STATE OF NORTH DAKOTA

CAMPUS COMMUNITY
ASSIGN CHECKLISTS – MANUAL
TRAINING MANUAL

VERSION 8.0

Disclaimer

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ASSIGN CHECKLISTS – MANUAL

OVERVIEW

Checklists can be assigned to individuals, organizations, events, or groups of individuals. For each checklist item that you assign, you can specify the individual who is responsible for that item. You can specify a due date for the overall checklist and assign the same or different due dates for each item on the checklist.

You can enter checklists manually throughout your system, or with the 3C engine you can define events and triggers to have the system add or update checklists for individuals or organizations automatically from within your business processes.

NOTE: The **automated process** is covered in the 3C Engine chapter.

An administrative function and a 3C group are required for each of the 3Cs.

The administrative function identifies the variable data associated with the specific category of checklist. For example, the administrative function of ADMA, for Admissions [Application Level] identifies the Academic Career, Student Career Number, Application Number, and Application Program Number.

The 3C group provides user-level security access to categories of checklists, while providing or restricting the user's ability to edit the data. For example, a security administrator might give a specific user 3C group security access to items in the Notice of Dismissal communication category, with an update only status so that he or she can view the data, but cannot modify it.

Buttons appear on many pages in your system to enable you to transfer directly from that page to another page within the

same administrative function, to generate or review a checklist for the individual or organization whose information you are currently viewing.

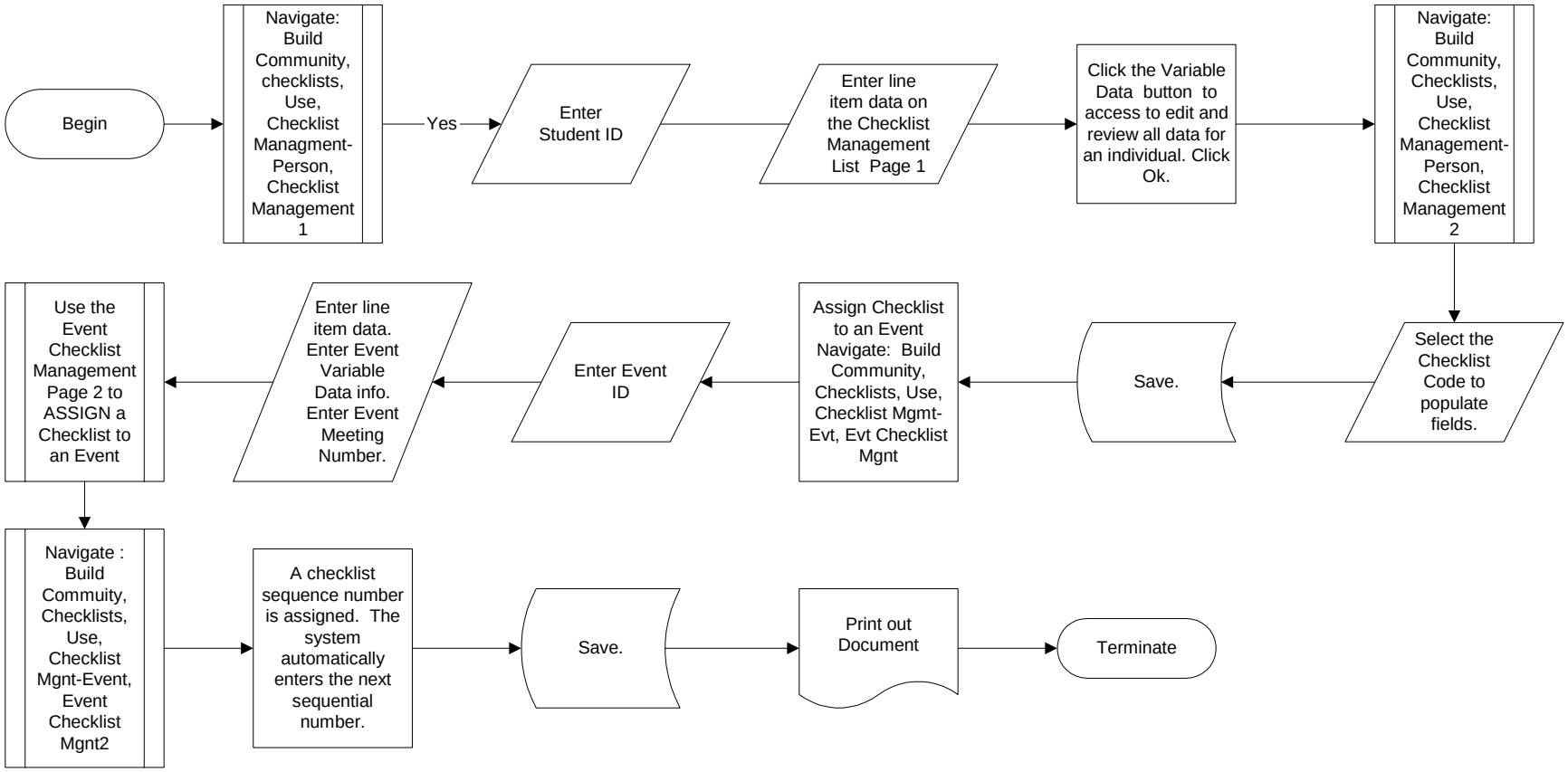
OBJECTIVES

After completing this section, you will be able to:

