked in the Attribute Dictionary. ▸ Click here to expand...
International	The **International** checkbox only displays when the **Activity Type** is *Field Trip*. If the activity needs preapproval, marking this checkbox ensures Campus routes your activity request to the correct approver(s).

Field	Description
Status	The Activities status. This is a read-only field. • **Draft** • **Preapproval Returned** • **Preapproval Required** • **Preapproval Pending** • **Preapproval Complete** • **Ready** • **Registration Open** • **Registration Closed** • **Active - Registration Open** • **Active - Registration Closed** • **Complete** • **Cancelled** **Tip** If the *Registration Closed Date* is after the *Activity Start Date*, the *Status* is Active - Registration Open.
School(s)	The school(s) to which you can associate the Activity. Only schools to which you have tool rights display. *This is a required field.*
Activity Owners (Primary)	The primary person(s) responsible for the Activity. To appear in this field, the person must have an active assignment in the selected school and • the **Activity Staff** checkbox marked on their District Assignment OR • be assigned the **Activity Staff** role on their Work Assignment (HR Only). You may select more than one person in the field. For access to attendance and messaging options, the person must also have Teacher marked on their District Assignment or be assigned the Teacher role on their Work Assignment (HR Only). When a Primary Owner is not the person who created the activity and changes the Primary Owner to another person, they will not have access to the activity after they save their changes. When a Primary Owner is not the person who created the activity and adds themselves as the Activity Owner (Secondary), they will only have read-only access to the activity after they save their changes. *This is a required field.*

Field	Description
Activity Owners (Secondary)	The secondary person(s) responsible for the Activity. To appear in this field, the person must have an active assignment in the selected school and - the **Activity Staff** checkbox marked on their District Assignment OR - be assigned the **Activity Staff** role on their Work Assignment (HR Only). You may select more than one person in the field. For access to attendance and messaging options, the person must also have Teacher marked on their District Assignment or be assigned the Teacher role on their Work Assignment (HR Only).
Registration Open Date	The first day on which the Activity displays in the School Store and people can register for the Activity. The date must be prior to the Activity Start Date and Registration Close Date. *This is a required field.*
Registration Close Date	The last day on which the Activity displays in the School Store. The date must be after the Registration Open Date and prior or equal to the Activity End Date. If you do not enter a date, Campus automatically uses the Activity End Date.
Activity Start Date	The date on which the Activity begins. The date cannot be prior to the Registration Open Date or after the Activity End Date. *This is a required field.*
Activity End Date	The date on which the Activity ends. The date cannot be prior to the Activity Start Date or Registration Close Date. *This is a required field.*

Step 2 - Build Roster

Define eligible participants by selecting a saved Ad Hoc filter.
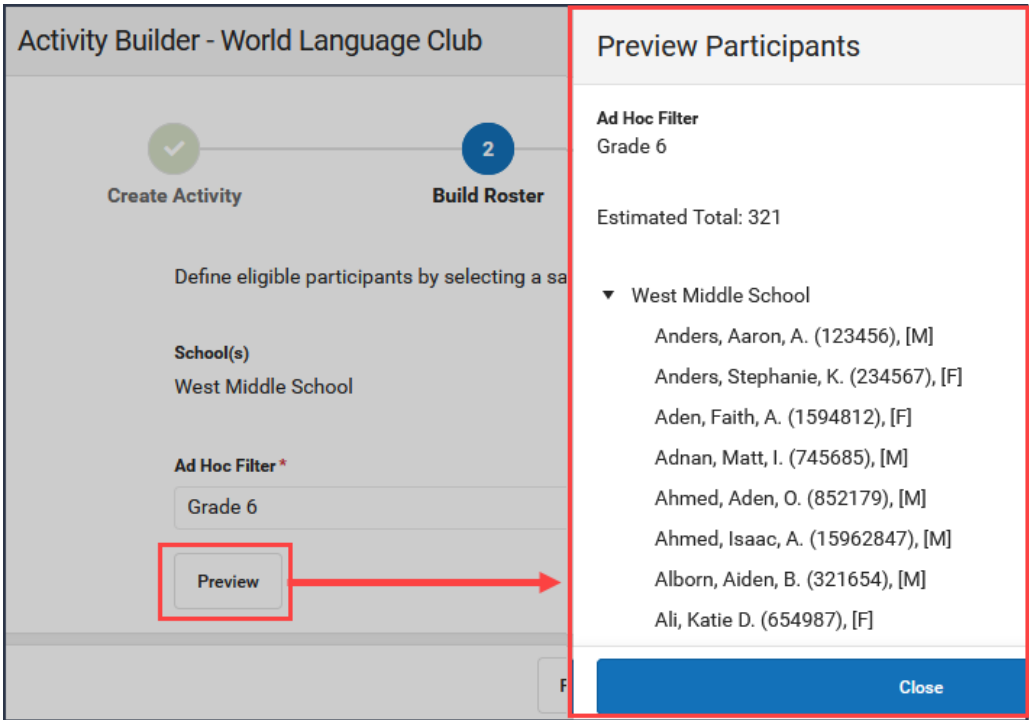
▶ Click here to expand...

