Create New Activity (Activity Monitor)

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Tool Search: Activity Monitor

> **Before You Begin**
> - Add any needed documents in Custom Forms
> - Create an Ad Hoc filter for selecting eligible students.

Step 1 - Create Activity

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

▶ Click here to expand...

Infinite Campus

1	2	3	4	5
Create Activity	Build Roster	Form Selection	Link to Portal	Finish
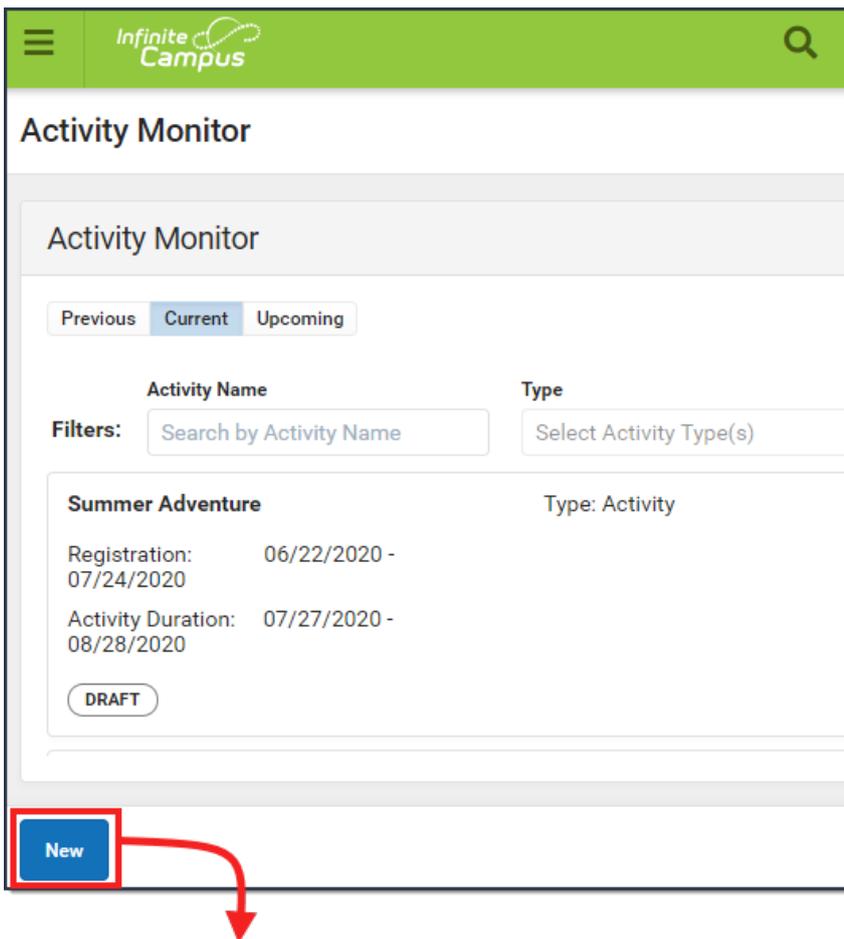
Use this tool to create an Activity Packet. Define below the details of the Activity then progress to additional components of the registration process.

Activity Name: (Required)

Status:
Draft

Type: (Required)

School(s): (Required)
Harrison High ✕

Primary Activity Owner(s): (Required)

Secondary Activity Owner(s):

Registration Open Date: (Required)
MM/DD/YYYY

Registration Close Date: (Required)
MM/DD/YYYY

Activity Start Date: (Required)
MM/DD/YYYY

Activity End Date: (Required)
MM/DD/YYYY

Enable Waitlist:
☑

**Waitlist Close Date:**
MM/DD/YYYY

Delete Incomplete Registrations: ⓘ
☑

Waitlist Notifications

Add custom portal notifications for guardians and students. These will be triggered based on certain dates or actions taken within the waitlist. Generic text for the notifications will be provided, but can be customized if desired. All notifications will be prefaced with "Activity Waitlist Update for First Name Last Name".

