

Activity Builder [.2311-.2403]

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Tool Search: Activity Monitor

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
 - Declining a Signed Form
- Step 4 Link to Portal
- Step 5 Finish
- Submit an Activity Request for Preapproval

Тір

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...

tivity	Monitor					
Activit	y Monitor					
Previous	Current Upo	coming				
	Activity Name		Туре			
Filters:	Search by Ac	tivity Name	Select Activity Type	(s)		
Summ	er Adventure		Type: Activity			
Regist 07/24/	ration: 06 /2020)/22/2020 -				
Activity 08/28/		/27/2020 -				
DRAF	_					
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ivity Mol	der (New) 1 e Activity Use this tool to create Activity Name* Field Trip School(s)* Registration Open Date*	e an Activity Packet. De	efine below the details of the Activity then prog Status Draft Activity Level * Activity Owners (Primary) * Registration Close Date	Link t gress to additional cor International	a to Portal mponents of the registr	5 Finish

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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.				
Туре	 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 				
	Core Attribute/Dictionary * System Settings > Custom Data and Links > Core Attribute/Dictionary Save Seve Core Attribute/Porgram SecolardedStition SecolardedStition SecolardedStition SecolardedStition				
	Code Name Seq Value Standard Code Active × 1A Gold 1 X × 2A Silver 2 X × 3A Bronze 3 X × 4A Blue 4 Example Activity Levels X × 18 Green 5 Activity Levels may be anything you choose. X × 38 Orange 7 X × 4B Yellow 8 X				
International	The International checkbox only displays when the Activity Type is <i>Field Trip</i> . 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 <i>Registration Closed Date</i> is after the <i>Activity Start Date</i> , the <i>Status</i> 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. <i>This is a required field.</i>



Field	Description
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.
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. <i>This is a required field.</i>



Field	Description
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.

Click here to expand...

Activit	y Builder - Lacrosse	Club 10th Grade Gir	s				
	Create Activity	2 Build Roster	Fo	- 3 rm Selection	Link	to Portal	5 Finish
	Define eligible part	icipants by selecting a save	d Ad Hoc filter				
	School(s)						
	Harrison High						
	Ad Hoc Filter*						
	10th Grade Girls		•				
	Preview						
-							
		Previous	Cancel	Save & Hold	Save & Next		

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. <i>This is a required field.</i>



ield	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.				
	Eligibility on step 4 of the builder. St enrollment will be added to the previe	able Include Future Enrollments unde cudents with an applicable future ew if their enrollment falls within the Day se students will display with the status of			
	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.				
		s, the freview displays fregular results.			
		hoc filter that is assigned to the activity,			
	If you do not have access to the ad	hoc filter that is assigned to the activity,			
	If you do not have access to the ad the Preview button does not displa	hoc filter that is assigned to the activity, y. Preview Participants Ad Hoc Filter All High School Students Preview Future Enrollments			
	If you do not have access to the ad the Preview button does not displated Activity Builder - Film Club	hoc filter that is assigned to the activity, y. Preview Participants Ad Hoc Filter All High School Students			
	If you do not have access to the ad the Preview button does not displated Activity Builder - Film Club 1 Create Activity Build Roster Form Define eligible participants by selecting a saved Ad School(s)	hoc filter that is assigned to the activity, y. Preview Participants Ad Hoc Filter All High School Students Preview Future Enrollments Estimated Total: 954 • Harrison High			
	If you do not have access to the ad the Preview button does not displated Activity Builder - Film Club (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	hoc filter that is assigned to the activity, y. Preview Participants Ad Hoc Filter All High School Students Preview Future Enrollments • Estimated Total: 954 • Harrison High Abegg, Dylan, V. (#171900001), [M] Abegg, Wallace, D. (#181900002), [M] Alborough, Dallas. (#109301), [M] Anderson, Jack, A. (#662478), [M] Anderson, Jana. (#181900003), [F]			

Step 3 - Form Selection

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

Click here to expand...

ity Builder - Patty's Painting				
		3		
Create Activity	Build Roster	Form Selection	Link to Portal	Finish
Select the appropriate selected.	forms for registration and indica	te whether the form is considered required. Forms $$\complement$$	must be active during the full registration	period to be
Activity Type		Registration Dates		
Activity		11/16/2022 - 11/18/2022		
Form Title * (At least one f	orm is required)	Required 🟮		
Permission Form (11,	/01/2022-) × •	Guardian Registration	/e	
Transportation Form	(11/01/2022 -) × •	Yes	re	
2022 Holiday Schedu	le (01/01/2022 -) × •	No • Remo	re	
Add Form				

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

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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. <i>This is a</i> <i>required field.</i>
	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.

