

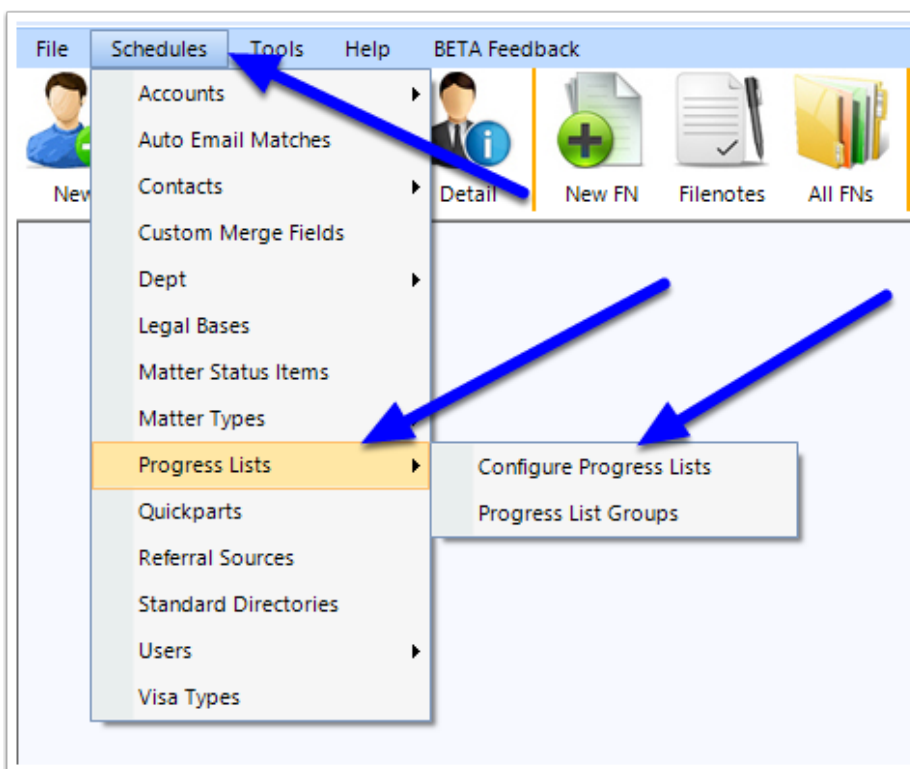
Progress Items - How to Create/Edit a Progress List template

The Progress List allow users to create document and task checklist on a matter and set up 'progress workflows'. There are a number of inbuilt checklist templates in Migration Manager but users can also create their own checklist templates.

This article covers how to create a Progress List template.

1. Open the Progress List schedule

All of the Progress List templates are contained with the Schedules. To access these, in the top menu, go to **Schedules > Progress Lists > Configure Progress Lists**



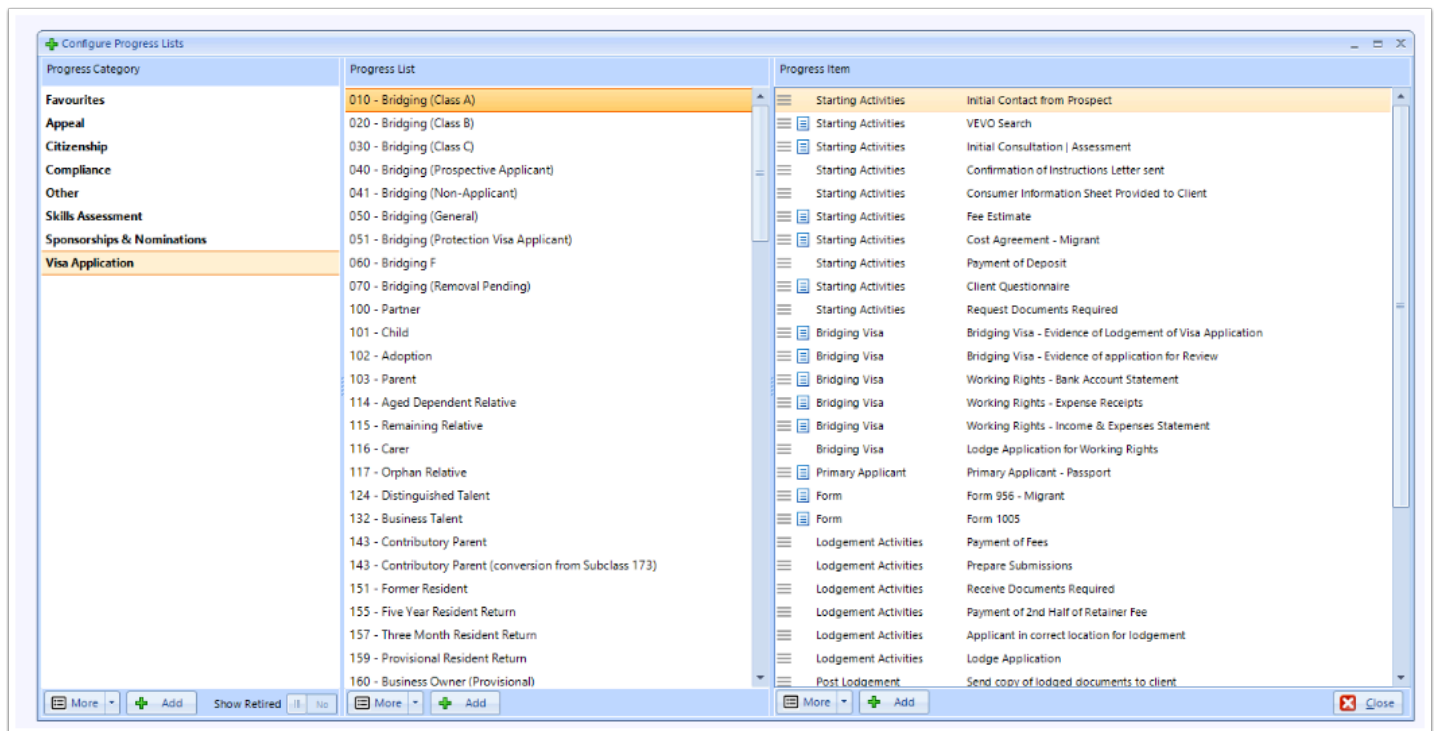
The Configure Progress Lists window will now appear