Send a notification when a student is approved:
☐
Enter Notification Text:

Send a notification when a student is removed:
☐
Enter Notification Text:

Send a notification when registration closes:
☐
Enter Notification Text:

[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. *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. 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.*

Field	Description
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...
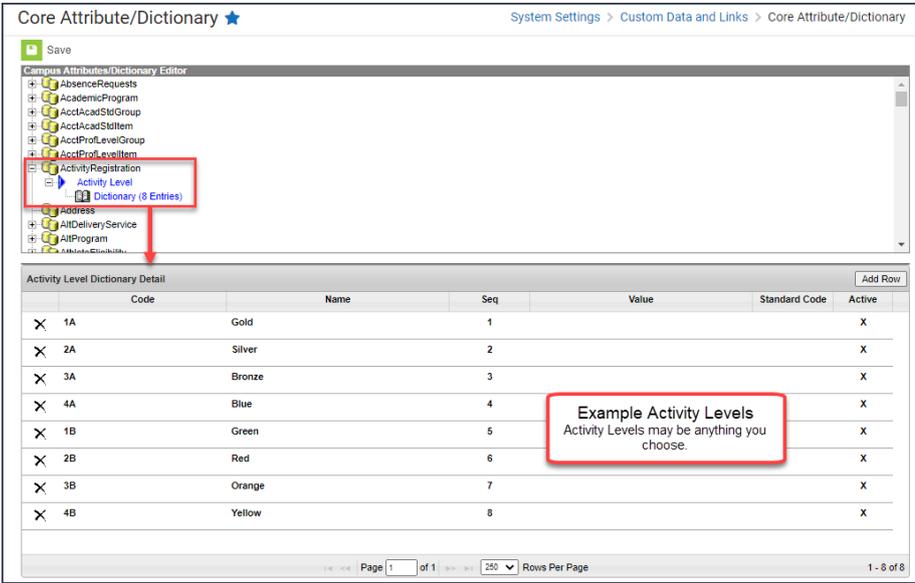
Field	Description
International	The **International** checkbox only displays when the **Activity Type** is *Field Trip*. If the activity needs preapproval, marking this checkbox ensures Campus routes your activity request to the correct approver(s).
Status	The Activities status. This is a read-only field. • **Draft** • **Preapproval Returned** • **Preapproval Required** • **Preapproval Pending** • **Preapproval Complete** • **Ready** • **Registration Open** • **Registration Closed** • **Active - Registration Open** • **Active - Registration Closed** • **Complete** • **Cancelled** 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.*

Field	Description
Primary Activity Owner(s)	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. 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. 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.*
Secondary Activity Owners(s)	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 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.
Registration Open Date	The first day the Activity is displayed in the School Store and people can register for the Activity. The date must be before the Activity Start Date and Registration Close Date. *This is a required field.*
Registration Close Date	The last day on which the Activity is displayed 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 before 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 before the Activity Start Date or Registration Close Date. *This is a required field.*

Field	Description
Enable Waitlist	When this setting is activated, it will create a waitlist for students to join once the activity's inventory reaches zero. The "Add to Cart" button will then change to "Join Waitlist." Activity staff will manage the waitlist by either granting spots or removing students as necessary.
Waitlist Close Date	The final date students can join a waitlist prior to registration closing.
Waitlist Notifications	Custom notifications for guardians and students will be sent based on a student's approval status, removal, or if registration has closed for an activity with a waitlist.
Delete Incomplete Registrations	When turned on, this setting will automatically delete activity registrations on the day after an activity ends if those registrations have been started without completing the purchase and the student never participated in the activity.

Step 2 - Build Roster

If a "Preapproval is required..." banner appears at the top of the Activity Builder, the activity must be pre-approved. See Preapproval Configuration and Preapproval Requests for details.

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.*
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.

