

Checklists in sunapsis 4

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AN INDIANA UNIVERSITY INNOVATION

Topics

We will examine differences between version 3 and 4 concerning...

- Checklist Workflow Improvements
- Configuration Improvements
- New Documentation



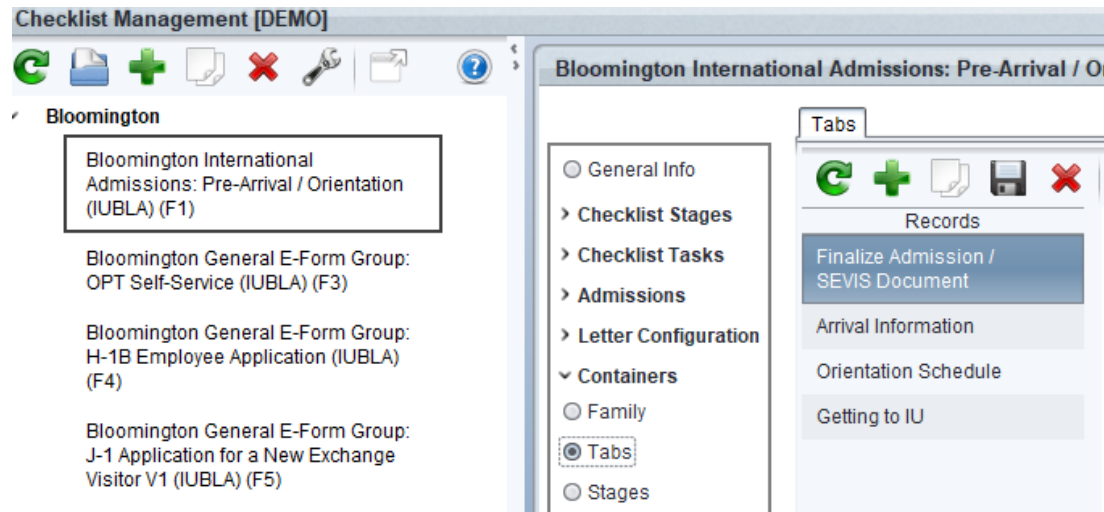
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Good News!

- Checklists become more versatile in sunapsis 4.
 - All checklist types make use of new accordion style online services organization for client/admin workflows.
 - Look and feel for client experience improved dramatically.
 - Metrics for individual workflow analysis are more available/transparent.
 - In-App Checklist Letter/Task extension documentation will be available.
- None of your checklists will break when you upgrade from sunapsis 3 to 4.
 - Sunapsis will convert your existing checklists to the new format.
 - New behavioral features are inherited automatically with the upgrade.
 - Workflow Information becomes more transparent.

Client Online Services sunapsis 3

Container Tabbed View only works with Admission/Pre-Arrival type checklists in sunapsis 3



The screenshot shows the iStart interface. At the top, there is a world map and the iStart logo. Below the logo, it says 'Online Services for International Students, Scholars, and Staff.' and 'Secure Online Session'. The main section is titled 'F-1 Students' and contains a congratulatory message: 'Congratulations on your admission! Now that you've received your SEVIS document, it's time to finalize your, complete pre-arrival, get your orientation schedule, and arrive on campus. The steps below will guide you through the process:'. Below this message, there are four tabs: 'Finalize Admission / SEVIS Document' (selected), 'Arrival Information', 'Orientation Schedule', and 'Getting to IU'. The 'Finalize Admission / SEVIS Document' tab is active, showing 'Instructions' and 'Things You Need to Do'. The 'Instructions' section contains two paragraphs of text and two checkboxes: 'Congratulations! You are admitted!' and 'Immigration Document Status'. The 'Things You Need to Do' section contains three checkboxes: 'SEVIS Dependents (Spouse / Children)', 'SEVIS Transfer In Request', and 'Confirm Mailing Address'. At the bottom, there is a banner for 'Bruce DEMO Banner TEMP435409' and 'Campus: Bloomington Application to Computer Science'. A legend at the bottom right explains the status icons: Incomplete, Optional, Complete, Draft, Submit Another, Not Yet Available, Pending Review, Follow-Up Required, and Awaiting Answer.

