



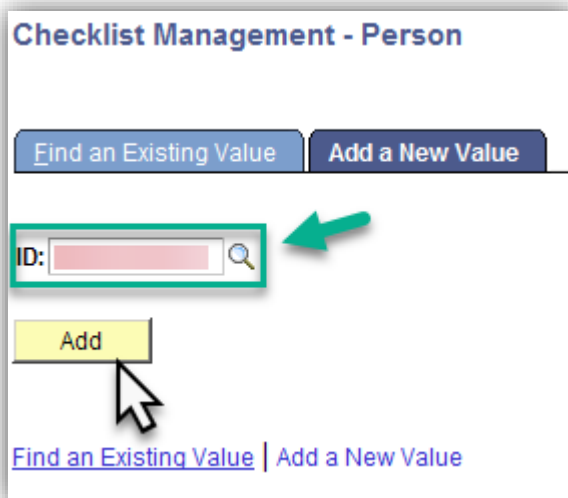


The following steps will explain how to include checklists or "To Do" items for students visible in their student centre. Depending on authorization, checklists can be added or removed, either manually or by via the checklist icon. The following steps outline the manual process for the following:

- Add/Remove a Checklist
- Checklist Management - Person to Review a Checklist
- Use a Checklist Icon

Add/Remove a Checklist:

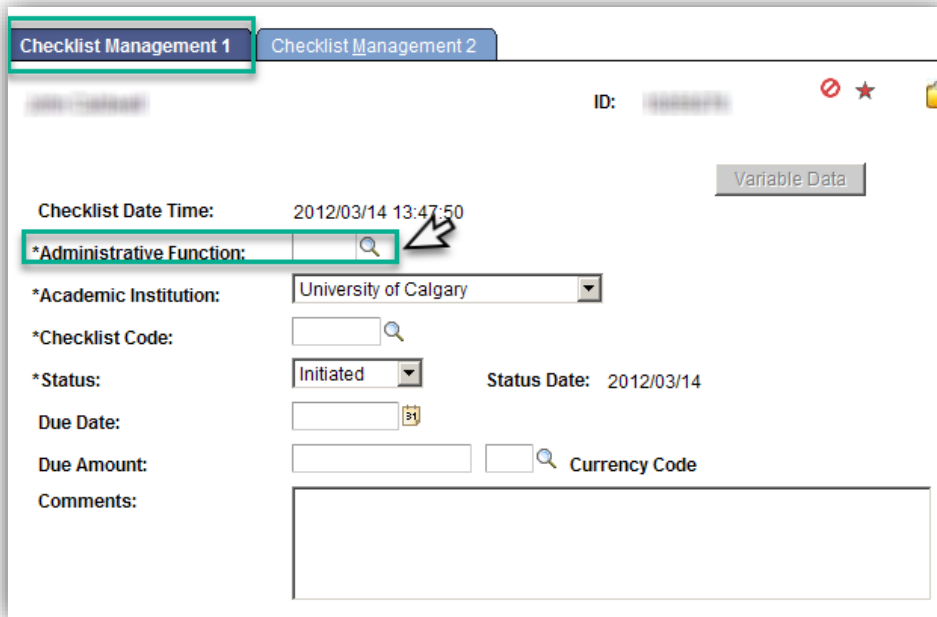
1. Click the **Campus Community** link.

