Assigning a Checklist to a Person

Trigger:

Concept

You can assign checklists to individuals 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.

In addition to assigning checklists manually, you can use the 3C engine to automatically assign checklists based on rules and conditions that you set up, or you could also use the mass change process.

You can manually assign a checklist to an individual using the Checklist Management pages.

Consider this scenario: A prospective student has many tasks to complete during her PeopleSoft University application process. She needs to write a personal statement and submit official transcripts and test scores. Your goal is to assign a checklist to this individual for the application process.

Field(s) | Comments
---|---

Output - Results | Comments
Additional Information
1.) Checklist Management - Person
Create or update a checklist for a person.
Home>Campus Community>Checklists>Person Checklists>Checklist Management - Person

2.) Checklist Management - Event
Manage checklists for an event organized by your institution.
Home>Campus Community>Checklists>Event Checklists>Checklist Management - Event

3.) Checklist Management - Org
Create or update a checklist for an external organization.
Home>Campus Community>Checklists>Organization Checklists>Checklist Management - Org
### Step 1
1. Click the **Add a New Value** tab.

### Step 2
2. Enter the student id into the **ID** field.
   
   Enter "**14002636**".

### Step 3
3. Click the **Add** button.
Step | Action
--- | ---
4. | Use the Checklist Management 1 page to assign a checklist to an individual.
5. | The system populates the Checklist Date Time field with the date and time of the checklist's creation. It is set to the current system date and time.
### Step 6

You can associate checklist items with the administrative function with which an individual is associated. You can then use that function to enter checklist items as a subset of items on a larger, more comprehensive checklist with its own overall due date. Use the **Administrative Function** field to specify the administrative function code. The administrative function codes reside on the **Administrative Functions** page.

In this example, you want to associate the individual with the **Admissions Application** function.

Enter the desired information into the **Administrative Function** field. Enter "ADMA".

### Step 7

Refresh the page.

Press [Tab].

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<table>
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</table>
| 8.   | Notice that the **Variable Data** button has been enabled. Use this button to access the **Variable Data** page, on which you can view or enter the variable data associated with the specified administrative function. If variable data is not required or allowed for the specified administrative function, this button is unavailable.  

In this example, this button is activated because the Admissions Application administrative function was selected. Now, enter the data associated with this function.  
Click the **Variable Data** button. |

![Variable Data Button](image-url)
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<tr>
<td>9.</td>
<td>Based on the individual and administrative function that you selected on the Checklist Management 1 page, various fields automatically appear on the Variable Data page. With this feature, PeopleSoft ensures consistency between all records within a similar functional area across the institution. The administrative function of ADMA identifies the academic career, student career number, application number, and application center. In this example, specify UGRD as the code associated with the Undergraduate academic career. Enter the desired information into the Academic Career field. Enter &quot;UGRD&quot;.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the OK button.</td>
</tr>
<tr>
<td>11.</td>
<td>In the Academic Institution field, specify the entity with which this individual is associated. This entity can be a university or a college that runs independently from other similar entities and has its own set of rules and business processes. In this example, this field's default value is Univ of Missouri - Columbia. This individual is associated with Univ of Missouri; therefore, retain the default specification.</td>
</tr>
</tbody>
</table>
### Step 12

Use the **Checklist Code** field to specify the code that describes the checklist assigned to this individual. Only those checklist codes that are associated with the administrative function specified on the **Checklist Item Functions** page are available. Click in the **Checklist Code** field.

![Checklist Management](image1)

### Step 13

In this example, the individual is to be assigned the **Transfer** checklist.

Enter the desired checklist code into the **Checklist Code** field. Enter "ATRN00".

![Checklist Management](image2)

### Step 14

Refresh the page. Press \[Tab\].

### Step 15

In the **Status** field, the system displays the status and the date when the status was updated. Valid status values are Initiated or Completed.
16. Click the **Checklist Management 2** tab.
<table>
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<tbody>
<tr>
<td>17.</td>
<td>Use the <strong>Checklist Management 2</strong> page to view or assign all or some of the checklist items to the individual and identify who is responsible for each item.</td>
</tr>
<tr>
<td>18.</td>
<td>The ACT/SAT test scores, high school and college transcripts checklist items associated with the Admissions Application administrative function are displayed. You can remove any items you do not want to include or add additional items if necessary.</td>
</tr>
<tr>
<td>19.</td>
<td>The <strong>Sequence</strong> field represents 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.</td>
</tr>
<tr>
<td>20.</td>
<td>The <strong>Item</strong> field displays the code for this checklist item. The available item codes are from the <strong>Checklist Item Functions</strong> page for the administrative function selected.</td>
</tr>
<tr>
<td>21.</td>
<td>The <strong>Status</strong> and <strong>Status Date</strong> fields display the status and status date of the checklist item. Valid statuses are: Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived, or Cancelled.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
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<td>------</td>
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</tr>
<tr>
<td>22.</td>
<td>In the <strong>Due Date</strong> field, 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.</td>
</tr>
<tr>
<td>23.</td>
<td>In the <strong>Responsible ID</strong> field, the system displays a default ID, which 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. The system also displays the name of the individual with that ID.</td>
</tr>
</tbody>
</table>

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<td>24.</td>
<td>Click the <strong>Save</strong> button.</td>
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<tr>
<td>Step</td>
<td>Action</td>
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<td>------</td>
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<tr>
<td>25.</td>
<td>You have successfully assigned a checklist to an individual.</td>
</tr>
</tbody>
</table>

To summarize, you can create checklists for individuals to track applications, organize recruitment mailings, assign tasks to staff members, and generate a series of communication items.  

*End of Procedure.*