Progress Items - How to add a Document and Tasks Checklist to a Matter (Pre Version 8.8.1.0)

The Progress Items function within Migration Manager allows a user to set a list of documents and activities/tasks in a matter and tack when these tasks/documents are required to be attended to or have been completed. Migration Manager has a built in set of Progress Items checklists available for most visa types that based on the Immigration Department's issued document checklists.

The information in the Progress tab also directly links into Snapshot which allows users to quickly and easily keep track of their caseload activity.

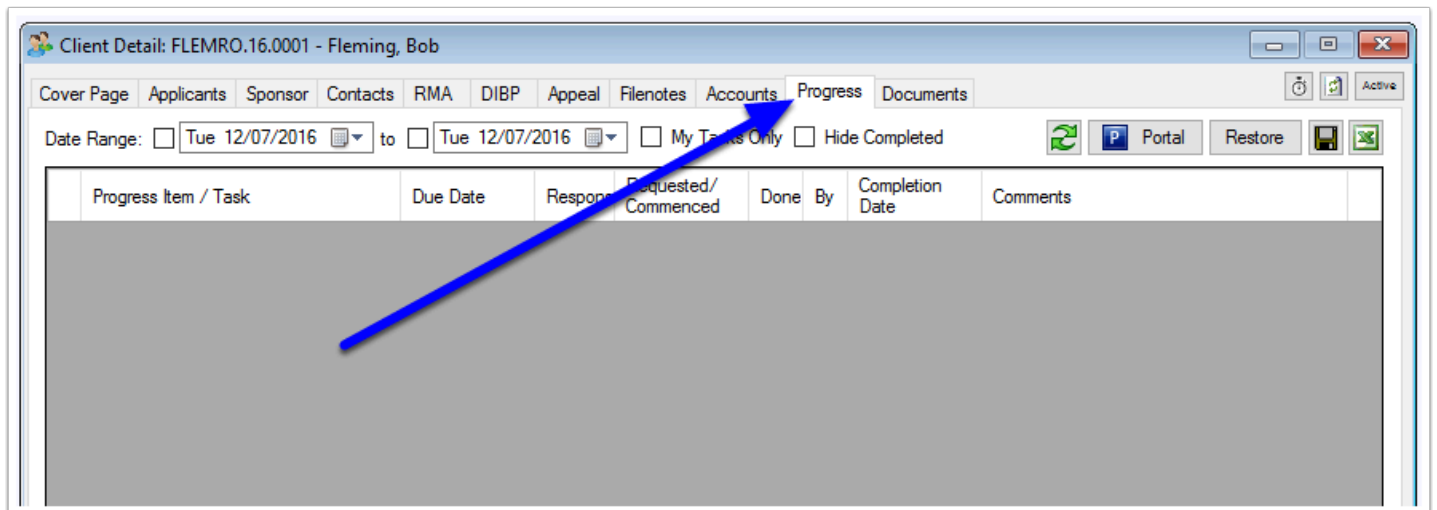This article covers how to add a basic checklist to a Matter.

1. Open the Matter

First click the '**Open**' button in the main menu to open the relevant Matter that you want to add a checklist to.
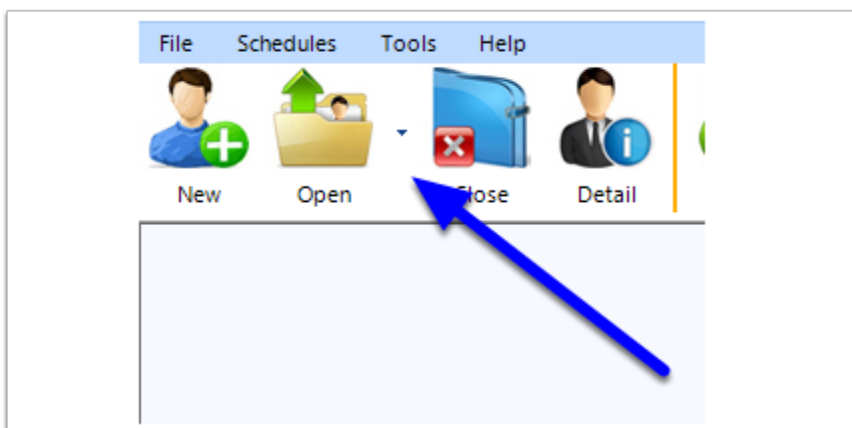

