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 worklfows'. 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**

File	Schedules Tools Help	BETA Feedback
	Accounts	
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	Custom Merge Fields	
	Dept 🔸	
	Legal Bases	
	Matter Status Items	
	Matter Types	
	Progress Lists 🔹 🕨	Configure Progress Lists
	Quickparts	Progress List Groups
	Referral Sources	
	Standard Directories	
	Users •	
	Visa Types	

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.

Configure Progress Lists	Burgers tick		Des anno 14 ann	-
Progress Category	Progress List		Progress Item	
avourites	010 - Bridging (Class A)	^	Starting Activities	Initial Contact from Prospect
Appeal	020 - Bridging (Class B)		Starting Activities	VEVO Search
litizenship	030 - Bridging (Class C)		Starting Activities	Initial Consultation Assessment
Compliance	040 - Bridging (Prospective Applicant)	=	Starting Activities	Confirmation of Instructions Letter sent
Other	041 - Bridging (Non-Applicant)		Starting Activities	Consumer Information Sheet Provided to Client
kills Assessment	050 - Bridging (General)		Starting Activities	Fee Estimate
ponsorships & Nominations	051 - Bridging (Protection Visa Applicant)	_	= 🗉 Starting Activities	Cost Agreement - Migrant
isa Application	060 - Bridging F		Starting Activities	Payment of Deposit
	070 - Bridging (Removal Pending)		📃 📃 Starting Activities	Client Questionnaire
	100 - Partner		Starting Activities	Request Documents Required
	101 - Child		📃 🗏 Bridging Visa	Bridging Visa - Evidence of Lodgement of Visa Application
	102 - Adoption		🚍 🔳 Bridging Visa	Bridging Visa - Evidence of application for Review
	103 - Parent		😑 🗐 Bridging Visa	Working Rights - Bank Account Statement
	114 - Aged Dependent Relative		📃 📃 Bridging Visa	Working Rights - Expense Receipts
	115 - Remaining Relative		📃 🗐 Bridging Visa	Working Rights - Income & Expenses Statement
	116 - Carer		Bridging Visa	Lodge Application for Working Rights
	117 - Orphan Relative		📃 🗐 Primary Applicant	Primary Applicant - Passport
	124 - Distinguished Talent		= 🗉 Form	Form 956 - Migrant
	132 - Business Talent		= Form	Form 1005
	143 - Contributory Parent		Lodgement Activities	Payment of Fees
	143 - Contributory Parent (conversion from Subclass 173)		Lodgement Activities	Prepare Submissions
	151 - Former Resident		Lodgement Activities	Receive Documents Required
	155 - Five Year Resident Return		Lodgement Activities	Payment of 2nd Half of Retainer Fee
	157 - Three Month Resident Return		Lodgement Activities	Applicant in correct location for lodgement
	159 - Provisional Resident Return		Lodgement Activities	Lodge Application
	160 - Business Owner (Provisional)	-	Post Lodgement	Send copy of lodged documents to client

2. Select a relevant Category

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

Progress Category	Progress List
Favourites	Admin File
Appeal	Prospect
Citizenship	
Compliance	
Other	
Skills Assessment	
Sponsorships & Nominations	
Visa Application	
×	
E More - + Add Show Retire	

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

	155
	157
	159
	160
🖾 More 🔻 🕂 Add	Show Retired 🔢 No
L	
More 🔻 🖶 Add	Show Retired

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.

Progress Category	Progress List	
avourites	Admin File	
Appeal	Prospect	
itizenship		
Compliance		
Other		
kills Assessment		
ponsorships & Nominations		
/isa Application		
	1	
	· · · ·	

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

Name of the Progre	ess List:		
My New Progress L	ist		
		Cancel	ОК

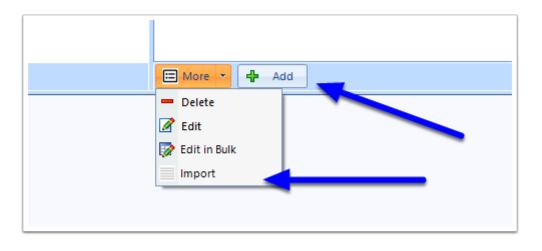
The new Progress List will appear and is now ready for you to add Progress Items.

