

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...](#)

1 Create Activity

2 Build Roster

Define eligible participants by selecting a saved Ad Hoc filter.

School(s)
High School

Ad Hoc Filter
Select Ad Hoc Filter

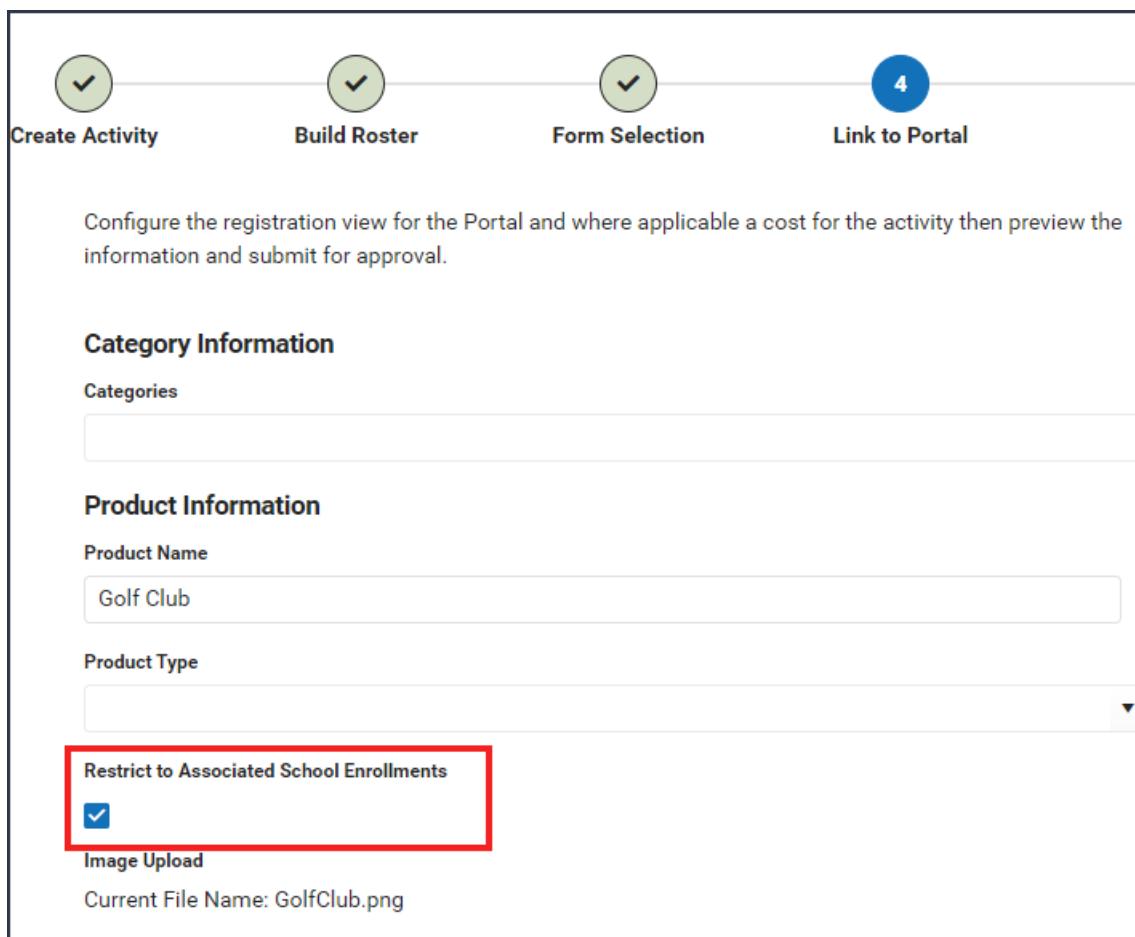
Preview

Description of group to be created (max characters 1000)

Club is open to all high school students.

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

► [Click here to expand...](#)



Configure the registration view for the Portal and where applicable a cost for the activity then preview the information and submit for approval.

Category Information

Categories

Product Information

Product Name

Golf Club

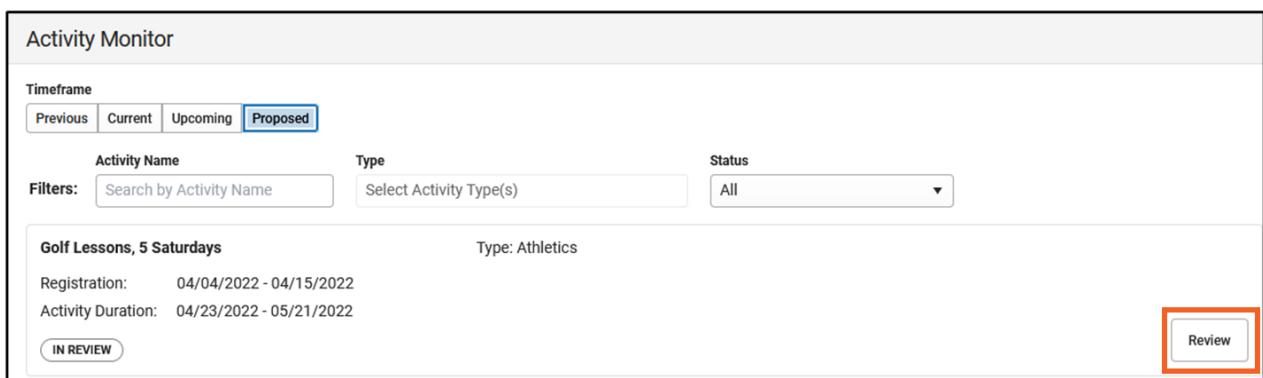
Product Type

Restrict to Associated School Enrollments

Image Upload

Current File Name: GolfClub.png

- 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**

Activity Name Type Status

Filters: Search by Activity Name

Golf Lessons, 5 Saturdays Type: Athletics

Registration: 04/04/2022 - 04/15/2022

Activity Duration: 04/23/2022 - 05/21/2022

IN REVIEW **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.

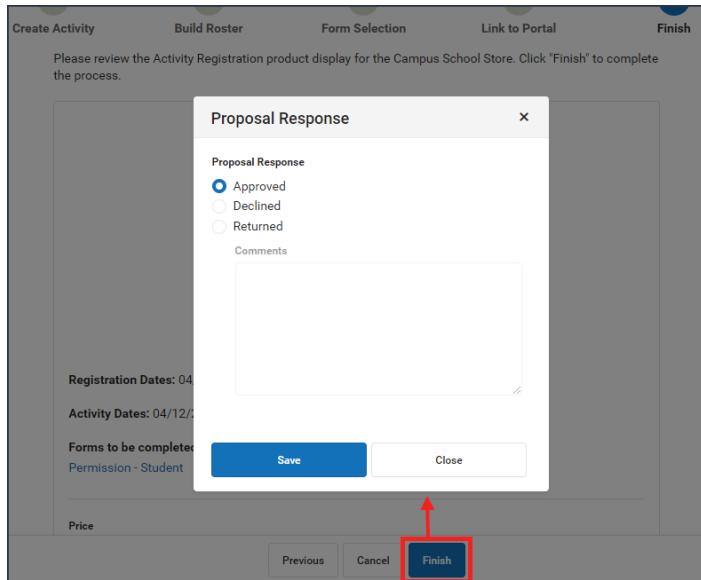
2. Review each screen in the Activity Builder and make any necessary changes.

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.



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.