Use the following field descriptions to complete the Build Roster screen.

Field	Description
School(s)	This field displays the school(s) that were selected in Step 1 - Create Activity.
Ad Hoc Filter	The Ad Hoc filter for selecting eligible students. Campus only allows students who are included in the Ad Hoc filter and have an active enrollment in the school(s) associated with the activity to register for the activity. *This is a required field.*

Field	Description
Preview	Click this button to preview roster information in a side panel. The panel displays an estimate of the total number of students listed by school then provides the student's names. If a student has multiple enrollments and Campus cannot identify the primary enrollment, an asterisk (*) displays behind the student's name.

> **IF** your district includes a school in its Ad hoc filter, verify the **same** school is selected on Step 1 - Create Activity. If the Ad hoc filter and the activity are associated with different schools, the Preview displays irregular results.

> If you do not have access to the ad hoc filter that is assigned to the activity, the **Preview** button does not display.

Step 3 - Form Selection

Select the appropriate forms for registration and indicate whether the form is considered required.

▶ Click here to expand...

Use the following field descriptions to complete the Form Selection screen.

| Field	Description
Activity Type	This field displays the Activity Type that were selected in Step 1 - Create Activity. • Activity • Athletics • Field Trip
Form Title	This field displays the custom forms associated with the Activity Type. You must select at least one form. You can add multiple forms by clicking the Add Form button. This is a required field. Tip: If the form title is grey and cannot be selected, check the form's active dates. The form must be active for the full time that your activity has registration open.
Required	Mark this checkbox to display a red star next to the form in the School Store. The following image demonstrates how this appears in the store. Forms to be completed (required forms indicated with"*") Student-Athlete Statement* Transportation Form

Step 4 - Link to Portal

On this screen, configure how the activity should display in the School Store and set up the associated costs.

▶ Click here to expand...

Activity Builder - Lacrosse Club 10th Grade Girls

| ✓ Create Activity | ✓ Build Roster | ✓ Form Selection | **4** Link to Portal | 5 Finish |
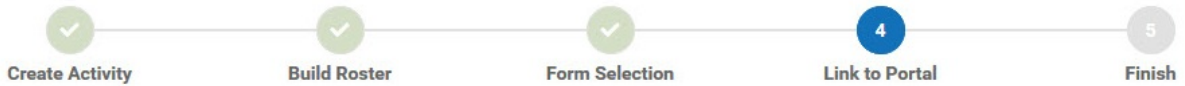
Configure the registration view for the Portal and cost where applicable for the activity.

Category Information

Categories *

Sports Clubs (Harrison High) ✕

Product Information

Product Name *
Lacrosse Club 10th Grade

Product Type *
Athletics ▼

Restrict to Associated School Enrollments
☐

Image Upload
Max File Size: 20MB

Select files...

Product Description and Special Instructions

Paragraph ▼ | **B** | *I* | U | ⋮

Lacrosse club is for students who want to play more than just the regular season or students who are new to the sport.