iStart Home Page

- Admission
- Biographical Information
- Conference 2018 E-Form Workshop
- Departmental Services

Legend:

- ☐ = Incomplete
- ☐ = Optional
- ☒ = Complete
- ☐ = Draft
- ☐ = Submit Another
- ☐ = Not Yet Available
- ☐ = Pending Review
- ☐ = Follow-Up Required
- ☐ = Awaiting Answer
- ☒ = Denied


Client Online Services sunapsis 4




Checklist container tabs are being dropped in favor of accordion style menus in sunapsis 4 automatically (i.e. we will convert these to the new format for you).

All checklist types can use this behavior, not just admission/pre-arrival ones!

Eform Display properties

Display & E-Form Group Configurations	
Title	Financial Documentation
Meta Information	
Action Icon	
Administrative Campus	Bloomington
Category	Pre-Arrival
Group	
Sub-grouping Header	1. Finalize Admission / SEVIS Document

 INDIANA UNIVERSITY



Atlas

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[J-1 Scholar Services](#)
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[Go to Admin Services](#)
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Pre-Arrival Checklist

1. Finalize Admission / SEVIS Document -

☒ COMPLETE

[Financial Documentation](#)

☒ COMPLETE

[SEVIS Dependents \(Spouse / Children\)](#)
05/24/2018 03

+

[Add New SEVIS Dependents \(Spouse / Children\)](#)

☒ APPROVED

[Local U.S. Address Information](#)

2. Arrival Information -

☐ REQUIRED

[Your Information](#)

☐ REQUIRED

[Passport Information](#)

☐ REQUIRED

[Housing Information](#)

☐ REQUIRED

[Bloomington, Indiana Arrival Date](#)

3. Orientation Schedule +

4. Getting to IU +

The sunapsis 3 way

The screenshot displays the SUNAPSIS 3 Way application interface, which is used for managing international admissions. The main window shows a list of records for "International Admissions (Bloomington) | Fall 2018 | First-Year Beginner Undergrad | Document Collection [TEST]". The list includes columns for various tasks and forms, such as "Tagged by Office Staff", "Task: PRIORITY", "Task: Faculty Sponsor", "Task: Sponsored Student", "Task: Athlete", "E-Form: Official High School Academic Records", "E-Form: Toefel test", "Task: Academic Items are Received", "E-Form: English Proficiency", "Task: Preliminary Admission Recommendation", "E-Form: Passport Information", "E-Form: Financial Documentation", "E-Form: Add a Dependent", and "Note: First-Year Beginner Undergrad".

Overlaid on the main window are three smaller windows:

- Profile Status (457121) [TEST]:** This window shows the profile status for a specific student. It includes fields for "200041" and "N", "02/22/1999 | Male", and "South Korea | F-1". It also lists "Bloomington No Profile Status" and "Pending Submission".
- International Admissions (Bloomington): Fall 2018 | First-Year Beginner Undergrad | Document Collection | ADMT AFQL | 02/07/2018 [TEST]:** This window shows a document collection for a specific student. It includes a "Financial Documentation" section with a "File Uploaded" button and a "Add a Dependent" section with a "File Uploaded" button. It also includes a "Client" section with "Internal Use" and a "Signed By" section.
- Checklist Workflow # [TEST]:** This window shows a checklist workflow for a specific student. It includes a list of tasks and forms, such as "Active Checklist Workflow", "Tagged by Office Staff", "Task: PRIORITY", "Task: Faculty Sponsor", "Task: Sponsored Student", "Task: Athlete", "Task: STARR awarded/email sent", "Task: Special Mailing Instructions", "E-Form: Official High School Academic Records", "E-Form: SEVIS Transfer In Request", "E-Form: Toefel test", "Task: Academic Items are Received", "E-Form: Official SAT or ACT Scores", "E-Form: English Proficiency", "E-Form: Explanation of Time Since High School Graduation", "E-Form: Counselor Signature Form", "E-Form: Optional Supplemental Application Items", "Task: Preliminary Admission Recommendation", "E-Form: Passport Information", and "E-Form: Financial Documentation".

