Activity Tracking Functional User Documentation

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Introduction

Activity tracker allows the assignment of activities to a person in Campus Café. For example, activities might include a basic note to a complex workflow that triggers emails and reminders.

This documentation is designed for functional users who assign and query activities.

Permissions

A user needs permission to the Tracker Member that holds the activity tracking template to be assigned. The user also needs access to the relevant Person Selected screens and, if wishing to query all activities, to the Activity Tracking screen under All Users.

Add activity to a person's record

There are multiple ways to attach an activity to a person's record. This includes manually adding an activity, triggering an activity through the admissions portal, triggering with a database trigger, and adding a batch of activities. The method employed will depend on the use case and personal preference. This document will outline manual addition of an activity and batching activities onto multiple records. Triggered activities require additional configuration covered in a separate document.

Manually adding an activity to individual record

1. Navigate to the person's record
2. Navigate to Person Selected → Activity Tracking
3. To the right of the Templates box, click the magnifying glass

4. Click Select next to the template to add
   Tip: Use the search box in the upper right to find the desired template
5. Click Add New Tracking Group
6. The activity is now assigned to the person

Add activity to individual record(s) in People Finder

1. Navigate to the requisite People Finder, for example Student Finder
2. Use a pre-defined filter or set desired criteria to return the population for which to apply the activity
3. Check the selected box next to all people to apply the activity
4. Click Add Activity
5. Choose for Page or For All
6. A new screen appears. To the right of the Template Name box, click the magnifying glass
7. Click Select next to the template to add
   Tip: Use the search box in the upper right to find the desired template
8. You can optionally tie the activity to a specific semester.

9. In the Add Only for These People box you can choose whether to add the activity to everyone selected, only those that do not have the activity or only those that do not have the activity for the set semester.
10. Optionally add a comment that will appear in activity tracking results as First Comment
11. Optionally assign a user
12. In the box type the message
13. Click submit

Edit activity

1. Navigate to the person's record
2. Navigate to Person Selected → Activity Tracking
3. Under the actions column, click the pencil
4. Click the + button to reveal additional fields, including attachment, reminders and more

Attachment
Use to upload an associated attachment.

Reminders

- Reminder Date: This date is used for the automatic email reminder feature. If a workflow is set up as a reminder (either the assigned to box is checked or additional email addresses are specified), then this date will automatically be set to the same date as the due date. This date can be changed at any time.
- Reminder Sent: This field will automatically check when the email reminder is sent. A user may uncheck the box and reset the reminder date to get a new reminder at any time.

More
Provides additional fields, including but not limited to:

- Semester: This field is used for activities where a term or semester is relevant. This would include admissions tracking items and the entering semester of the prospect is automatically entered into this field.
- Due Date: this can be configured in the workflow setup to automatically compute based on the initial date assigned.
- Submitted Date: this can be manually set or configured in the workflow to complete when a certain action occurs.
- Completed Date: this can be manually set or configured in the workflow to complete when a certain action occurs.
- Original Amount, Amount Paid, Amount Due: to track associated costs with activity. For example, the costs to attend an event. The pledge reminder system uses these field to track the amount of the original pledge, the amount currently paid, and the remaining amount due.
- Customizable Fields: These fields can be used generically to track money fields or other text associated with a tracking record. They are not searchable.

- Response Value: This field will contain the response from a web form question. For example, on the forms menu, there is a form that asks a person if they wish to participate in an event. The value of yes/no would be stored in this field for that question.
- URL: This field is used to store a URL associated with the tracking record.
- School Code and Name: This field is used to track the CEEB number or name of a school in a missing transcript tracking record.

Viewing activities

View by individual person

1. Navigate to the person's record
2. Navigate to Person Selected → Activity Tracking
3. The results shown depend on the filter criteria

Adjust the filter

1. Click > Filters
2. Set desired criteria
   Note: Setting the Date Completed to <= 0 will show non-completed activities, setting this to >=0 will show *both* non-completed and completed tasks
3. Click Submit
4. Basic data will appear in the results grid. Use the column visibility button to show or hide additional columns. Click a column to sort by that column. Click and hold a column to drag it to reorder the columns.
5. Under the Actions column, click the pencil to edit, the X to delete

View from People Finder

1. Navigate to the People Finder
2. Use a pre-defined filter or set desired criteria to return the population
3. Check the selected box next to all people to view
4. Click the Activities button
5. Select For Page or For All
6. A new screen will open. The ID numbers of the previously selected population will automatically carry.
7. Select what activities should be shown
   Note: Setting the Date Completed to <= 0 will show non-completed activities, setting this to >=0 will show *both* non-completed and completed tasks
8. Click Submit

View from Activity Tracking

1. Navigate to All Users → Activity Tracking
2. Set desired criteria
   Note: Setting the Date Completed to <= 0 will show non-completed activities, setting this to >=0 will show *both* non-completed and completed tasks
3. Click Submit
4. Basic data will appear in the results grid. Use the column visibility button to show or hide additional columns. Click a column to sort by that column. Click and hold a column to drag it to reorder the columns.
5. Under the Actions column, click the pencil to edit, the X to delete or the person to launch the person's individual record