

OSP: Copying Activities

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Why Copy Activities?

Copying activities allows you to use the information from another activity to create a new one. It saves you time and allows you keep track of sales under a separate activity number. We recommend that you use the copy feature instead of updating an old activity, such as an activity from last year, so that you can easily keep track of this year's orders and statement information.

Included with this how-to document is an example of when you might want to use this feature: [Setting Up Field Trips](#).

Note: Don't see the activity you want to copy? Be sure to put a checkmark in the Include Inactive checkbox before you search.

Copying Existing Activities to a New Activity Number

To use the Copy Activity feature:

1. Log into OSP with your Bookkeeper login and password.
2. Go to the Activity Selection screen by choosing Transactions | Activity Setup (1).
The Activity Selection screen appears with a list of current (live) activities.

Note: To view ALL activities, including inactive ones, select the Include Inactive checkbox and then select the search button (3).

OSP: Copying Activities

The screenshot shows the OSP Management Portal interface. The top navigation bar includes Home, Statements, Transactions, Inquiry, Reports, Setup, Import/Export, ManagePassword, Students, and Admin. The main content area is titled 'Activity Setup' and includes a search field and a table of activities. A red circle highlights the 'Include Inactive' checkbox, and a blue circle highlights the 'Edit' link for the 'School T-Shirt' activity.

Activity No	Activity Name	Price	Sponsor/Teacher	Account No	Active	
ZZ101-108	DECA Conference	\$300.00	bruce.willis@osmsinc.com	700.03	<input checked="" type="checkbox"/>	Edit Delete
ZZ101-11	Grad Night	\$100.00	denzel.washington@osmsinc.com	500.00	<input checked="" type="checkbox"/>	Edit Delete
ZZ101-13	School T-Shirt	\$10.00	al.pacino@osmsinc.com	400.00	<input checked="" type="checkbox"/>	Edit Delete
ZZ101-133	Student Parking 2013-2014	\$250.00	ehartnett@osmsinc.com	200.222	<input checked="" type="checkbox"/>	Edit Delete

3. Choose the existing activity you want to copy by selecting the Edit Activity link to the right of the activity (2).

The existing activity appears with the current details. We now refer to this as the Activity Template or Old Activity.

Scroll to bottom of the activity screen and press the COPY button.

The screenshot shows the 'Add/Edit OSP Activity' form. The form contains the following fields and values:

- Activity Number: ZZ101-13
- Activity Name: School T-Shirt
- Description: One size fits all, white, school T-Shirt.
- Search Sponsor/Teacher: [Search]
- Sponsor/Teacher Email Address: al.pacino@osmsinc.com
- Sponsor/Teacher Last Name: Pacino
- Sponsor/Teacher First Name: Al
- Date Activity Starts: [Calendar]
- Date to go Online for Sale: 6/6/2012 [Calendar]
- Date to go Offline for Sale: 6/6/2014 [Calendar]
- Price: 10.00
- Check Book ID: Checkbook
- Search Fund Account: [Search]
- Fund Account: 400.00
- Fund Account Description: General
- Grade Level: All
- Course/Class: [Empty]
- This Activity is for TRO use only:

A red circle highlights the 'Copy' button at the bottom right of the form.

4. OSP creates a new activity for you with a new activity number but keeps the other information the same.

5. Make any necessary changes, such as different dates or activity title.
6. Press Save.

OSP returns to the Activity Selection screen. Your new activity and Activity Template appear in the Activity Selection screen (unless your Activity Template is inactive).

Example: Setting Up Field Trips

One of the reasons for using the COPY ACTIVITY feature may be to set up field trips for an entire grade going to a single event. Most schools like to set up one activity per teacher going on the trip. You can also set up a separate activity for chaperones/parents.

1. Add the first teacher's Field Trip. Be sure to add the teacher's name at the start of the activity title so parents can find the correct activity to purchase.
2. Save this activity.

OSP returns to the Activity Setup screen and displays this first teacher's field trip.

3. Select this same activity again by choosing Add/Edit Activity link to the right of the activity.

OSP displays the field trip information for you. Note the current Activity Number!

4. Scroll to the bottom of the screen and press COPY.

*OSP creates a new activity **number** for you with the same information as the first teacher's field trip.*

5. Update the Activity Title and Description for the next teacher (include the teacher's name at the beginning of the Activity Title for easy reference).
6. Select Save and Close.

OSP returns to the Activity Setup screen. Both field trips now appear in the Activity Setup screen.

7. Repeat for as many teachers and classrooms as you need. You can even set up a separate activity for parent and chaperone tickets.