The bottom of the interface shows a status bar with various icons and a "Signed By" section.

sunapsis 4 Day-to-Day

- Moved from “Checklist Workflow Management”
- New side-panel on right gives context checklist information, note-taking capabilities, record of stage moves and a quick view of the admissions

The screenshot displays the Sunapsis 4 Day-to-Day interface. The main area shows a checklist configuration for 'International Admissions' at 'Bloomington'. The checklist includes fields for Stage Entry Date (05/30/2014), Stage Rank (5), Open Checklist (Yes), Action / Reason or Application Status, Checklist Type (International Admissions), Checklist Configuration (Bloomington | International Admissions | Pre-Arrival Checklist), Checklist Campus (Bloomington), Admit Type (First-Year Beginner Undergrad), Admit Term (4148), Application Number (44), E-Form Group (Pre-Arrival Checklist (IUBLA)), and E-Form Group Record Number (51). A bottom navigation bar includes Checklist Notes, Stage Activity, and Admission Record.

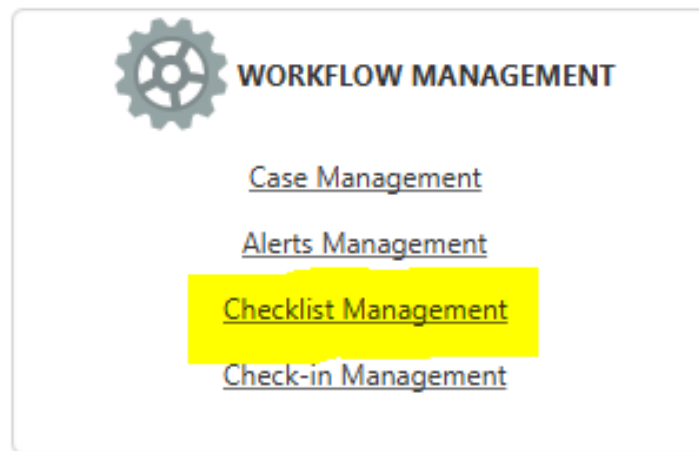
The side-panel on the right provides context and application data. It includes a table of Stage Activity with columns for Entry Date and Stage. The table shows the following data:

Entry Date	Stage
05/30/2014	Getting to IU
05/29/2014	Orientation Schedule
05/28/2014	Ready for Schedule
05/27/2014	Arrival Information
05/27/2014	Finalize Admission / SEVIS

Below the table, the side-panel displays application data for a specific applicant, including fields for Campus (Bloomington), College, School, Division, Department (bl-nik), Application Center, Program Action, Program Action Reason, Applicant Status (Admitted), Datestamp of Last Action on File (05/15/2014), Admit Term (4148), Term Start Date (09/01/2014), Term End Date (12/15/2014), Application Received Method, Application Creation Date, and Application Fee Date.

sunapsis 4 Day-to-Day » Staff » Checklists (Mgmt)

- Accessed using “Checklist Management” link in Control Center
- Moved to new table display (similar to Alerts, if you’ve seen that)
 - Sortable columns
 - Includes handy-dandy filters (savable preferences coming later)
- Add a new person to any checklist from this screen...even those with nobody on it!



sunapsis 4 Day-to-Day » Staff » Checklist Stage View

International Office Module | SUNAPSIS

Control Center Checklist Management **Checklist: Finalize Admission / SEVIS Document (F1|FYU|4188) ×**

INTERNATIONAL ADMISSIONS (BLOOMINGTON) | FALL 2018 | FIRST YEAR UNDERGRADUATE | FINALIZE ADMISSION / SEVIS DOCUMENT

HSU, PING JO | TEMP819648 (104320) | CHECKLIST ID #4422

Checklist Stage Checklist Documentation Student / Scholar Profile Student / Scholar Checklist

