Activity Dashboard [.2223 - .2311]

Last Modified on 08/15/2023 11:14 am CDT

Important Information About this Tool | View Activities | Create and Submit an Activity Proposal | Recall a Proposed Activity | Edit an Activity | Copy an Activity | Cancel or Delete an Activity | Submit an Activity Request for Preapproval | Tool Rights

Classic View: Activity Registration > Activity Dashboard

Search Terms: Activity Dashboard

The Activity Dashboard allows primary and secondary activity owners to manage their activities. This tool also allows users, who have the correct tool rights, to create and submit proposed activities for approval.

What can I do?	What do I need to know?
- View Activities - Create and Submit an Activity Proposal - Recall a Proposed Activity - Edit an Activity - Copy an Activity - Cancel or Delete an Activity - Submit an Activity Request for Preapproval	- Important Information About this Tool - Tool Rights

Important Information About this Tool

- Secondary Activity Owners only have a read-only view of the activity to which they are assigned unless they are the creator of the proposed activity. The Remove and Recall buttons will not display for them even if they are given the Delete tool right.
- 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.
- Activities that are **In Review** cannot be edited.
- Declined activities appear in the **Previous** area with the status **Declined** and comments from the reviewer.
- Returned activities appear in the **Proposed** area, can be edited, and can be re-submitted for approval.

View Activities

The initial view provided by the Activity Dashboard is a summary view of all Current activities. However, you can view other activities by using the following options.

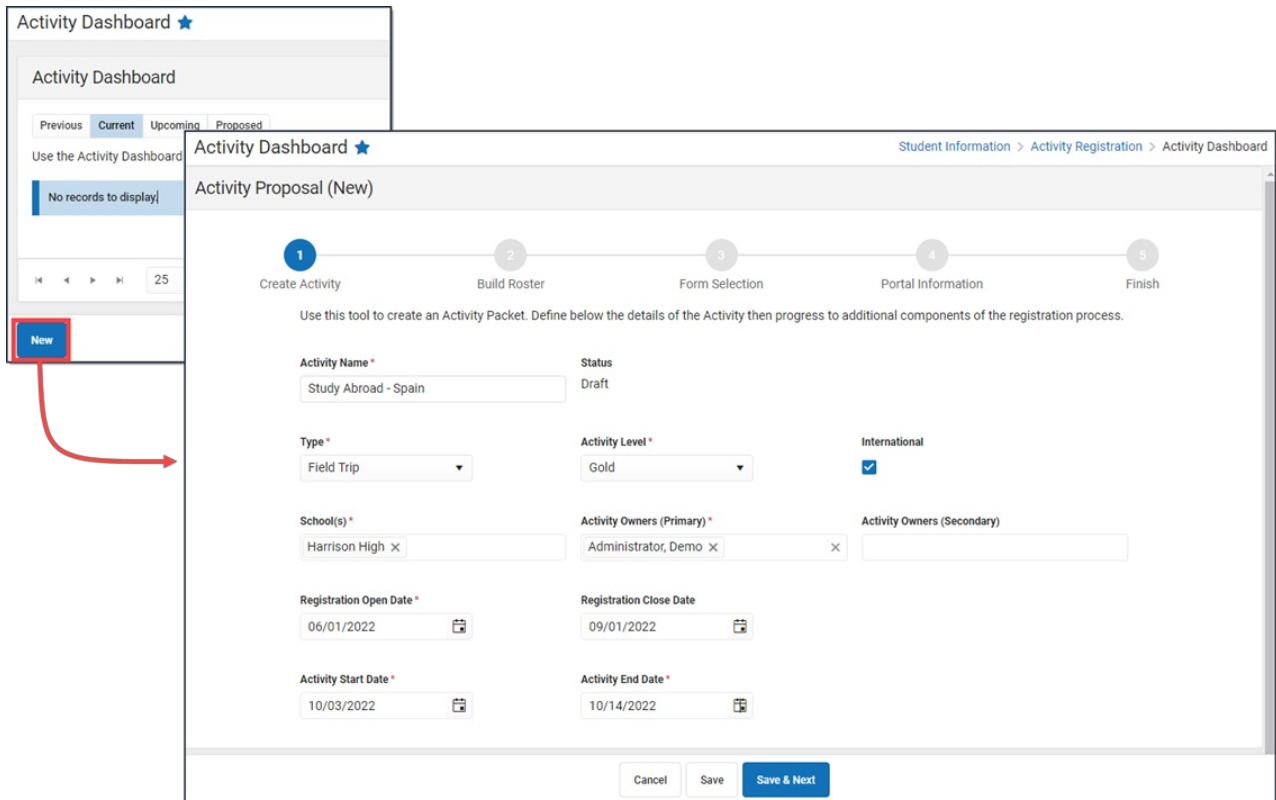| Option	Description
Previous	All activities in a **Complete, Canceled, or Declined** status. Declined activities include comments from the reviewer that can be seen here.
Current	All activities in a **Registration Open**, **Registration Closed**, **Active - Registration Open**, or **Active - Registration Closed** status.
Upcoming	All activities in **Ready** or **Approved** status.
Proposed	All activities in a **Draft - Proposal**, **Pending**, **In Review**, or **Returned** status. • Users can only view activities they submit or view activities for which they are listed as the primary or secondary activity owner. • Activities that are **In Review** cannot be edited. • Activities in a **Returned** status can be edited and re-submitted for approval.
Filters	You can further narrow the number of activities that display by using the following filters: • **Activity Name** • **Type** (Activity, Athletics, Field Trip) • **Status**
Prior Year Only	When this checkbox is marked, only activities from the prior calendar year display. This checkbox only displays on the **Previous** tab.