The **Configure Progress Lists** Window consists of three panes:

- The **left** pane is the **Progress Category**. This is so you can group Progress Lists into particular Categories for ease of use.
- The **middle** pane is the **Progress List**. If you click a particular Category in the left Pane, you will see which Progress Lists exist for that Category.

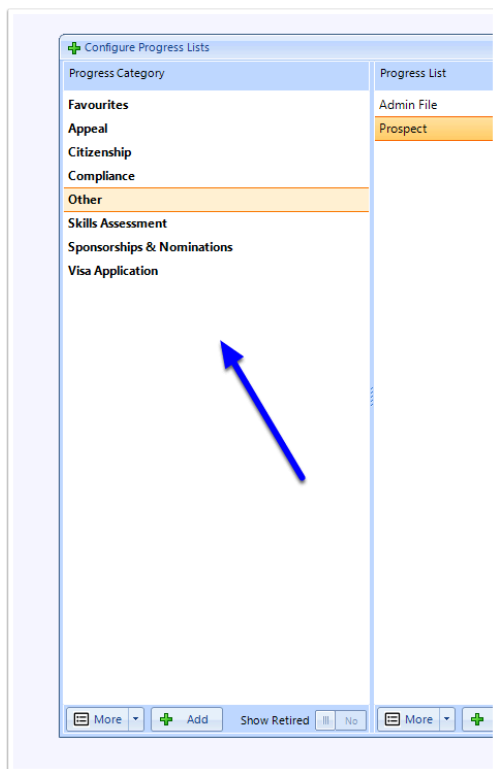
- The **right** pane are the **Progress Items**. By selecting a Progress List in the middle pane, you can see what Progress Items are available for that list.

In the below example, we are looking at the **Visa Application** Category and by selecting the '**010- Bridging (Class A)**' Progress List we can see the **Progress Items** for that list.

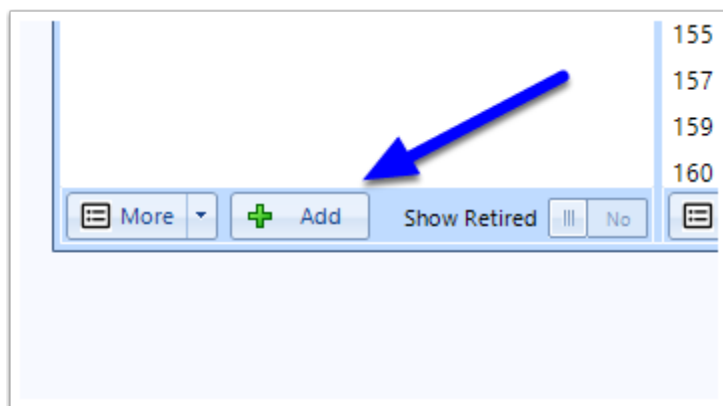


2. Select a relevant Category

To create a Progress List you must first select a relevant Category from the first column

