Create and Submit New Activity Proposal

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Tool Search: Activity Dashboard

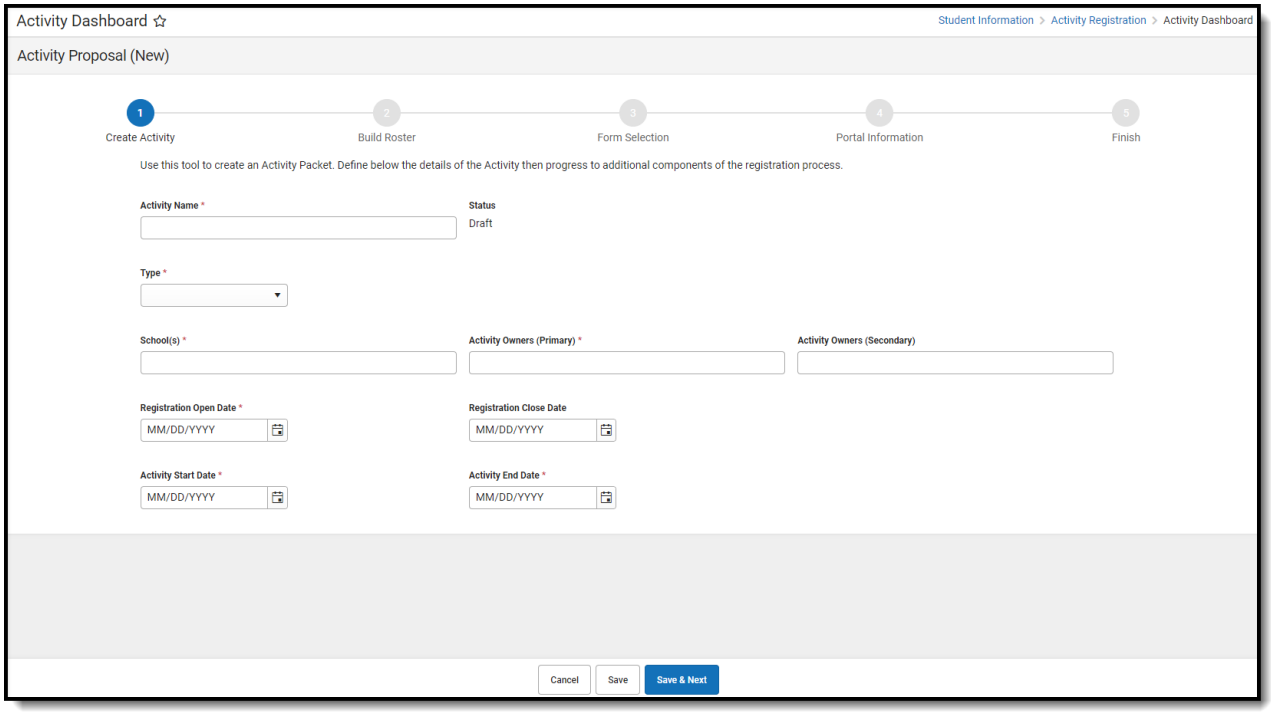
Activity Dashboard allows primary and secondary activity owners to manage their activities, including the ability to create and submit proposed activities for approval.

> You must have Add rights for the Activity Dashboard to complete these steps.

1. Create Activity

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

Click here to expand...



Use the following field descriptions to complete the Create Activity screen.

Field	Description

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 allows you 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 when 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.*
Activity Level	Activity Levels are another way to identify different kinds of activities. This field only displays in if you have added Activity Levels in the Attribute Dictionary and is optional unless the **Required** checkbox is also marked in the Attribute Dictionary.
International	The **International** checkbox only displays when the activity **Type** is *Field Trip*. If your district uses the Preapproval process, marking this checkbox ensures Campus routes your activity request to the correct approver(s).
Status	The Activity status. This is a read-only field.
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.*

