

Department	
Responsibility/Role	Admissions Office, Advisors Office, Financial Aid Office, Office of the Registrar, Student Accounts
File Name	Review Assigned Checklists Detail_SPD_v1
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Review Assigned Checklists Detail

Trigger:

Required Field(s)	Comments

Output - Result(s)	Comments

Additional Information

System Process Document

Review Assigned Checklists Detail

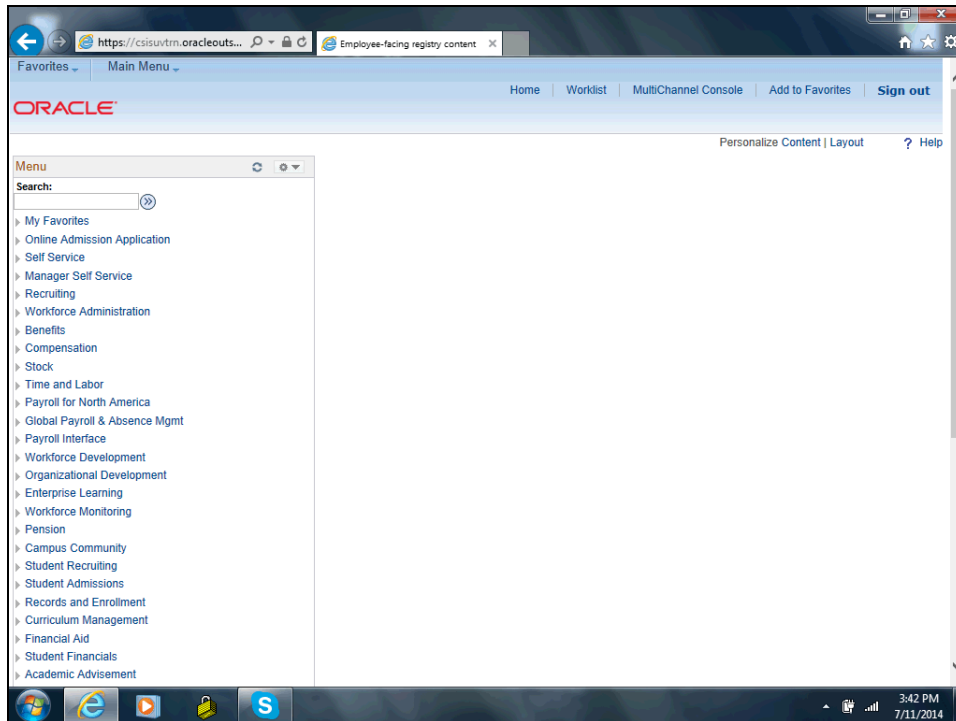


Procedure

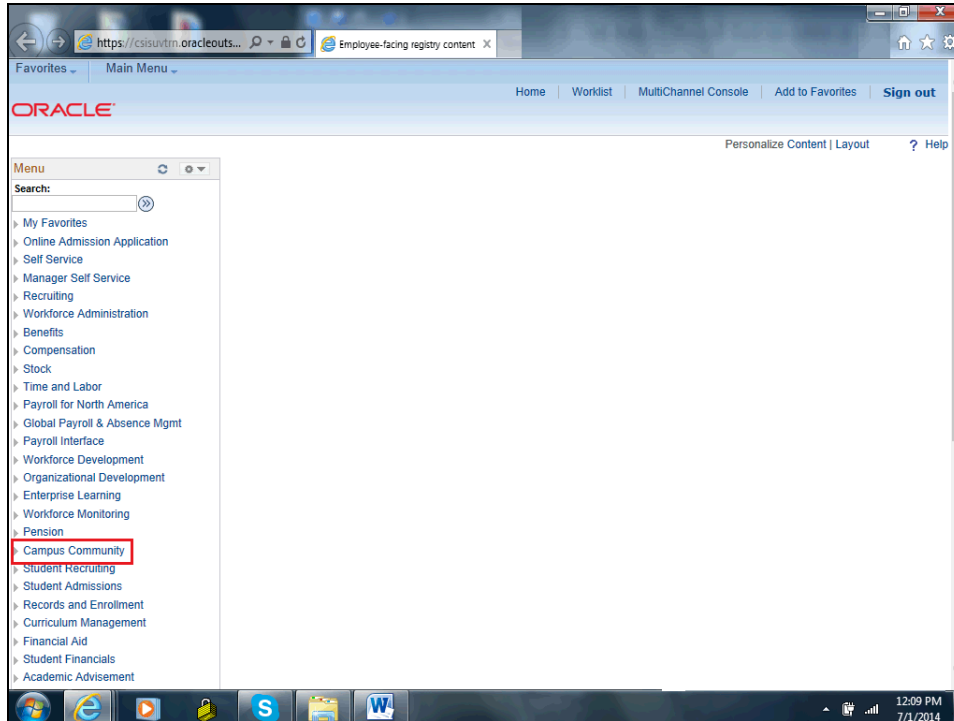
You can assign checklists to individuals or groups of individuals. For each checklist item that you assign, you can specify the staff member who is responsible for that item. You can specify a due date for the overall checklist and assign the same or different due dates for each item on the checklist.