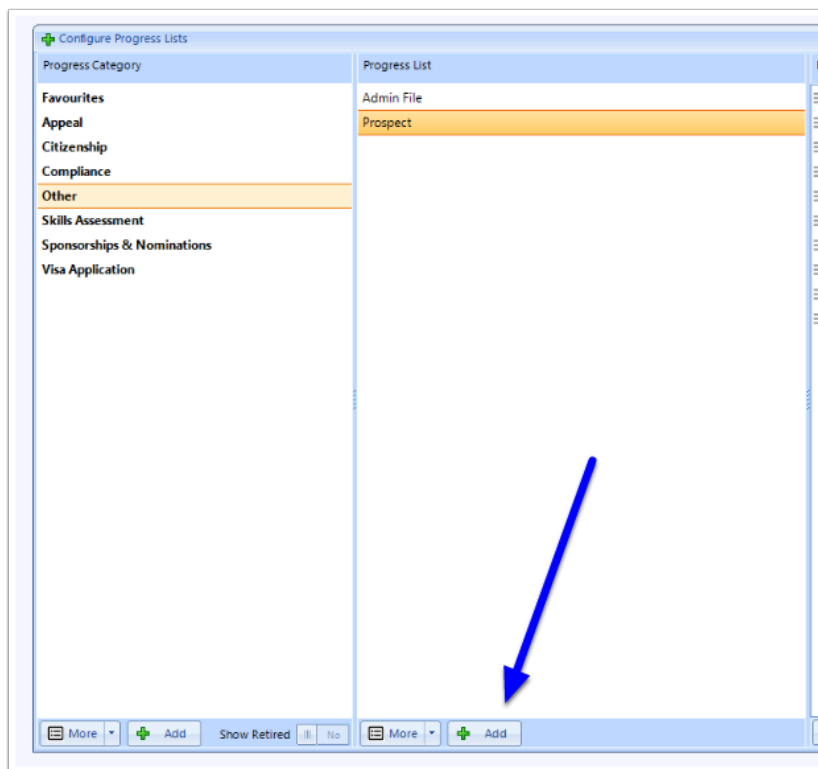


💡 If there isn't a category relevant to the list you want to create, click the Add button to create a new Category.

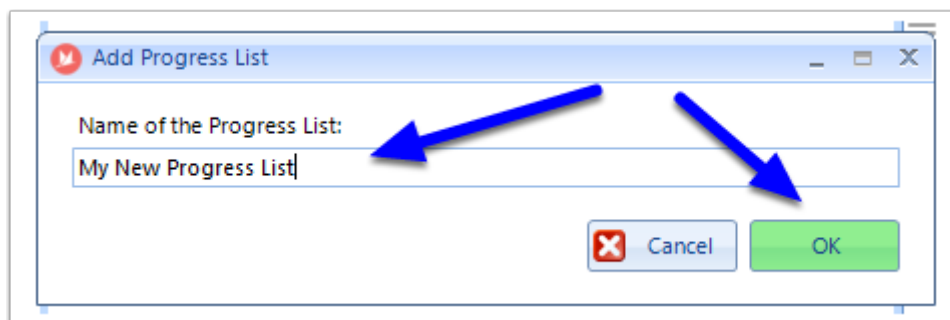


3. Add a Progress List

In the Progress List column (the second column), click the **Add** button on the bottom of the screen (or use the right click options) to start creating a new list.



The Add Progress List window will appear. Enter the name of the new Progress List and then click **OK**



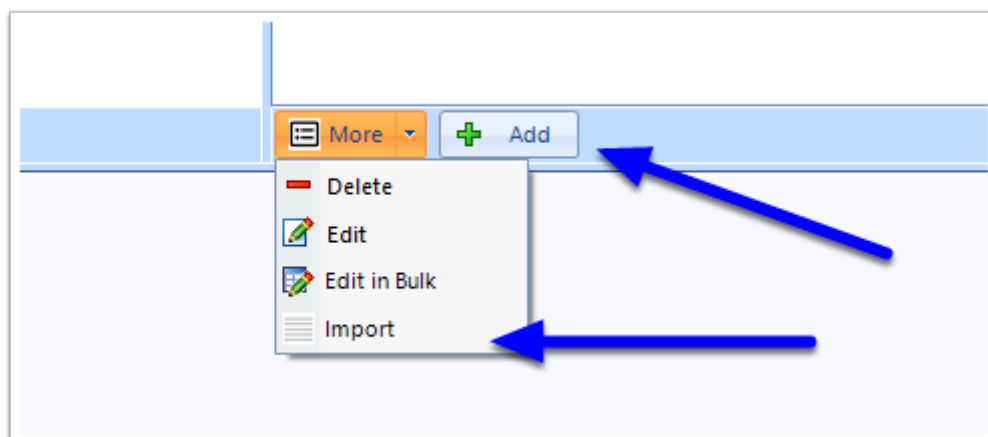
The new Progress List will appear and is now ready for you to add Progress Items.

+ Configure Progress Lists		
Progress Category	Progress List	Progress Item
Favourites	Admin File	
Appeal	My New Progress List	
Citizenship	Prospect	
Compliance		
Other		
Skills Assessment		
Sponsorships & Nominations		
Visa Application		

4. Add Progress Items

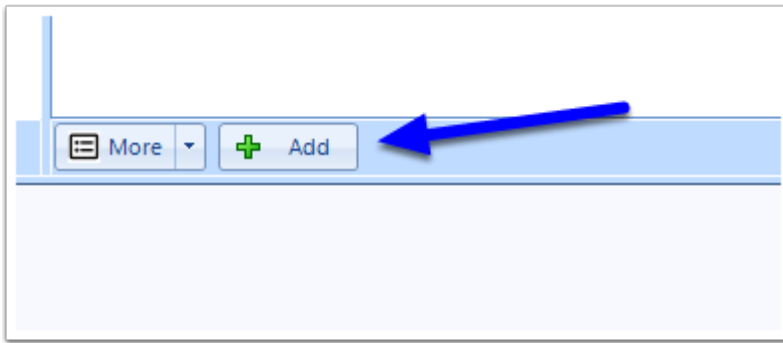
To add Progress items to the list, you have two options.