2. Click the **Checklists** link.

3. Click the **Person Checklists** link.

4. Click the **Checklist Management - Person** link.

5. Click the **Add a New Value** tab. Enter the student ID number. Click the **Add** button.



Checklists, Add/Remove and Checklist Management - Person

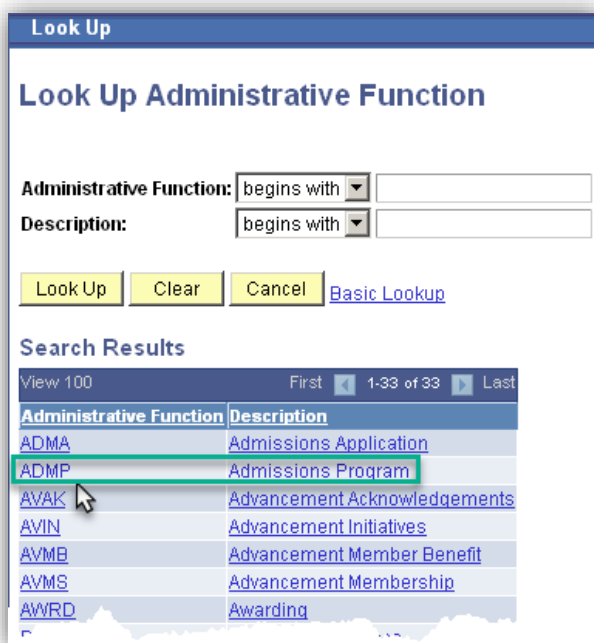
SA – Student Administration Basics

6. On Checklist Management 1, select the Administrative Function. Click the **Look up Administrative Function** button.



The screenshot shows the 'Checklist Management 1' form. The 'Administrative Function' field is highlighted with a red box and a mouse cursor. The form includes fields for Checklist Date Time (2012/03/14 13:47:50), Academic Institution (University of Calgary), Checklist Code, Status (Initiated), Status Date (2012/03/14), Due Date, Due Amount, Currency Code, and Comments.

7. A list of Administrative Functions will appear, make the appropriate selection. For this example, we will select ADMP Admissions Program. Click the **ADMP** link.



The screenshot shows the 'Look Up Administrative Function' dialog. It has search criteria for Administrative Function and Description, both set to 'begins with'. Below the search buttons, a table of search results is displayed. The 'ADMP' link is highlighted with a red box and a mouse cursor.

Administrative Function	Description
ADMA	Admissions Application
ADMP	Admissions Program
AVAK	Advancement Acknowledgements
AVIN	Advancement Initiatives
AVMB	Advancement Member Benefit
AVMS	Advancement Membership
AWRD	Awarding

8. Click the **Look up Checklist Code** button.



9. A list of Checklist Codes display, make the appropriate selection (e.g. UGSW1). Click the **UGSW1** link.

Look Up Checklist Code
✕

[Help](#)

Checklist Code

Description

Checklist Type

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100 First ◀ 1-24 of 24 ▶ Last

Checklist Code	Description	Checklist Type
DVM	Veterinary Medicine	Req List
GSACNV	GS-Conversion Checklist	Other
GSADMT	GS Admit	Condition
GSAPPL	GS Application	Req List
GSNEWF	GS Newly Admitted - Fall	Req List
GSNEWP	GS Newly Admitted-Spring	Req List
GSNEWS	GS Newly Admitted-Summer	Req List
GSNEWW	GS Newly Admitted-Winter	Req List
GSPROG	GS Program Specific	Condition
OPEX	Exchange	Req List
OPST	Open Studies	Req List
OSAPPL	OPST Application	Req List
PGMR	PGME Registration	Condition
UGARCH	Architectural Studies Minor	Condition
UGART	FA - Art Program	Req List
UGAUDT	FA - Audition Required	Req List
UGBAMU	Inactive BA in Music	Req List
UGBCR	MD - BCR Application	Condition
UGDQR	UG Diverse Qualifications	Condition
UGENER	Energy Engg Supplemental Info	Condition
UGQATR	Qatar Application for Admissio	Req List
UGQTRP	Qatar - Supporting Docs	Condition
UGSW1	UG SW	Condition
UGTHR	Music Theory Requirement	Condition

Checklists, Add/Remove and Checklist Management - Person

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10. Note the status is initiated. Other status include completed and cancelled. The next steps show how to associate the checklist item to the application. Click the **Variable Data** button.

Variable Data

Checklist Date Time []

*Administrative Function ADMP Admissions Program

*Academic Institution University of Calgary

*Checklist Code UGSW1 UG SW

*Status Initiated

Status Date []

Due Date 9999/12/31

D ... Am ... []

Cr ... Code []

11. Click the **Look up Academic Career** button. If there were more than one career (e.g. Grad) it would display here. Click the **Undergrad** link.