In this topic, you will learn how to [Review Assigned Checklist Details](#).

Step	Action
1.	You can review detailed checklist data for an individual. The Checklist Detail 1 and 2 pages are view-only versions of the Checklist Management 1 and 2 pages.



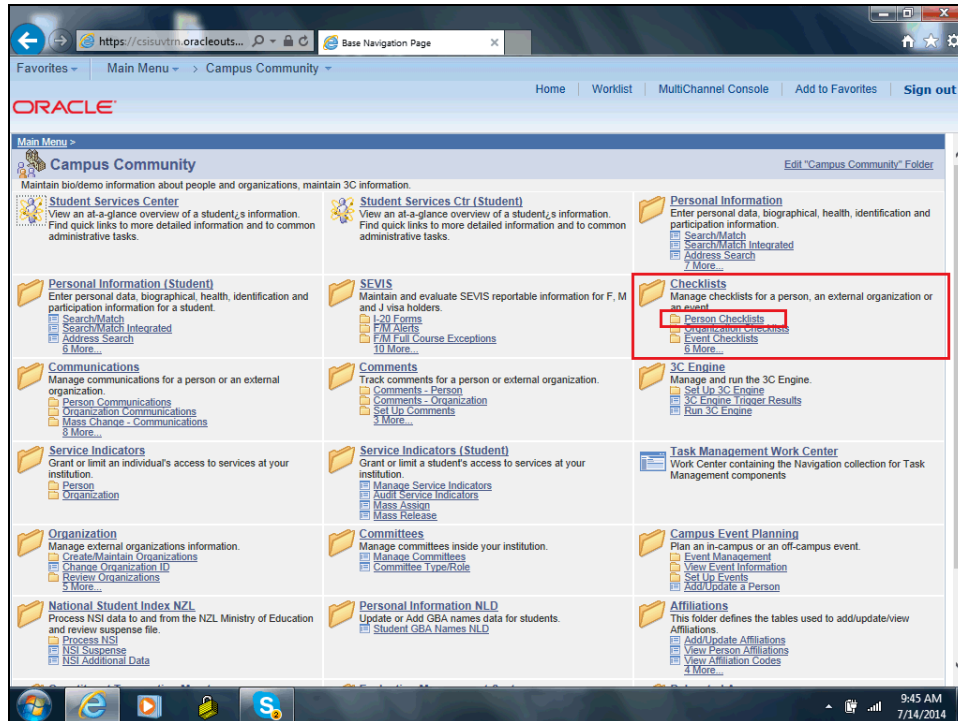
Step	Action
2.	Sign in to the Campus Solutions from the