Create and Submit an Activity Proposal

You must have Add rights for the Activity Dashboard to complete these steps.

- Step 1. Create Activity
- Step 2. Build Roster
- Step 3. Form Selection
- Step 4. Portal Information
- Step 5. Finish

Step 1. Create Activity

The first step 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.

Field	Description
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 in if you have added Activity Levels in the Attribute Dictionary and is optional unless the **Required** checkbox is also marked in the Attribute Dictionary.
International	The **International** checkbox only displays when the activity **Type** is *Field Trip*. If your district uses the Preapproval process, marking this checkbox ensures Campus routes your activity request to the correct approver(s).
Status	The Activity status. This is a read-only field.
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). Secondary Activity Owners only have a read-only view of the activity to which they are assigned unless they are also the creator of the proposed activity. Secondary owners on an activity do not have the **Remove** button for delete/cancel functions even if the Delete tool right is assigned.
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 and/or entering a description of the group.

▶ 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.
Description of group to be created	A description of the eligible participants.
Ad Hoc Filter	The Ad Hoc filter for selecting eligible students. Campus only allows students who are included in the Ad Hoc filter to register for the activity. If you do **not** have rights to Ad Hoc, this field does not display.
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 you do not have access to ad hoc or to the ad hoc filter that is assigned to the activity by a reviewer, the **Preview** button does not display.

Step 3. Form Selection

Select the appropriate forms for registration and indicate whether the form is considered required. Forms must be active during the full registration period to be selected.

▶ 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
Registration Dates	This field displays the Registration Dates that were selected in Step 1 - Create Activity.

Field	Description
Form Title	This field displays the custom forms associated with the Activity Type. This field is required unless you mark the **Additional Forms Pending** checkbox. You can add multiple forms by clicking the **Add Form** button. **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.
Additional Forms Pending	Mark this checkbox if you are not ready to select forms or have additional forms you want to add later. When this checkbox is marked, the Activity cannot be approved. Campus requires the approver in the Activity Monitor to Return the proposed activity to you so that you can add the forms or they can Decline the activity. You can mark this checkbox and have custom forms associated at the same time.
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. Portal Information

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

▶ Click here to expand...

Field	Description
Image Upload	This option allows you to add a picture of the product.
Consent	Marking this checkbox indicates that you are aware of the Acceptable Use Policies of your district and Infinite Campus.
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.
Associated Costs	

Field	Description
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.*
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.
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** | Item Name *	Selling Price *	Reduced Price	Free Price	
---	---	---	---	---
Golf Club	$100.00	$50.00	$25.00	Remove
Golf Club & Activity Bus	$120.00	$75.00	$25.00	Remove	 Add

Step 5. Finish

> ⚠️
> You can **NOT** complete this step if your activity requires preapproval.
> See the Submit an Activity Request for Preapproval topic for more information.

Review how the Activity Registration product will display for the Campus School Store. Click **Finish** to complete creating the activity and submit the activity for approval. A Notification is sent to users who have Activity Approval tool rights.

After you click Finish, the Activity is in a **Pending** status until the review begins. While it is Pending, you can **Edit** the activity or **Recall** the activity. Once your proposed activity is **In Review**, you cannot make changes.

▸ Click here to expand...

