

Train the Trainer Modules: Campus Community

7.3.1 Manage Checklist and Comments

Introduction

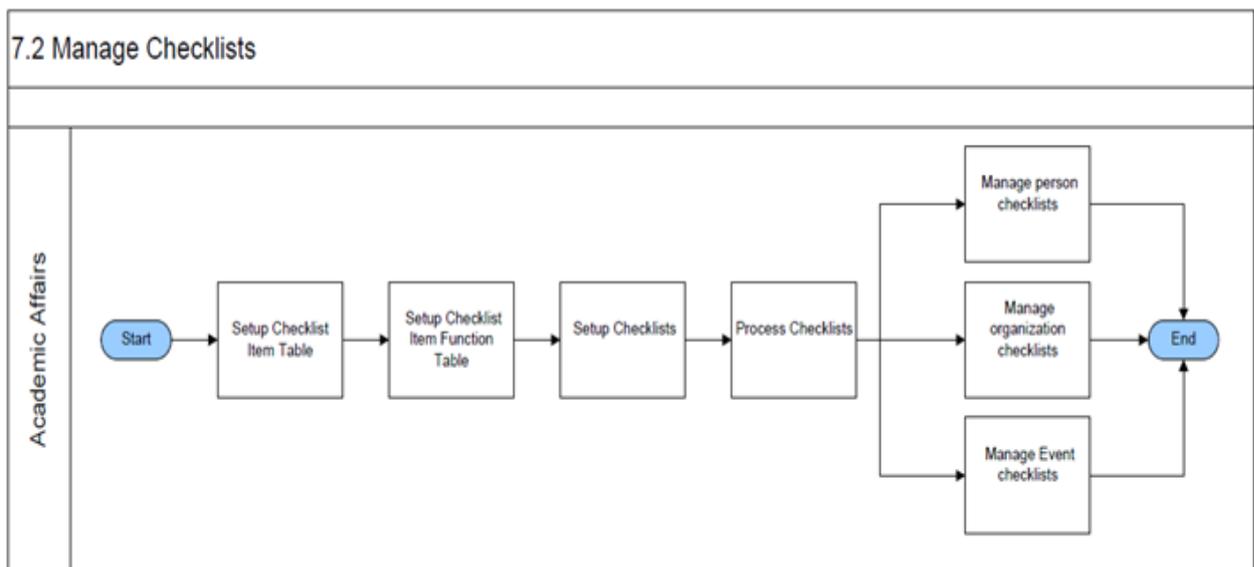
A module to manage checklists and comments and this training will help you to fully understand all the steps how to manage checklists and comments in KSAU-SIS.

Understanding the Manage Checklists and Comments

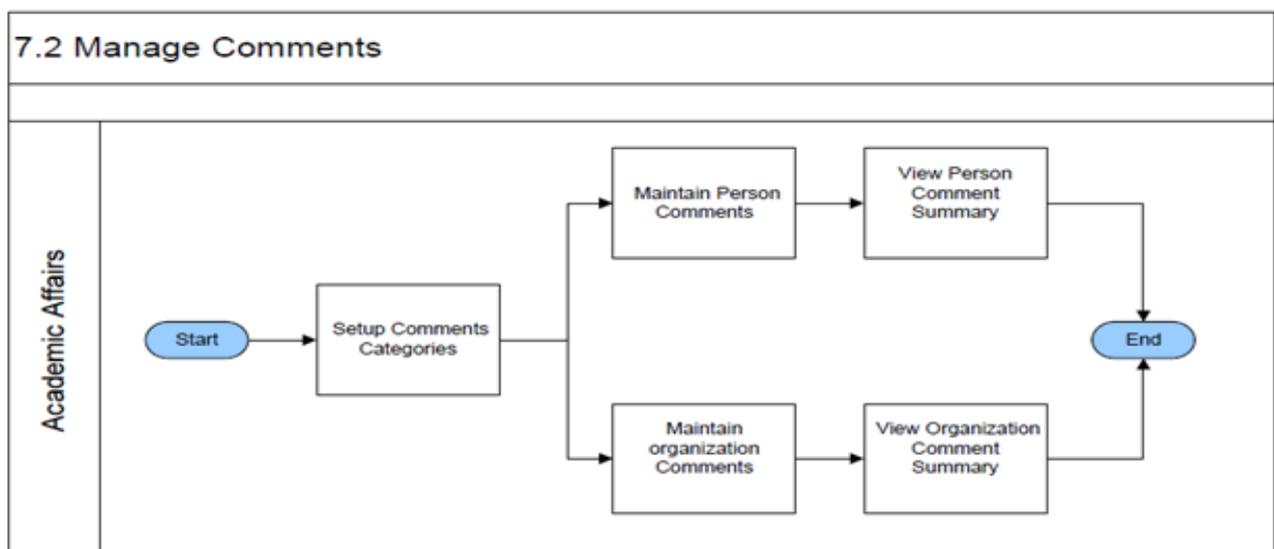
Manage Checklists and Comments deals with managing and maintaining checklist of a person which includes things like degree level e.g. under graduate etc. It also deals with managing and maintaining comments for a person and an organization.

