

# Activity Dashboard [.2223 - .2311]

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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?
<ul> <li>View Activities</li> <li>Create and Submit an Activity Proposal</li> <li>Recall a Proposed Activity</li> <li>Edit an Activity</li> <li>Copy an Activity</li> <li>Cancel or Delete an Activity</li> <li>Submit an Activity Request for Preapproval</li> </ul>	<ul> <li>Important Information About this Tool</li> <li>Tool Rights</li> </ul>

Previous	Current	Upcoming Proposed		
se the A		-		with appropriate tool rights may also propose new activities
ilters:	Activity Nan	y Activity Name	Type Select Activity Type(s)	Status 🗸
			beleat reality ()pe(b)	
Chess (	Club		Type: Activity	
Registra		03/25/2021 -		
Activity	Duration:	04/01/2021 - 04/30/2021		
RETUR	NED			Edit Comments
Robotic	cs Club		Type: Activity	
Registra	ation:	04/05/2021 -		
Activity	Duration:	04/05/2021 - 06/30/2021		
DRAFT	- PROPOSAL	)		Edit Remove
Yoga C	lub		Type: Athletics	
Registra	ation:	03/22/2021 -		
Activity	Duration:	03/29/2021 - 06/30/2021		
PENDI	NG			Edit Recall
Film Cl	lub		Type: Activity	
Registr	ration:	03/22/2021 -		
Activity	y Duration:	05/03/2021 - 05/31/202	1	
DRAFT	- PROPOSAL	)		Edit Remove

## **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.

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- 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.

ctivity Dashboard			
Previous Current Upcoming Proposed	]		
e the Activity Dashboard to manage act Activity Name	vities as a primary or secondary owner. Use <b>Type</b>	ers with appropriate tool rights ma <b>Status</b>	ay also propose new activit Prior Year Only
Iters: Search by Activity Name	Select Activity Type(s)		→

Option	Description
Previous	All activities in a <b>Complete, Canceled, or Declined</b> status. Declined activities include comments from the reviewer that can be seen here.
Current	All activities in a <b>Registration Open</b> , <b>Registration Closed</b> , <b>Active -</b> <b>Registration Open</b> , or <b>Active - Registration Closed</b> status.
Upcoming	All activities in <b>Ready</b> or <b>Approved</b> status.
Proposed	<ul> <li>All activities in a Draft - Proposal, Pending, In Review, or Returned status.</li> <li>Users can only view activities they submit or view activities for which they are listed as the primary or secondary activity owner.</li> <li>Activities that are In Review cannot be edited.</li> <li>Activities in a Returned status can be edited and re-submitted for approval.</li> </ul>
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 <b>Previous</b> 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...

tivity Dashboard 1	*					
Activity Dashboard						
Previous Current Upcom	Activity Dechboord				Student Information > Activi	ity Registration > Activity Dashb
No records to display	Activity Proposal (New)					
	1					
a a > > 25	Create Activity	Build Roster	Form Sele	ction	Portal Information	Finish
	Study Abroad -	Spain	Draft Activity Level *		International	
$\smile$	Field Trip	•		•		
	School(s)*		Activity Owners (Primary) *		Activity Owners (Secondary)	
	Harrison High 3	<	Administrator, Demo $  imes $	×		
	Registration Open	ate *	Registration Close Date			
	06/01/2022	Ċ.	09/01/2022			
	Activity Start Date		Activity End Date *			
	10/03/2022		10/14/2022	Ĩ		
			Cancel Save	Save & Next		

Use the following field descriptions to complete the Create Activity screen.