Look Up Academic Career

Empl ID []

Academic Career = []

Look Up Clear Cancel Basic Lookup

Search Results

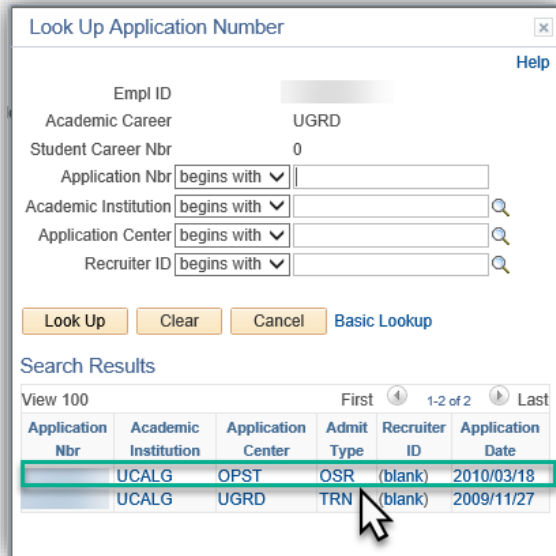
View 100 First 1 of 1 Last

Academic Career
Undergrad

12. Click the **Look up Application Number** button.



13. This is an example of a student having two applications submitted. For this example, we will select the most recent. Click the **Application** link.



Look Up Application Number

Empl ID [redacted]
Academic Career UGRD
Student Career Nbr 0
Application Nbr begins with []
Academic Institution begins with []
Application Center begins with []
Recruiter ID begins with []

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

Application Nbr	Academic Institution	Application Center	Admit Type	Recruiter ID	Application Date
UCALG	OPST	OSR	(blank)		2010/03/18
UCALG	UGRD	TRN	(blank)		2009/11/27

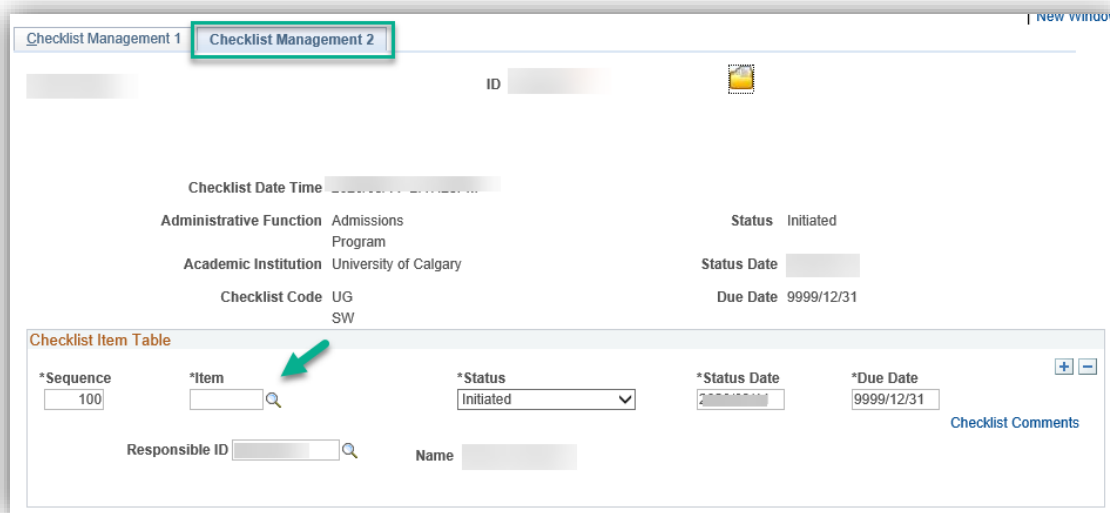
14. Click the **OK** button.



15. Click the **Checklist Management 2** tab.



16. On Checklist Management 2, enter the applicable Checklist Item. Click the **Look up Item** button.



Checklist Management 1 Checklist Management 2

ID [redacted]

Checklist Date Time [redacted]

Administrative Function Admissions Program Status Initiated
Academic Institution University of Calgary Status Date [redacted]
Checklist Code UG SW Due Date 9999/12/31

Checklist Item Table

*Sequence	*Item	*Status	*Status Date	*Due Date
100	[]	Initiated	[redacted]	9999/12/31

Responsible ID [redacted] Name [redacted]