🖕 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)

🖾 More 🔻 🕂 Add

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: <u>Progress Item Groups How do Progress Item Groups work</u>
- 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.

	Progress Item/Task:			
1)	_			
1	Туре:		Group:	
2	Default Comment:	*	3	· 3
4)				
-	Default Portal Instructions	(only available for	documents):	
				^
1				
				~
	Add to all lists	in this category		
			cel 🔚 Save and New	Save and Close

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

🔓 Add Progress Item	2
Progress Item/Task:	
Passport (Current)	
Type:	Group:
Document 🔹	Primary Applicant 🔹 💽
Default Comment:	
Default Portal Instructions (only available for	documents):
Provide the pages of your current passport and passport issue and expiry dates	showing your photo, personal details,
Add to all lists in this category	cel 🕞 Save and New

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.

🕂 Configure Progress Lists		_ = ×
Progress Category	Progress List	Progress Item
Favourites	457 - Temporary Work (Skilled)2	
Appeal	461 - New Zealand Citizen Family Relationship (Temporary)	
Citizenship	462 - Work and Holiday (Temporary)	
Compliance	476 - Skilled - Recognised Graduate	
Other	482 - Temporary Skill Shortage (Subsequent Entrant)	
Skills Assessment	482 - Temporary Skill Shortage	
Sponsorships & Nominations	482 - Temporary Skill Shortage (Subsequent Entrant)	
Visa Application	485 - Skilled - Graduate	
	485 - Temporary Graduate	
	489 - Skilled - Regional (Provisional)	
	491 - Skilled Work Regional (Provisional)	
	494 - Skilled Employer Sponsored Regional (Provisional)	
	500 - Student	2
	500 - Student (Subsequent Entrant)	
	590 - Student Guardian	
	600 - Visitor	
	601 - Electronic Travel Authority	
	602 - Medical Treatment	
	651 - eVisitor	
	676 - Tourist (Short Stay)	
	771 - Transit	
	773 - Border	
	785 - Temporary Protection	
	786 - Temporary (Humanitarian Concern)	
	790 - Safe Haven Enterprise	
	800 - Territorial Asylum 👻	
More - Add Show Retired No	E More V 4 Add	E More V 🕂 Add

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

		Import	
		Edit in Bulk	
		Edit	
		- Delete	
tired III No	More V Add	More Add	Close
	800 - Territorial Asylum .	×	
	790 - Safe Haven Enterprise		
	786 - Temporary (Humanitarian Concern)		
	785 - Temporary Protection		
	773 - Border		
	771 - Transit		
	676 - Tourist (Short Stay)		
	651 - eVisitor		
	602 - Medical Treatment		
	601 - Electronic Travel Authority	≡	
	600 - Visitor		
	590 - Student Guardian		
	500 - Student (Subsequent Entrant)		
	500 - Student		
	494 - Skilled Employer Sponsored Regional (Provisional)		
	491 - Skilled Work Regional (Provisional)		
	489 - Skilled - Regional (Provisional)		
	485 - Temporary Graduate		
	485 - Skilled - Graduate		
	482 - Temporary Skill Shortage (Subsequent Entrant)		
	482 - Temporary Skill Shortage		

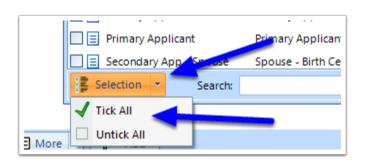
The *Import Progress Item* window will now appear. Using the Select **Category** and **Select List** dropdown, you can search for the existing template list that you want to import items from.