Customer Comments
☐

Associated Costs

Track Limits
☑

Partial Refunds
☐

Item Name *	Selling Price *	Reduced Price	Free Price	Inventory Limit *	
Lacrosse Club	$100.00	$50.00	$25.00	30	Remove
Lacrosse Club with Activity Bus	$120.00	$65.00	$25.00	30	Remove

Add

Receipt Comments

Add comments or special instructions you wish to appear on customer's receipt here.

| Previous | Cancel | Save & Hold | **Save & Next** |

Use the following field descriptions to complete the Link to Portal screen.

Field	Description
Category Information	
Category	Categories are how similar products are grouped together in the store. When a portal user selects a category, only the products assigned to that category display. *This is a required field.* See the Categories (School Store) article for more information about managing categories.
Product Information	
Product Name	The name that displays in the store. *This is a required field.*
Product Type	Product Types are assigned to products and to Fund Accounts. When a product is purchased, funds are deposited into the bank associated with the Fund Account that is assigned to the same Product Type. Product Types are set up in the School Store: *System Administration > School Store > Product Types*. *This is a required field.*
Active	When this checkbox is marked, the product displays on the School Store. However, if this checkbox is not marked, the product is not available even if registration is currently open. This checkbox is most useful for troubleshooting issues in the School Store. If the Category associated to the activity is inactivated, this checkbox is automatically unmarked. The Active checkbox does NOT display when the Activity is in a Draft or Cancelled status. ▶ Click here to expand...

Field	Description
Restrict to Associated School Enrollments	When this checkbox is marked, the Recipient dropdown list will only display students who have an enrollment in the active school year at the school to which the activity is attached. This includes primary, secondary, and enrollments with a future end date. **Example** If you have an Activity attached to the High School only and this checkbox is marked, parents will only be able to select their student(s) with primary and secondary High School enrollments in the active school year as well as enrollments with a future end date. Please note that if the same Activity is associated with multiple schools; e.g., a middle school and a high school, parents can select both middle and high school students in both stores.
Image Upload	This option allows you to add a picture of the product.
Product Description and Special Instructions	Detailed information about the product. This description appears below the picture of the product. **Tip** Use this area to provide more information about the activity like meeting times, locations, and contact information. You could also provide special instructions such as how to turn in the forms.
Customer Comments	When this checkbox is marked, customers can add information to their purchase before they check out.
Associated Costs	
Track Limits	Mark this checkbox if you want to track the number of openings or items you have available or if you want to cap the number of students allowed to enroll. When this checkbox is marked, Campus calculates the amount of inventory you have available after a purchase is made through the School Store. Marking this checkbox enables the **Inventory Limit** field and makes it required. Do NOT mark this checkbox if you do not want to limit the number of registrations that can be sold.
Partial Refunds	When this checkbox is marked, partial refunds can be issued in the Payments Reporter for the activity. If this **Partial Refunds** checkbox is marked and the **Track Limits** option is also selected, the Payments Reporter will allow you to increase the number of available openings or items when you make a partial refund.
Item Name	The Product Name automatically displays here but can be changed. *This is a required field.* If more than one option is available for users to select, this is the name of the option that displays under the Product in the School Store.
Selling Price	The price customers see and pay in the School Store. The price can be $0.00. *This is a required field.*

Field	Description
Reduced Price	The price students with reduced eligibility status pay and see in the School Store. The price can be $0.00. To use this feature, the **Allow Free and Reduced Pricing** checkbox must be marked in the School Store setup.
Free Price	The price students with a free eligibility status pay and see in the School Store. The price can be $0.00. To use this feature, the **Allow Free and Reduced Pricing** checkbox must be marked in the School Store setup.
Inventory Limit	This field is only available if you marked the **Track Limits** checkbox. Enter the maximum number that may be purchased. Once this number is reached, the product does not display in the School Store. If you process a refund during registration, Campus returns the inventory for purchase. *This is a required field when tracking limits.*
Add (button)	Click the **Add** button to add another item that may be purchased for this product. In the following example, an option was added that includes an activity bus. **Associated Costs** **Track Limits** ☑ | Item Name *	Selling Price *	Reduced Price	Free Price	Inventory Limit *	
Lacrosse Club	$100.00	$50.00	$25.00	30	Remove
Lacrosse Club with Activity Bus	$120.00	$65.00	$25.00	30	Remove	 Add
Receipt Comments	This field allows you to enter comments or special instructions that you want on the customer's receipt. For example, you could add reminders for event times, meeting places, or what to bring.