Checklist Comments

Checklists, Add/Remove and Checklist Management - Person

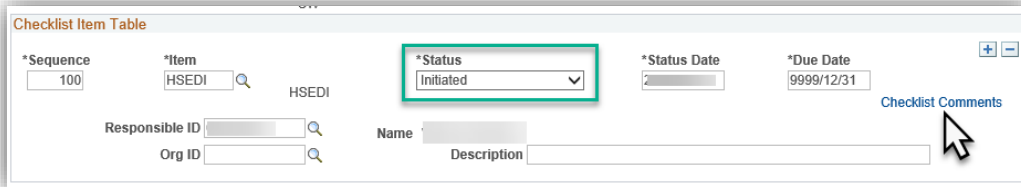
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17. The list of Checklist items display. You can scroll down the list to make a selection. For example, select HSEDI (HS Transcript Transfer ApplyAB).

Look Up Item			
FTRAN	Org	Final Official Transcript	Final Tran
FUNDNG	(blank)	Proposed Funding Plan	Funding
FWAIVE	(blank)	Foundation Year Waiver	FDNWAIV
GMAT	(blank)	Graduate Mgmt Admission Test	GMAT
GRE	(blank)	Graduate Record Examination	GRE
GREADV	(blank)	Graduate Record Exm - Advanced	GRE - Adv
GSACD	Org	GS-Accepted-Dept (CONV)	ACD-CNV
GSADM	Org	Admission - Letter (CONV)	ADM-CNV
GSDEFA	Org	GS-Deferred Adm Letter (CONV)	DEFA-CNV
GSFD	Org	GS-File Sent to Dept (CONV)	FD-CNV
GSFEE	Org	GS-Application Fee (CONV)	FEE-CNV
GSFEEM	Org	GS-MGMT MBA/EMBA \$ Fee(CONV)	FEEM-CNV
GSFF	Org	GS-File Received in FGS (CONV)	FF-CNV
GSFS	Org	GS-File sent to FGS (CONV)	FS-CNV
GSLOI	Org	GS-Letter of Intent (CONV)	LOI-CNV
GSMEDI	Org	GS-Media (CONV)	MEDI-CNV
GSNOFE	Org	GS-Appl Fee Outstandg CONV)	NOFE-CNV
GSNOP	Org	GS-No Graduate Program (CONV)	NOP-CNV
GSPGMP	Org	GS-Program Proposal (CONV)	PGMP-CNV
GSPSTE	Org	GS-Personal Statement (CONV)	PS-CNV
GSRADM	Org	GS-Readmission Letter (CONV)	RADM-CNV
GSRCF	Org	GS-Reg Confirmatn Frm (CONV)	RCF-CNV
GSREAC	Org	GS-Adm File Reactivated (CONV)	REAC-CNV
GSREF	Org	GS-Reference (CONV)	REF-CNV
GSREM	Org	GS-Reminder (CONV)	REM-CNV
GSREV	Org	GS-Revised Adm Letter (CONV)	REV-CNV
GSRFD	(blank)	GS-Refusal-Dept (CONV)	RFD-CNV
GSRFF	Org	GS-Refusal -FGS (CONV)	RFF-CNV
GSTEST	Org	GS-Test Score (CONV)	TEST-CNV
GSTP	Org	GS-Thesis Proposal (CONV)	TP_CNV
HOURS	(blank)	Clinical Hours for RN	C Hours
HRMDIP	Org	Proof Dipl Complete Winter Trm	HRM Confrm
HSEDI	Org	HS Transcript Transfer ApplyAB	HSEDI
HSTRAN	Org	High School Transcript	HS Tran
HSTRQ	Org	High School Transcript	HS Trnscrp
ID-RP	(blank)	Copy of Qatar ID/RP	ID-RP

18. Note the status defaults to initiated. Other status include completed, received and waived. If authorized, the status can be changed. Click the [Checklist Comments](#) link.



Checklist Item Table

*Sequence: 100 *Item: HSEDI *Status: **Initiated** *Status Date: *Due Date: 9999/12/31

Responsible ID: Org ID: Name: Description:

[Checklist Comments](#)

19. Note the checklist item comment is auto populated based on the Checklist item selected. You can enter student specific comments that will be visible in the student centre if desired. Click the **OK** button.



Checklist Item Comments

Checklist Item: **HSEDI HS Transcript Transfer ApplyAB**

Responsible ID: Org ID:

Checklist Item Comment: The UofC will obtain a high school transcript on your behalf through ApplyAlberta.

