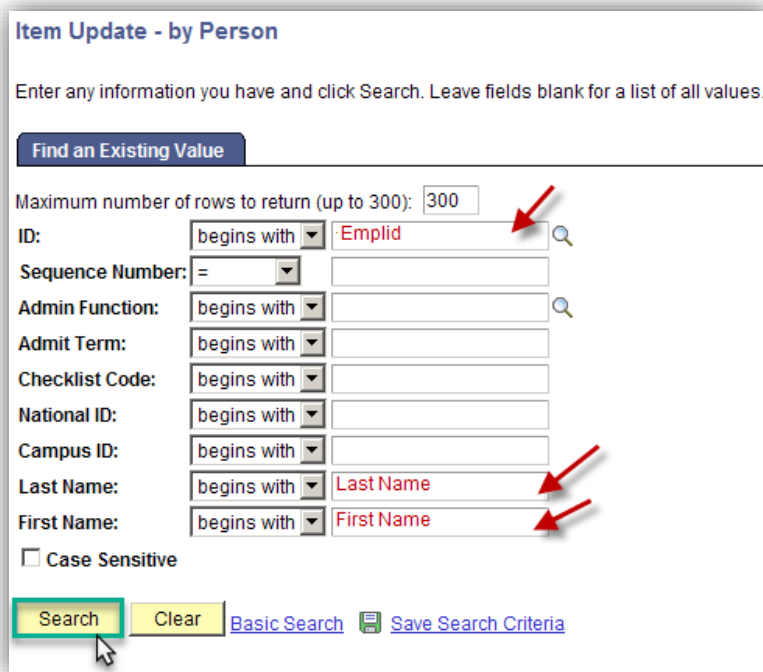


The following is how to update a checklist by person, view and update the checklist summary (if authorized) and view the details of a checklist. Please note, which components you may update change or view, depends on authorization.

## Item Update by Person:

1. Click the **Campus Community** link.  
[▶ Campus Community](#)
2. Click the **Checklists** link.  
[Checklists](#)
3. Click the **Person Checklists** link.  
[Person Checklists](#)
4. Click the **Item Update - by Person** link.  
[Item Update - by Person](#)
5. Enter the emplid, Last Name, First Name or any search criteria you have. Click the **Search** button.



**Item Update - by Person**

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

**Find an Existing Value**

Maximum number of rows to return (up to 300):

ID:

Sequence Number:

Admin Function:

Admit Term:

Checklist Code:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

# Checklists: Update by Person, Summary & Detail

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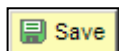
- Any checklists will appear in the grid below. Select the desired checklist. For this example click the **APFEE** link.

| ID | Sequence Number | Admin Function | Admit Term | Checklist Code | National ID Country | NID Short Description | National ID | Date of Birth | Gender | Name | Campus | Last Name | First Name |
|----|-----------------|----------------|------------|----------------|---------------------|-----------------------|-------------|---------------|--------|------|--------|-----------|------------|
| 1  |                 | ADMA           | 2107       | APFEE          | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 2  |                 | PROS           | (blank)    | ELP            | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 3  |                 | ADMP           | 2107       | UGSW1          | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 4  |                 | ADMA           | 2107       | UGCANT         | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 5  |                 | ADMA           | 2103       | APFEE          | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 6  |                 | ADMA           | 2107       | ADDL           | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |
| 7  |                 | ADMP           | 2107       | UGSW2          | CAN                 | SIN                   | *****       | 10/13/1962    | Female |      |        |           |            |

- By default, any checklists in **Initiated Status** display. If authorized, the Status can be changed by clicking on the **Item Status** list. Checklists can be **Completed, Initiated** or **Waived**. For this example, select Completed. Click the **Completed** list item.

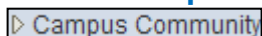
| Item      | Sequence | Administrative Function | Checklist Type | Checklist Code Descr      | *Item Status | *Status Date |
|-----------|----------|-------------------------|----------------|---------------------------|--------------|--------------|
| Essay     | 200      | ADMP                    | ADC            | UG SW Alternate Checklist | Initiated    | 2012/02/08   |
| Rec Ltr   | 400      | ADMP                    | ADC            | UG SW Alternate Checklist | Completed    | 2012/02/08   |
| Reference | 300      | ADMP                    | ADC            | UG SW Alternate Checklist | Initiated    | 2012/02/08   |
| Work Exp  | 100      | ADMP                    | ADC            | UG SW Alternate Checklist | Initiated    | 2012/02/08   |

- Note the Status Date defaults to the System Date (today's date). This can be changed if required. Click the **Save** button.