1. Assign and edit Checklists to individuals and events.
2. View checklists assigned to individuals and events.

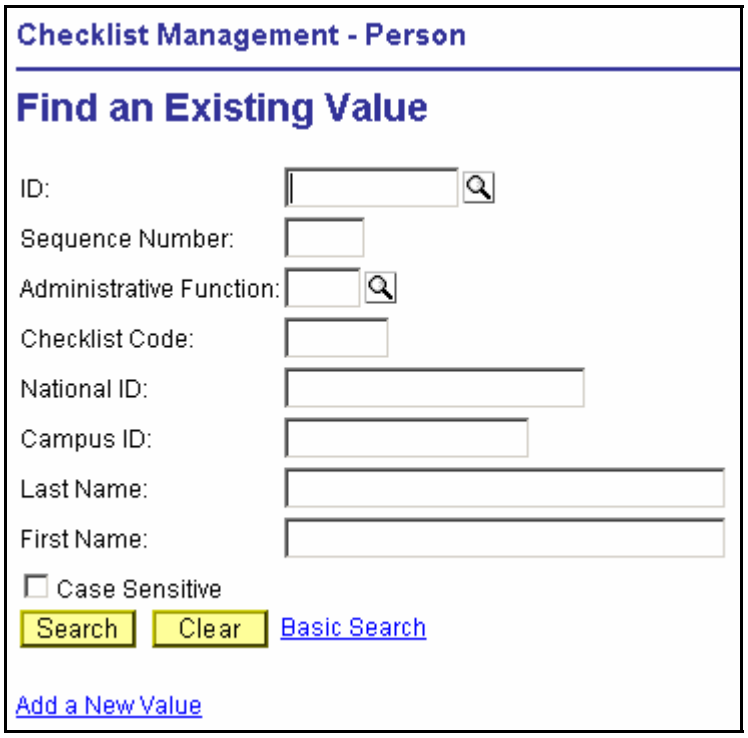
ASSIGN CHECKLISTS BUSINESS PROCESS FLOW

This business process assigns checklists to an individual, organizations, events, or groups of individuals.



WALKTHROUGH – ASSIGN CHECKLIST FOR STUDENT

1. **Navigation**: Home > Build Community > Checklists > Use > Checklist Management - Person
2. **Checklist Management – Person, Find an Existing Value** page is displayed.

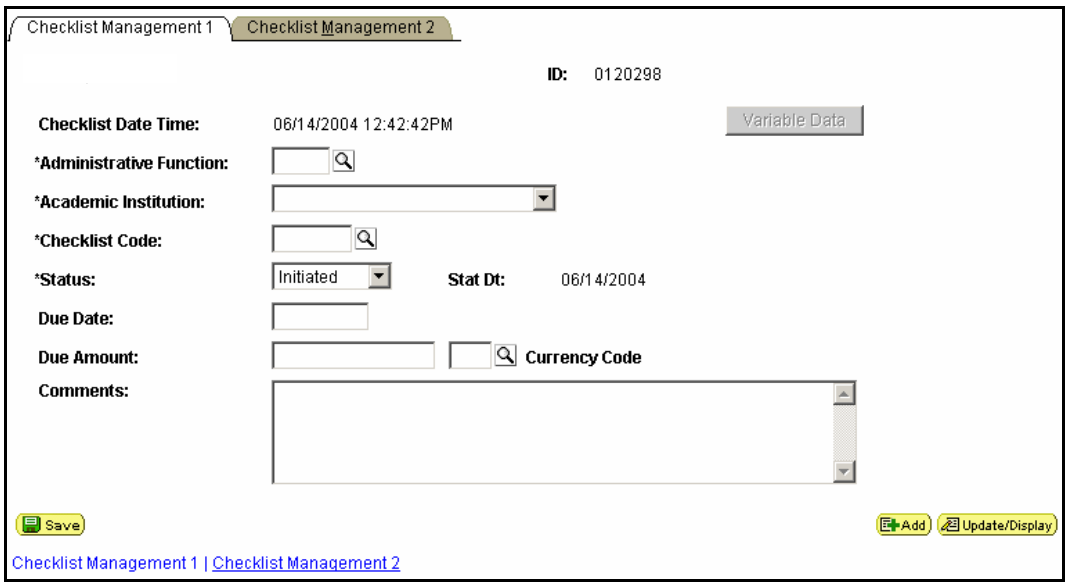


3. Find an Existing Value.
   a. Enter an existing ID or click Search.
   b. A list of values that meet your search criteria will be displayed.
   c. Click on the ID that you wish to process.
4. **OR** select Add a New Value.