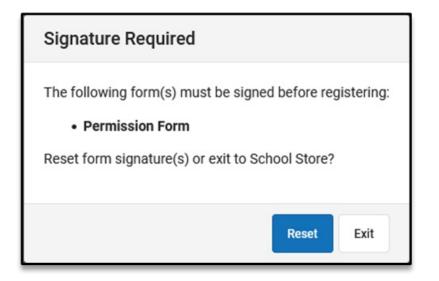


Field	Description	Description			
Required	or student before it of option from the Requ	Some forms may require information or an eSignature from the parent or student before it can be purchased in the School Store. Select an option from the Required dropdown list to determine whether information or signatures are required.			
	Option	Description			
	Νο	The default. The form does not require information or a signature. The form is optional, meaning it does not have to be opened or reviewed before purchasing the activity in School Store.			
	Yes	When Yes is selected, the guardian or student must open the form and review it before the activity can be added to the cart within the School Store.			
	Guardian Registration	The Guardian Registration option works the same as Yes, except, the guardian ONLY can initiate the registration process. The form MUST be signed by the guardian before it can be added to the cart in the School Store. Read the topic Declining a Signed Form if a guardian does NOT sign the form.			
		tion selected, one or two red stars appear next to ol Store. The following image demonstrates how core.			
	Form(s) ("*" indica Permission Form ** Transportation For 2022 Holiday Sche	m*			

Declining a Signed Form

If a form has the option **Guardian Registration** selected, the guardian must sign the form. If he or she declines the signature, this message appears when the guardian clicks the **Add to Cart** button.





Option	Description
Reset	When the guardian clicks the Reset button, he or she has another chance to sign the form by clicking the name of the form, signing it, and then submitting it. The guardian can now click the Add to Cart button to purchase the activity.
Exit	When the Exit button is clicked, the activity is placed back into the School Store, and the guardian must start over with the registration process to purchase the activity.

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 Bu	uilder - Soccer	Club 10th Grade Boy	S		
					5
Creat	te Activity	Build Roster	Form Selection	Link to Portal	Finish
		istration view for the Portal	and cost where applicable for the	e activity.	
	5 5	·		,	
	Category Infor	mation			
	Categories *				
	Athletics (Harri	son High) 😣	×		
	Product Inform				
	Product Name* Soccer Club 10	Product Type *	× •		
		Soccer	~ •		
	Image Upload Max File Size: 20ME	,			
	Select files		here to upload		
		brop mes			
	Description and Spe	ecial Instructions			
	A: ¶	T: +:			
		is for students who wan			
	the regular s	season or students who a	are new to the sport.		
		Prev	ious Cancel Save S	Save & Next	

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

Field	Description		
Category Inform	ation		
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. <i>This is a required field.</i> See the Categories (School Store) article for more information about managing categories.		
Product Information			
Product Name	The name that displays in the store. <i>This is a required field.</i>		



Field	Description				
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: <i>System Administration > School Store > Product Types</i> . <i>This is a required field.</i>				
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				
	Category Information Categories Athletics (Willmar Senior High) Product Information Product Name Product Type LaCrosse Club Athletics				
	Restrict to Associated School Enrollments				
Image Upload					
Product Description					
Product	 This option allows you to add a picture of the product. Detailed information about the product. This description appears below the 				
Product Description and Special	 This option allows you to add a picture of the product. 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 				
Product Description and Special Instructions	 This option allows you to add a picture of the product. 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. When this checkbox is marked, customers can add information to their 				



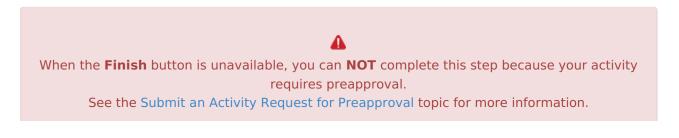
Field	Description
Restrict to Associated School Enrollments	When this checkbox is marked, the Recipient dropdown list will only display students who have an enrollment in the active school year at the school to which the activity is attached. This includes primary, secondary, and enrollments with a future 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.
Include Future Enrollments	When this checkbox is marked, this will allow users to look ahead for future enrolled students that also meet the criteria of the Ad Hoc filter from Step 2.
	Restrict to Associated School Enrollments must be selected to use Include Future Enrollments.
Days from Registration End Date	The number of days (between 1 and 365) into the future that enrollments can be viewed.
Associated Costs	5
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. <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>



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. If a student is manually registered for an activity within the Activity Roster and the Option Purchased is set to an item with an inventory limit, it will affect Inventory Limits. <i>This is a required field when tracking limits.</i>					
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 Image: Selling Price* Reduced Price Free Price Inventory Limit* Lacrosse Club \$100.00 \$50.00 \$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.