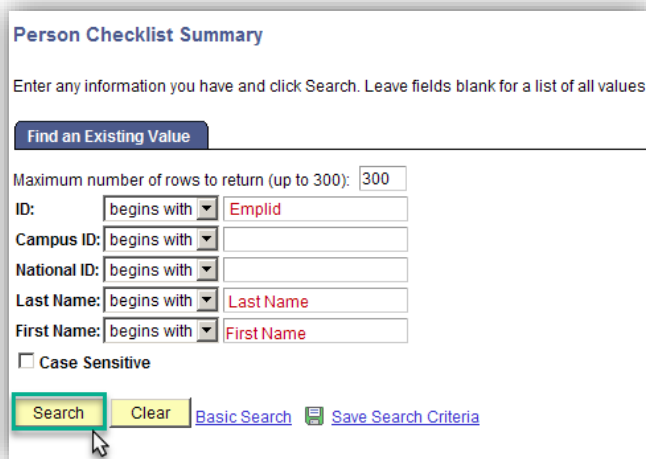


## Person Checklist Summary:

- Click the **Campus Community** link.



2. Click the **Checklists** link.  
[Checklists](#)
3. Click the **Person Checklists** link.  
[Person Checklists](#)
4. Click the **Person Checklist Summary** link.  
[Person Checklist Summary](#)
5. Enter emplid, Last Name or First Name to search. Click the **Search** button.



**Person Checklist Summary**

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

**Find an Existing Value**

Maximum number of rows to return (up to 300):

ID:

Campus ID:

National ID:

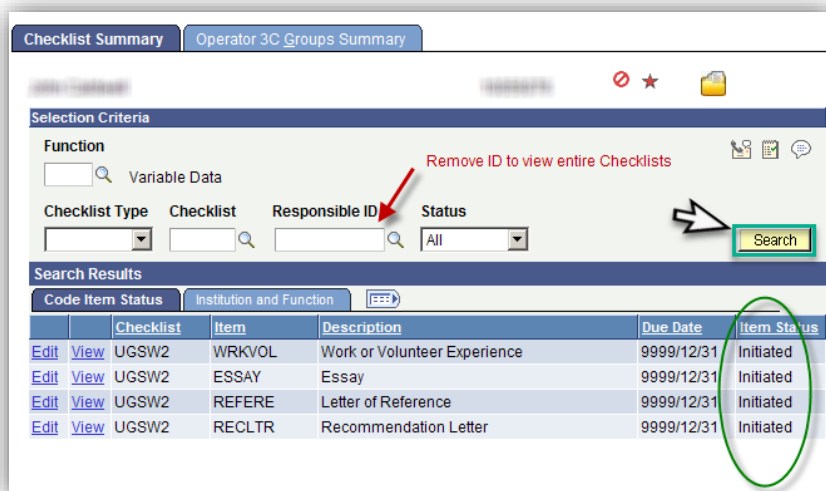
Last Name:

First Name:

Case Sensitive

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

6. Checklists display based on the Selection Criteria entered. With only the Responsible ID populated just the checklists created by this individual will display. By default, any Checklists in Initiated Status will display. Consequently, if the Responsible ID is removed the entire list of Checklists will appear regardless of the Status. Click the **Search** button.



**Checklist Summary** **Operator 3C Groups Summary**

**Selection Criteria**

Function  [Remove ID to view entire Checklists](#)