2. Go to the Progress Tab

Once the matter window opens, click the **Progress** tab. If this is the first time you have opened the *Progress* tab for this matter it will contain a blank screen.

Creating a Checklist from a Template

1. Right Click and select 'Add Progress Items' > 'From Template'

Now right click anywhere on the grey screen and from the context menu choose 'Add Progess Item(s)' and then select 'From Template'.
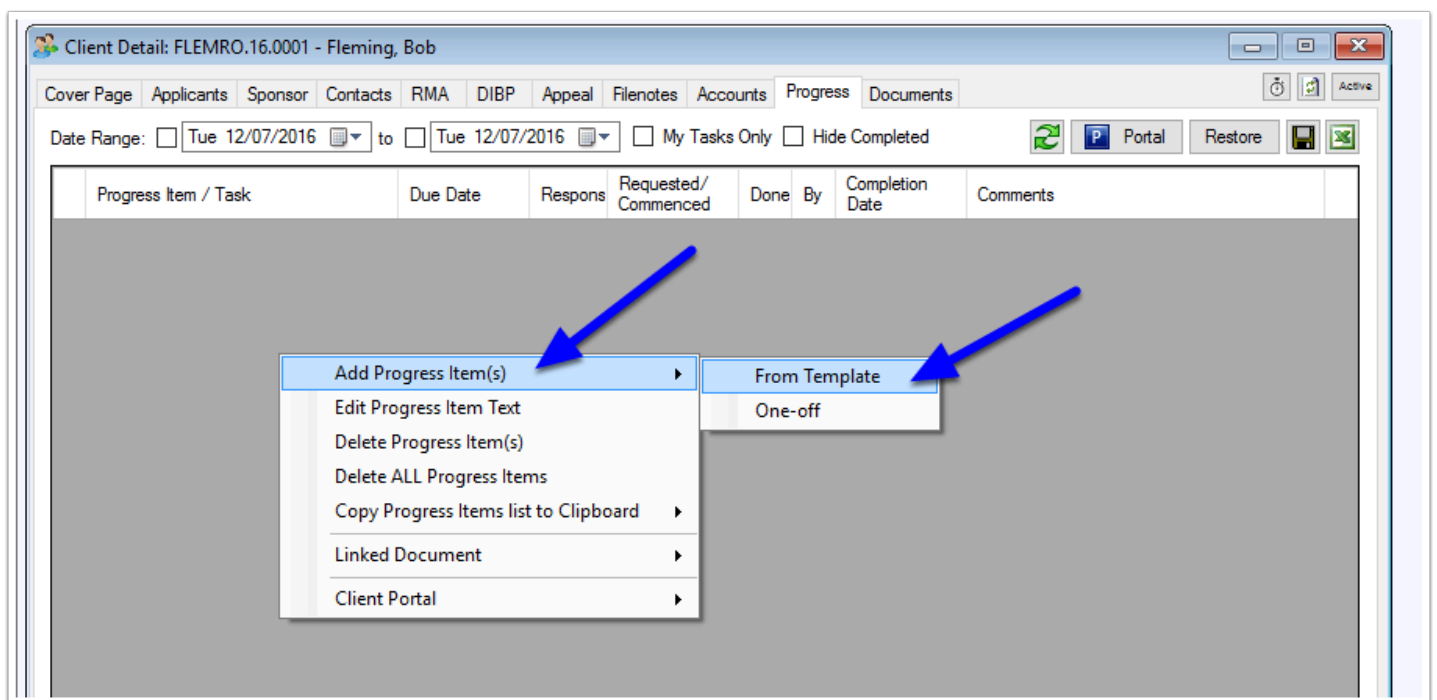
2. Select the Checklist to use

From the 'Matter Type' dropdown, select the checklist that you want to use. In this example we will be using the 'Short List'.