Records on File: 4

				Tagged by Office Staff	E-Form: Financial Documentation	E-Form: Financial Documentatio...	E-Form: Official High School Ac...	E-Form: Pick Up Request	E-Form: SAT / ACT Waiver Request	E-Form: SEVIS Transfer In Request	E-Form: Waitlist	E-Form: Reserve your place at IU	E-Form: Optional Supplemental ...	E-Form: Passport Information	E-Form: Financial Documentation	E-Form: Holistic Review	E-Form: Undergraduate Essay	Task: Finalize Admission Tab Co...	-Form: Shipping Information	-Form: Reserve Arrival Housing	-Form: Requested Information ...	-Form: Request to Re-Issue Ad...	checklist Notes
Hsu, Ping JO	TEMP819648	06/18/2018	★	■	○	■	○	○	○	○	■	○	■	■	○	■	■	⚙️					
Reynolds, Matt DEMOF1	TEMP773041	05/18/2018	★	□	○	□	○	○	🕒	○	○	□	○	□	□	○	□	□					
Wappes, Joshua DEMO	TEMP208195	05/18/2018	★	□	○	□	○	○	○	○	○	□	○	□	□	○	□	□					
Zungali, Brian	TEMP478070	05/29/2018	★	□	○	□	○	○	○	○	○	□	○	□	□	○	□	□					

Task: Finalize Admission Tab Complete

- ☒ Approve
- ☒ Conditionally Approve
- ☐ Follow-up
- ☒ Deny
- ☒ Submitted
- ☐ Required
- ☐ Optional
- ☒ Not Applicable

Close

- Left click to select, right to set status
- Stage view supports multi-select actions
 - Stage movement
 - Closing checklists
 - Multi-apply E-Form and Task statuses (there's a new button for this, too)
 - Coming later: Ability to apply Templates from Tasks as well as E-Forms

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sunapsis 4 Day-to-Day » Staff » Checklists

Add Client Directly Within Stage View

Fall 2013	First Year Undergraduate	Orientation Schedule	2
Fall 2015	First Year Undergraduate	Getting to IU	29
Fall 2014	First Year Undergraduate	Getting to IU	16
Fall 2014	First Year Undergraduate	Getting to IU	16

GENERATE NEW CHECKLIST

University ID

0001234567

Specific Checklist Workflow *

Fall 2018

Unique Identifier

00645512

Note: The unique identifier would be the admissions application number for admissions/initial document and orientation workflows. For general e-form group workflows leave blank, as the generated e-form group number will be populated automatically.

Generate New Checklist

Close

sunapsis 4 Day-to-Day » Staff » Checklists (Mgmt)











- New tabs give quick access to detailed client information
 - Student / Scholar Profile
 - Student / Scholar Checklist (including E-Forms, Advisor Center, etc.)

Control Center Checklist Management Checklist: Getting to IU (F1|FYU|4158) X Jiawei DEMO Cài Search International Profiles

INTERNATIONAL ADMISSIONS (BLOOMINGTON) | FALL 2015 | FIRST YEAR UNDERGRADUATE | GETTING TO IU

DOE, JOHN TEST | TEMP779806 (102019) | CHECKLIST ID #1193

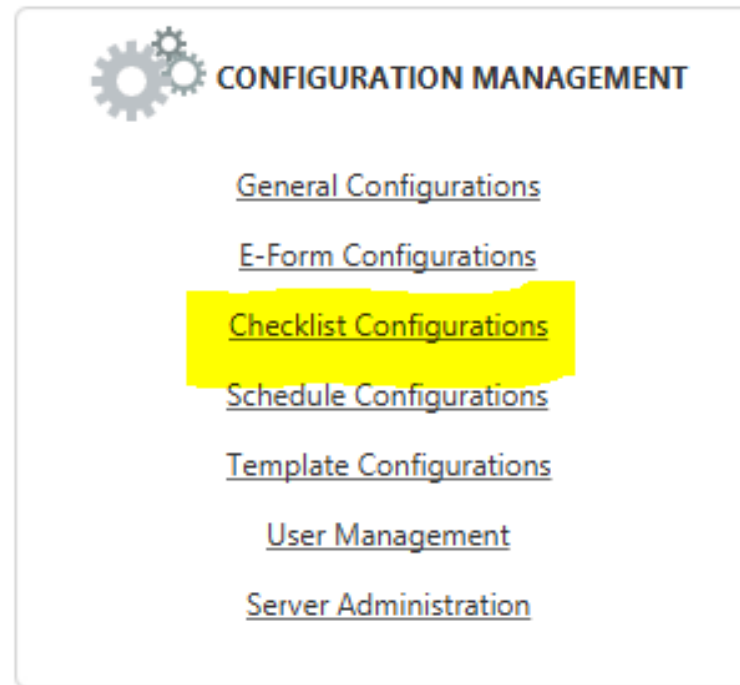
Checklist Stage Checklist Documentation Student / Scholar Profile Student / Scholar Checklist