Checklist Type  Checklist  Responsible ID  Status  **Search**

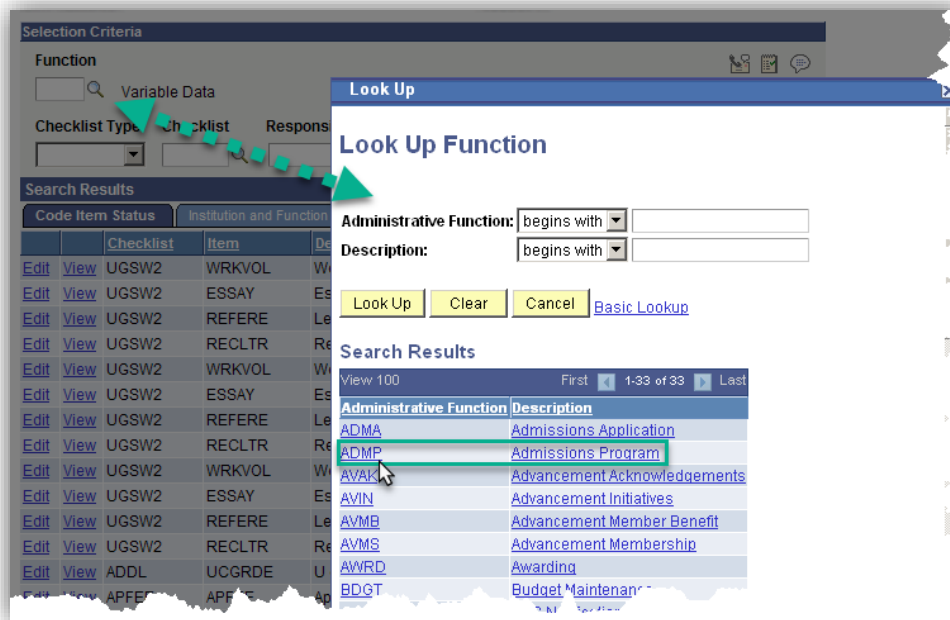
**Search Results**

| Code                 | Item                 | Status | Institution and Function | Checklist                    | Item       | Description | Due Date | Item Status |
|----------------------|----------------------|--------|--------------------------|------------------------------|------------|-------------|----------|-------------|
| <a href="#">Edit</a> | <a href="#">View</a> | UGSW2  | WRKVOL                   | Work or Volunteer Experience | 9999/12/31 | Initiated   |          |             |
| <a href="#">Edit</a> | <a href="#">View</a> | UGSW2  | ESSAY                    | Essay                        | 9999/12/31 | Initiated   |          |             |
| <a href="#">Edit</a> | <a href="#">View</a> | UGSW2  | REFERE                   | Letter of Reference          | 9999/12/31 | Initiated   |          |             |
| <a href="#">Edit</a> | <a href="#">View</a> | UGSW2  | RECLTR                   | Recommendation Letter        | 9999/12/31 | Initiated   |          |             |

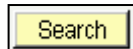
# Checklists: Update by Person, Summary & Detail

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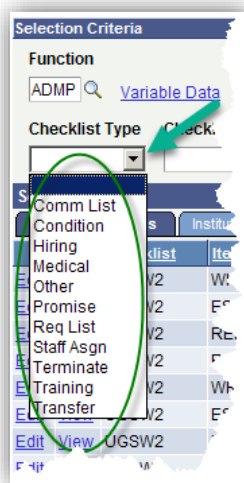
7. Selecting the applicable Function or Variable Data can further define the search results. Click the **Look up Function** button. A list of Functions Variable Data displays. For this example select ADMP Admissions Program. Click the **ADMP** link.