Use the **Preview Future Enrollments** checkbox to allow you to see who would be included if you choose to enable **Include Future Enrollments** under **Eligibility** on step 4 of the builder. Students with an applicable future enrollment will be added to the preview if their enrollment falls within the **Days from Registration Close Date**. These students will display with the status of Future. To refresh the preview with updated results, click **Generate**.

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

Including forms and document uploads is optional.

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. Forms can be added or removed after activity registration has been opened.

▶ Click here to expand...

Forms

Optionally, 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. Forms are no longer editable once they have been assigned or when the activity is in an open or active state.

Activity Type: **Registration Dates:**
Athletics   03/24/2025 - 05/02/2025

Form Title: **Required:**

[Select a Form ▼]   [No ▼]   [Clear]

[Add Form]

Document Uploads

Optionally, enable document uploads and determine whether they are required and where they will post to. Provide instructions to the parents or students who will be uploading using the "Upload Instructions" text box. A preview will be provided on step 5.

Enable Uploads
☑

Document #1

Document Name: (Required)   **Code: (Required)**   **Required:**   **Post Location: (Required)**
Name parents/students see   Name at posted location

[   ]   [   ]   [No   ▼]   [▼]

Upload Instructions:

[   ]

[Clear All]

[Add Upload]

[Previous] [Cancel] [Save] [Save & Next]

Forms

Use the following field descriptions to complete the Form section.

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.
Form Title	This field displays the custom forms associated with the Activity Type. 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.

Field	Description
Required	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
No	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.

Document Uploads

Use the following field descriptions to complete the Document Uploads section. If enabled for an Activity, a Required Uploads Complete column will appear in the Activity Roster.

To enable Document Uploads, the Campus Digital Repository and Activity Registration setting within it must be turned on.

- If Campus Digital Repository is disabled (either at the Activity Registration location or the specific post location), activities will become inactive (the step 4 "Active" checkbox will be unchecked) and cannot be re-checked until Campus Digital Repository is re-enabled. Once Campus Digital Repository is re-enabled, you will need to manually check the "Active" checkbox to allow the activity to go live again.

Field	Description
Enable Upload	Mark this checkbox to enable document uploads when parents and students sign up for activities.

Field	Description
Document Name	The name associated with the document upload.
Code	An internal name for Campus records and data.
Required	Designate whether the document upload will be required to sign up for the activity.
Post Location	The location in Campus where document will be posted after approval by Activity Staff.
Upload Instructions	The instructions provided for parents and students while uploading a document during activity registration.
Clear All	Clear all fields associated with the document upload.
Add Upload	Include another option to upload documents related to 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.

Once an Activity has been purchased, the Associated Costs cannot be modified.

▶ Click here to expand...

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.*

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: *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... **Category Information** Categories Athletics (Willmar Senior High) **Product Information** Product Name Product Type LaCrosse Club Athletics Active ☑ Restrict to Associated School Enrollments ☑
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.
Eligibility	

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	
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. This will be automatically checked when Enable Waitlist has been selected in Step 1 and cannot be turned off until Enable Waitlist has been disabled. View Manage Activity Waitlists for more information.
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.

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 whose guardians have given permission to share it with School Store the pay and see. 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 whose guardians have given permission to share it with the School Store pay and see. 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. *This is a required field when tracking limits.* If Enable Waitlist has been selected in Step 1, students who attempt to purchase the activity after the Inventory Limit has been reached will be added to a waitlist. View Manage Activity Waitlists for more information.
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

Field	Description
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.

⚠️

If the **Finish** button is unavailable, you cannot complete this step because your activity requires preapproval.
See the Submit an Activity Request for Preapproval topic for more information.

▶ Click here to expand...