Recall a Proposed Activity

After you submit a proposed activity for approval, the activity is in a **Pending** status until the review begins. While it is Pending, you can **Edit** the activity or **Recall** the activity. When you Recall a proposed activity, you can delete the activity or rescind your request. When you rescind your

request, the activity status returns to **Draft - Proposal** and you can make any necessary changes before re-submitting the activity for approval. Recalling an activity removes the activity from the Activity Monitor Proposed screen.
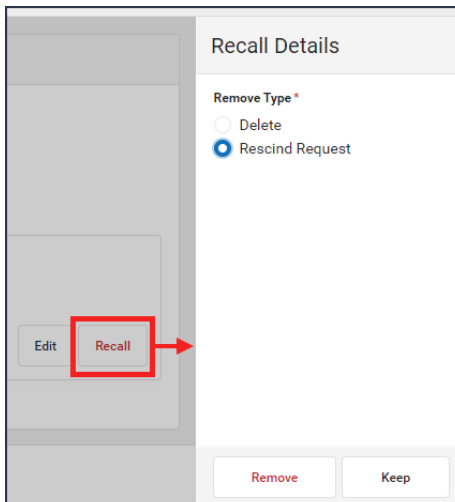
Remove and Recall buttons do not display for Secondary Activity owners even if they are given the Delete tool right.
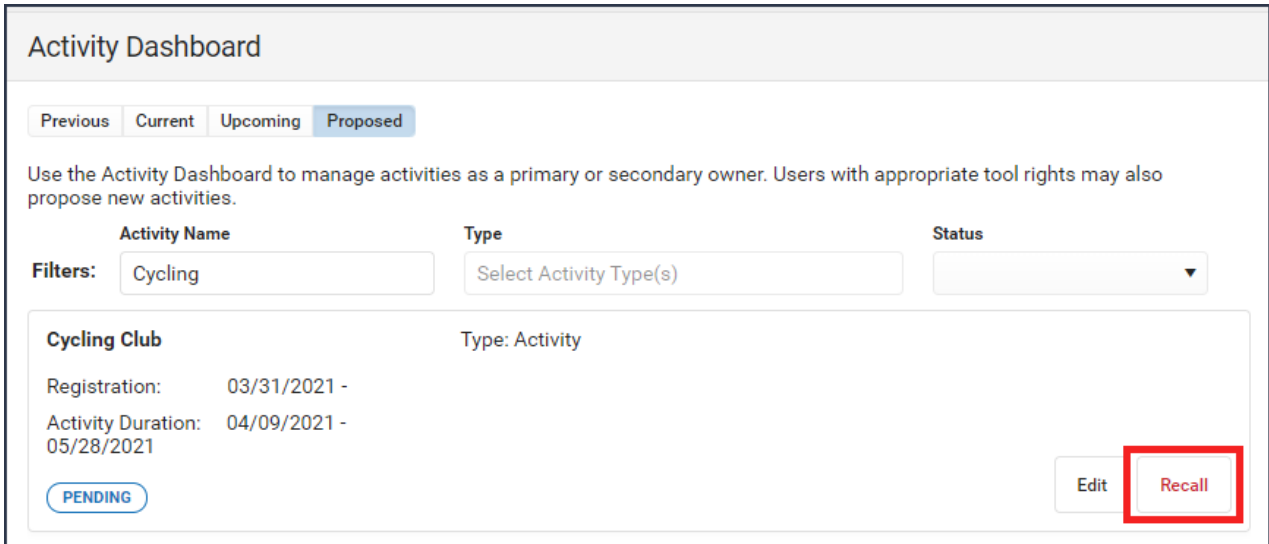
1. Click **Recall**.
    Result
    The **Recall Details** panel displays.

2. Select **Delete** to permanently delete the proposed activity or select **Rescind Request** to recall the proposed activity.
3. Click **Remove**.
    Result
    If you selected **Delete**, Campus permanently deleted the activity. If you selected **Rescind Request**, Campus returned the activity to **Draft - Proposal** status and you can make any necessary changes.

Edit an Activity

You can edit an activity if it is in one of the following statuses: **Draft - Proposal**, **Pending**, **Returned**, **Ready**, **Active - Registration Closed**, or **Registration Open**. To edit an activity, click the **Edit** button. Depending on the filter you are using; i.e., Current, Upcoming, or Proposed, the Activity Builder or the Activity Proposal screens will display and you can make any necessary changes.

Comments are available if a proposed activity is **Returned** (or **Declined**) and may help you edit your activity.

Copy an Activity

To save time, click the **Copy** button to copy an existing activity and create a new Activity Proposal. After you click **Copy**, Campus displays the Activity Proposal tool in copy mode. See the Create and Submit an Activity Proposal topic (above) for details about each step in the Activity Proposal tool.