5. **ID**: Enter the ID or click to select from the lookup list.
6. Click Add.

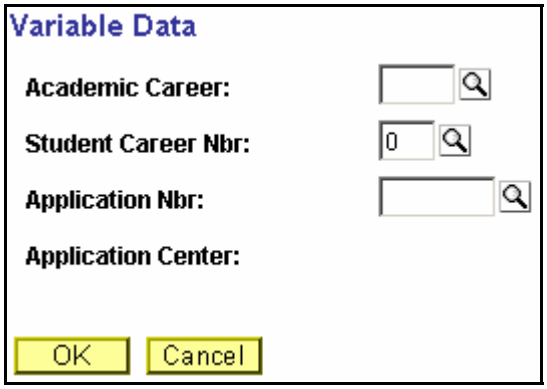
CHECKLIST MANAGEMENT 1

1. The **Checklist Management 1** page is displayed.



2. **Administrative Function**: Enter or select the function. If you accessed this page from another page, the system automatically displays the administrative function from that page. Examples of functions are: *ADMA, PROS, STRM*.
3. **Academic Institution**: Select the institution from the drop list.
4. **Checklist Code**: Enter or select 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.

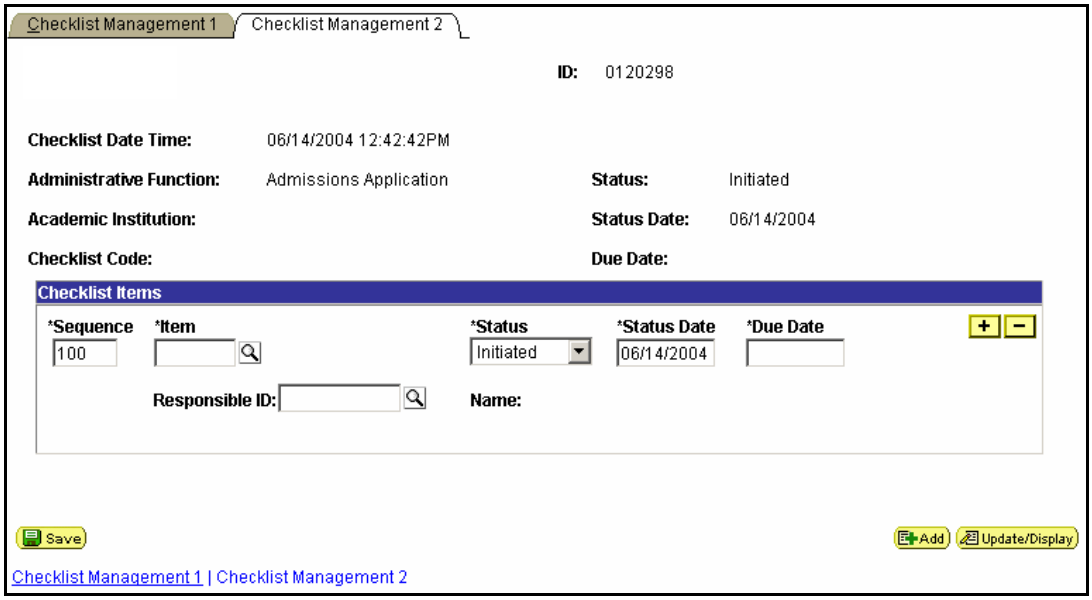
5. **Status**: Select the status of Initiated or Completed from the drop list.
6. **Due Date**: The date by which the entire checklist must be completed for this individual.
7. **Due Amount**: The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.
8. Click Variable Data.
9. The **Variable Data** page is displayed.



10. **Variable Data**: Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.
11. Click **OK** to return to the Checklist Management 1 page.
12. Click **SAVE** to commit your changes to the database.

CHECKLIST MANAGEMENT 2

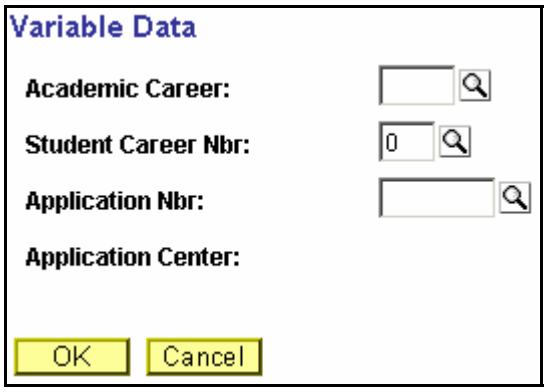
1. Click the Checklist Management 2 tab.
2. The **Checklist Management 2** page is displayed.



