

Process Activity Proposals

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Tool Search: Activity Monitor

Staff can create and submit activities for approval in the Activity Dashboard. Once submitted for approval, the activity will be displayed in the Proposed timeframe of Activity Monitor. Only users with the *Activity Approval* tool right can review proposed activities.

When reviewing, keep the following items in mind.

- You cannot review your own proposed activity.
- If an Ad hoc filter is not provided by the user, you can add one on the Build Roster screen.
- If the user who submitted the activity does not have access to Ad hoc, a description of the group they want for the activity may be included.
 - Click here to expand...

0	2
Create Activity	Build Roster
Define eligible participants by selecting a	a saved Ad Hoc filter.
School(s)	
High School	
Ad Hoc Filter	
Select Ad Hoc Filter	•
Preview	
Description of group to be created (max charac	cters 1000)
Club is open to all high school students	3.

 On Step 4. Link to Portal, the Restrict to Associated School Enrollments checkbox is automatically marked.

Click here to expand...



eate Activity	Build Roster	Form Selection	4 Link to Portal
Configure the r information an	egistration view for the P d submit for approval.	ortal and where applicable a	cost for the activity then preview t
Category Inf	ormation		
Categories			
Product Info Product Name	rmation		
Golf Club			
Product Type			
Restrict to Assoc	iated School Enrollments]	
Image Upload			

- If someone Recalls an activity that they submitted, there is no notification that this occurred. The proposed activity is removed from the Proposed screen.
- Not all fields are required during the review; however, for an activity to be eligible for approval, the following fields must be filled in:
 - Ad hoc Filter
 - Categories
 - Product Type

Activity	/ Monitor			
Timeframe Previous	Current Upcoming Proposed			
Filters:	Activity Name Search by Activity Name	Type Select Activity Type(s)	Status All •	
Golf Le Registr Activity	ssons, 5 Saturdays ation: 04/04/2022 - 04/15/20 2 Duration: 04/23/2022 - 05/21/20	Type: Athletics 22		Review

Use the following steps to review Activities that are in a **Pending** or **In Review** status.

1. Click the **Review** button.

Result

The Activity Builder displays on Step 1 Create Activity.



2. Review each screen in the Activity Builder and make any necessary changes.

Tip: You can skip screens by clicking the number at the top of the page. You might want to skip to Step 5 Finish if you already know the proposed activity must be declined or returned.

3. On Step 5 Finish, click **Finish**. **Result**

The Proposal Response options display.

	Proposal Resp	onse	×	
	Proposal Response Approved Declined Returned Comments			
Registration Dates Activity Dates: 04/ Forms to be comp Permission - Stude	: 04. 12/: etec Save	Close		
		+		

- 4. Select one of the following options.
- **Approved** The activity will display in the Current or Upcoming area with the appropriate status.
- **Declined** The activity is removed from the Activity Monitor and displays in the Previous area of the Activity Dashboard with a status of *Declined*. When you select this option, the Comments text box is enabled and you must leave notes for the user who submitted the activity.
- **Returned** The activity displays in the Proposed area with the status *Returned*. When you select this option, the Comments text box is enabled and you must leave notes for the user who submitted the activity. The activity displays in the Activity Dashboard with the status *Returned*. The user who submitted the activity can review your comments, make changes, and re-submit the activity for approval.

5. Click the **Save** button when you are finished. A notification is sent to the user who submitted the proposed activity.