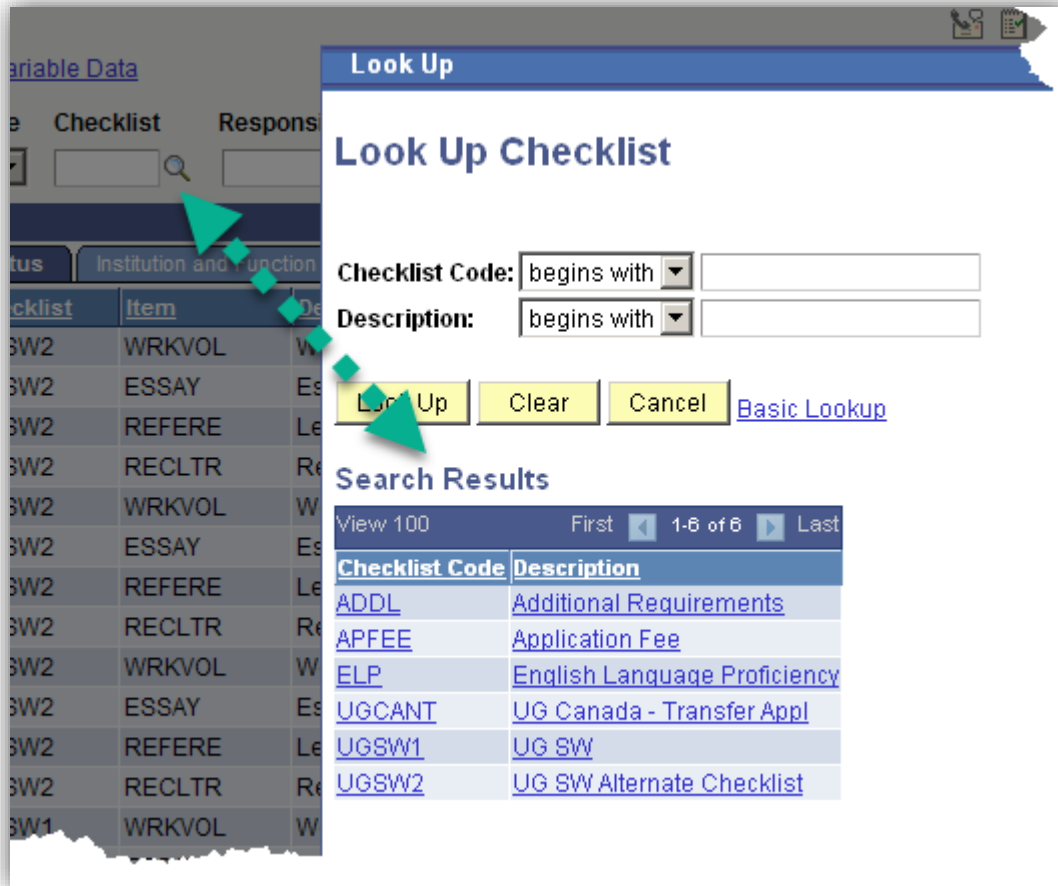
8. Click the **Search** button.



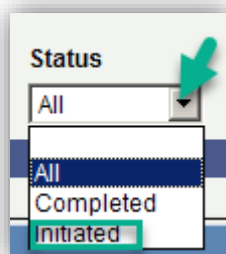
9. Search results can also be defined by Checklist Type. Click the **Checklist Type** list. If desired, select the applicable Checklist Type.



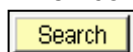
10. Checklists can also be selected. The checklist type list is populated by the selection made in the Function Variable Data field (ie. ADMP). Click the **Look up Checklist** button.



11. The Status field can be used to Search for **All**, **Completed** or **Initiated** Checklists. For this example, click **Initiated**.



12. When completed with the Selection Criteria, click the **Search** button.



# Checklists: Update by Person, Summary & Detail

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13. The Edit link on the Code Item Status transfers to Checklist Management 1 where, if authorized, you can edit the checklist. Click the **Edit** link.