3. **Sequence**: 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.
4. **Item**: Enter or select the code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.
5. **Status**: Select the status of the checklist item: *Initiated, Completed, Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived,* or *Cancelled.*
6. **Status Date:** The date of the current status.
7. **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. Due dates reflect the Start Date of each upcoming Fall/Spring/Summer Term.
8. **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.
9. Click + to add additional checklists items.
10. Click **SAVE** to commit your changes to the database.

EDIT VARIABLE DATA FOR STUDENT

1. Click the Checklist Management 1 tab.
2. The **Checklist Management 1** page is displayed.
3. Click Variable Data.
4. The **Variable Data** page is displayed.



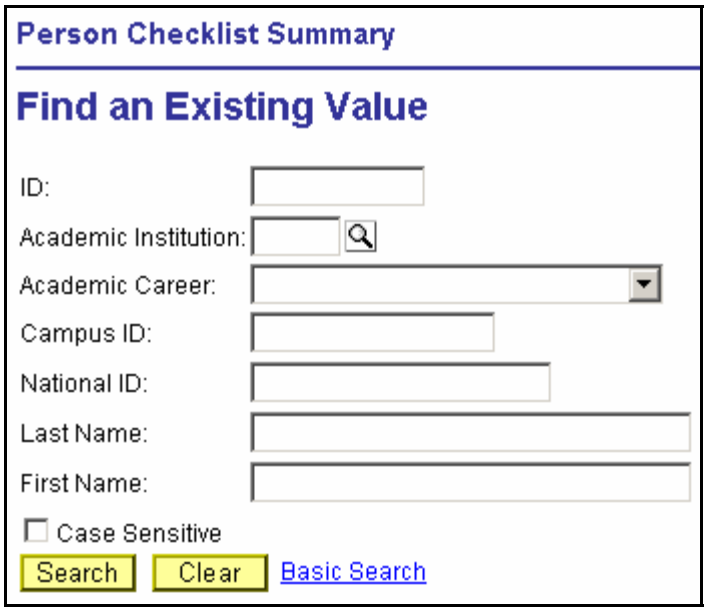
5. **Variable Data**: Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.
6. Click **OK** to return to the Checklist Management 1 page.
7. Click **SAVE** to commit your changes to the database.

EDIT CHECKLIST FOR STUDENT

8. Follow the process **Assign Checklist for Student** as described above to display the **Checklist Management 1** page.
9. Edit fields as necessary.
10. Click **SAVE** to commit your changes to the database.
11. Click the **Checklist Management 2** tab.
12. The **Checklist Management 2** page is displayed.
13. Click + − to edit the fields as necessary.
14. Click **SAVE** to commit your changes to the database.

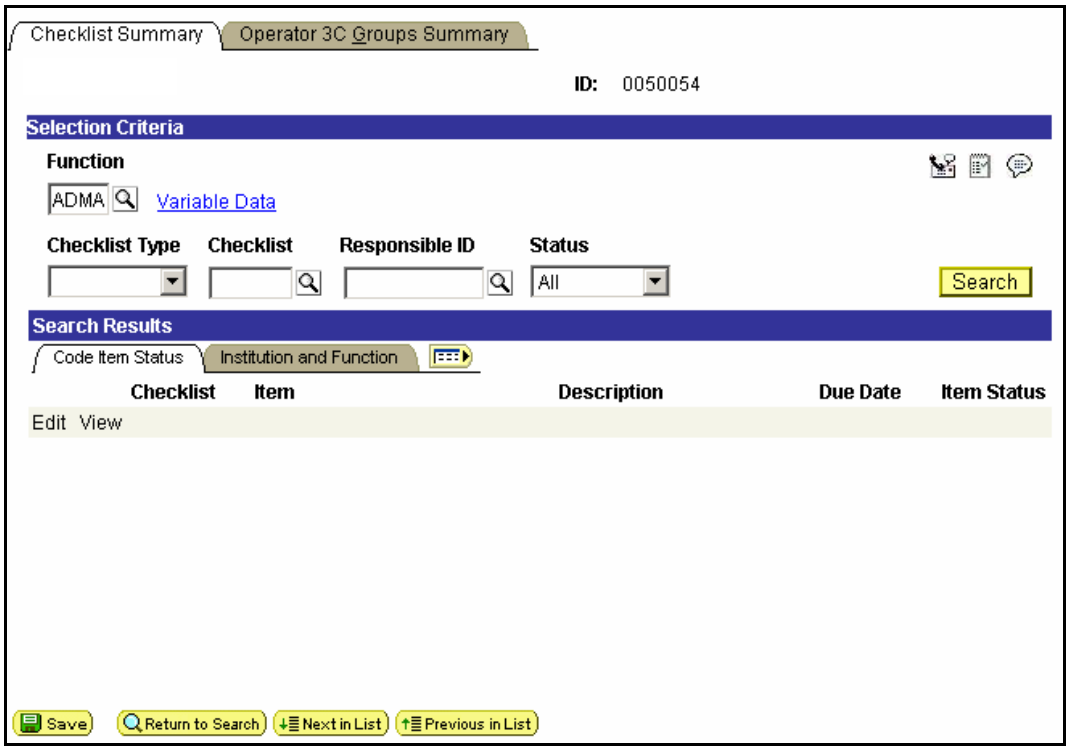
WALKTHROUGH – VIEW CHECKLIST FOR STUDENT