3. Untick the items you don't want in your checklist

The next step is for you to review the pre-set list of documents/tasks and determine if all of the pre-set items are relevant to the matter at hand. Those items which you determine are not relevant to the matter at hand should be unticked.

4. Click 'Commit'

Click the '**Commit**' button to add the selected items to this matters *Progress* tab.

5. Basic list created

The selected Progress Items from the template will now be added to this matters *Progress* Tab

Add a One-Off Progress Item

If you wish to just add a one-off Progress Item for this Matter (An Item that is not in a progress template and wont be used again), then you can add a One-Off Progress Item.
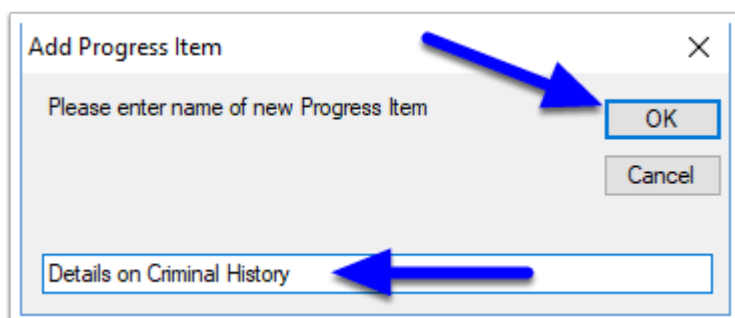
1. Right Click and select 'Add Progress Items' => 'One-Off'