When you copy an activity, Campus creates a new Activity Proposal by duplicating most of the information from the existing activity.

- Registration and Activity dates are not copied.
- Campus verifies Activity Owners, Ad Hoc filters and Custom Forms are still active and requires you to update that information if necessary.
- You cannot copy an activity if its Status is one of the following: Draft, In Review, Returned, Declined, Cancelled, or any state of Preapproval.
- You must have **Add** rights for the Activity Dashboard to copy an activity.
- Once you start the Copy process, progress is not saved. So, do not stop until you have finished.
- You can **NOT** finish copying an activity if your activity requires preapproval. See the Submit an Activity Request for Preapproval topic for more information.

Example Copy Button

Cancel or Delete an Activity

Upcoming activities in **Ready** status or Proposed activities in **Draft - Proposal** status can be permanently removed from the Activity Dashboard.

To Delete or Cancel an Activity, you must have Delete tool rights for the Activity Dashboard and Calendar rights for the school associated with the activity. You cannot Delete or an Cancel an activity in *Preapproval Pending - Proposal* status.

There are two options for removing an activity from the Activity Dashboard:

- **Delete** completely removes the activity from the Activity Dashboard.
- **Cancel** assigns the *Canceled* status and automatically moves the activity to the **Previous**

view on the Activity Dashboard. After canceling an activity, you can see who canceled the activity, the date on which it was canceled, and the cancelation reason by clicking the **Edit** button.

1. Click the **Remove** button.

Result
The Remove Details panel displays.

2. Select **Delete** or **Cancel**.

3. Enter a **Cancellation Reason**. This field is required for Canceled activities.
4. Click **Remove**.
Result
A Confirmation message displays

Submit an Activity Request for Preapproval

If your activity requires preapproval before it can be submitted for review, 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* and submit your

activity for review.