Business Process Map

Manage Checklists



Maintain Comments



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7.3.1 Manage Checklist and Comments

A. Manage Checklists

Go to page: Main Menu ->Campus Community->Checklist->Person Checklist -> Checklist Management – Person

Checklist Management 1 | **Checklist Management 2**

ABDUS SHABBIR ABDUS ID: 0074

Checklist Date Time: 02/29/1435 12:39:05PM Variable Data

*Administrative Function: Admissions Application

*Academic Institution:

*Checklist Code: Checklist for UGRD Stream 2

*Status: **Status Date:** 02/29/1435

Due Date:

Due Amount: **Currency Code**

Comments:

[Checklist Management 1](#) | [Checklist Management 2](#)

Administrative Function

The code for the functional area with which this individual is associated. The available administrative function codes are from the Administrative Functions page. If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code

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.

Status and Stat Dt (status date)

The system displays the status and the date when the status was updated. Valid status values are Initiated or Completed.

Due Date The date by which the entire checklist must be completed for this individual.

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Due Amount

The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.

Comments

Enter comments to further identify or describe the checklist for this individual.

Variable Data

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer. If variable data is required, the Variable Data button is available. Select the variable data (for example, Aid Year) for which the checklist is applicable.

[Checklist Management 1](#) | [Checklist Management 2](#)

ABDUS SHABBIR ABDUS ID: 0074

Checklist Date Time: 02/29/1435 12:39:05PM

Administrative Function: Admissions Application Status: Initiated

Academic Institution: KSA Univ. of Health Sciences Status Date: 02/29/1435

Checklist Code: Checklist for UGRD Stream 2 Due Date: 06/11/1435

Checklist Item Table						
*Sequence	*Item		*Status	*Status Date	*Due Date	+ -
<input type="text" value="300"/>	<input type="text" value="KS_U21"/>	Undergradu	Initiated <input type="text"/>	<input type="text" value="02/29/1435"/>	<input type="text" value="06/11/1435"/>	+ -
Responsible ID: <input type="text"/>		Name: <input type="text"/>				
<input type="text" value="400"/>	<input type="text" value="KS_U22"/>	TOEFL/IELT	Initiated <input type="text"/>	<input type="text" value="02/29/1435"/>	<input type="text" value="06/11/1435"/>	+ -
Responsible ID: <input type="text"/>		Name: <input type="text"/>				

[Checklist Management 1](#) | [Checklist Management 2](#)

Sequence

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.

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Item

The code for this checklist item. The available item codes are from the Checklist Item Functions page for the administrative function selected.

Status and Status Date

The status and status date of the checklist item: Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived, or Cancelled. Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

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.

Responsible ID and Name

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. The system displays the name of the individual with that ID.

Association ID and Name

If the checklist item was created with an item association of Name on the Checklist Items page, the Association ID field appears for you to identify the associated person. For example, the checklist item might be a medical appointment, and that appointment might be with Dr. Clara Simpson. Dr. Simpson is the associated person. If the associated person has an ID in your database, enter it here. When you exit the field, the system displays the name of that individual. If the individual does not have an ID in your database, enter his or her name manually.