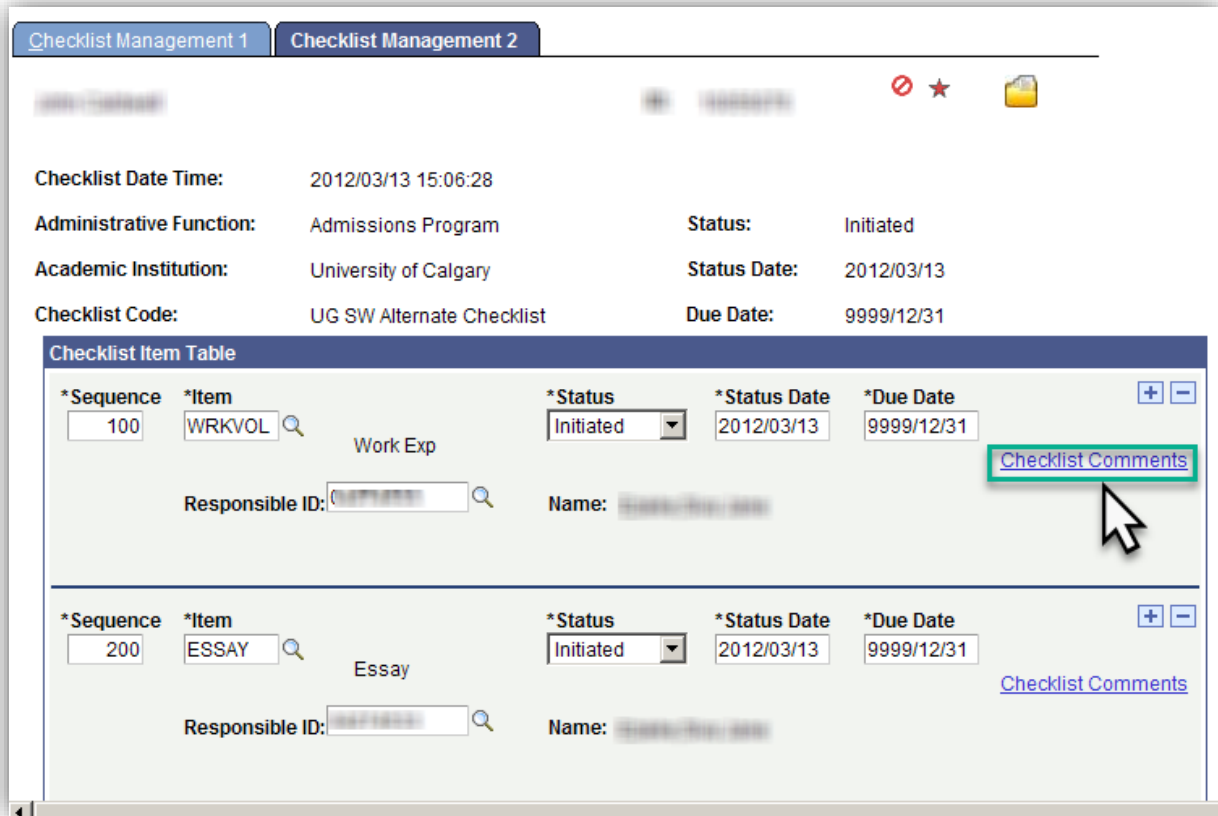
The screenshot shows a web application interface for managing checklists. At the top, there is a 'Selection Criteria' section with a search bar containing 'ADMP' and a 'Variable Data' link. Below this are filters for 'Checklist Type', 'Checklist', 'Responsible ID', and 'Status' (set to 'All'). A 'Search' button is located to the right. The main area is titled 'Search Results' and contains a table with columns: 'Code Item Status', 'Institution and Function', 'Checklist', 'Item', 'Description', 'Due Date', and 'Item Status'. The first row is highlighted in green, and a mouse cursor is pointing at the 'Edit' link in the first column of this row.

| Code Item Status     | Institution and Function | Checklist | Item   | Description                  | Due Date   | Item Status |
|----------------------|--------------------------|-----------|--------|------------------------------|------------|-------------|
| <a href="#">Edit</a> |                          | UGSW2     | WRKVOL | Work or Volunteer Experience | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | ESSAY  | Essay                        | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | REFERE | Letter of Reference          | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | RECLTR | Recommendation Letter        | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | WRKVOL | Work or Volunteer Experience | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | ESSAY  | Essay                        | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | REFERE | Letter of Reference          | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | RECLTR | Recommendation Letter        | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | WRKVOL | Work or Volunteer Experience | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | REFERE | Letter of Reference          | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | RECLTR | Recommendation Letter        | 9999/12/31 | Initiated   |
| <a href="#">Edit</a> |                          | UGSW2     | RECLTR | Recommendation Letter        | 9999/12/31 | Initiated   |