Student Specific Comment: **Optional Comments (visible to student)**

OK Cancel

Checklists, Add/Remove and Checklist Management - Person

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20. When completed press save. The checklist item will be immediately displayed in the student centre. Click the **Save** button.



21. If authorized, you may remove or delete a comment by clicking on the minus "-" sign. To delete a checklist item navigate to the checklist item on the Checklist Management 2 tab. Deleting a checklist item may be necessary if it was added in error. Otherwise, checklists are updated manually, or in some cases, by the system. Click the **Checklist Management 2** tab.



22. Ensure you are on the correct checklist table item and click the minus sign. In some cases, there may be more than one item in the checklist item table. Click the **Delete row** button.



The screenshot shows a 'Checklist Item Table' form with the following fields: *Sequence (100), *Item (HSEDI), *Status (Initiated), *Status Date, *Due Date (9999/12/31), Responsible ID, Org ID, Name, and Description. A mouse cursor is pointing to a minus sign icon in the top right corner of the form.

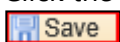
23. The Delete Confirmation prompt displays, click the **OK** button.

The dialog box is titled 'Delete Confirmation' and contains the text: 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' Below the text are two buttons: 'OK' and 'Cancel'. A mouse cursor is pointing to the 'OK' button.

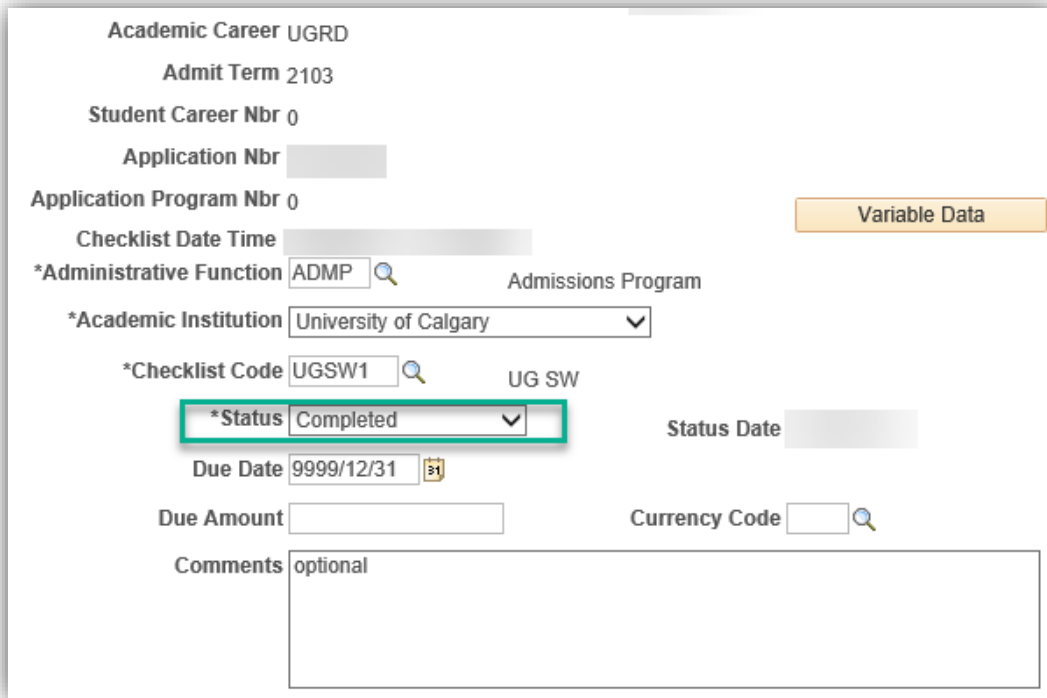
24. Click the **Checklist Management 1** tab.



25. Click the **Save** button.



26. Note: After deleting the checklist item the status changes to completed. This checklist item will not appear in the student centre.



Academic Career UGRD
Admit Term 2103
Student Career Nbr 0
Application Nbr [redacted]
Application Program Nbr 0
Checklist Date Time [redacted] Variable Data
*Administrative Function ADMP Admissions Program
*Academic Institution University of Calgary
*Checklist Code UGSW1 UG SW
*Status Completed Status Date [redacted]
Due Date 9999/12/31
Due Amount [redacted] Currency Code [redacted]
Comments optional

The next steps will explain how to review a Checklist from Checklist Management - Person.