Field	Description
Activity Name	A name for the activity you are creating. <i>This is a required field.</i>
	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		
Туре	<ul> <li>The activity Type is provided by Campus. Options include the following:</li> <li>Activity</li> <li>Athletics</li> <li>Field Trip</li> <li>This is a required field.</li> </ul>		
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 <b>Required</b> checkbox is also marked in the Attribute Dictionary.		
International	The <b>International</b> checkbox only displays when the activity <b>Type</b> is <i>Field Trip</i> . 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. <i>This is a required field.</i>		
Activity Owners (Primary)	<ul> <li>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 <ul> <li>the Activity Staff checkbox marked on their District Assignment OR</li> <li>be assigned the Activity Staff role on their Work Assignment (HR Only).</li> </ul> </li> <li>You may select more than one person in the field.</li> </ul>		
	For access to attendance and messaging options, the person must also have <b>Teacher</b> marked on their District Assignment or be assigned the <b>Teacher</b> 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)	<ul> <li>The secondary person(s) responsible for the Activity.</li> <li>To appear in this field, the person must have an active assignment in the selected school and <ul> <li>the Activity Staff checkbox marked on their District Assignment OR</li> <li>be assigned the Activity Staff role on their Work Assignment (HR Only).</li> </ul> </li> <li>You may select more than one person in the field.</li> </ul>
	For access to attendance and messaging options, the person must also have <b>Teacher</b> marked on their District Assignment or be assigned the <b>Teacher</b> 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 <b>Remove</b> 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. <i>This is a required field.</i>
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. <i>This is a required field.</i>
Activity End Date	The date on which the Activity ends. The date cannot be prior to the Activity Start Date or Registration Close Date. <i>This is a required field.</i>

### Step 2. Build Roster

Define eligible participants by selecting a saved Ad Hoc filter and/or entering a description of the group.

Activity Dashboard 🖈		Stu	dent Information > Activity Regis	tration > Activity Dashboard
Activity Proposal - Cycli	ng Club			
	2			
Create Activity	Build Roster	Form Selection	Portal Information	Finish
Define eligible pa activity. * (Popul		ation regarding the criteria for	those who may be associated with	n this
School(s)				
Harrison High				
Description of grou	p to be created (max characters	1000)		
Ad Hoc Filter				
Select Ad Hoc	Filter		•	
Preview				
	Previous	Cancel Save Sa	ave & Next	

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

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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 <b>not</b> 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 <b>Preview</b> 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...

<b>Ø</b> ——	- <b>O</b>	3	4	- 5
Create Activity	Build Roster	Form Selection	Portal Information	Finish
			whether the form is considered period to be selected.	
Activity Type				
Activity				
Registration Dat	es			
04/05/2021 -	06/11/2021			
Form Title	Re	quired		
Select a Forr	n 🔻	Clear		
Add Form Additional Form	s Pending			
	Previous	Cancel Save	Save & Next	

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

Field	Description
Activity Type	<ul> <li>This field displays the Activity Type that were selected in Step 1 - Create Activity.</li> <li>Activity</li> <li>Athletics</li> <li>Field Trip</li> </ul>
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 <b>Additional Forms Pending</b> checkbox. You can add multiple forms by clicking the <b>Add Form</b> button.			
	<b>Tip</b> : 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.

Create Activity	Build Roster	Form Selection	Portal Information	F
Configure the regi approval.	istration view for the Portal and	where applicable a cost for the	activity then preview the information a	ind submit fo
Image Upload Max File Size: 10MB Consent:				
	bound by the Terms and Conditions of cies of both the District and Infinite C			
Select files	Drop files her	e to upload		
Description and Spe	cial Instructions			
Format	▼ B I <u>U</u>	:		
Associated Cos	sts			
Item Name *	Selling Price *	Reduced Price Free Price		
Golf Club			Clear	

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. <b>Tip</b> 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. <i>This is a required field.</i> 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. <i>This is a required field.</i>				
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 <b>Allow Free and Reduced Pricing</b> 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 <b>Allow Free and Reduced Pricing</b> checkbox must be marked in the School Store setup.				
Add (button)	Click the <b>Add</b> 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



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.



Activity Propo	sal - Golf Club	)						
								- 5
Create Activ	vity E	uild Roster	Forn	n Selection	F	Portal Informatio	n	Finish
Plea	se review the detai	Is of the proposed a	activity. Clie	ok "Finish" t	o submit fo	r approval.		
			, y'sl	lay gol	2			
			$\langle \cdot \cdot \rangle$	····)				
			1	Ť				
			GOL					
			UUL					
G	olf Club will meet e	every MWF at 3 PM.	Equipment	t will be pro	vided or you	ı can bring your	own.	
R	Registration Dates: 04/05/2021 - 06/11/2021 Activity Dates: 04/12/2021 - 06/11/2021							
A								
Forms to be completed (required forms indicated with " $\star$ ")								
Fo	orms to be added.							
Ad	ctivity Options *							
	Select Option						•	
Pr	rice							
0	uantity			Total Price				
	1		•	\$0.00				
Re	ecipient							
			Ŧ					
		P	revious	Cancel	Finish			

# **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.

Activity Dashboard					
Previous	Current Upcoming Propose	ed			
	Activity Dashboard to manage a new activities.	ctivities as a primary or secondary owner	. Users with appropriate tool rights may also		
	Activity Name	Туре	Status		
Filters:	Cycling	Select Activity Type(s)	•		
Cycling	g Club	Type: Activity			
Registr	ration: 03/31/2021 -				
Activity 05/28/	_		Edit Recall		

### 1. Click Recall. Result

The Recall Details panel displays.