1. Manually add new items using the **Add** button; or
2. Import items from another list using the **Import** button under the **More** button



4.1. Using the Add button

To add a new Progress Item click the **Add** button in the Progress List column (the third column)



The Add Progress Item window will now appear. You should insert details in to some or all of the following fields:

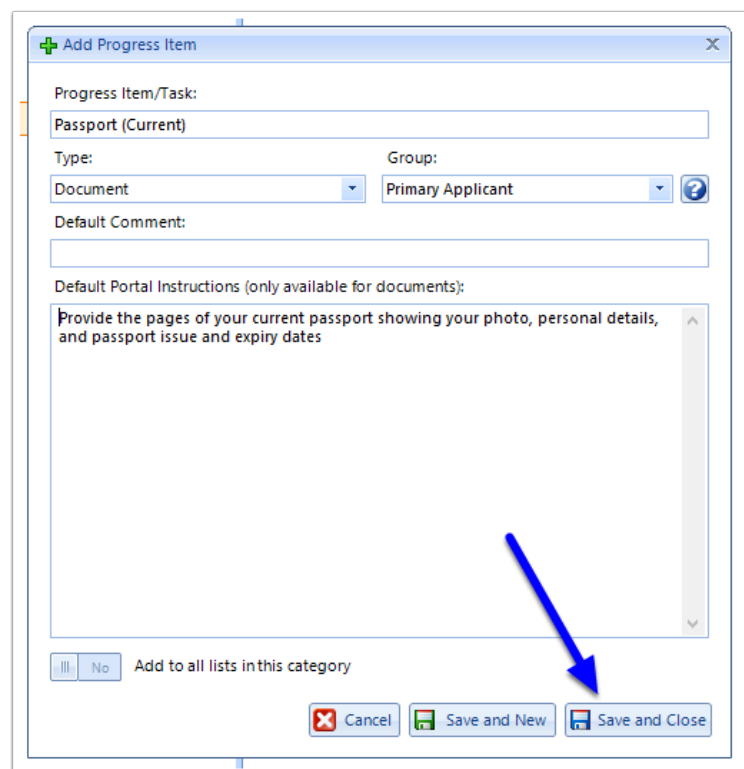
1. **Progress Item/Task** (required) - this is the name of the task or document
2. **Type** (required) - select whether the item is a Document or an Activity
3. **Group** (optional) - setting the Groups has an affect when importing a checklist in to a matter as it can automate the setting of the Required From information as well as whether the visibility filter will control the availability of the item on the import view. For full details on how Groups work, see: [Progress Item Groups - How do Progress Item Groups work](#)
4. **Default Comment** (optional) - The information inserted in to this field will automatically appear as a comment on the Progress Item when it is added to a matter
5. **Default Portal Instructions** (optional) - If the item is a document, you can set the default instructions which will appear on the Portal if this item is uploaded to the portal
6. **Add to all lists in this category** (optional) - If this new item is one that you want to have appear on all of the Progress List templates in this Category, slide this to Yes. Note that the item will appear on the bottom of all of the lists.

The 'Add Progress Item' dialog box contains the following fields and controls:

- 1** Progress Item/Task: A text input field.
- 2** Type: A dropdown menu.
- 3** Group: A dropdown menu with a help icon.
- 4** Default Comment: A text input field.
- 5** Default Portal Instructions (only available for documents): A large text area.
- 6** Add to all lists in this category: A slider control.

At the bottom of the dialog are three buttons: 'Cancel', 'Save and New', and 'Save and Close'.

When you have finished inserting the relevant information, click **Save and Close** (or 'Save and New' to add another)



Progress Item/Task:
Passport (Current)

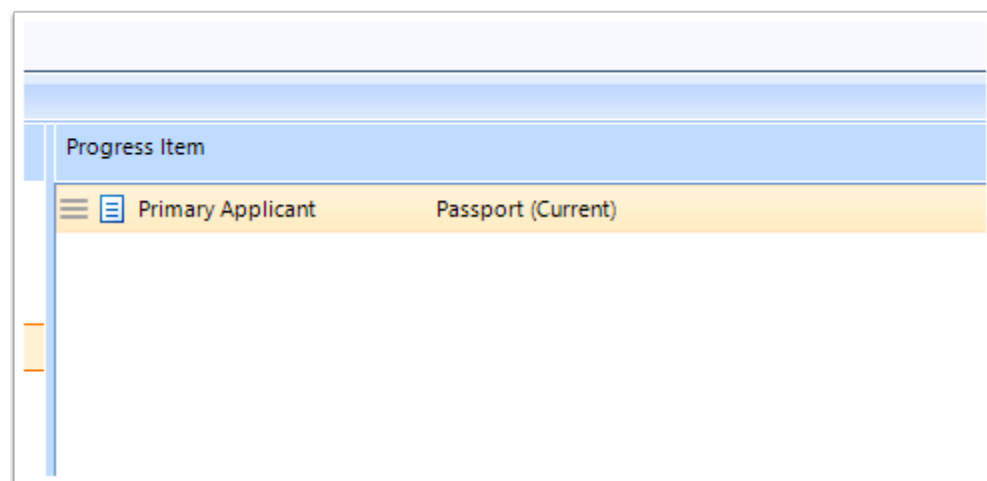
Type: Document Group: Primary Applicant

Default Comment:

Default Portal Instructions (only available for documents):
Provide the pages of your current passport showing your photo, personal details, and passport issue and expiry dates

