

Ultracamp Set up Task #3

Due: Nov. 4th

Need to Complete:

- Confirm Tasks and Processes set up for Documents from the Document Management
 - Create a Page Order Template for your subject area – attach it to your session template if it will be universal for most of your programs
 - Test out Options and think through how you might need this
 - Share with Kirsten if you have a reason to use Activities
 - If overwhelmed with extra time (lol), continue thinking about custom questions and preparing those and forms for your future sessions.

 - **1. Processes and Tasks – only need for documents**
 - o Go to Settings – System/Management – Processes
 - Create one Processes (checklist) for many tasks.
 - o Go to Settings – System/Management - Task Template
 - Can create many tasks under one processes.
 - **2. Page Order Templates - optional**
 - o Go to Settings – Session Templates – Page Order Templates
 - Create a page order template for how you want certain registrations to be ordered. Remember One Page Order Template for many Sessions. If you are using this – attach it to your session templates.
 - **3. Options and Activities – set up if your sessions have additional options to choose from outside of fees.**
 - o Go to Settings – Option Templates– Option Categories
 - One category for many templates
 - o Go to Settings – Option Templates– Option Templates
 - Many templates under one category
- OR
- o Go to Settings – Activity Templates– Activity Categories
 - o Go to Settings – Activity Templates– Activity Templates

Additional Help Videos and How To's from Ultracamp:

[Task Templates](#)

[Tasks and Processes](#)

[Option Categories](#)

[Option Templates](#)

[Scheduling Session Options](#)

[Scheduled Session Options & Option Templates](#)

[Activities](#)