1. **Navigation**: Home > Build Community > Checklists > Inquire > Person Checklist Summary
2. **Person Checklist Summary, Find an Existing Value** page is displayed.

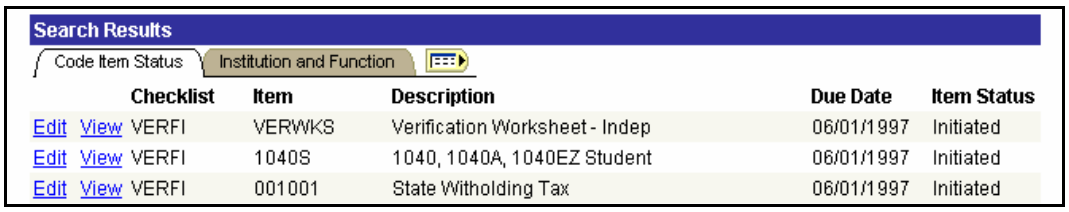


3. **Find an Existing Value**
   a. Enter the values by which you would like to search. Academic Institution, Academic Career, ID, Last Name, First Name, or National ID (SSN).
   b. Click Search. A list of values that meet your search criteria will be displayed.
   c. Click on the student you wish to view.

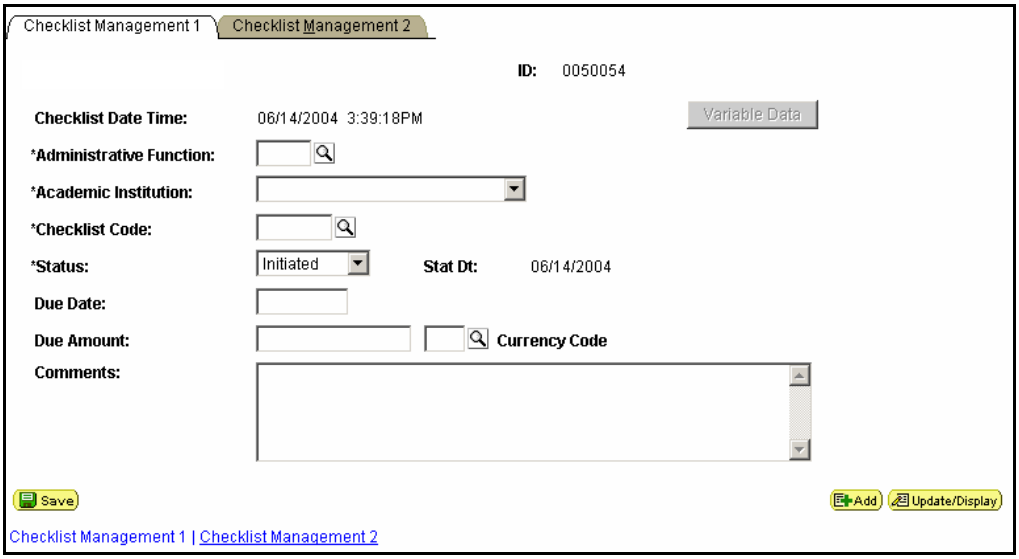
4. The **Checklist Summary** page is displayed.



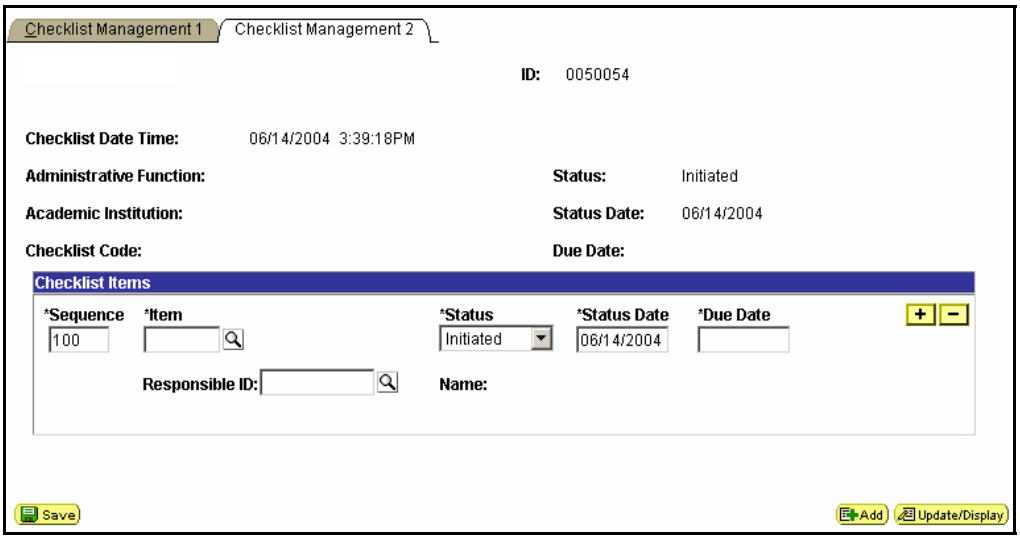
5. If you click Search without entering any values, the system searches for all checklists for the individual and displays the **Search Results** at the bottom of the page. You can enter values or any combination of values to limit the search.