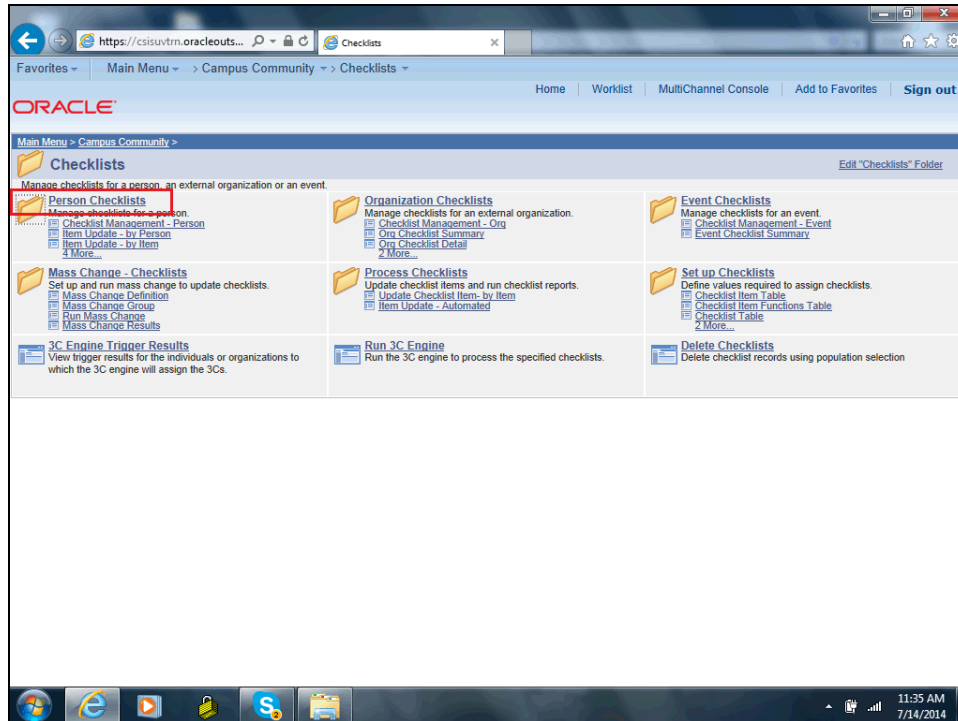
Step	Action
3.	<p>Once you sign in, you will see a list of navigation links that are in relation to your responsibility and roles.</p> <p>For example: Admissions Office Financial Aid Office</p> <p>Checklists are within the Campus Community menu.</p> <p>Click the Campus Community link.</p>

System Process Document

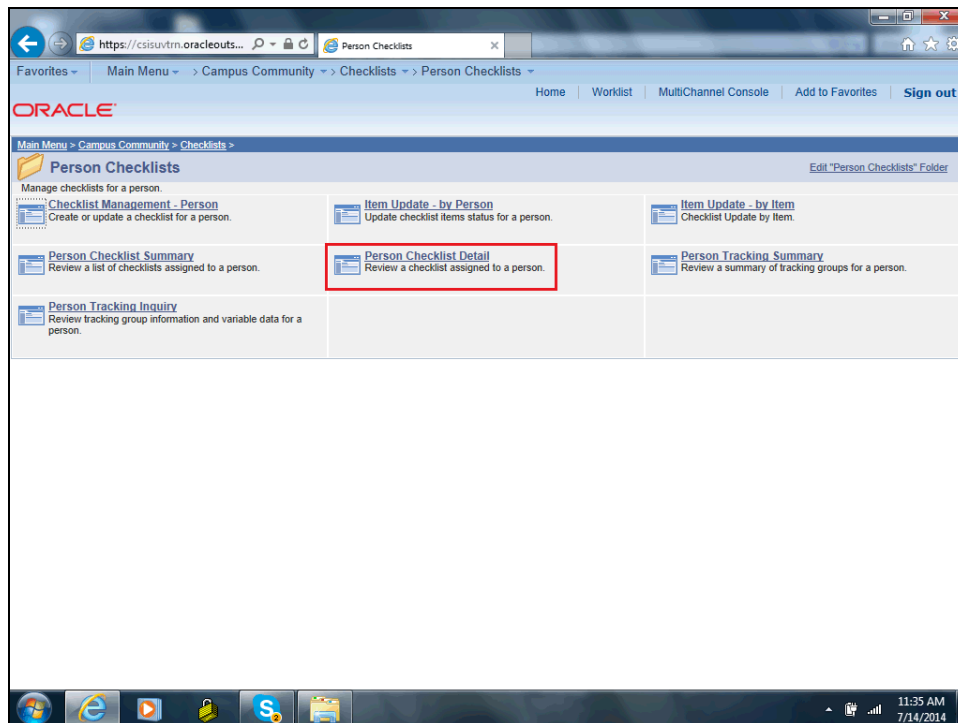
Review Assigned Checklists Detail



Step	Action
4.	<p>If you click the Checklists folder you will see additional navigation.</p> <p>Or, you can click the Person Checklists link for an entire list of Person Checklist functions.</p>