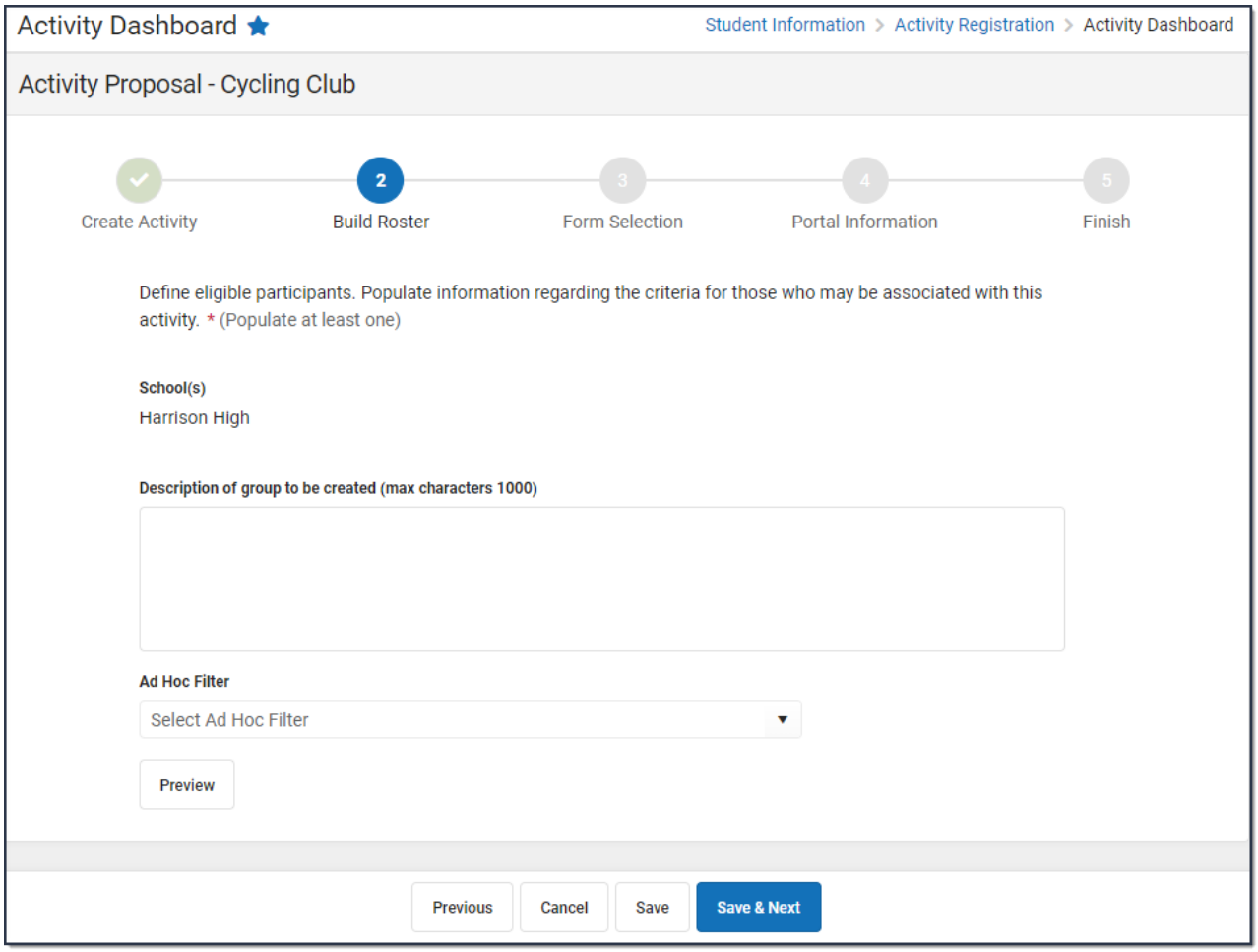
Field	Description
Activity Owners (Primary)	The primary person(s) responsible for the Activity. To appear in this field, the person must have an active assignment in the selected school and the **Activity Staff** checkbox marked on their District Assignment. You may select more than one person in the 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.*
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. 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. Secondary Activity Owners only have a read-only view of the activity to which they are assigned unless they are also the creator of the proposed activity. Secondary owners on an activity do not have the **Remove** button for delete/cancel functions even if the Delete tool right is assigned.
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. *This is a required field.*
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. *This is a required field.*

Field	Description
Activity End Date	The date on which the Activity ends. The date cannot be prior to the Activity Start Date or Registration Close Date. *This is a required field.*
Delete Incomplete Registrations	An automatic progress on the Activity End Date will remove any forms started by people who signed up for the event but didn't complete their registration. See "Manage Incomplete Registrations" for more details.

2. Build Roster

Define eligible participants by selecting a saved Ad Hoc filter and/or entering a description of the group.

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.

Field	Description
Description of group to be created	A description of the eligible participants.
Ad Hoc Filter	The Ad Hoc filter for selecting eligible students. Campus only allows students who are included in the Ad Hoc filter to register for the activity. If you do **not** have rights to Ad Hoc, this field does not display.
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. If you do not have access to ad hoc or to the ad hoc filter that is assigned to the activity by a reviewer, the **Preview** button does not display.

