

# TRACKS & CHECKLISTS

GUIDE

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#### TRACKS / CHECKLISTS OVERVIEW

* **What are Tracks & Checklists?**
	+ Tracks and Checklists are features in the platform that are equivalent to the ‘Paths’ feature in the old system.
	+ As an Officer in your Group, you're able to create a list of requirements that can be assigned to Members in your Group and completed as time goes on, depending on what constitutes a completed task.
	+ A Track and/or Checklist allows Officers and users to keep tabs on a Member's progress completing that set of requirements.
* **What is the difference between a Track & a Checklist?**
	+ A Checklist is a list of different items that require completion. The progress of that completion is trackable by Members and Officers.
	+ A Track is just a series of Checklists with different items that require completion. Again, the progress of that completion is trackable by Members and Officers.
* **What is a Completion Rule?**
	+ A Completion Rule defines how a certain item in a Checklist is completed.
		- This can be through attending an event, submitting a survey, becoming a Group Officer and much more.

#### VARIOUS TRACKS / CHECKLISTS INSTRUCTIONS

* **Find Tracks/Checklists Assigned To You (As A Group Member)**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > My Tracks/Checklists [Left-Hand Menu].
* **Find Tracks/Checklists When You Want To Create One (As An Officer)**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists.
* **How To Create A Checklist**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 'Create Checklist' Button > Save > Create Items in Checklist > Save.
			* *Repeat these steps for as many Items as you're setting up in your Checklist.*
* **How To Create A Track**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 'Create Track' Button > Save > 'Add Checklist' Button > Save > Create Items in Checklist > Save.
			* *Repeat these steps for as many Checklists as you're setting up in your Track.*
* **How To Set Up A Completion Rule**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 'Edit' Click On Checklist Item > Click On 'Completion Rule' Button >Set Up Your Completion Rule To What Fits Your Requires > Save.
			* *Repeat these steps for every Completion Rule you set up in a Checklist.*
* **How To Assign A Track/Checklist To Members**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 'Assign' Next To Track/Checklist Name > Choose Assignees.
* **How To ‘Batch Assign’ A Track/Checklist To Members**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 3 Dots/Ellipses Next To Track/Checklist > Click 'Batch Assign' Button > Paste In Assignees' Emails.
* **How To Run A Completion Report**
	+ *Where To Find?*
		- Log Into [Custom platform link](https://www.campusgroups.com/home_login) > Group > More Tools [Left-Hand Menu] > Checklists > 3 Dots/Ellipses Next To Track/Checklist > Click 'Completion Report' Button > Select Users' Data You Want [On Next Screen] > Generate Report.

#### CAMPUSGROUPS ARTICLES

* [How To Create Checklists](%E2%97%8F%09https%3A/help.campusgroups.com/en/articles/2902419-how-to-create-checklists)
* [How To Create A Track](%E2%97%8F%09https%3A/help.campusgroups.com/en/articles/2902426-how-to-create-a-track)
* [How To Use The Completion Rule Feature Of A Checklist](%E2%97%8F%09https%3A/help.campusgroups.com/en/articles/2902432-how-to-use-the-completion-rule-feature-of-a-checklist)
* [How To Use The Batch Assign Feature To Assign Students To A Checklist Or A Track](%E2%97%8F%09https%3A/help.campusgroups.com/en/articles/2902429-how-to-use-the-batch-assign-feature-to-assign-students-to-a-checklist-or-a-track)

#### NEED MORE HELP?

1. Explore CampusGroups Resource Articles [http://help.campusgroups.com.](http://help.campusgroups.com/)
2. Click “?” on bottom right to access CampusGroups Support.
3. Email campus contacts (insert campus contact emails).