1. Click the **Preapparoval** link in the banner.
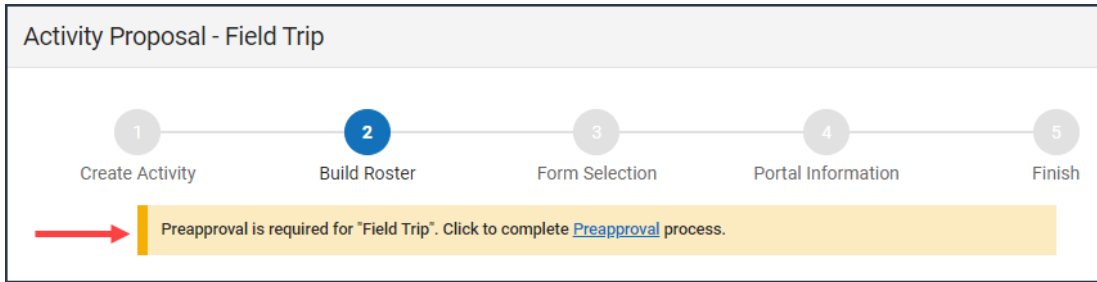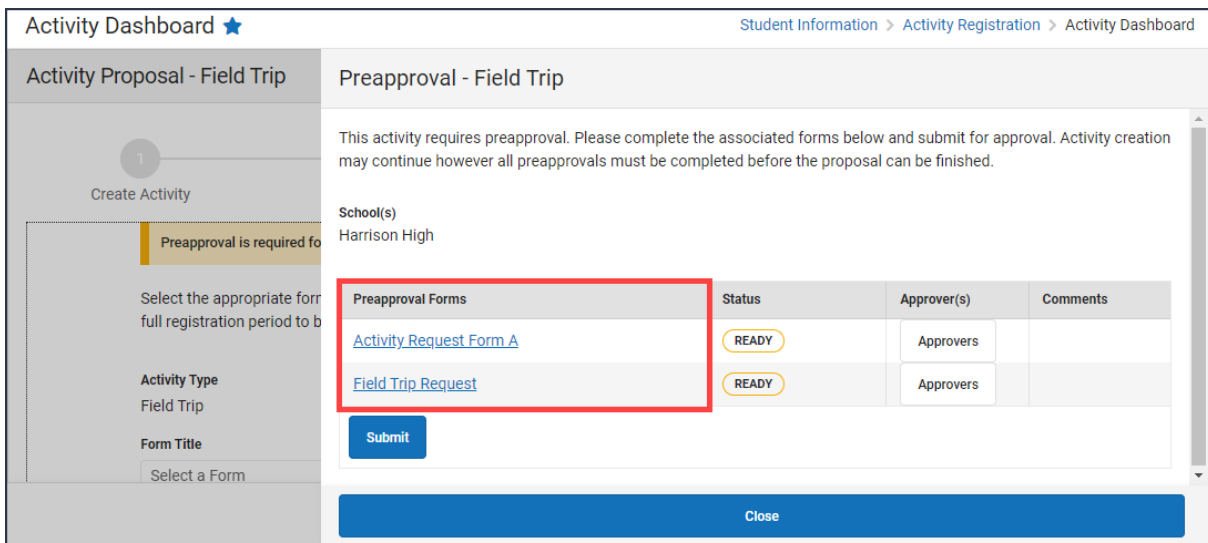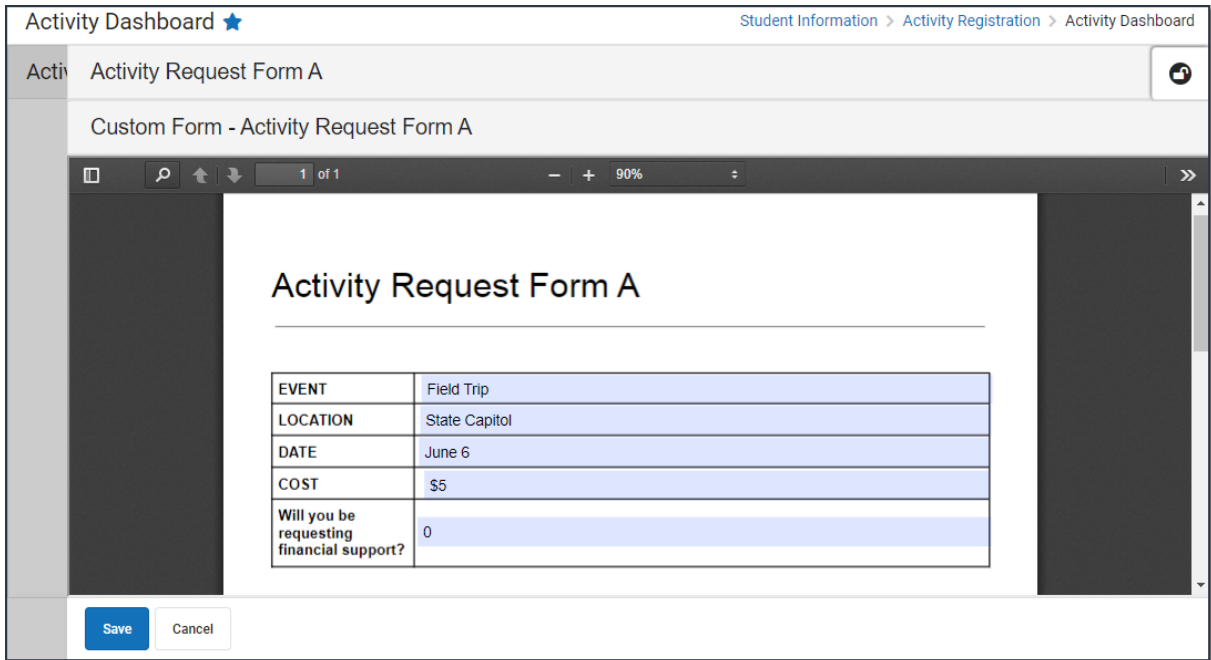

Result: The Preapproval panel displays.

▶ 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.

▶ Click here to expand...

Result: The status changes to **Pending**.

3. Click **Submit**.

Result: The status changes to **Submitted**.

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** to return to the Activity Dashboard.

Tip: You can click the **Rescind** button to make changes or cancel the activity until the Activity Approver opens the activity preapproval in the Activity Preapproval tool.

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

Tool Rights

Classic View: System Administration > User Security > Users > Tool Rights > School Store >

Activity Registration > Activity Dashboard

New Look of Campus View: User Management > User Accounts > Tool Rights > Student Information > Activity Registration > Activity Dashboard

Tool	Read	Write	Add	Delete
Activity Dashboard	Users can view any activities they submit or view activities for which they are listed as the activity owner. Secondary Activity Owners will have a read-only view of the activity to which they are assigned unless they are the creator of the proposed activity. The Remove and Recall buttons will not display for them even if they are given the Delete tool right.	Users may edit proposed activities.	Users may submit proposals for new activities and copy existing activities.	Users can remove activities that are in the Ready (Upcoming) or Draft - Proposal (Proposed) status or recall proposed activities after they are sent for approval.