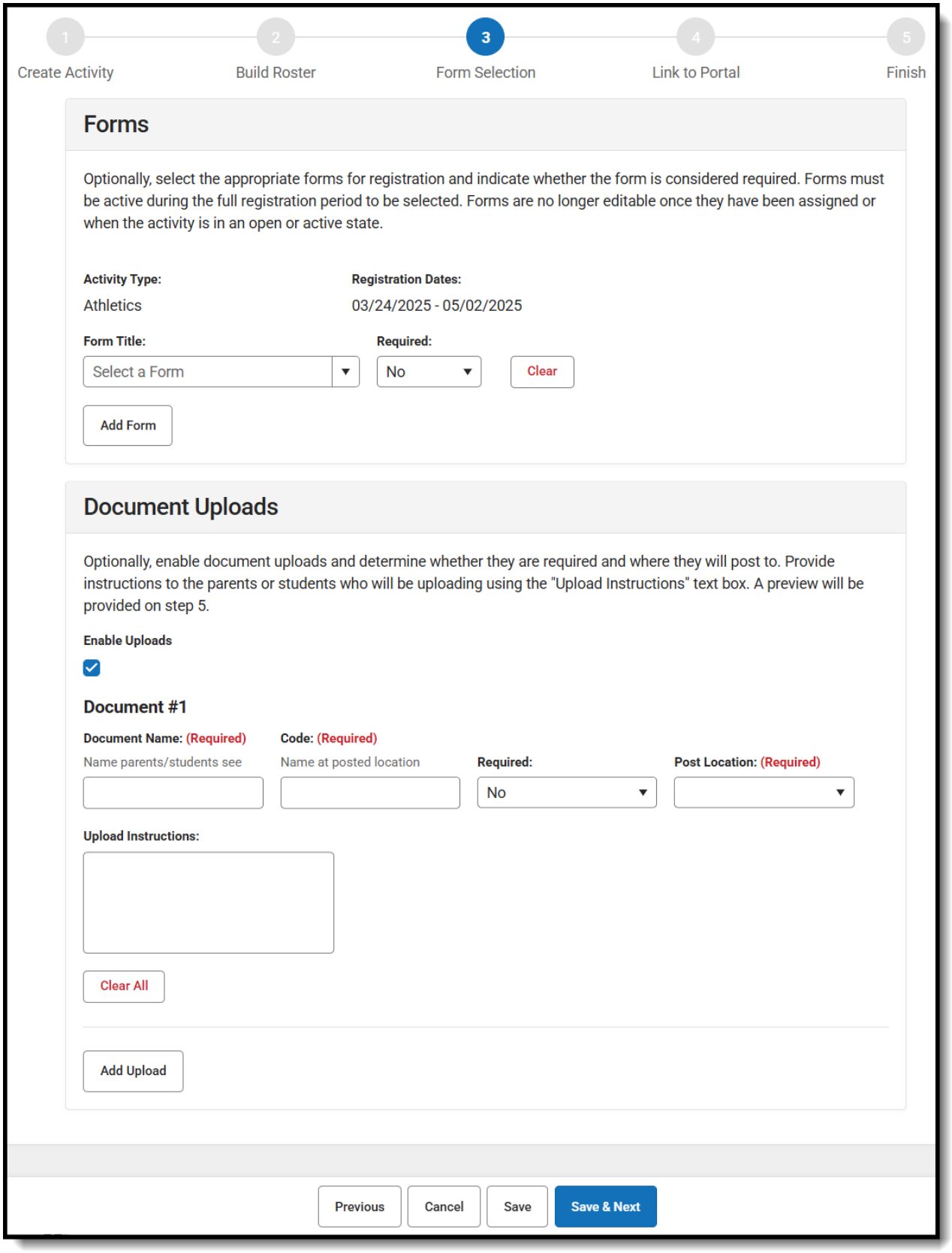
3. Form Selection

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.

Once a form has been assigned out, it can no longer be edited for the Activity.

Click here to expand...



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.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Required</td><td>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.
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>No</td><td>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.</td></tr>
<tr><td>Yes</td><td>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.</td></tr>
<tr><td>Guardian Registration</td><td>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.</td></tr>
</table></td></tr>
</table>

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.