6. Click and the **Checklist Management 1** page is displayed for view only.

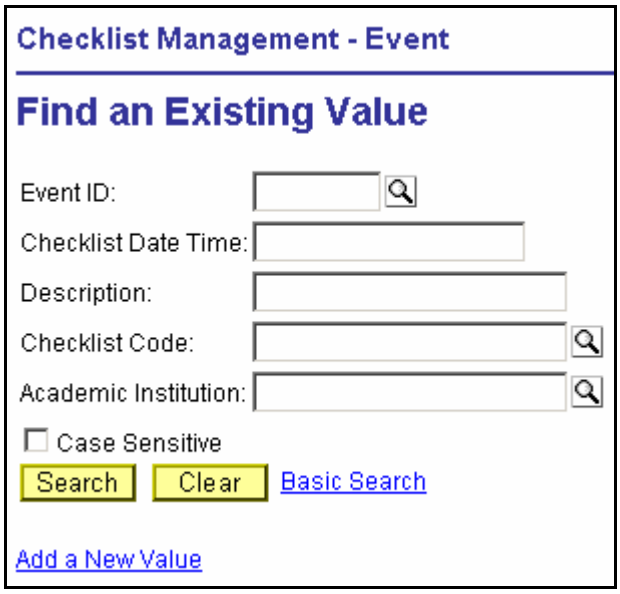


7. Click the **Checklist Management 2** tab.
8. The **Checklist Management 2** page is displayed for view only.

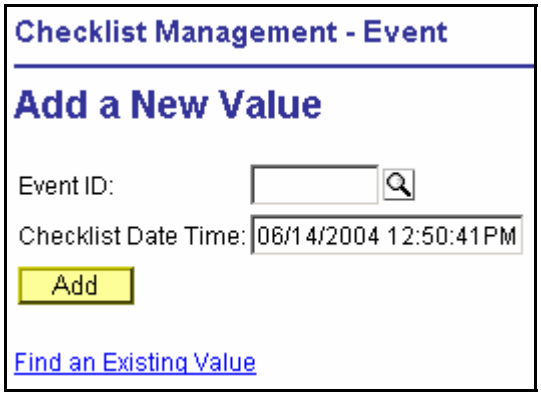


WALKTHROUGH – ASSIGN CHECKLIST FOR EVENT

1. **Navigation**: Home > Build Community > Checklists > Use > Checklist Management - Event
2. **Checklist Management – Event, Find an Existing Value** page is displayed.



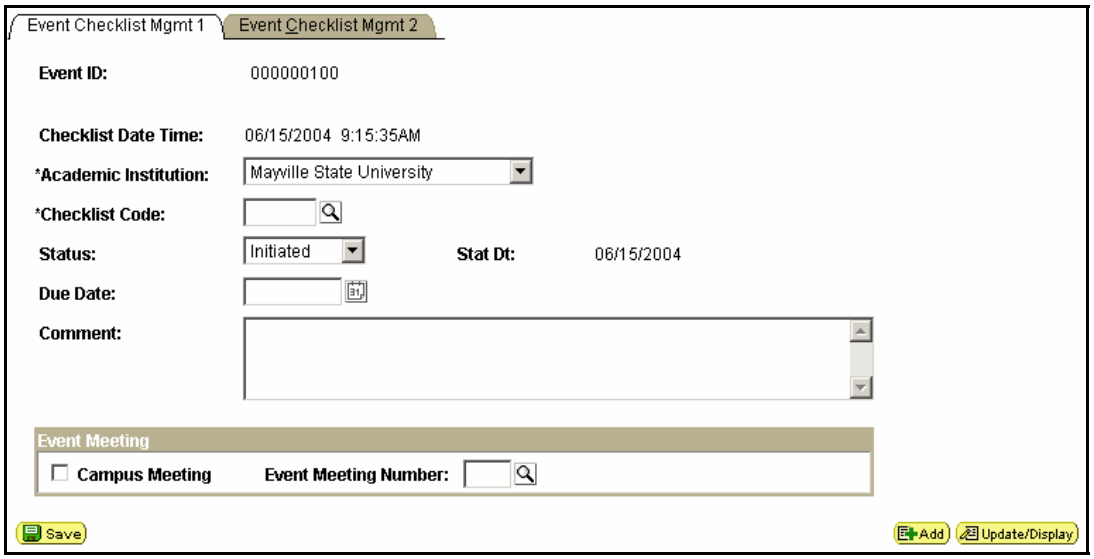
3. **Find an Existing Value**
   a. **Event ID**: Enter the ID you would like to search by or select the value from the lookup table.
   b. Enter additional values by which you would like to search or select the values from the lookup table.
   c. Click Search. A list of events that meet your search criteria will be displayed.
   d. Click on the event you wish to view.
4. **OR** click Add a New Value.