P 🕂 Import Progress Iten	n	x
t Select Category	Select List	•
- <u> Select Category</u>	Select List	
Selection 💌	Search:	🔀 Close 🕑 Insert

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

Group	Progress Item/Task	
		Default Comment
	Initial Contact from Prospect	
	Initial Consultation Assessment	
	VEVO Search	
	Confirmation of Instructions Letter sent	
	Fee Estimate	
-	Consumer Information Sheet Provided to Client	
	Cost Agreement - Migrant	
	Payment of Deposit	
	Client Questionnaire	
	Request Documents Required	
mary Applicant	Primary Applicant - Birth Certificate	
mary Applicant	Primary Applicant - Deed Poll or Name Change	
mary Applicant	Primary Applicant - Divorce Certificate	
mary Applicant	Primary Applicant - if Widowed - Death Certificate	
mary Applicant	Primary Applicant - Marriage Certificate (Previous)	
mary Applicant	Primary Applicant - Military Service and Discharge Records	
mary Applicant	Primary Applicant - Passport	
mary Applicant	Primary Applicant - Passport Photos	
condary App - Spouse	Spouse - Birth Certificate	
condary App - Spouse	Spouse - Deed Poll or Name Change	
condary App - Spouse	Spouse - Divorce Certificate	
condary App - Spouse	Spouse - Marriage Certificate (Previous)	
condary App - Spouse	Spouse - Passport	
		Close 🕑 Inse
	nary Applicant nary Applicant nary Applicant nary Applicant nary Applicant nary Applicant ondary Applicant ondary App - Spouse ondary App - Spouse ondary App - Spouse ondary App - Spouse	Fee Estimate Consumer Information Sheet Provided to Client Cost Agreement - Migrant Payment of Deposit Client Questionnaire Request Documents Required nary Applicant Primary Applicant - Birth Certificate nary Applicant Primary Applicant - Divorce Certificate nary Applicant Primary Applicant - Miritage Certificate (Previous) nary Applicant Primary Applicant - Maritage Certificate (Previous) nary Applicant Primary Applicant - Passport nary Applicant Primary Applicant - Passport Photos ondary App - Spouse Spouse - Divorce Certificate ondary App - Spouse Spouse - Marriage Certificate (Previous) ondary App - Spouse Spouse - Marriage Certificate ondary App - Spouse Spouse - Marriage Certificate (Previous) ondary App - Spouse Spouse - Passport

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**.

Primary Applicant Primary Applicant Primary Applicant Primary Applicant Secondary App - Spouse Selection Search:	Primary Applicant - Military Service and Discharge Records Primary Applicant - Passport Primary Applicant - Passport Photos Spouse - Birth Certificate Close Close Ins	
- Add	More Add	

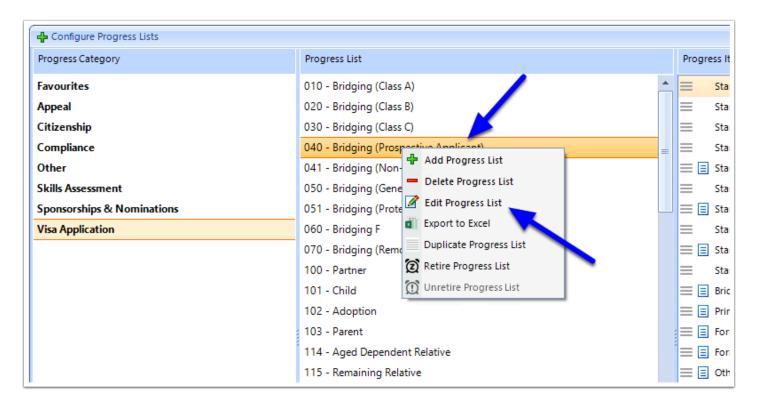
The items will now be imported in to your new list.

				= ×
Progress List		Progress Item		
489 - Skilled - Regional (Provisional)	*	=	Initial Contact from Prospect	4
491 - Skilled Work Regional (Provisional)		=	Initial Consultation Assessment	
494 - Skilled Employer Sponsored Regional (Provisional)		=	VEVO Search	
500 - Student		=	Confirmation of Instructions Letter sent	=
500 - Student (Subsequent Entrant)		≡∎	Fee Estimate	
590 - Student Guardian		=	Consumer Information Sheet Provided to Client	
600 - Visitor			Cost Agreement - Migrant	
601 - Electronic Travel Authority		=	Payment of Deposit	
602 - Medical Treatment			Client Questionnaire	
651 - eVisitor		=	Request Documents Required	
676 - Tourist (Short Stay)		📃 📃 Primary Applicant	Primary Applicant - Birth Certificate	
771 - Transit		😑 🗐 Primary Applicant	Primary Applicant - Deed Poll or Name Change	

Solution 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.