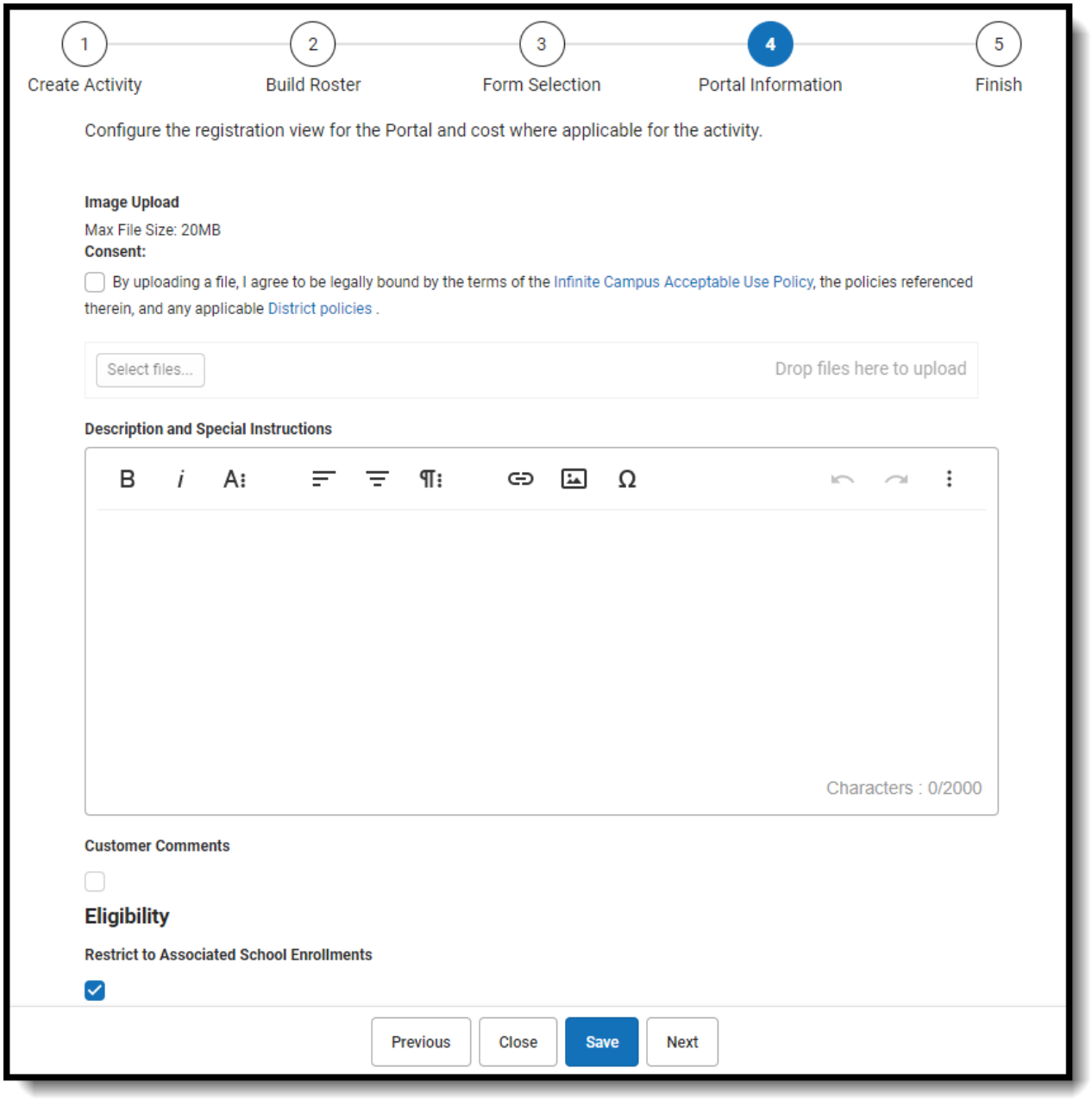
Field	Description
Document Name	The name associated with the document upload.
Code	An internal name for Campus records and data.
Required	Designate whether the document upload will be required to sign up for the activity.
Post Location	The location in Campus where document will be posted after approval 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.

4. Portal Information

On this screen, configure how the activity should display in the School Store and set up the associated costs.

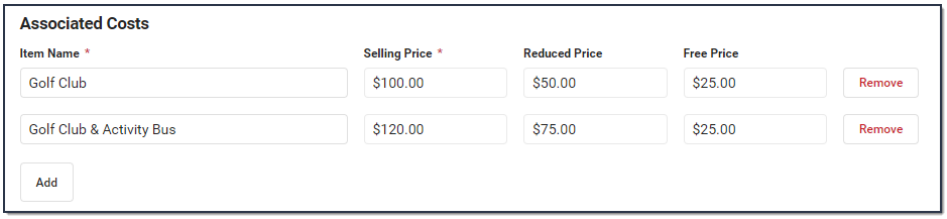
> Once an Activity has been purchased, the Associated Costs cannot be modified.

Click here to expand...