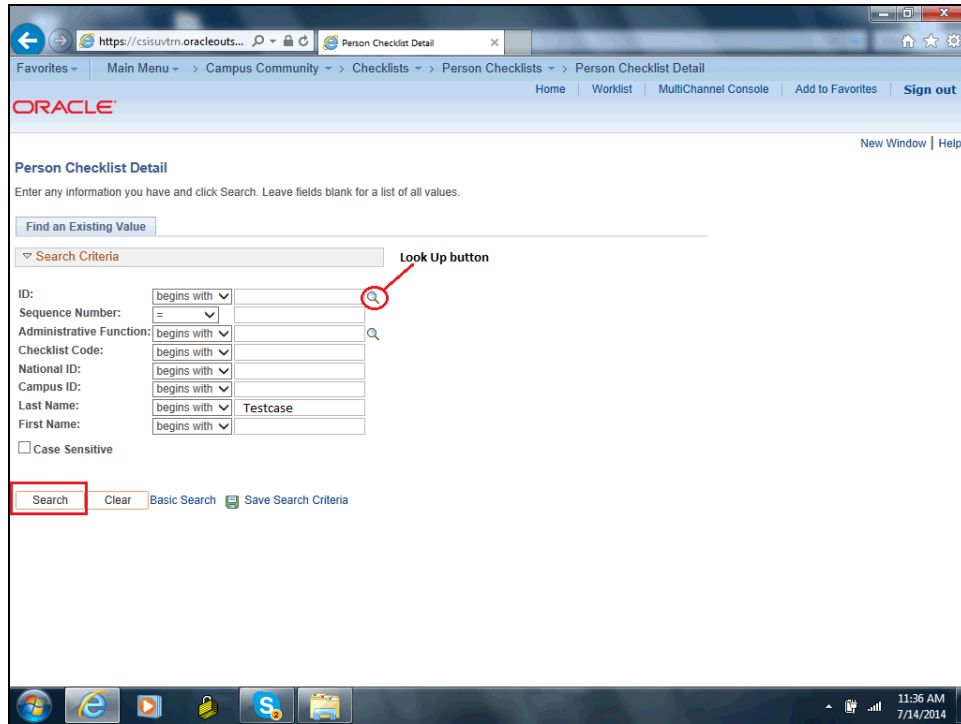
Step	Action
5.	Click the Person Checklist link.



System Process Document

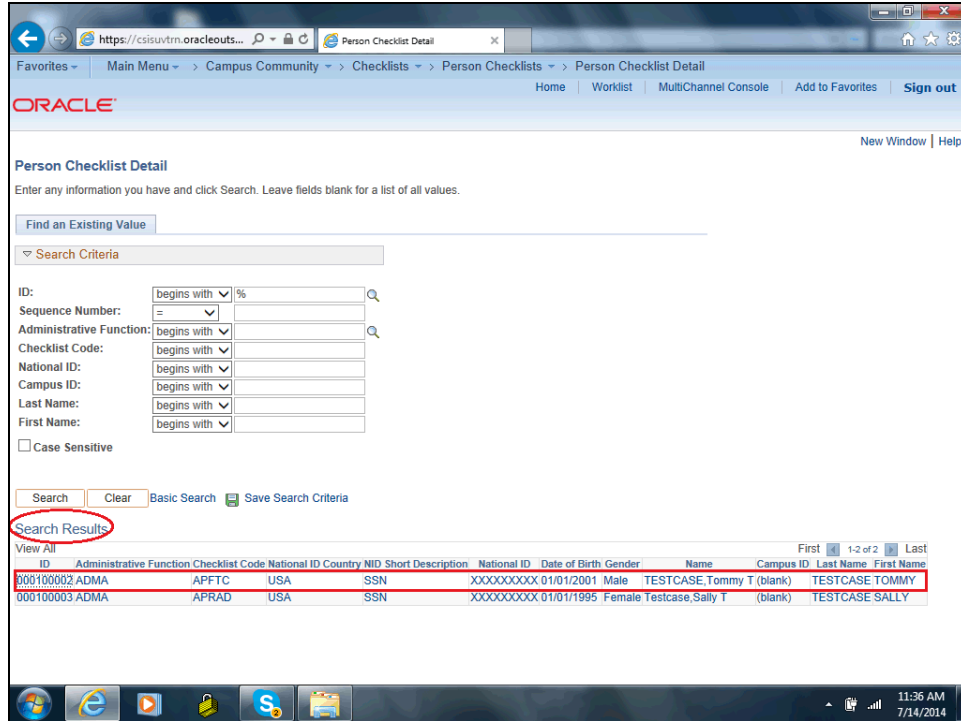
Review Assigned Checklists Detail

Step	Action
6.	Click the Person Checklist Detail link to review checklists assigned to a person.