Right click anywhere on the grey screen and from the context menu choose **Add Progress Item(s)** and then select **One-Off**.
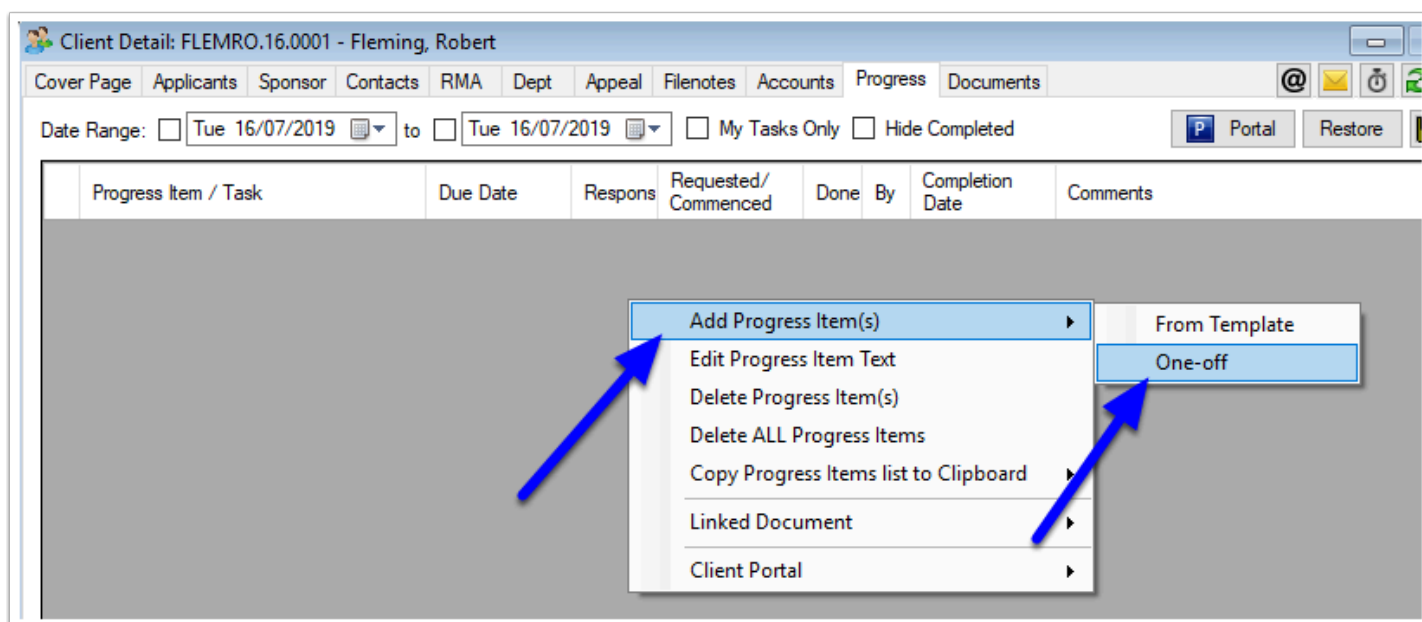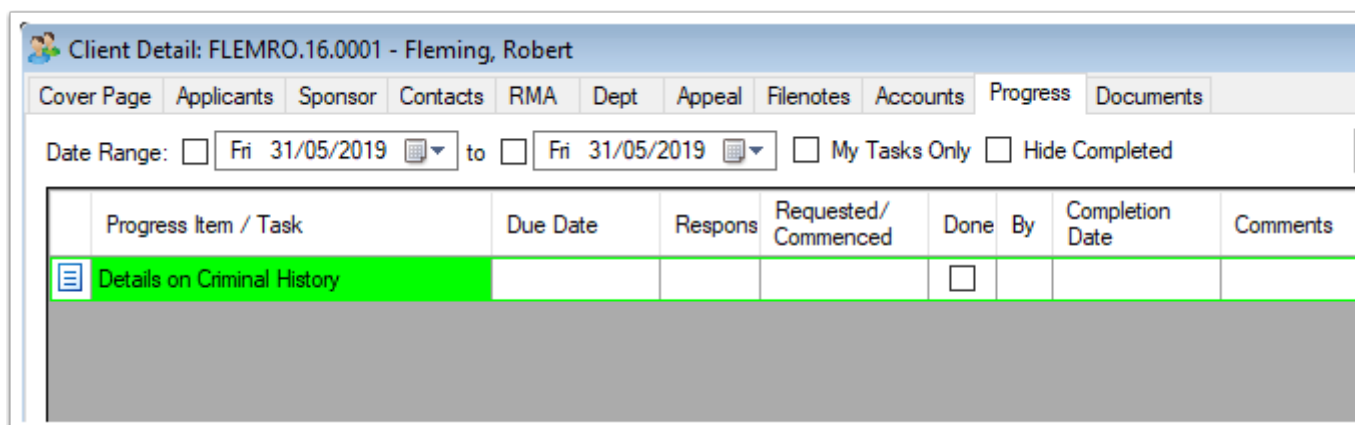
2. Enter the Description

When the *Add Progress Item* window appears, enter the **Description** of this Progress Item, then click **OK.**

3. The item will appear on the Progress list

4. Choose Progress Item Type

A Progress Item can either be a **Document** Item or an **Activity**. Example:

- A Document Item may be a Request for a Form, or a Form needing to be sent.
- An Activity Item is usually a task that needs to be completed.

Double click the **Document icon** on the left of the row to toggle between the item being a Document or an Activity.

(Blank means Activity, Document icon means Document)

> ℹ️ Once you have started adding items to the *Progress* tab of a Matter you can then do a number of different things with this list including:
>
> - Add additional items to a matters checklist
> - Tracking due and completed dates using the Progress list and Snapshot
> - Scan or Bookmark received items
> - Request documents via the Secure Client Portal