Field	Description
Image Upload	This option allows you to add a picture of the product.
Consent	Marking this checkbox indicates that you are aware of the Acceptable Use Policies of your district and Infinite Campus.

Field	Description
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.
Eligibility	
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	
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.*

Field	Description
Reduced Price	The price students with a Reduced eligibility status whose guardians have given permission to share it with the School Store and Activity Registration 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 and the Campus Product Permission must be enabled in FRAM Preferences.
Free Price	The price students with a Free eligibility status whose guardians have given permission to share it with the School Store and Activity Registration 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 and the Campus Product Permission must be enabled in FRAM Preferences.
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. 

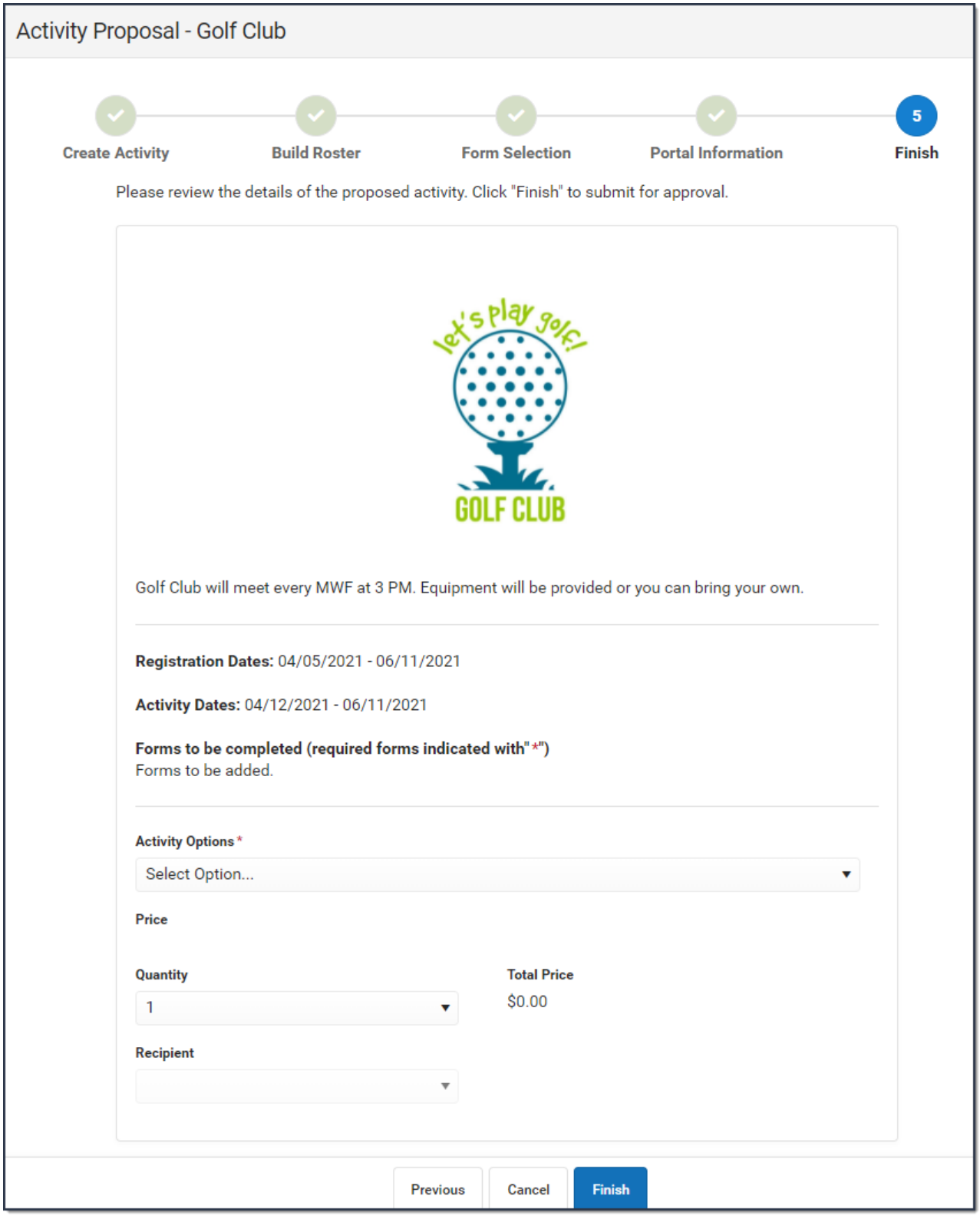
5. Finish

You can **NOT** complete this step if your activity requires preapproval.
See the Submit an Activity Request for Preapproval topic for more information.

