

Process Activity Proposals

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Tool Search: Activity Monitor

This content is also available in video format.

+ Video

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...](#)

The screenshot shows the 'Build Roster' step of the activity creation process. The progress bar indicates that 'Create Activity' is complete and 'Build Roster' is the current step. The form includes a 'School(s)' dropdown menu with 'High School' selected. Below that is an 'Ad Hoc Filter' dropdown menu with 'Select Ad Hoc Filter' selected. A 'Preview' button is visible. A red box highlights the 'Description of group to be created (max characters 1000)' field, which contains the text 'Club is open to all high school students.'

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

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- 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

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.

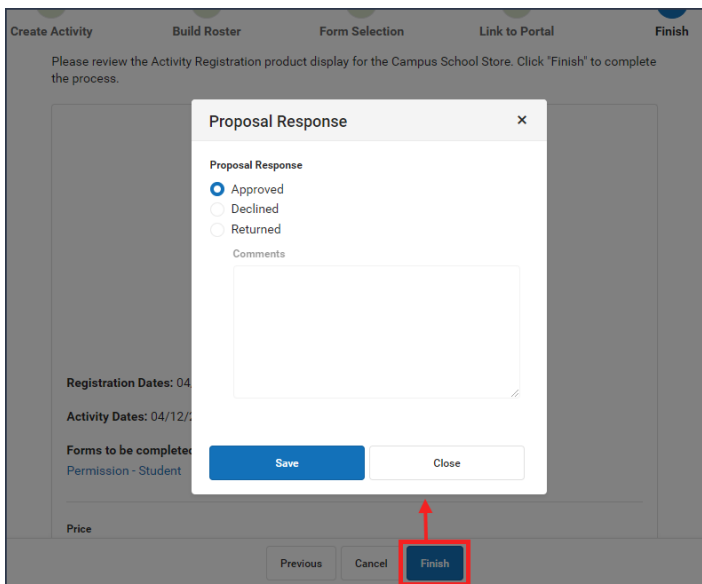
2. Review each screen in the Activity Builder and make any necessary changes.

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.



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.