				Tagged by Office Staff	E-Form: Financial Documentation	E-Form: Financial Documentation Spring ...	E-Form: Official High School Academic R...	E-Form: Pick Up Request	E-Form: SAT/ACT Waiver Request	E-Form: SEVIS Transfer In Request	E-Form: Waitlist	E-Form: Add a Dependent	E-Form: Reserve your place at IU	E-Form: Optional Supplemental Applicati...	E-Form: Passport Information	E-Form: Financial Documentation
Abdykaimov, Ziyat TEST	TEMP430245	01/13/2015		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abell, Kathy TEST	TEMP103994	11/06/2015		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arapova, Veronica Lorem ipsum dolor s...	TEMP546278	05/27/2015		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cài, Jiawei DEMO	TEMP753310	03/28/2015	Admitted	★	✓	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chen, Jiachun Cadiente	TEMP123987	10/03/2014		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doe, John TEST	TEMP779806	09/20/2015		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
H...	TEMP500505	05/10/2015		★	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

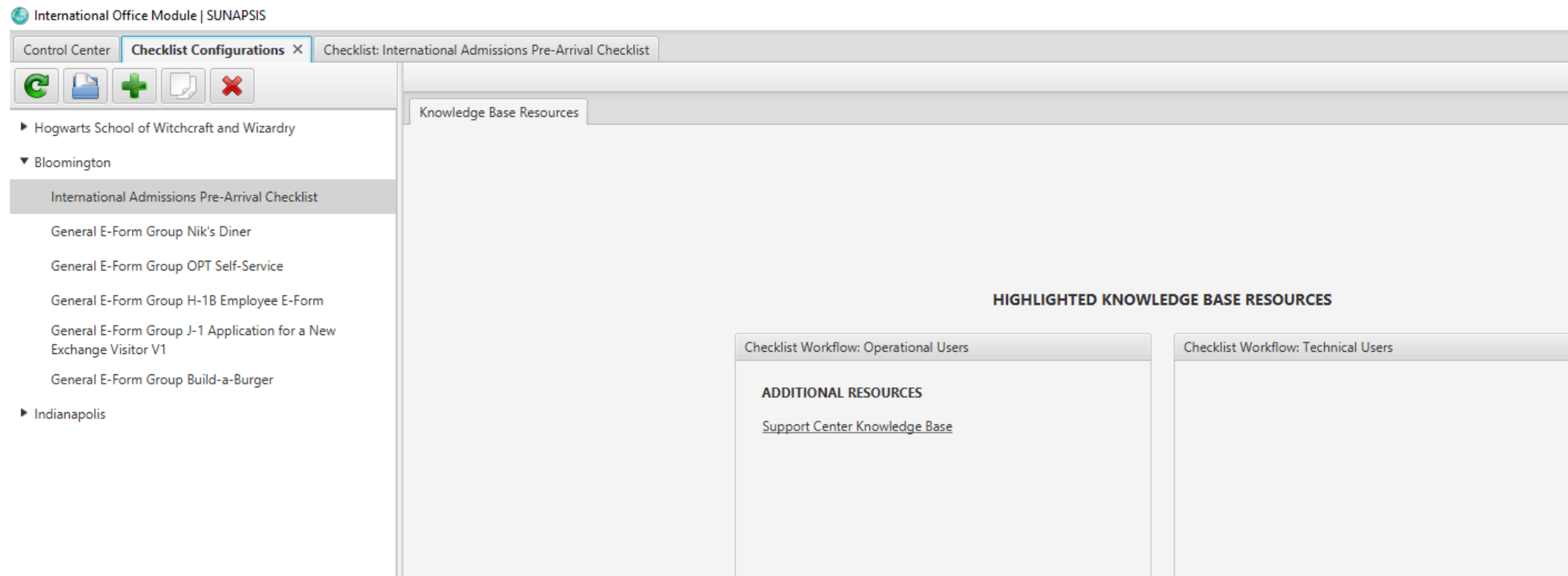
sunapsis 4 sunapsis 4 Checklist Configuration