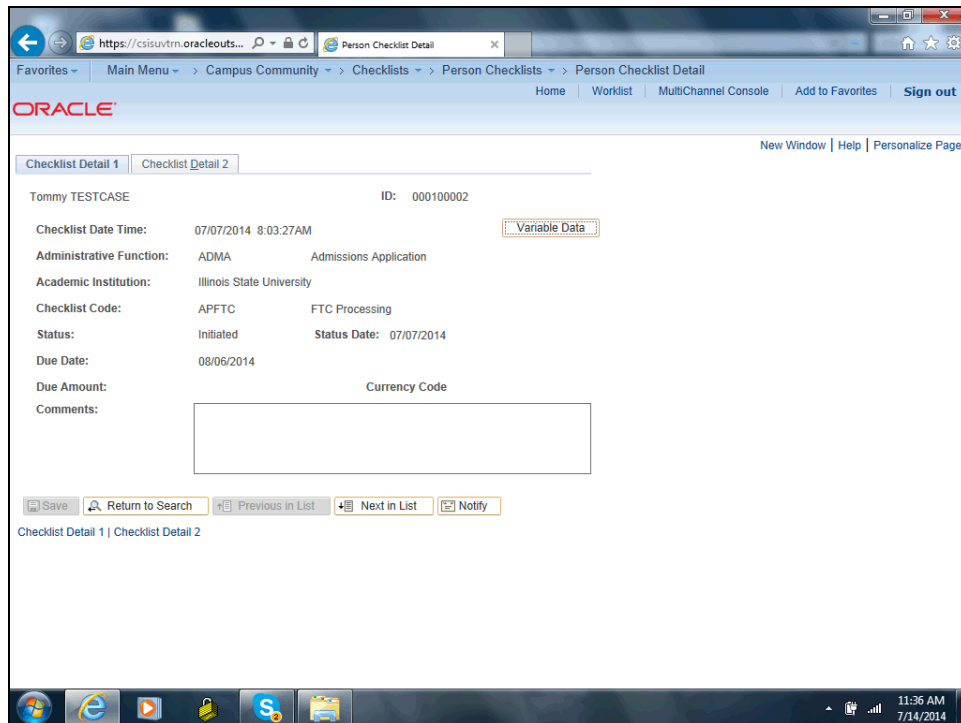


The screenshot shows the Oracle Person Checklist Detail search page. The search criteria section includes fields for ID, Sequence Number, Administrative Function, Checklist Code, National ID, Campus ID, Last Name, and First Name. Each field has a dropdown menu with 'begins with' selected. The 'Search' button is highlighted with a red box, and the 'Look Up button' (magnifying glass icon) is highlighted with a red circle. The 'Search' button is also highlighted with a red box.

Step	Action
7.	<p>Begin by searching for the person you want to view checklists for. Enter data in any field or use the Lookup buttons to see a list of values.</p> <p>You can bring up all values by using the wildcard % in any field.</p> <p>Click the Search button.</p>



Step	Action
8.	From the Search Results section of the page, click the link for the desired person from the list.