5. **Event ID**: Enter the Event ID or click to select from the lookup list.
6. Click Add.

EVENT CHECKLIST MANAGEMENT 1

1. The **Event Checklist Management 1** page is displayed.

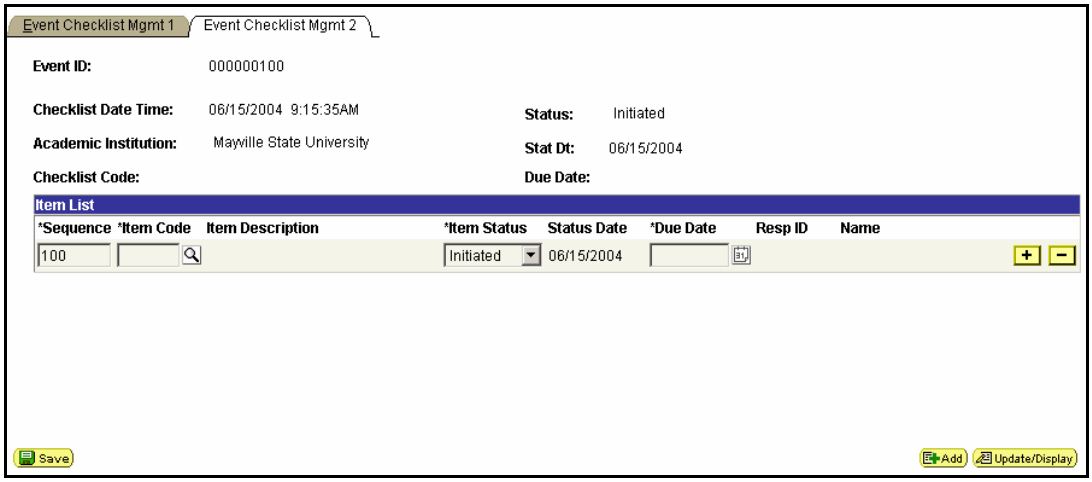


2. **Academic Institution**: Select the institution from the drop list with which this event is associated.
3. **Checklist Code**: Enter or select the code from the lookup that describes the checklist assigned to this organization.
4. **Status**: The status of the checklist item: *Initiated* or *Completed.*
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.

6. **Comment**: Enter comments as necessary.
7. **Campus Meeting**: When selected, indicates that this checklist is for a specific meeting assigned to this event.
8. **Event Meeting Number**: Enter or select the number from the lookup of the specific meeting to which this checklist is assigned.
9. Click **SAVE** to commit your changes to the database.

EVENT CHECKLIST MANAGEMENT 2

1. Click the **Event Checklist Management 2** tab.
2. The **Event Checklist Management 2** page is displayed.



3. **Sequence**: The number of this checklist item in the list of checklist items for this organization. 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.
4. **Item Code**: Enter or select the code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.
5. **Item Status**: The status of the checklist item: *Initiated or Completed.*
6. **Status Date:** The date of the current status.
7. **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. Due dates reflect the Start Date of each upcoming Fall/Spring/Summer Term.

8. **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.
9. Click + to add additional checklists items.
10. Click **SAVE** to commit your changes to the database.