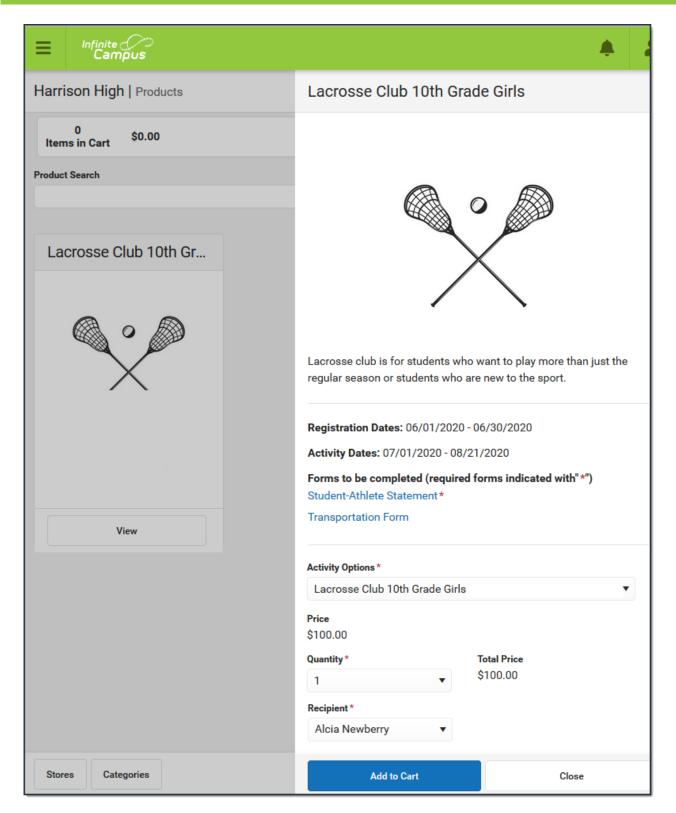
• Click here to expand...



Activity B	uilder - Lacr	osse Club 10th Gra	ade Girl	S				
								5
Create	Activity	Build Roster	For	m Selection		Link to Portal	F	Finish
		he Activity Registration p						
	are new to the Registration	b is for students who was the sport. Dates: 06/01/2020 - 06/ es: 07/01/2020 - 08/21/2	30/2020	more than ju	ust the regul	lar season or stude	nts who	
		completed (required for	ms indicat	ted with" *")				
	Student-Athl Transportati	ete Statement* on Form						
	Activity Option							
	Select Opti Price						•	
	Quantity			Total Price				
	1		•	\$0.00				
	Recipient							
	1679		*					
		F	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.

Activity Monitor 🛧		Student Information > Activity	Registration > Activity Monitor	
Activity Builder - Running	J Club			
1 Create Activity	2 Build Roster	3 Form Selection	4 Link to Portal	5 Finish
Preapproval is r	equired for "Running Club". Click t	to complete <u>Preapproval</u> process.		

Result: The Preapproval panel displays.

Click here to expand...

Activity Monitor ★		Student Information	Activity Registrat	ion > Activity Monitor
Activity Builder - Running (Preapproval - Running Club			
Create Activity Preapproval is req	This activity requires preapproval. Please complete the may continue however all preapprovals must be compl School(s) Harrison High			al. Activity creation
Define eligible parti	Preapproval Forms	Status	Approver(s)	Comments
School(s) Harrison High	Activity Request Form A	READY	Approvers	
Ad Hoc Filter*				
All Males				
Preview				
		Close		

- 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	Then
request is	



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 <i>Preapproval Complete - 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 <i>Preapproval Declined</i> status and moved to the Previous tab in the Activity Monitor.

Previous Versions

Activity Builder [.2247-.2311] Activity Builder [.2235 - .2243]