14. If authorized, edits can be completed. Click the **Checklist Management 2** link.

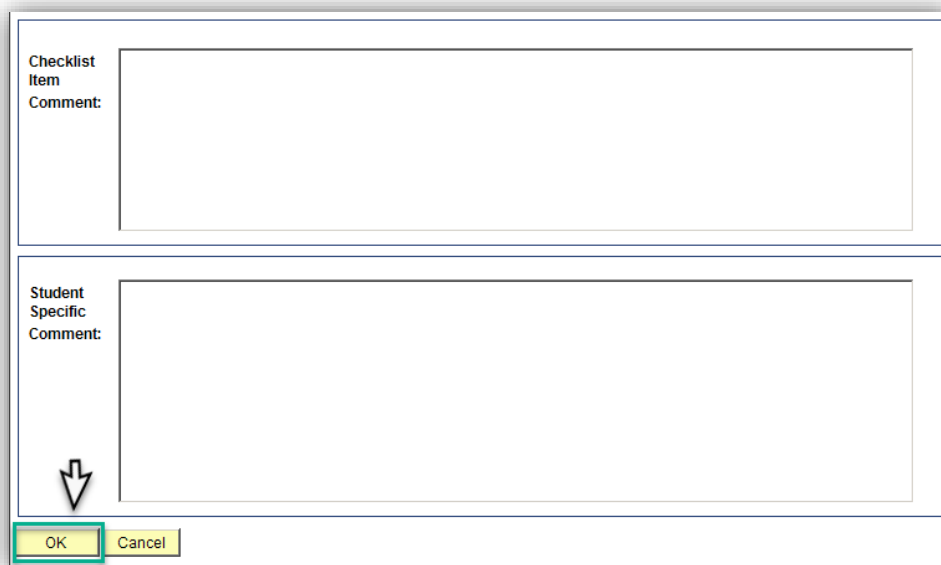
The screenshot shows the 'Checklist Management 2' form. At the top, there are two tabs: 'Checklist Management 1' and 'Checklist Management 2', with the latter being selected and highlighted. The form contains several fields: 'Academic Career' (UGRD), 'Admit Term' (2107), 'Student Career Nbr' (0), 'Application Nbr' (with a 'Variable Data' button), 'Application Program Nbr' (0), 'Checklist Date Time' (2012/03/13 15:06:28), '\*Administrative Function' (ADMP), '\*Academic Institution' (University of Calgary), '\*Checklist Code' (UGSW2), '\*Status' (Initiated), 'Due Date' (9999/12/31), 'Due Amount' (with a 'Currency Code' button), and 'Comments' (test). Green arrows point to the search icons for 'ADMP', 'UGSW2', and the 'Comments' field. A mouse cursor is pointing at the 'Checklist Management 2' tab.

15. Review the Checklist Comments on Checklist Management 2. Click the **Checklist Comments** link.



The screenshot shows the 'Checklist Management 2' window. At the top, there are tabs for 'Checklist Management 1' and 'Checklist Management 2'. Below the tabs, there are several fields: 'Checklist Date Time: 2012/03/13 15:06:28', 'Administrative Function: Admissions Program', 'Academic Institution: University of Calgary', and 'Checklist Code: UG SW Alternate Checklist'. To the right, 'Status: Initiated', 'Status Date: 2012/03/13', and 'Due Date: 9999/12/31' are displayed. Below these fields is a 'Checklist Item Table' with two rows. The first row is for 'Work Exp' (Sequence 100, Status Initiated, Status Date 2012/03/13, Due Date 9999/12/31). The second row is for 'Essay' (Sequence 200, Status Initiated, Status Date 2012/03/13, Due Date 9999/12/31). Both rows have a 'Checklist Comments' link. A mouse cursor is pointing at the 'Checklist Comments' link for the 'Work Exp' item.

16. Any comments will be displayed here, included any student specific comment. To return to the previous page, click the **OK** button.



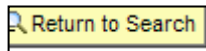
The screenshot shows a dialog box with two text input areas. The first area is labeled 'Checklist Item Comment:' and the second is labeled 'Student Specific Comment:'. Below the input areas, there are two buttons: 'OK' and 'Cancel'. A mouse cursor is pointing at the 'OK' button.

# Checklists: Update by Person, Summary & Detail

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17. Click the **Return to Search** link.



18. The View link transfers to Checklist Management 1 for "view only" access. Click the **View** link.

| Search Results |                      |        |                          |                              |             |           |
|----------------|----------------------|--------|--------------------------|------------------------------|-------------|-----------|
| Code           | Item                 | Status | Institution and Function |                              |             |           |
|                | Checklist            | Item   | Description              | Due Date                     | Item Status |           |
| Edit           | <a href="#">View</a> | UGSW2  | WRKVOL                   | Work or Volunteer Experience | 9999/12/31  | Initiated |
| Edit           | <a href="#">View</a> | UGSW2  | ESSAY                    | Essay                        | 9999/12/31  | Initiated |
| Edit           | <a href="#">View</a> | UGSW2  | REFERE                   | Letter of Reference          | 9999/12/31  | Initiated |

19. No editing is permitted in "view only". Click the **Return to Search** link.

Admit Term: 2107  
Student Career Nbr: 0  
Application Nbr: 42094804  
Application Program Nbr: 0  
Checklist Date Time: 2012/03/13 15:06:28  
Administrative Function: ADMP Admissions Program  
Academic Institution: University of Calgary  
Checklist Code: UGSW2 UG SW Alternate Checklist  
Status: Initiated Status Date: 2012/03/13  
Due Date: 9999/12/31  
Due Amount: Currency Code  
Comments: test

Variable Data

Save Return to Search Notify

20. To view your 3C authorization, click the Operator 3C Groups Summary tab. Click the **Operator 3C Groups Summary** tab.