Org ID (organization ID) and Description

If the checklist item was created with an item association of Organization on the Checklist Items page, the Org ID field appears for you to identify the associated organization. For example, the checklist item might be a transcript, and a transcript is required from Cottonwood High School. Cottonwood High is the associated organization. If the associated organization has an ID in your database, enter it here. When you exit the field, the system displays the name of that organization. If the organization does not have an ID in your database, enter the name manually.

➤ How to "Manage Person Checklist"?

Following are the minimum requirement to Manage Person Checklist:

Minimum Required Fields	Sample Values
Administrative Function	ADMA
Academic Institution	KSAU
Checklist Code	UGRD2
Status	Initiated
Academic Career	UGRD
Student Career Nbr	0
Application Nbr	00024856
Application Center	KSAU Application Center

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7.3.1 Manage Checklist and Comments

Prerequisites

- Administrative Function
- Academic Institution
- Checklist Code
- Status
- Academic Career
- Student Career Nbr
- Application Nbr
- Application Center

Execution steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_AAO", Password = "123"]

Step 2: Go to page: Main Menu ->Campus Community->Checklist->Person Checklist -> Checklist Management – Person

Step 3: Enter Person ID information in ID field and click 'Search'. This will display the search results. If no search result is displayed, please modify the search parameters. Or click on the "Add a New Value" tab, enter Person ID. Then click "Add" to open the page.

Step 4: Select Administrative Function accordingly and if you are coming on this Page by Clicking Checklist Icon from any other component / application e.g. Maintain Application, this function would be auto populated.

Step 5: Select Checklist Code, this will auto populate the second tab with checklist items

Step 6: Specify Due Date and Enter your comments.

Step 7: Go to Tab 2 and Update Status of different checklist Items, Status Date, Due Date and Responsible Person. You can also add and remove few checklist items on this page by using + and – buttons.

Step 8: Click "Save". This will save your changes in system. You can click this any time after completing mandatory field information for interim save operation.

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B. Maintain Comments

Go to page: Main Menu -> Campus Community->Comments->Comments - Person->Person Comment Entry

Person Comment Entry

iuoioio ll io ID: 0072

Comment DateTime: 02/29/1435 2:22:55PM

*Administrative Function:

*Academic Institution: KSA Univ. of Health Sciences

*Comment Category: Variable Data

Comment Data

Comment ID:

Department:

Comment Date: 02/29/1435

Comments:

Append Comments:

Save Notify Add Update/Display

Administrative Function

The code for the administrative area with which this comment is associated.

Academic Institution

The academic institution with which this comment is associated.

Comment Category

The business need with which this comment is associated.

Variable Data

Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function. If you transferred to this page directly from a functional area, the variable data transferred from there. If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

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Comment Data:

Comment ID

The system displays the ID of the person entering the comment. If someone else is responsible for this comment, you can override the default ID and type the responsible person's ID.

Department

The department responsible for the comment.

Comment Date

The date when the comment is entered. The default date is the system's current date. You can override this date.

Comments

The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to Allow Changes, this field is editable.

Append Comments

If the default comment is set to Append, this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments.

➤ How to "Maintain Person Comments"

Following are the minimum requirement to **Maintain Person Comments**:

Minimum Required Fields	Sample Values
Administrative Function	ADMA
Academic Institution	KSAU
Comment Category	1
Department	DAR
Academic Career	UGRD
Student Career Nbr	0
Application Nbr	00024856
Application Center	KSAU Application Center

Prerequisites

- Administrative Function
- Academic Institution
- Comment Category
- Department
- Academic Career
- Student Career Nbr
- Application Nbr
- Application Center

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Execution steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_AAO", Password = "123"]

Step 2: Go to page: Main Menu -> Campus Community->Comments->Comments - Person->Person Comment Entry

Step 3: Enter Person ID information in ID field and click 'Search'. This will display the search results. If no search result is displayed, please modify the search parameters.
OR

Click on the "Add a New Value" tab, enter Person ID. Then click "Add" to open the page.

Step 4: Select Administrative Function accordingly and if you are coming on this Page by Clicking Comment Icon from any other component / application e.g. Maintain Application, this function would be auto populated.

Step 5: Select Comment Category Code

Step 6: Specify your Department and Comment Date and Enter Your Comments

Step 7: Click "Save". This will save your changes in system. You can click this any time after completing mandatory field information for interim save operation.