Cancel Save and New Save and Close

The created item will now appear in your template Progress List



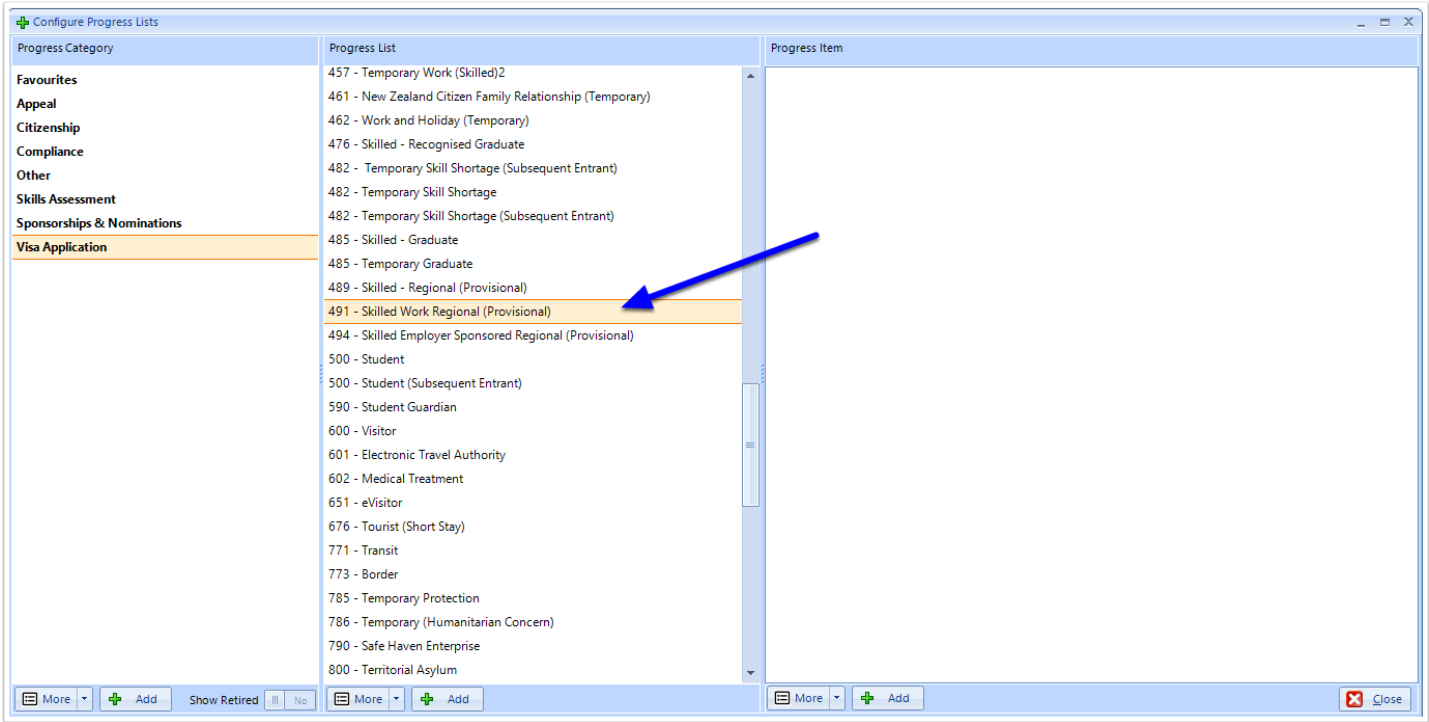
Progress Item	
Primary Applicant	Passport (Current)

Repeat this process to add as many items as needed.