21. The Operator 3C Groups Summary displays your authorizations for Checklists, Communications and Comments. Inquiry Indicator allows view access and Update Indicator allows editing. If required, additional access and permissions can be requested.



| Operator Group Summary |                                | Inquiry Indicator                   | Update Indicator                    |
|------------------------|--------------------------------|-------------------------------------|-------------------------------------|
| Institution            | Description                    |                                     |                                     |
| University of Calgary  | Advising Session Comments      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Bachelor of Com Rehabilitation | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Bachelor of Health Sciences    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Convocation                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Co-op/Internship               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Department                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Faculty of Education - UGRD    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| University of Calgary  | Effective Writing              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

### Checklist Management 1 & 2 Detail (View Only):

Checklists items cannot be updated, assigned or removed in Checklist Detail.

1. Click the [Campus Community](#) link.  
[Campus Community](#)
2. Click the [Checklists](#) link.  
[Checklists](#)
3. Click the [Person Checklists](#) link.  
[Person Checklists](#)
4. Click the [Person Checklist Detail](#) link.  
[Person Checklist Detail](#)

# Checklists: Update by Person, Summary & Detail

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5. Enter desired search criteria, Emplid, Last Name or First Name. Click the **Search** button.

**Person Checklist Detail**

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

**Find an Existing Value**

Maximum number of rows to return (up to 300):

ID:

Sequence Number:

Administrative Function:

Admit Term:

Checklist Code:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

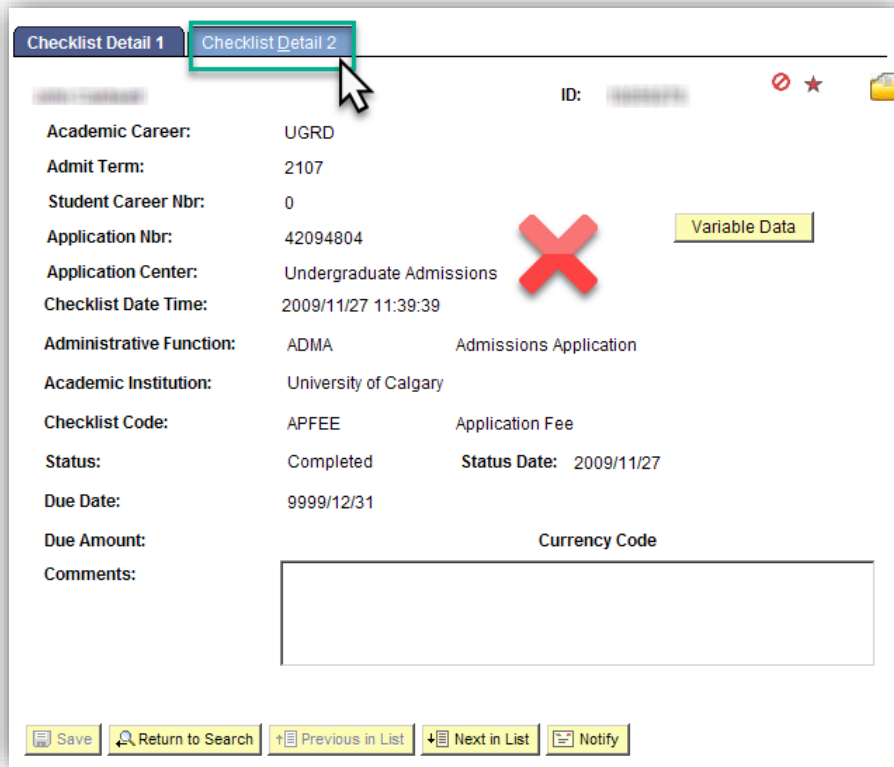
6. Any checklists will display in the grid below. Select the desired checklist. For example, click the **APFEE** link.