Step 5 - Finish

Review the Activity Registration product display for the Campus School Store and validate the appropriate Custom Forms are attached. Click **Finish** to complete the process. After you click Finish, the Activity is in a **Ready** or **Registration Open** status. Editing is limited when an activity is in a **Registration Open** status. Most fields cannot be changed.
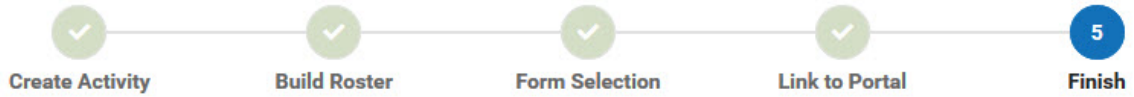
> ⚠️
>
> When the **Finish** button is unavailable, you can **NOT** complete this step because your activity requires preapproval.
> See the Submit an Activity Request for Preapproval topic for more information.

▶ Click here to expand...

Activity Builder - Lacrosse Club 10th Grade Girls

✓ **Create Activity** — ✓ **Build Roster** — ✓ **Form Selection** — ✓ **Link to Portal** — **5** **Finish**

Please review the Activity Registration product display for the Campus School Store. Click "Finish" to complete the process.

Lacrosse club is for students who want to play more than just the regular season or students who are new to the sport.

Registration Dates: 06/01/2020 - 06/30/2020

Activity Dates: 07/01/2020 - 08/21/2020

Forms to be completed (required forms indicated with" *")
Student-Athlete Statement *
Transportation Form

Activity Options *
Select Option... ▼

Price

Quantity
1 ▼

Total Price
$0.00

Recipient
▼

Previous   Cancel   **Finish**

The following image is an example of this activity on the School Store.

> Once a student has registered for an activity, that activity no longer appears for them in the School Store.

Submit an Activity Request for Preapproval

If your activity requires preapproval before it can be created, a yellow banner displays under the progress tracker after *Step 1. Create Activity* or it displays on the Proposed tab with the status
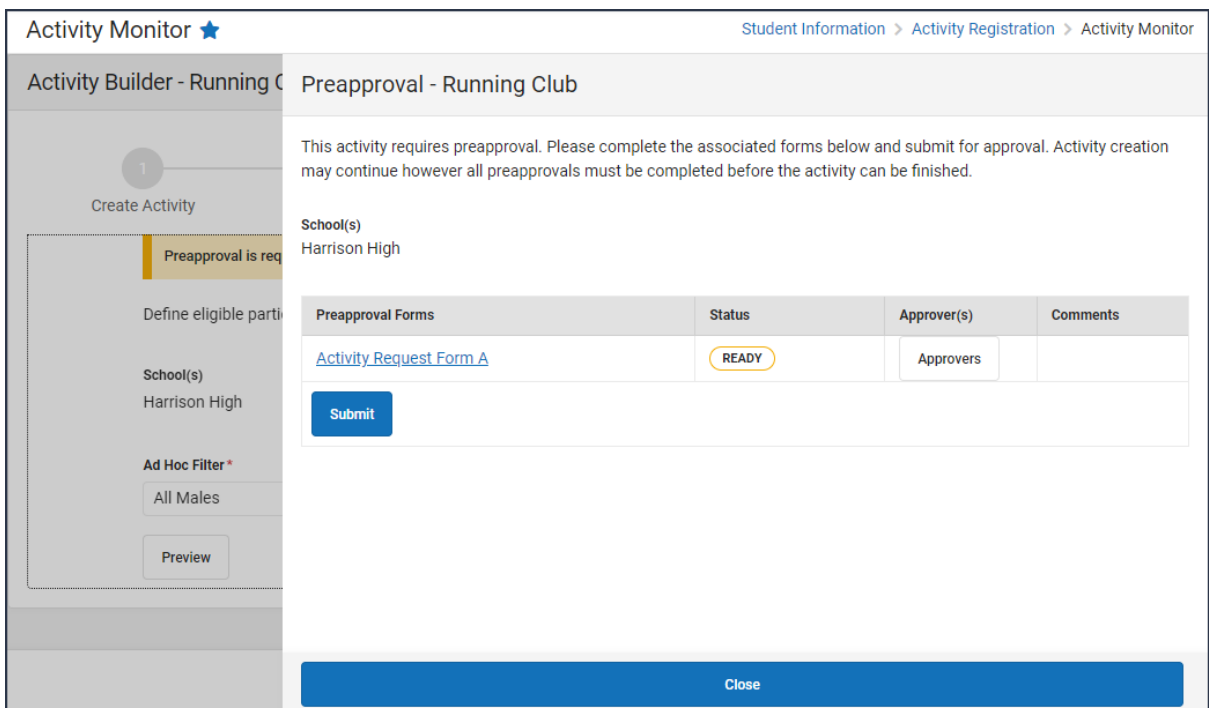
Preapproval Required - Proposal. You can submit your activity request for preapproval at any time but the activity must be approved before you can complete Step 5. Finish.