Review how the Activity Registration product will display for the Campus School Store. Click **Finish** to complete creating the activity and submit the activity for approval. A Notification is sent to users who have Activity Approval tool rights.

After you click Finish, the Activity is in a **Pending** status until the review begins. While it is Pending, you can **Edit** the activity or **Recall** the activity. Once your proposed activity is **In Review**, you cannot make changes.

Click here to expand...

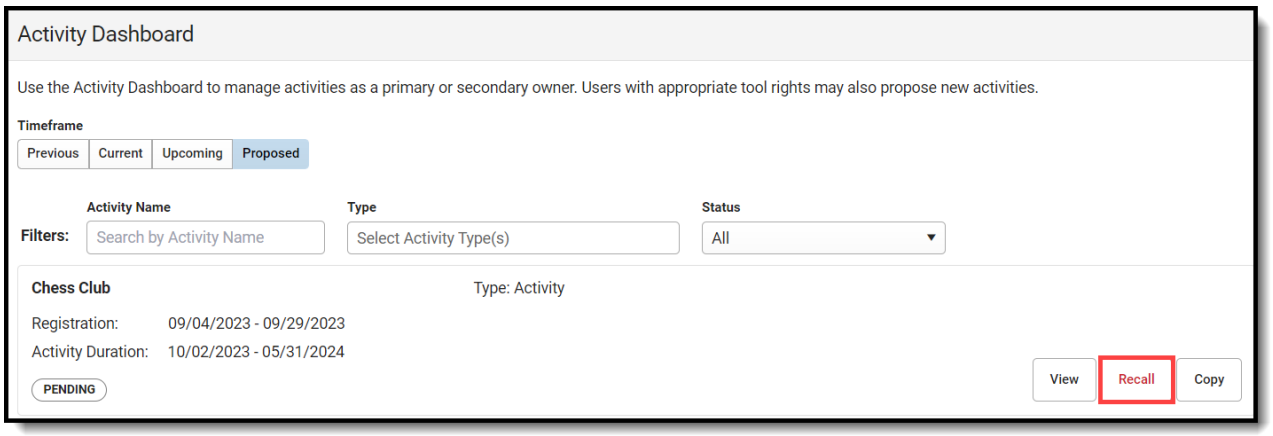


Recall a Proposed Activity

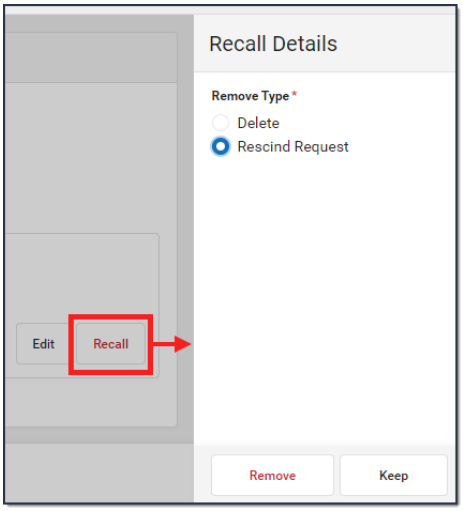
After you submit a proposed activity for approval, the activity is in a **Pending** status until the review begins. While it is Pending, you can **Edit** the activity or **Recall** the activity. When you Recall a proposed activity, you can delete the activity or rescind your request. When you rescind your

request, the activity status returns to **Draft - Proposal** and you can make any necessary changes before re-submitting the activity for approval. Recalling an activity removes the activity from the Activity Monitor Proposed screen.

Remove and Recall buttons do not display for Secondary Activity owners even if they are given the Delete tool right.



1. Click **Recall**.
   Result
   The **Recall Details** panel displays.



2. Select **Delete** to permanently delete the proposed activity or select **Rescind Request** to recall the proposed activity.
3. Click **Remove**.
   Result
   If you selected **Delete**, Campus permanently deleted the activity. If you selected **Rescind Request**, Campus returned the activity to **Draft - Proposal** status and you can make any necessary changes.

