

3C's - Comments, Checklists, Communications

Adding/Updating Checklists

Description

Use checklists to assign lists of requirements or a series of communications to individuals (primarily), organizations, events, or groups of individuals and monitor progress toward completing those requirements. You can use checklists to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and so on.

For each checklist item that you assign, you can specify the individual who is responsible for that item and the due date. You can also specify an ultimate due date for the overall checklist.

Process Steps

Step 1. Adding a Checklist

Navigation:


Campus Community > Checklists > Person Checklists > Checklist Management - Person

Follow this navigation to access the Checklist Management – Person Search page.


Step 1.1: Checklist Management – Person Search Page

Checklist Management - Person
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

ID: begins with 

Sequence Number: =

Administrative Function: begins with 

Checklist Code: begins with


National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

Case Sensitive


[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Click the [Add a New Value](#) link to add a checklist to the person, search to view and select existing checklists.

Checklist Management - Person

[Find an Existing Value](#) [Add a New Value](#)

ID: 


[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Verify the ID and click [Add](#) to access the Checklist Management page.

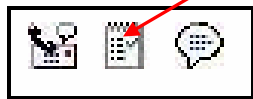
Alternate Navigation:

While you are working with the person either within Prospect Data or Application Maintenance, click the **Add a New Checklist** icon.

Note: Clicking the  (Enter a New Checklist) icon opens a new browser "popup" window. If you have some type of popup blocking software activated, you may not see the new windows. Either disable the popup blocker, or allow all popup from this site.

Application Program Data		Application Data	Application School/Recruiting	Application Student Response
Pavel Chekov		0137344		
Academic Institution:	University of Maine	Application Number:	00000072	
Academic Career:	Undergraduate	Career Number:	0	
Program Data				
Program Number:	0	Effective Date:	02/02/2006	
*Admit Term:	0710 2006 Fall	Effective Sequence:	1	
*Academic Program:	EGR EGR	Expected Graduation Term	0920 2009 Spr	
*Academic Load:	Full-Time	*Campus:	UM UM	
<input type="checkbox"/> Joint Program				

3C Icons



Add a new Checklist

This will open a new window with the Checklist Management page displayed for the person. Additionally, an Administrative Function will be defaulted, and Variable Data will be automatically populated.

Page	Admin Function
Application Program Data	ADMP
Application Data	ADMA
Application School/Recruiting	EVNT
Prospect Career Data	PROS
Prospect Program Data	PROP
Prospect School/Recruiting	EVNT

Step 1.2: The Checklist Management 1 Page

Use this page to assign a checklist to an individual.

Checklist Management 1		Checklist Management 2	
Pavel Chekov		ID: 0137344	
Checklist Date Time:	02/02/2006 9:50:47AM	Variable Data	
*Administrative Function:	ADMP Admissions Program		
*Academic Institution:	University of Maine		
*Checklist Code:	OAMAUD Music Audition		
*Status:	Initiated	Status Date:	02/02/2006
Due Date:	04/03/2006		
Due Amount:	<input type="text"/>	<input type="text"/>	Currency Code
Comments:	<input type="text" value="Expect a great cello performance from Pavel."/>		
Save Notify		Add Update/Display	
Checklist Management 1 Checklist Management 2			

- 1.2.1 **Administrative Function:** The code for the functional area with which this checklist is associated.
- If you accessed this page from another page, the system automatically displays the appropriate administrative function from that page. (See table above.)
- 1.2.2 **Checklist Code:** The code that describes the checklist assigned to this individual. The only checklist codes available are those associated with administrative function on the Checklist Item Functions page and those for which you have been granted update security.
- 1.2.3 **Due Date:** The date by which the entire checklist must be completed for this individual.
- 1.2.4 **Due Amount:** The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.
- 1.2.5 **Comments:** Comments to further identify or describe the checklist for this individual.
- 1.2.6 **Variable Data:** If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

Step 1.2.1: Reviewing or Updating Variable Data for an Individual

Click [Variable Data](#) to view the Variable Data Page.

Variable Data

Academic Career: UGRD Undergraduate

Student Career Nbr: 0

Application Nbr: 00000072

Application Program Nbr: 0

OK Cancel

Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.

Step 1.3: The Checklist Management 2 Page

Place checklist items on an individual's checklist and identify who is responsible for each item.

Checklist Management 1 Checklist Management 2

Pavel Chekov ID: 0137344

Checklist Date Time: 02/02/2006 9:50:47AM

Administrative Function: Admissions Program Status: Initiated

Academic Institution: University of Maine Status Date: 02/02/2006

Checklist Code: Music Audition Due Date: 04/03/2006

Sequence	Item	Status	Status Date	Due Date
100	MUSAUD Music Aud	Initiated	02/02/2006	04/03/2006

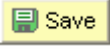
Responsible ID: 0030003 Name: Patterson, Gregory J



Save Notify Add Update/Display

Note. The checklist items associated with the specified checklist code on the Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page where all checklist items associated with the specified administrative function are available.

- 1.3.1 **Checklist Sequence:** The number of this checklist item in the list of checklist items for this individual. The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.
- 1.3.2 **Item:** The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.
- 1.3.3 **Status:** The status of the checklist item: *Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived, or Cancelled.*
- 1.3.4 **Status Date:** The date of the current status.

- 1.3.5 **Due Date:** The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an earlier date so that the item due date does not exceed the overall due date of the checklist.
- 1.3.6 **Responsible ID:** The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.

Click  to assign this checklist to this person.

If you have accessed these pages by clicking the  (Add a New Checklist) icon and opening a new window, then it is recommended that you close this browser window with either File – Close or .

Source Documents

Not Applicable

Security Roles

Maintained by:

Do not restrict access. Data access is controlled by 3C Group Security.

Viewable by:

APPROVED and TESTED by Admissions and Campus Community Team on February 21, 2006.