1. Click the **Preapproval** link in the banner.
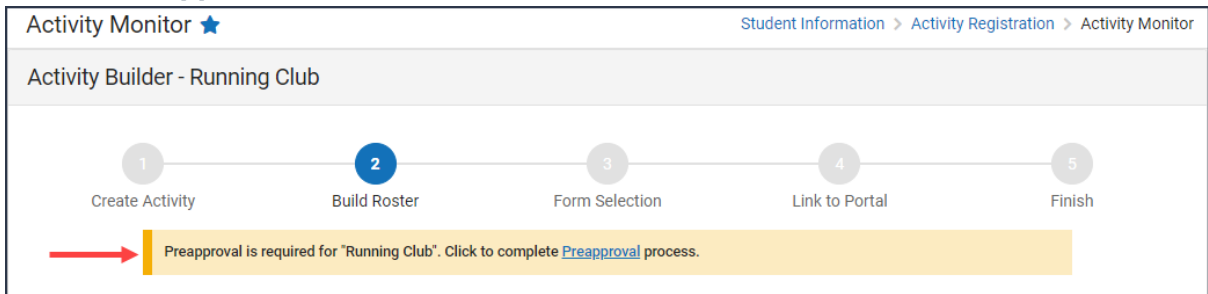
Result: The Preapproval panel displays.
▸ Click here to expand...

2. Click the links for the **Preapproval Form**(s) (there may be more than one), fill in the required fields, and then click **Save** in the action bar. Repeat this step for each form.
   Result: The status changes to **Pending**.
3. Click **Submit**.
   Result: The form status changes to **Submitted** and the **Submit** button changes to **Rescind**.
4. Click **Close** to close the panel and return to the activity.
   Result: The activity status changes to **Preapproval Pending - Proposal**. You can continue setting up your activity or click **Cancel.** Campus saves your activity and changes color the color of the forms alert based on the preapproval status.

If your activity request is...	Then...
Approved	you will receive a notification that your activity request was approved and you may complete Step 5. Finish. The Activity Proposal is also assigned the *Preapproval Complete - Proposal* status.

If your activity request is...	Then...
Returned	you will receive a notification that your activity request was returned. The activity request is assigned the *Preapproval Returned - Proposal* status and Campus unlocks the custom form(s) so that you can make changes and submit the activity request again for preapproval.
Declined	you will receive a notification that your activity request was declined. The activity request is assigned the *Preapproval Declined* status and moved to the Previous tab in the Activity Monitor.