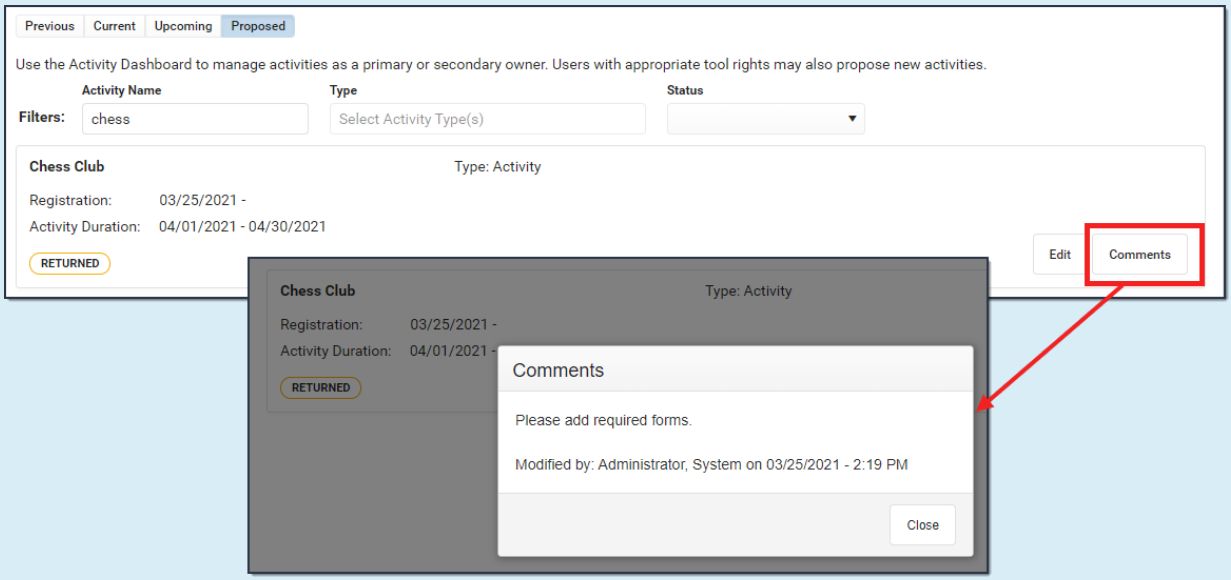
Edit an Activity

You can edit an activity if it is in one of the following statuses: **Draft - Proposal**, **Pending**, **Returned**, **Ready**, **Active - Registration Closed**, or **Registration Open**. To edit an activity,

click the **Edit** button. Depending on the filter you are using; i.e., Current, Upcoming, or Proposed, the Activity Builder or the Activity Proposal screens will display and you can make any necessary changes.



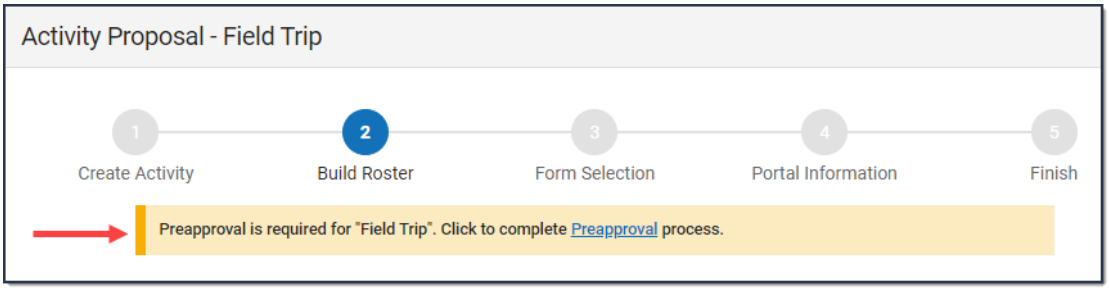
Comments are available if a proposed activity is **Returned** (or **Declined**) and may help you edit your activity.