**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 |      |           |           |            |
| 2  |                 | PROS           | (blank)    | ELP            | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |
| 3  |                 | ADMP           | 2107       | UGSW1          | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |
| 4  |                 | ADMA           | 2107       | UGCANT         | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |
| 5  |                 | ADMA           | 2103       | APFEE          | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |
| 6  |                 | ADMA           | 2107       | ADDL           | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |
| 7  |                 | ADMP           | 2103       | UGSW2          | CAN                   | SIN                   | *****       | 10/13/1962    | Female |      |           |           |            |

7. **Checklist Detail 1** will display in view only and no changes can be completed. Click the **Checklist Detail 2** tab.

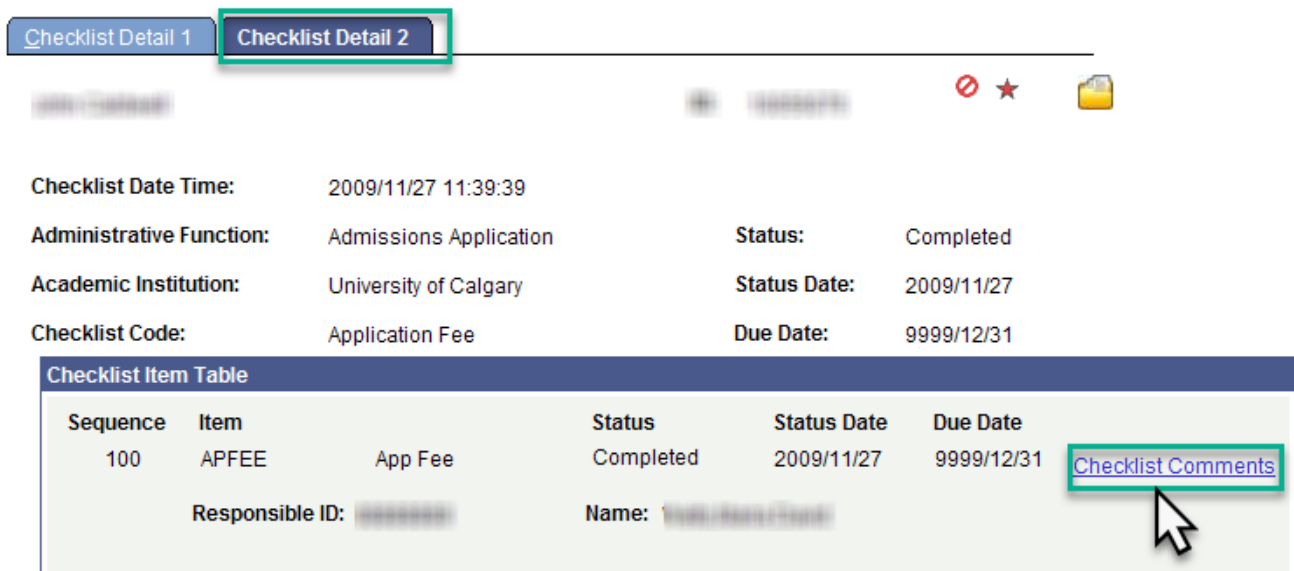


The screenshot shows a web form titled "Checklist Detail 2" with a mouse cursor pointing to the tab. The form contains the following fields:

- Academic Career: UGRD
- Admit Term: 2107
- Student Career Nbr: 0
- Application Nbr: 42094804
- 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: (Empty text area)

At the bottom of the form are buttons for Save, Return to Search, Previous in List, Next in List, and Notify. A red 'X' icon and a "Variable Data" button are also visible.

8. Checklist Details will display in view only. Click the **Checklist Comments** link.



The screenshot shows a view of "Checklist Detail 2" with a mouse cursor pointing to the "Checklist Comments" link. The details are as follows:

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

| Checklist Item Table       |       |         |                  |             |            |                                    |
|----------------------------|-------|---------|------------------|-------------|------------|------------------------------------|
| Sequence                   | Item  |         | Status           | Status Date | Due Date   |                                    |
| 100                        | APFEE | App Fee | Completed        | 2009/11/27  | 9999/12/31 | <a href="#">Checklist Comments</a> |
| Responsible ID: [REDACTED] |       |         | Name: [REDACTED] |             |            |                                    |

# Checklists: Update by Person, Summary & Detail

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9. You can view the Checklist Item Comments. Click the **OK** link.

### Checklist Item Comments

Checklist Item: APFEE      Application Fee

Responsible ID: [REDACTED]      [REDACTED]

**Checklist Item Comment:**

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

**Student Specific Comment:**

[Empty text area]

**OK**      **Cancel**

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

**End of Procedure.**