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
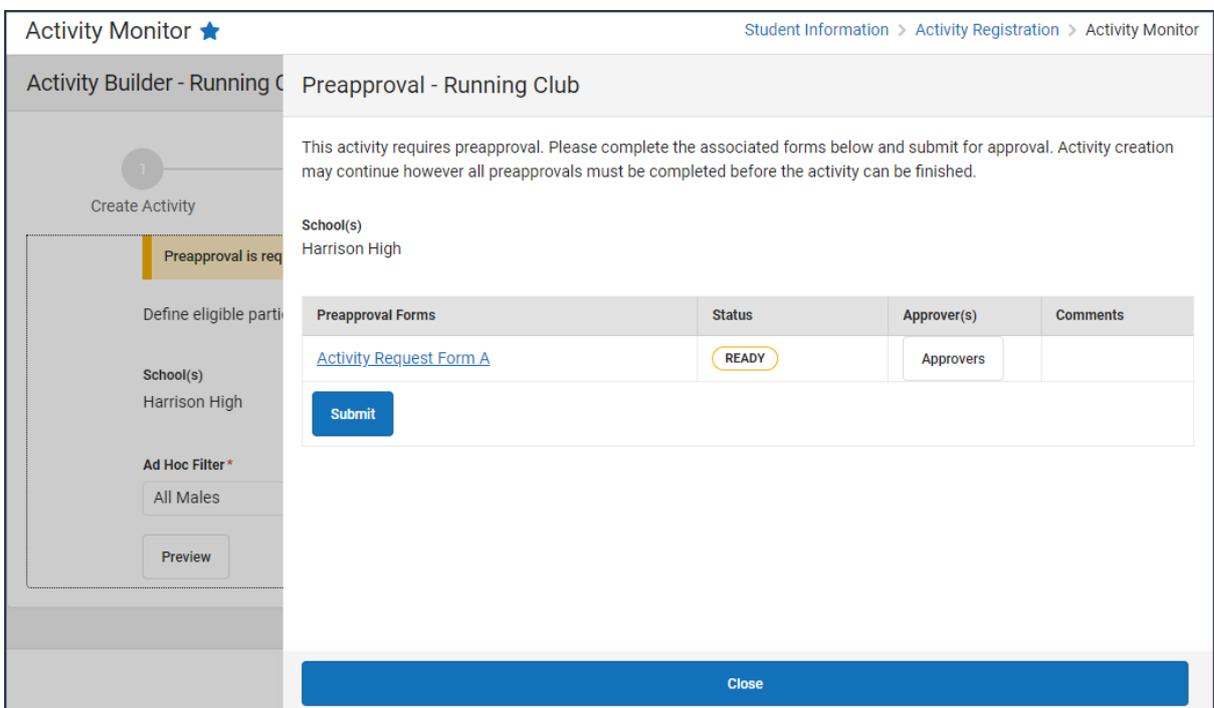
Preapproval Required - Proposal. You can submit your activity request for preapproval at any time but the activity must be approved before you can complete Step 5. Finish.

1. Click the **Preapproval** link in the banner.
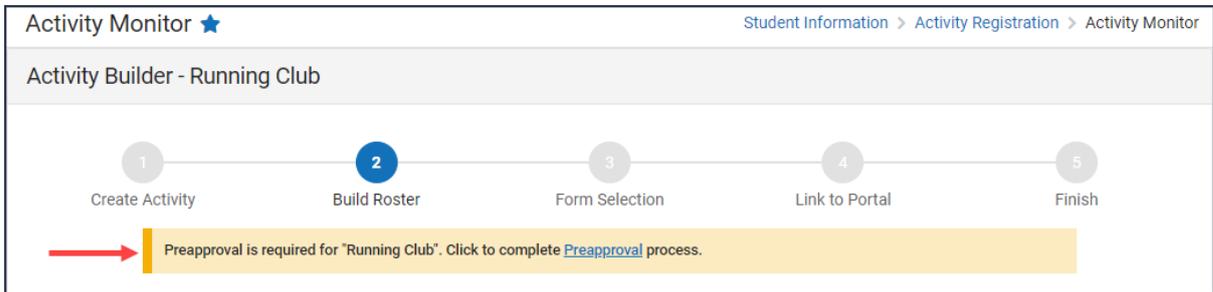
   Result: The Preapproval panel displays.

   ▸ 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...

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.
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.