	Recall Details
Edit Recall	Remove Type* Delete Rescind Request
	Remove Keep

- 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.

Activity Dashboard					
	Activity Dashboard to manage activ	rities as a primary or secondary owner. Us	ers with appropriate tool rights may also		
propose	new activities. Activity Name	Туре	Status		
Filters:	Cycling	Select Activity Type(s)	•		
Cycling	J Club	Type: Activity			
Registr	ation: 03/31/2021 -				
Activity 05/28/			Edit		

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

	vity Name	Туре		Status	
ilters: ch	less	Select Activity	Type(s)	▼	
Chess Club			Type: Activity		
egistration	n: 03/25/2021 -				
ctivity Dur	ation: 04/01/2021 - 04/3	0/2021			
RETURNED					Edit Comments
		Chess Club		Type: Activity	
			25/2021 -		
		Activity Duration: 04/	Comments		
		RETURNED			
			Please add req	uired forms.	
			Modified by: Ad	ministrator, System on 03/25/2021 - 2:	:19 PM
					Close

## **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.

Previous	Current Upcoming Proposed				
	Activity Dashboard to manage ac new activities.	tivities as a primary or s	secondary owner. Users	with appropriate t	ool rights may also
	Activity Name	Туре		Status	
ilters: Book Club		Select Activity	Select Activity Type(s)		
Book (	Club	Type: Activity	2	1	1
Registi 04/22/			Total Students	Payment Complete	Form Complete
Activity 05/28/	y Duration: 04/12/2021 - /2021				
	E - REGISTRATION CLOSED			Roste	r Edit Copy

### **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.

tiltana:			
Filters: club		Select Activity Type(s)	
Chess Cl	ub	Type: Activity	
Registrati	ion: 03/25/2021 -		

#### Result

The Remove Details panel displays.

2. Select Delete or Cancel.

Removal Details	
Remove Type * <ul> <li>Delete</li> <li>Cancel</li> </ul> Cancellation Reason *	
	<i>i</i>
Remove	Кеер

- 3. Enter a Cancellation Reason. This field is required for Canceled activities.
- 4. Click Remove.
  - Result

A Confirmation message displays

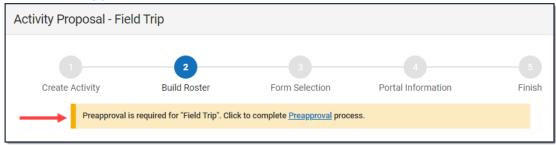
### Submit an Activity Request for Preapproval

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.

Activity Dashboard ★		Student Information	> Activity Registrati	ion > Activity Dashboard	
Activity Proposal - Field Trip	Preapproval - Field Trip				
Create Activity Preapproval is required fo	This activity requires preapproval. Please complete the associated forms below and submit for approval. Activity creation may continue however all preapprovals must be completed before the proposal can be finished.  School(s) Harrison High				
Select the appropriate forr	Preapproval Forms	Status	Approver(s)	Comments	
full registration period to b	Activity Request Form A	READY	Approvers		
Activity Type Field Trip	Field Trip Request	READY	Approvers		
Form Title	Submit				
Select a Form				-	
	Close				

- 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...

	ity Dashboard ★			Student Information > Activity Regist	ration > Activity Dashboard
Activ	Activity Request F	Form A			0
	Custom Form - Ad	ctivity Request F	orm A		
		Activity R	equest Form A	•	
		EVENT	Field Trip		
		LOCATION	State Capitol		
		DATE	June 6		
- 1		COST	\$5		
		Will you be requesting financial support?	0		
				I	

Result: The status changes to Pending.

3. Click Submit.

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**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 <i>Preapproval Complete -</i> <i>Proposal</i> status.	
Returned	you will receive a notification that your activity request was returned. The activity request is assigned the <i>Preapproval Returned</i> - <i>Proposal</i> 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 <mark>.</mark>	

## **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

ΤοοΙ	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.	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.
	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.			