- Configurations for Checklist located in the **sunapsis Control Center** within **Configuration Management**.



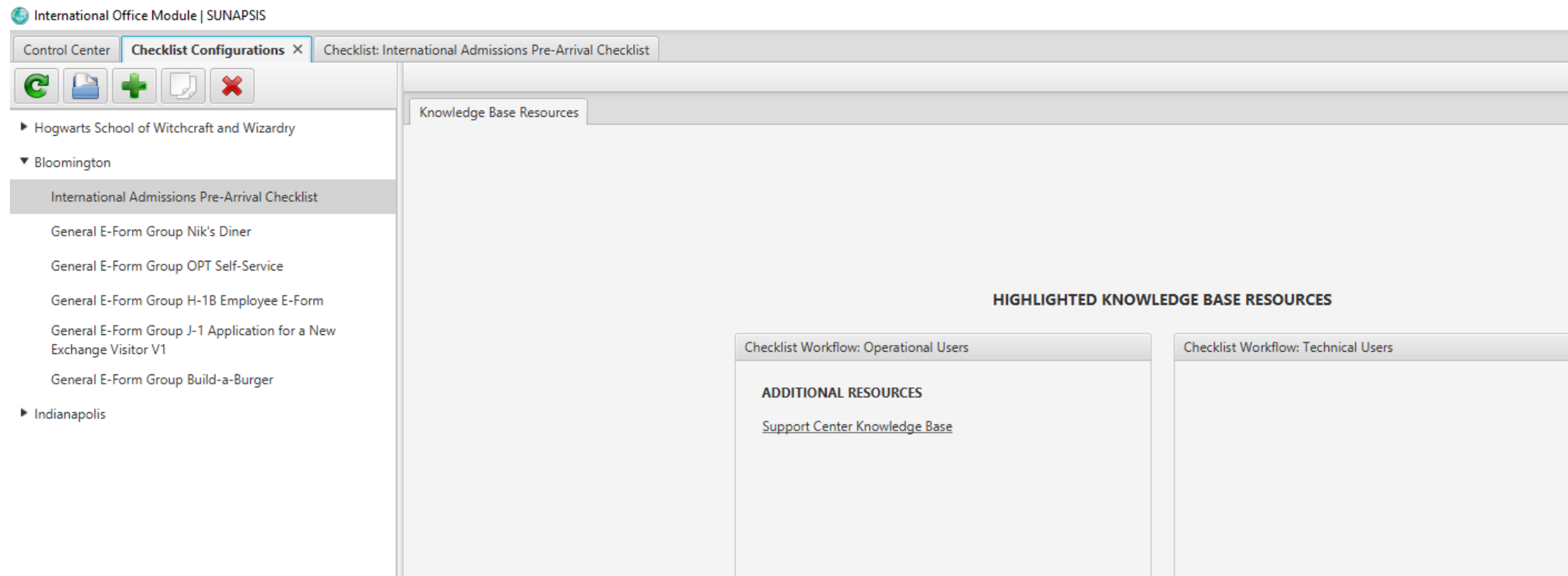
sunapsis 4 Checklist Configuration

New KB Resources area within Checklist Configurations in sunapsis 4 (more to come):



sunapsis 4 Checklist Configuration

New KB Resources area within Checklist Configurations in sunapsis 4 (more to come):





sunapsis 4 Checklist Configuration


International Office Module | SUNAPSIS


Control Center Checklist Configurations Checklist: International Admissions Pre-Arrival Checklist X