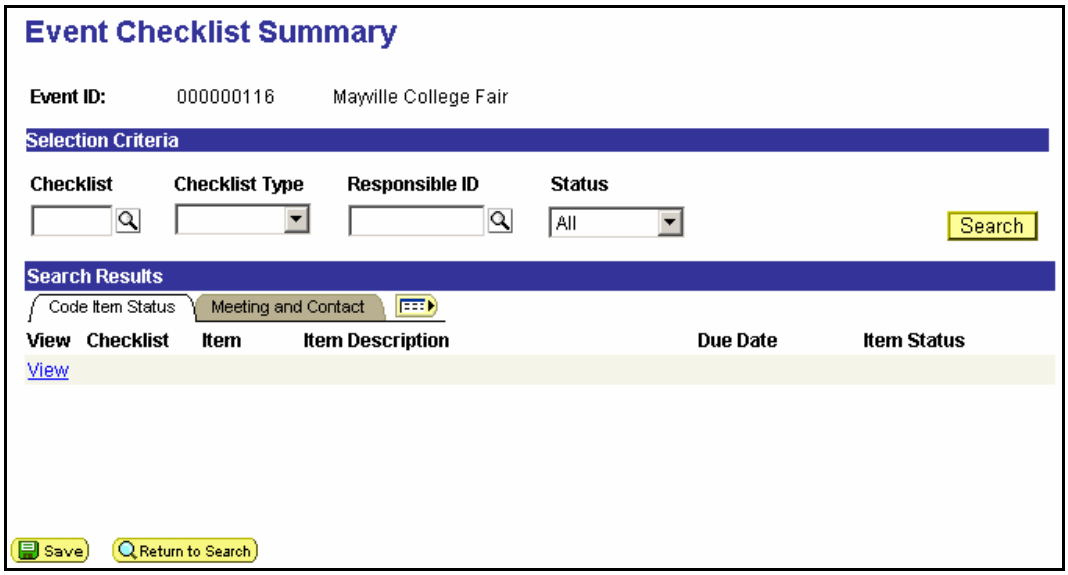
EDIT CHECKLIST FOR EVENT

1. Follow the process **Assign Checklist for Event** as described above to display the **Event Checklist Management 1** page.
2. Edit fields as necessary.
3. Click **SAVE** to commit your changes to the database.
4. Click the **Event Checklist Management 2** tab.
5. The **Event Checklist Management 2** page is displayed.
6. Click + − to edit the fields as necessary.
7. Click **SAVE** to commit your changes to the database.

WALKTHROUGH – VIEW CHECKLIST FOR EVENT

1. **Navigation**: Home > Build Community > Checklists > Inquire > Event Checklist Summary
2. **Event Checklist Summary, Find an Existing Value** page is displayed.

3. **Find an Existing Value**
   a. Enter the values by which you would like to search. Event ID, Academic Institution, Description.
   b. Click Search. A list of values that meet your search criteria will be displayed.
   c. Click on the event you wish to view.
4. The **Event Checklist Summary** page is displayed.

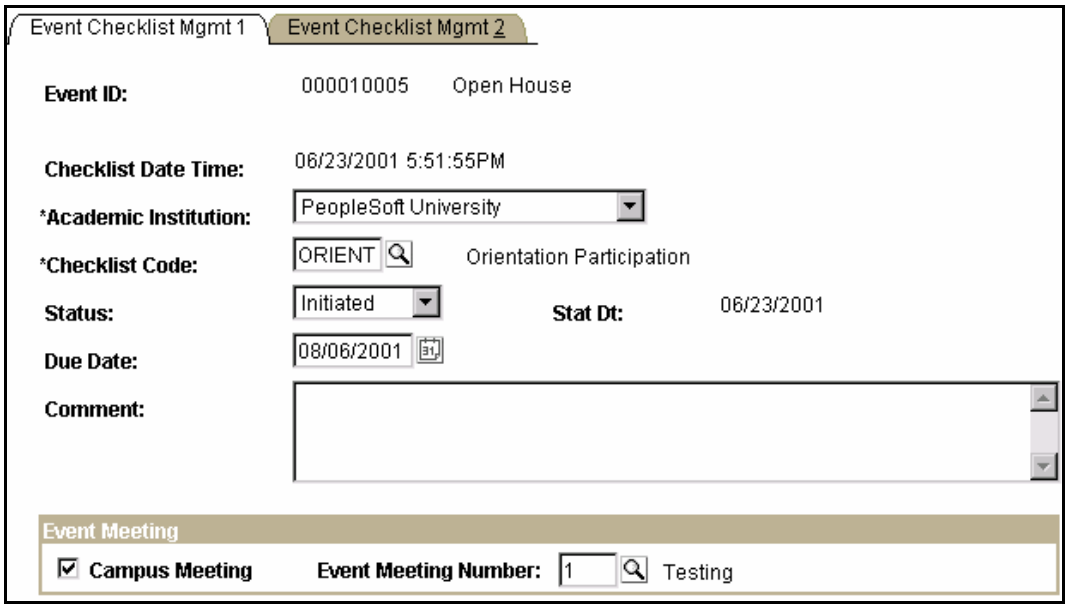


5. If you click Search without entering any values, the system will search for all checklists for this event and display the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

   Note: Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

CODE ITEM STATUS

1. Click View to access the **Event Checklist Management 1** page where you can view the checklist.



2. The View link is available only if the user has 3C group inquiry security access for this checklist code.

MEETING AND CONTACT

1. Use the Meeting and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.