1. Click the **Campus Community** link.

[Campus Community](#)
[Student Recruiting](#)

2. Click the **Checklists** link.

[Checklists](#)
[Manage checklists](#)

3. Click the **Person Checklists** link.

[Person Checklists](#)

4. Click the **Checklist Management - Person** link.

[Checklist Management - Person](#)

5. You can enter the student ID, Last Name or First Name to search for a student.
Click the **Search** button.

[Search](#)

Checklists, Add/Remove and Checklist Management - Person

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6. A list of Checklists may appear. Make the appropriate selection e.g. ADMA 2107 APFEE.

Search Results

View All First 1-9 of 9 Last

ID	Sequence Number	Admin Function	Admit Term	Checklist Code	National ID Country	NID Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
	1	ADMA	2107	APFEE	CAN	SIN	*****	10/13/1962	Female		(blank)		
	2	PROS	(blank)	ELP	CAN	SIN	*****	10/13/1962	Female		(blank)		
	3	ADMP	2107	UGSW1	CAN	SIN	*****	10/13/1962	Female		(blank)		
	4	ADMA	2107	UGCANT	CAN	SIN	*****	10/13/1962	Female		(blank)		
	5	ADMA	2103	APFEE	CAN	SIN	*****	10/13/1962	Female		(blank)		
	6	ADMA	2107	ADDL	CAN	SIN	*****	10/13/1962	Female		(blank)		

7. Details of the Checklist will appear including the Application Number, Administrative Function, Checklist Code, Status of the Checklist, Status Date and Due Date (if applicable). Also displayed may be the Due Amount and any additional comments.

Checklist Management 1 Checklist Management 2

ID: [REDACTED] 🚫 ★ 📁

Academic Career: UGRD

Admit Term: 2107

Student Career Nbr: 0

Application Nbr: [REDACTED] Variable Data

Application Center: Undergraduate Admissions

Checklist Date Time: 2009/11/27 11:39:39

*Administrative Function: ADMA Admissions Application

*Academic Institution: University of Calgary

*Checklist Code: APFEE Application Fee

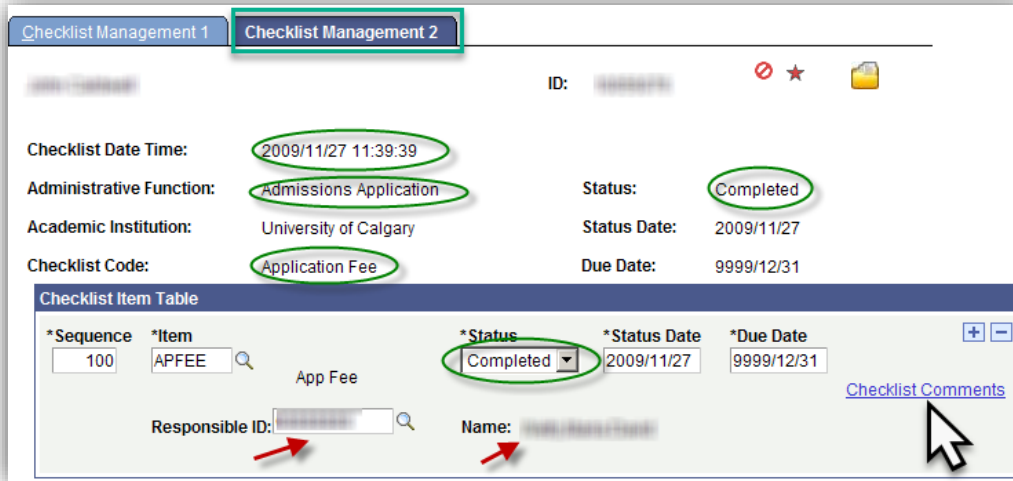
*Status: Completed Status Date: 2009/11/27

Due Date: 9999/12/31

Due Amount: → Currency Code

Comments: →

8. The **Checklist Management 2** tab will display the details of the checklist including Checklist Date and Time, Administrative Function, Checklist Code, Status, Responsible ID and the Name of the person who created the Checklist.



