Viewing a Person Checklist Summary

Trigger:

Concept

You can search for a summary of the checklist data that you want to review for an individual through myZou Campus Self Service, you can also access the Checklist Summary page by selecting Self Service, Outreach, View Person Information, Constituent Information, Checklist Summary.

In this topic, you previously assigned a checklist to an individual. You now want to view summary information for this checklist.

Field(s) | Comments
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Output - Results | Comments

Additional Information
Procedure

1.) **Personal Checklist Summary**
View checklist summary information for a student.
*Home* > *Records and Enrollment* > *3 C's Summaries* > *Personal Checklist Summary*

2.) **Checklist Summary**
View checklists assigned to an applicant.
*Home* > *Student Admissions* > *3 C's and Event Summaries* > *Checklist Summary*

3.) **Person Checklist Summary**
Review a list of checklists assigned to a person.
*Home* > *Campus Community* > *Checklists* > *Person Checklists* > *Person Checklist Summary*

4.) **Event Checklist Summary**
Review checklists assigned to a campus event organized by your institution.
*Home* > *Campus Community* > *Checklists* > *Event Checklists* > *Event Checklist Summary*

5.) **Org Checklist Summary**
Review a list of checklists assigned to an external organization.
*Home* > *Campus Community* > *Checklists* > *Organization Checklists* > *Org Checklist Summary*

6.) **Checklist Summary**
View checklists assigned to a prospect.
*Home* > *Student Recruiting* > *3 C's and Events Summaries* > *Checklist Summary*
### Step 1
Enter the student id into the **ID** field. Enter "14002636".

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**Conducting a Search**

When you open a task (using a hyperlink or page link), either an entry page will display or a search page (also referred to as **Find an Existing Value**) will appear prompting you for search keys needed to locate a record.

To find a record, or many records, search criteria must be entered, then click Search, and a Search Results page displays.

**Search pages contain:**
- Search keys
- Operators
- Search fields

Once you have entered in the search criteria key fields, click Search to
process the search. If you wish to refresh the page (without saving), so you can enter new or different criteria, click Clear.

Step | Action
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2. | Click the **Search** button.  
| | ![Search button](image)
3. | Use the **Checklist Summary** page to view a summary of checklist item status for an individual.
Step | Action
--- | ---
4. | You can further narrow your search by specifying values in the fields in the **Selection Criteria** region. In this example, you want to view all checklist items associated with Otto; therefore, you need not further narrow your search. Click the **Search** button.
5. | All the checklist items associated with Kimberly are displayed in the **Search Results** region.
   The **Code Item Status** tab displays information about each checklist item, such as checklist codes, description, due date, and status.
6. | Click the **Institution and Function** tab.
7. Use the **Institution and Function** tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the person who assigned or is responsible for the checklist item.

8. Click the **Edit** link for any of the rows to open the checklist in the **Checklist Management** page, where it can be edited.

9. Click the **View** link for any of the rows to open the checklist in the **Checklist Detail** page, which displays a view only version of the same information that can be seen in the **Checklist Management** page.

10. You have successfully viewed checklist summary information for an individual. **End of Procedure.**