Submit an Activity Request for Preapproval

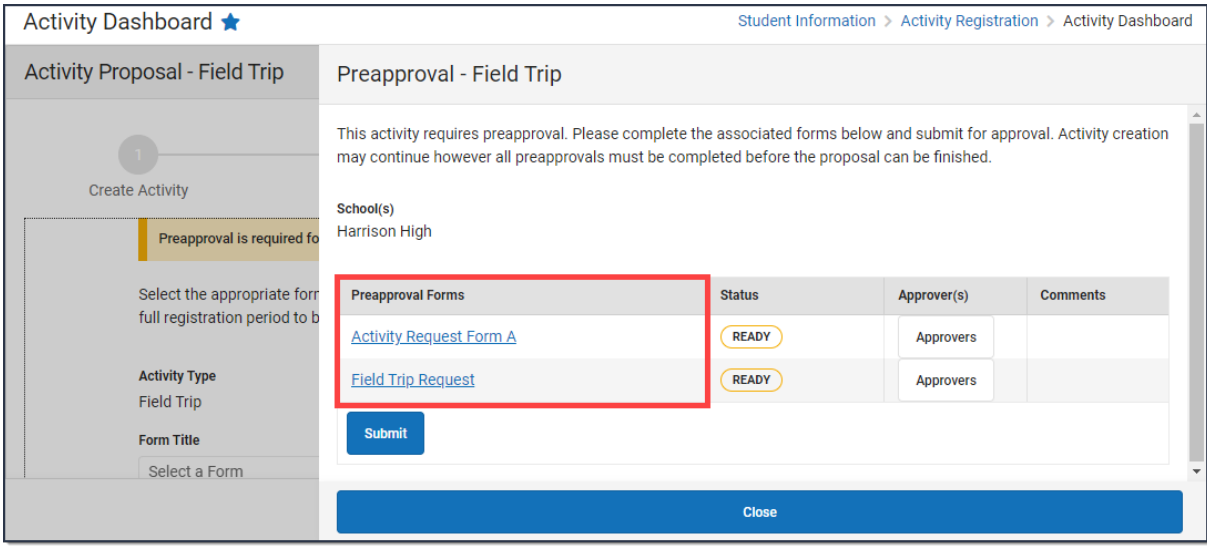
If your activity requires preapproval before it can be submitted for review, a yellow banner displays under the progress tracker after *Step 1. Create Activity* or it displays on the Proposed tab with the status *Preapproval Required - Proposal*. You can submit your activity request for preapproval at any time but the activity must be approved before you can complete Step 5. Finish and submit your activity for review.

1. Click the **Preapparoval** link in the banner.



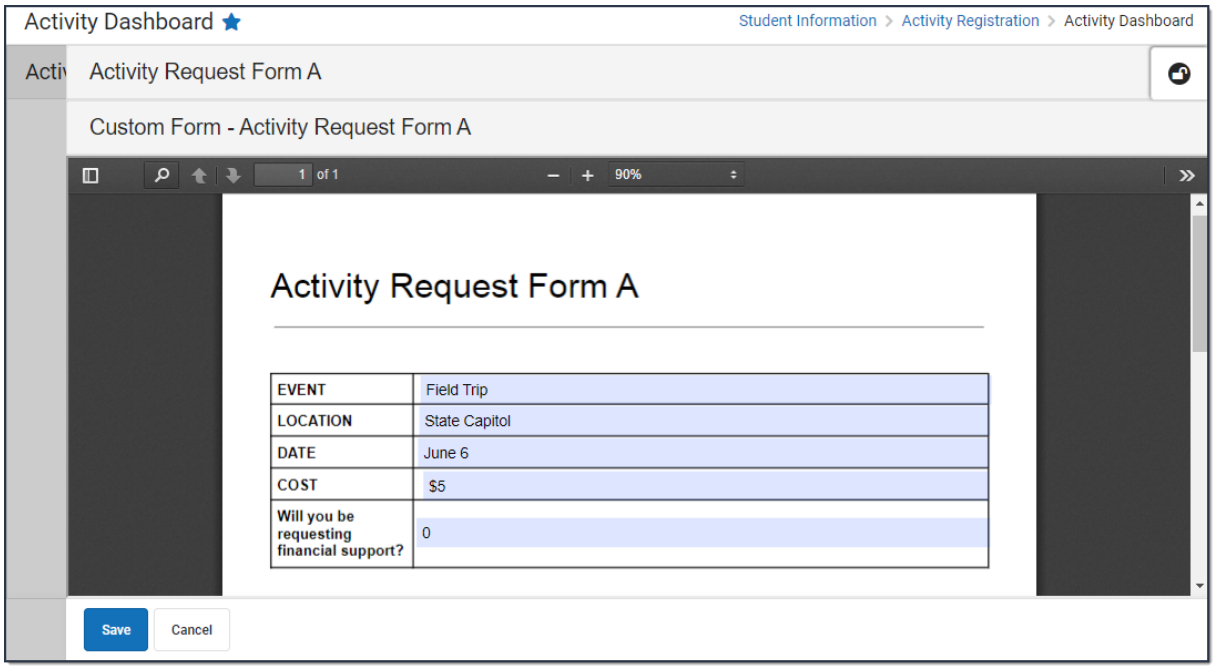
Result: The Preapproval panel displays.

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.

Click here to expand...



Result: The status changes to **Pending**.

3. Click **Submit**.
   Result: The status changes to **Submitted**.
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** to return to the Activity Dashboard.
   Tip: You can click the **Rescind** button to make changes or cancel the activity until the Activity Approver opens the activity preapproval in the Activity Preapproval tool.

If your activity request is...	Then...
Approved	you will receive a notification that your activity request was approved and you may finish your Activity Request. The Activity Request 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 Dashboard.