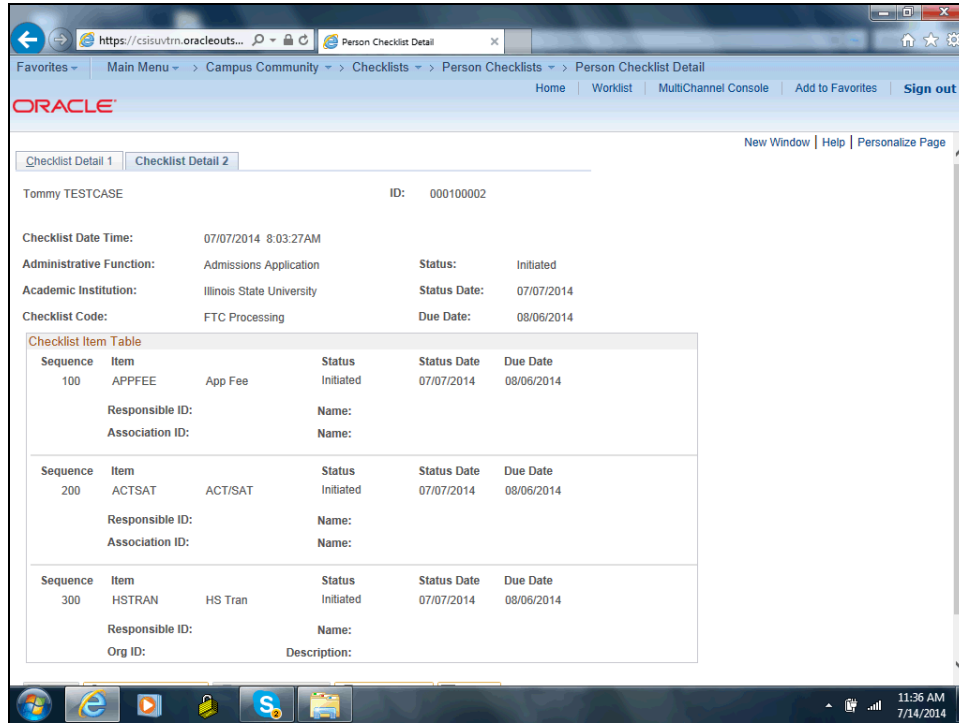


System Process Document

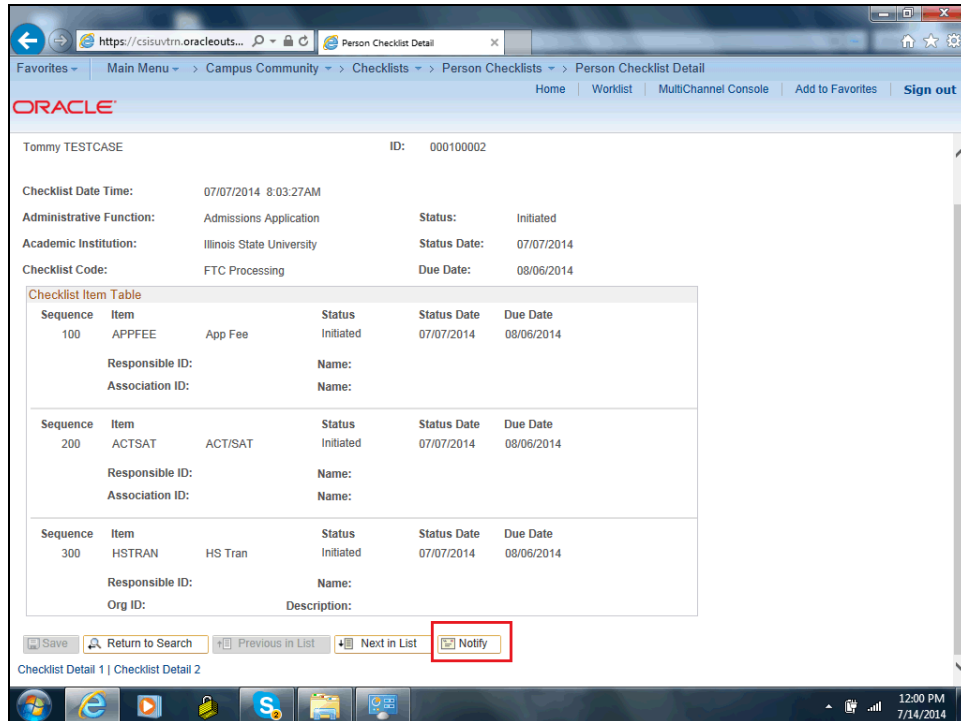
Review Assigned Checklists Detail



Step	Action
9.	<p>The Checklist Detail page is read - only. You cannot make any changes from this screen.</p> <p>Click the Checklist Detail 2 tab to see a list of items assigned.</p>



Step	Action
10.	<p>The Checklist Detail 2 tab will show information such as the type of item assigned, due date and the person responsible for entering/requesting the item.</p>



Tommy TESTCASE ID: 000100002

Checklist Date Time: 07/07/2014 8:03:27AM

Administrative Function: Admissions Application Status: Initiated

Academic Institution: Illinois State University Status Date: 07/07/2014

Checklist Code: FTC Processing Due Date: 08/06/2014

Sequence	Item	Status	Status Date	Due Date
100	APPFEE App Fee	Initiated	07/07/2014	08/06/2014
Responsible ID: Association ID:		Name:		Name:
200	ACTSAT ACT/SAT	Initiated	07/07/2014	08/06/2014
Responsible ID: Association ID:		Name:		Name:
300	HSTRAN HS Tran	Initiated	07/07/2014	08/06/2014
Responsible ID: Org ID:		Name:		Description:

Save Return to Search Previous in List Next in List **Notify**

Step	Action
11.	To Review the next checklist assigned to this person, click the Next in List button. In the event you want to e-mail someone in regards to this checklist assignment, click the Notify button at the bottom of the page.