The screenshot shows the 'Checklist Management 2' tab selected. The interface displays the following details:

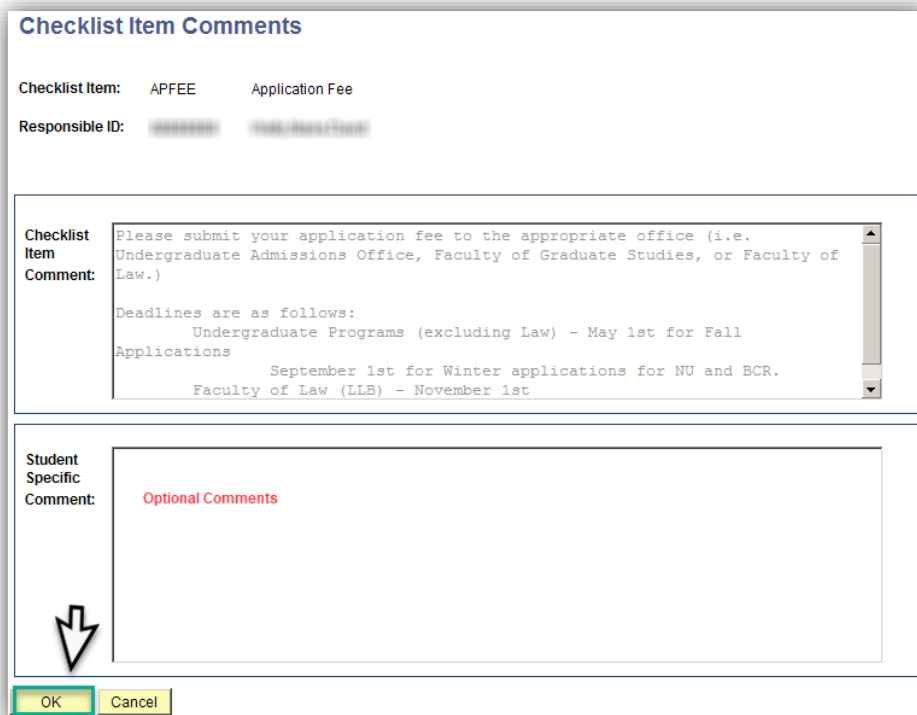
- Checklist Date Time:** 2009/11/27 11:39:39
- Administrative Function:** Admissions Application
- Academic Institution:** University of Calgary
- Checklist Code:** Application Fee
- Status:** Completed
- Status Date:** 2009/11/27
- Due Date:** 9999/12/31

Below the details is a 'Checklist Item Table' with the following data:

*Sequence	*Item	*Status	*Status Date	*Due Date
100	APFEE App Fee	Completed	2009/11/27	9999/12/31

At the bottom, there are fields for 'Responsible ID' and 'Name', both with red arrows pointing to them. A 'Checklist Comments' link is also visible.

9. Clicking on the **Checklist Comments** displays the Checklist Item Comments. If authorized, you can enter Student Specific Comments. Click the **OK** button.



The screenshot shows the 'Checklist Item Comments' dialog box. It contains the following information:

- Checklist Item:** APFEE Application Fee
- Responsible ID:** [ID] [Name]

The 'Checklist Item Comment' field contains the following text:

```
Please submit your application fee to the appropriate office (i.e. Undergraduate Admissions Office, Faculty of Graduate Studies, or Faculty of Law.)

Deadlines are as follows:
    Undergraduate Programs (excluding Law) - May 1st for Fall Applications
    September 1st for Winter applications for NU and BCR.
    Faculty of Law (LLB) - November 1st
```

The 'Student Specific Comment' field is currently empty and labeled 'Optional Comments'. A mouse cursor is pointing at the bottom left of this field.