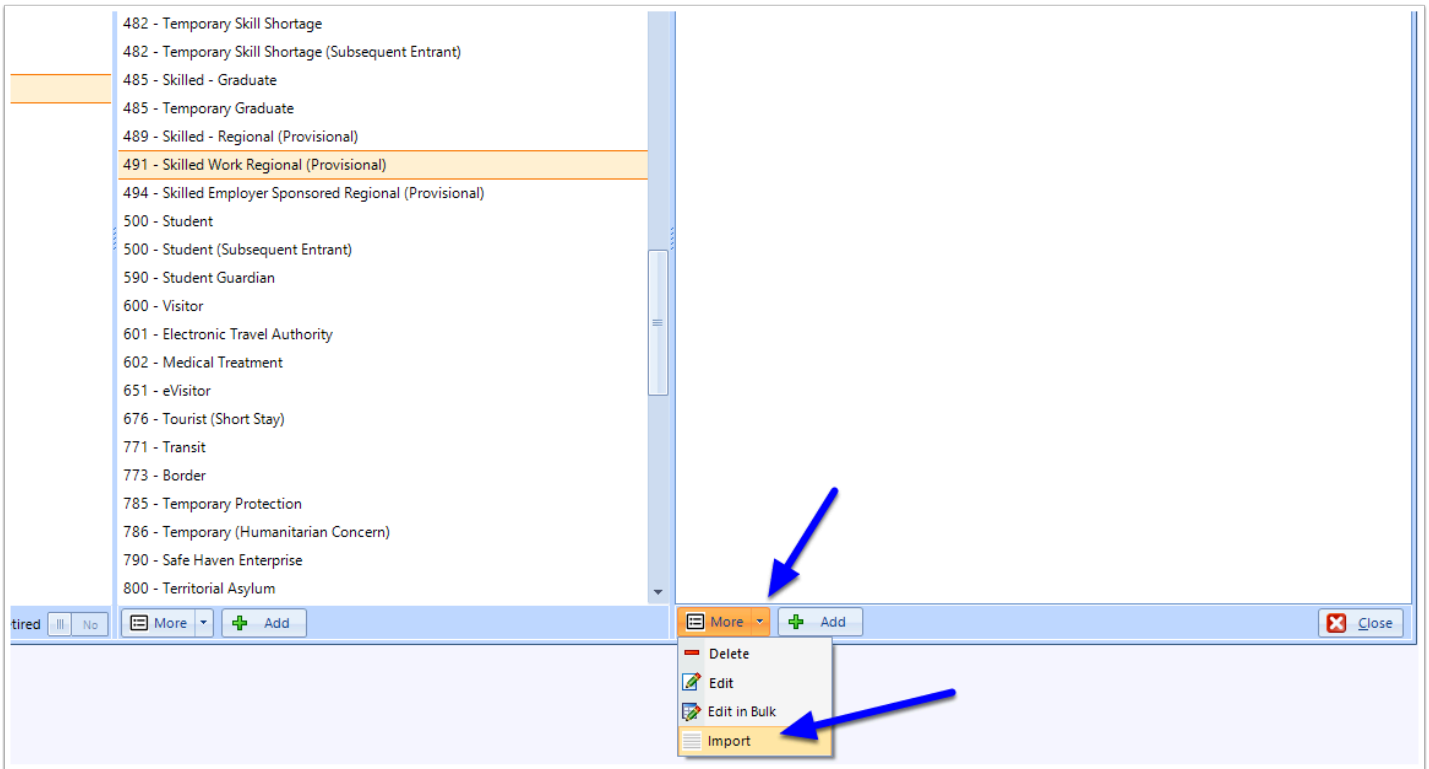
4.2. Using the Import option

If there is already a Progress Item (or a number of Progress Items) on another Progress List template that you would like to add to your new list, you can import these items by going to the **More** button in the Progress List column and clicking **Import**

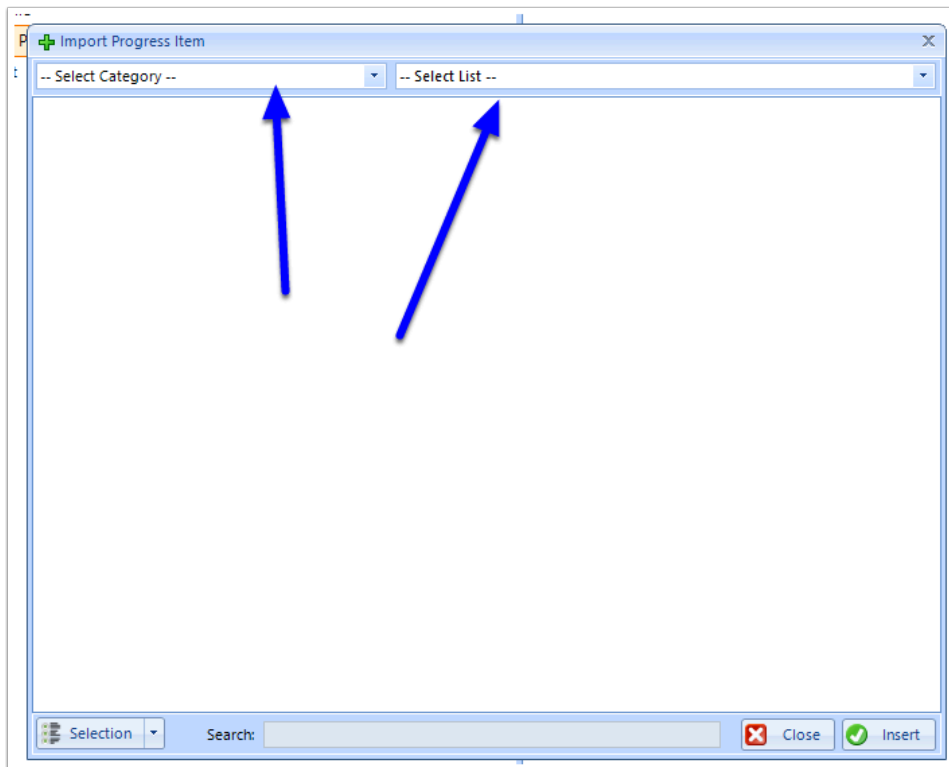
Select the **Progress List** you wish to add the new items to.