CHECKLIST CONFIGURATION ATTACH FILES


 **CHECKLIST**


 **ADMISSIONS**


 **STAGES**


 **TASKS**

 **ATTACH FILES**








 **LETTERS**

 **COMMUNICATIONS**

 **CLOSURE RULES**

 **DOCUMENTATION**

Attach Files Configurations

New Record

File Structure *

File Meta Info

E-Form to Auto Insert / Attach

Task to Auto Approve

SHARE DOCUMENT ACROSS ADMISSIONS / PRE-ARRIVAL

Select Scope to Share

Record Number

sunapsis 4 Checklist Configuration

We are now allowing users to document their checklist designs as thoroughly as they see fit directly within the Checklist Configurations area.

The screenshot displays the 'DOCUMENTATION' section of the Sunapsis 4 interface. It features a tab labeled 'Institutional Documentation'. Below the tab is a toolbar with icons for undo, redo, save, delete, insert, and print. The main area is divided into two panes. The left pane, titled 'Documentation', contains a list of empty rows. The right pane, titled 'Institutional Documentation', contains a rich text editor. The editor's toolbar shows 'Verdana' font and '10.5pt' size. The text in the editor reads: 'This checklist is used specifically for Fall Undergraduate F-1 students for pre-arrival purposes. This uses The "Pre-Arrival" E-Form Group. Do not edit without speak with Matt Reynolds first!'. The text includes underlines and a red squiggly line under 'pre-arrival'.

DOCUMENTATION

Institutional Documentation

Documentation

Institutional Documentation

Verdana 10.5pt B I U A




This checklist is used specifically for Fall Undergraduate F-1 students for pre-arrival purposes. This uses The "Pre-Arrival" E-Form Group. Do not edit without speak with Matt Reynolds first!

sunapsis 4 Checklist Configuration

Task and Letter Extensions are documented within the app.

✓ TASKS

Task ConfigurationsTask Reset RulesTask DescriptionsTask Extensions Library



▼ Untitled Item

Additional Academic Records

Admission Letter Generated

Admission Mailing Verification

Admitted

Applicant Plan Online

Application Fee Paid

Extension Group

Extension Title

Extension ID




Extension Documentation

Additional Academic Records

T034

LETTERS

Page TypesLetter SetupLetter PiecesLetter Extensions Library



▼ Untitled Item

▶ ADMIT

▼ Insert if action is ADMT

COND and reason STIP

AA Visa

ADMT/AFQL

All K Visas (K-1, K-2, K-3, K-4)

Any visa type except F-1 or J-1

Extension Group

Extension Title

Extension ID

Extension Documentation

Any visa type except F-1 or J-1




LE036

sunapsis 4 Checklist Configuration

Task and Letter Extensions are documented within the app.

✓ TASKS

Task ConfigurationsTask Reset RulesTask DescriptionsTask Extensions Library



▼ Untitled Item

Additional Academic Records

Admission Letter Generated

Admission Mailing Verification

Admitted

Applicant Plan Online

Application Fee Paid

Extension Group

Extension Title

Extension ID




Extension Documentation

Additional Academic Records

T034

LETTERS

Page TypesLetter SetupLetter PiecesLetter Extensions Library



▼ Untitled Item

▶ ADMIT

▼ Insert if action is ADMT

COND and reason STIP

AA Visa

ADMT/AFQL

All K Visas (K-1, K-2, K-3, K-4)

Any visa type except F-1 or J-1

Extension Group

Extension Title

Extension ID

Extension Documentation

Any visa type except F-1 or J-1

LE036

Considerations when moving from sunapsis 3 to 4

- Are you using Checklist Closure Rules?
 - Many institutions have missed this newer configuration and are not using it properly. Consult the sunapsis KB for details
- Document your checklists!
- Consider whether or not to alter your Eform Subgroup Headings to better make use of new accordion style menus, which work great with mobile access.

sunapsis 4 BETA



Fill out our BETA access form to get started!

<https://ois.iu.edu/machform/view.php?id=132171>



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Q&A





Thank You!

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