

# Get Ready Checklist

## WebAdMIT's Transfer Settings Process



Use the recommended checklist below to follow your progress through each Transfer Settings process.

Check off each step once it's completed.

| ✓ | WHEN                                   | WHAT  | WHERE                |
|---|--|---|----------------------|
|   | 4-6 months before the new cycle starts | Review your program(s) and delete any that you aren't using and don't want to be carried forward into the new cycle.  | Configuration Portal |
|   | 2-3 months before the new cycle starts | Look for an email alerting you that the Configuration Portal has opened.  | Configuration Portal |
|   | 2 months before the new cycle starts   | Review all templates created by you and other users, and delete/deactivate any that you are not using and do not want to be carried forward into the new cycle.   | WebAdMIT             |
|   | 2 months before the new cycle starts   | Instruct all users in WebAdMIT to change any Lists, Exports, PDF Manager templates, and Email Templates to be "visible by Everyone" if they would like to have these items carried forward into the new cycle.  | WebAdMIT             |
|   | 1-2 months before the new cycle starts | Review your program(s) and make any changes as needed. Submit your program(s) for review and alert your Account Manager and Client Success Manager.   | Configuration Portal |
|   | 1 month before the new cycle starts    | Decide who will initiate the transfer for your organization. This person will become the owner of the transferred Lists, Exports, and PDF Manager templates and will have editing and deletion abilities. Ensure that they are placed in a Work Group with the Configure Software permission set or in the WebAdMIT Administrators Work Group for the previous and new cycles. Also, ensure that they have access to all programs in the previous and new cycles. | WebAdMIT             |
|   | 1 month before the new cycle starts    | Decide who is the Institution Manager for your organization. This person can edit all users' accounts to ensure they are placed in the appropriate Work Groups and have the appropriate program(s) added to their account.  | WebAdMIT             |

|  |                                       |  |          |
|--|---------------------------------------|--|----------|
|  | Day of the new cycle start            | Look out for an email alerting you that the CAS application and WebAdMIT have opened.  | WebAdMIT |
|  | First week after the new cycle starts | Look for the Transfer Settings from Previous Setup panel on the Dashboard. Alert the individual who will be transferring your settings that this is available. | WebAdMIT |
|  | After the transfer has completed      | Check all features to ensure they carried forward correctly, and make edits as needed.   | WebAdMIT |