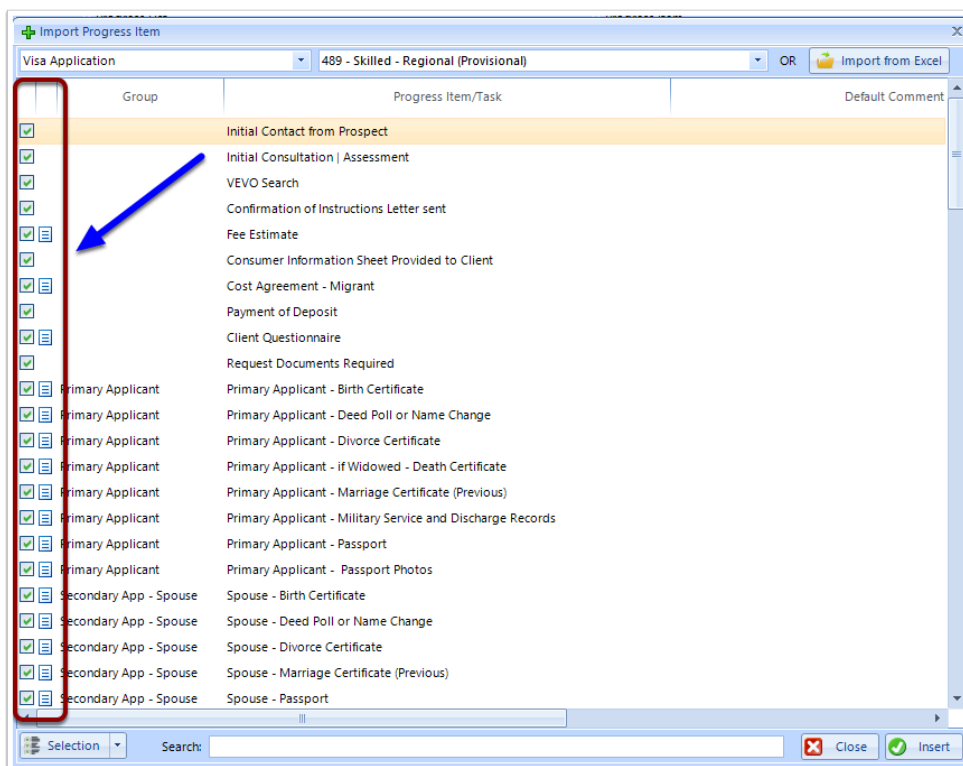
In the *Progress Item* Pane, click **More**, then **Import**.



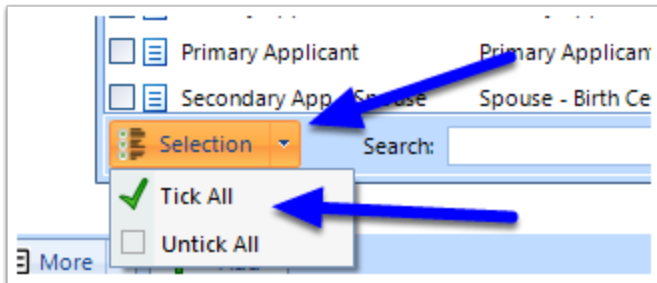
The *Import Progress Item* window will now appear. Using the Select **Category** and **Select List** dropdown, you can search for the existing template list that you want to import items from.



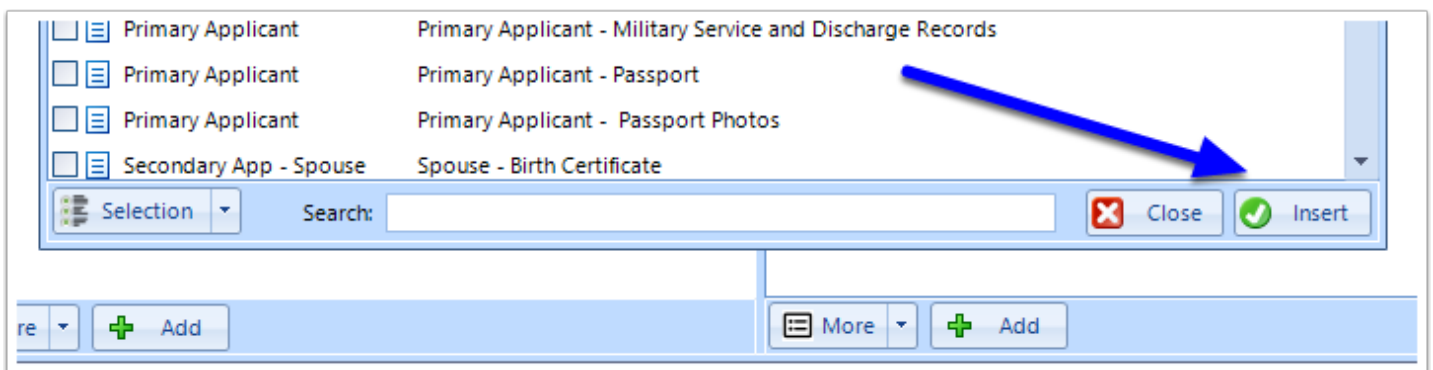
Next, select the items that you want to import by ticking each applicable item using the tickboxes on the left.