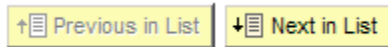
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Checklists, Add/Remove and Checklist Management - Person

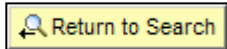
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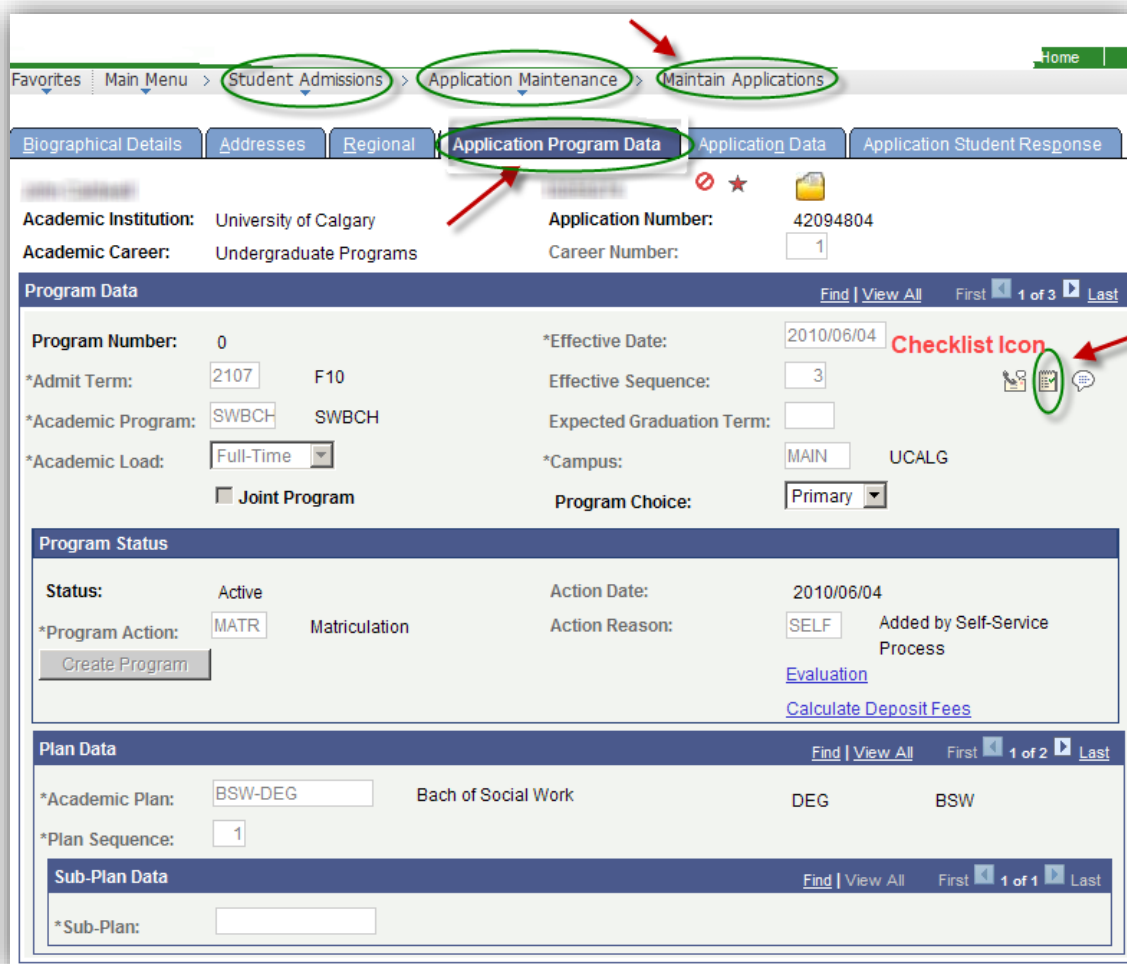
10. You can navigate to the next or previous checklist item by using the buttons.



Click the **Return to Search** button.



11. The Checklist Icon displays on a number of pages. When the Checklist Icon is used, Administrative Function and Variable Data transfer from the original page to Checklist Management 1. For this example the navigation displays the Checklist Icon in the Maintain Applications component in **Student Admissions > Application Maintenance**.



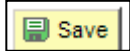
12. Click the **Add a New Checklist** icon.



13. When using the Checklist Icon, Administrative Function and Variable Data autocomplete saving you these steps. Click the **Look up Checklist Code** button. You can enter part of the checklist code or scroll to select the appropriate Checklist Code.



14. Enter any comments and press Save. Click the **Save** link.



For the corresponding online learning, consult the Student Administration (PeopleSoft Campus Solutions) training website.

End of Procedure.