System Process Document

Review Assigned Checklists Detail

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.


Notification Details

To: [FPS] HRHD EMEA Administrator/HHDEMEA_ADM [Lookup Recipient](#)

CC:

BCC:


Priority:

Subject: Communication created  [Delivery Options](#)

Template: Workflow Notification

Priority: %NotificationPriority

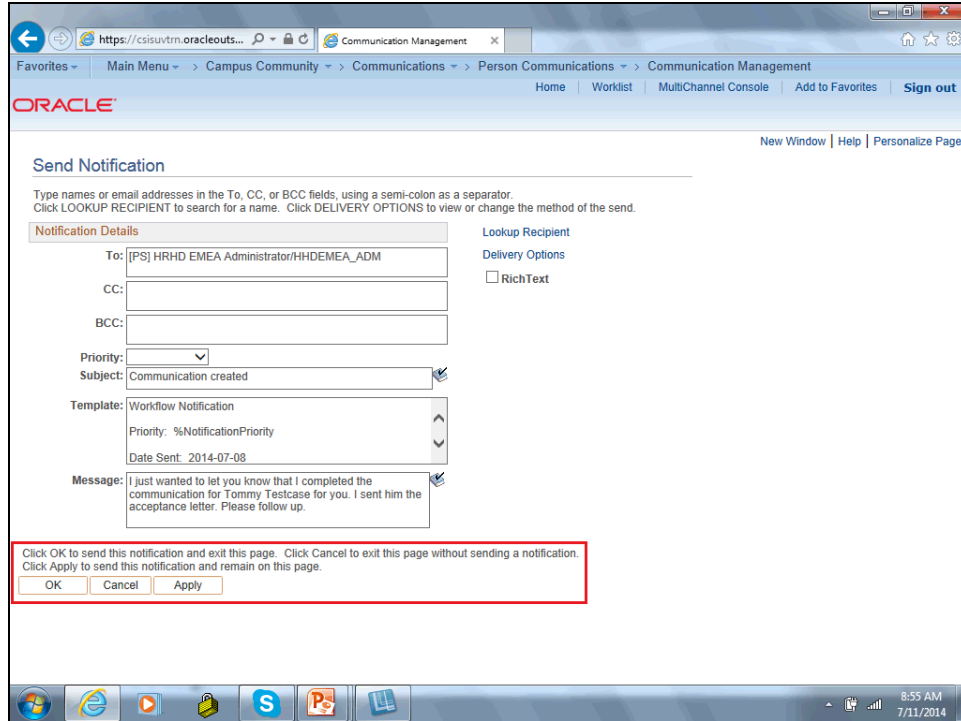
Date Sent: 2014-07-08

Message: I just wanted to let you know that I completed the communication for Tommy Testcase for you. I sent him the acceptance letter. Please follow up.  [Spellcheck](#)

RichText

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

Step	Action
12.	<p>Type names or e-mail addresses in the To, CC, or BCC fields. Click the Lookup Recipient link to search for a name.</p> <p>Click the Delivery link to view/change the method of sending.</p> <p>Select the Priority: Low, Medium, High.</p> <p>Enter the Subject. This field has spell check capability. Click the blue book.</p> <p>Type the Message. This field has spell check capability. Click the blue book.</p>



ORACLE New Window | Help | Personalize Page

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

To: [FPS] HRHD EMEA Administrator/HHDEMEA_ADM Lookup Recipient

CC: Delivery Options

BCC: RichText

Priority:

Subject: Communication created

Template: Workflow Notification

Priority: %NotificationPriority

Date Sent: 2014-07-08

Message: I just wanted to let you know that I completed the communication for Tommy Testcase for you. I sent him the acceptance letter. Please follow up.

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

8:55 AM
7/11/2014

Step	Action
13.	<p>When finished:</p> <p>Click OK to send the notification and exit.</p> <p>Click Cancel to Exit this page without sending.</p> <p>Click Apply to send notification but remain on this page.</p>
14.	<p>Congratulations....You have successfully completed Reviewing Assigned Checklists.</p> <p>End of Procedure.</p>