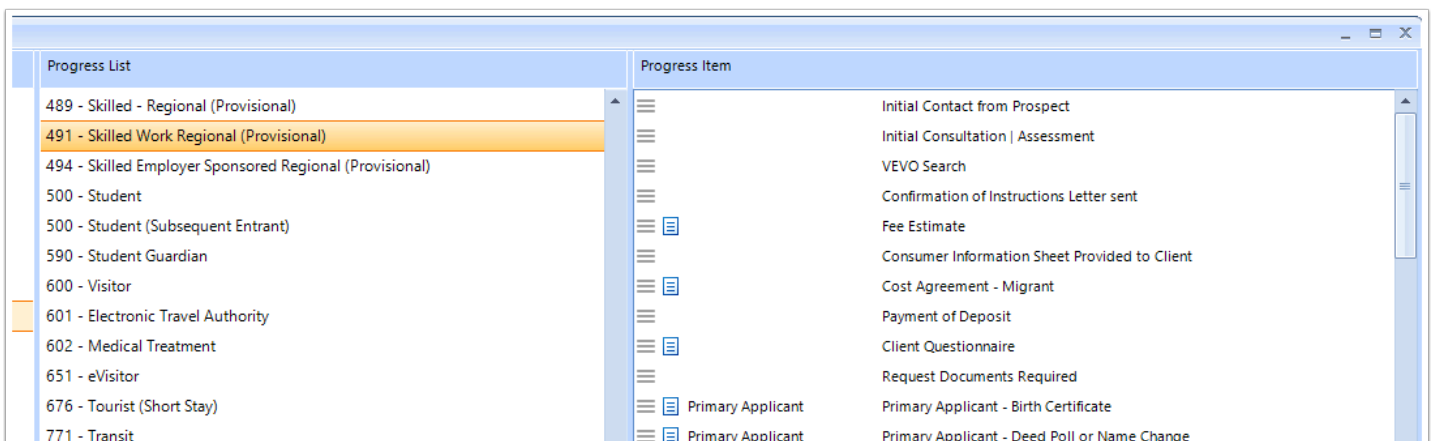
💡 Tip: If you want to select everything in the list, click on the **Selection** button and choose **Tick All**



When you have finished selecting the items you want to import, click **Insert**.



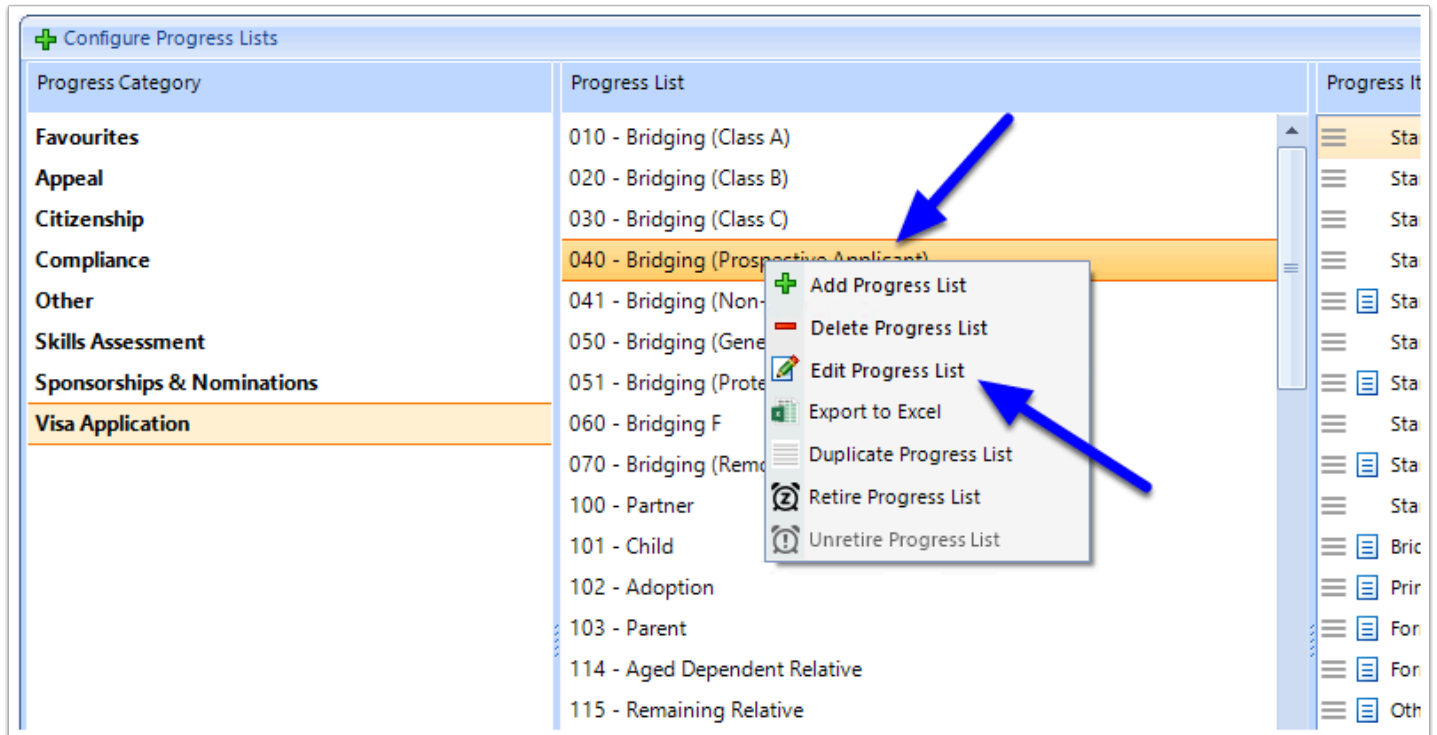
The items will now be imported in to your new list.



💡 Note: You can import items from different lists to build your new list.

5. Editing Items

To Edit a Category, Progress List or Progress Item, simply **right-click** on the item you wish to edit and select the Edit option.



6. Close

When you have finished building your new list, click the **Close** button in the right hand corner of the window.

