

STATE OF NORTH DAKOTA

**CAMPUS COMMUNITY
UPDATE CHECKLISTS
MANUAL AND AUTOMATED
TRAINING MANUAL**

VERSION 8.0

Disclaimer

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UPDATE CHECKLISTS – MANUAL AND AUTOMATED

OVERVIEW

You can update checklists several ways. You can update the status of checklist items **manually** or you can use **automated** processes to update checklists.

To run background processes and update checklists in batch (automatically), specify criteria and run either the Item Update — Automated or the Update Checklists — by Item process. You can use the 3C engine to update checklist items in batch, or automatically in real time, based on rules and events that you define.

NOTE: The 3C engine cannot update items that include organization and name IDs. You must update checklists for transcripts, test scores, and general material items either manually or by using the Item Update — Automated process.

You can run background processes and update checklists as needed.

NOTE: Users that update specific areas within the modules should have security to do so. Some users will only have access to 'inquire' and others will only be able to make modifications. Some users will have security access to do both modifications and inquiries.

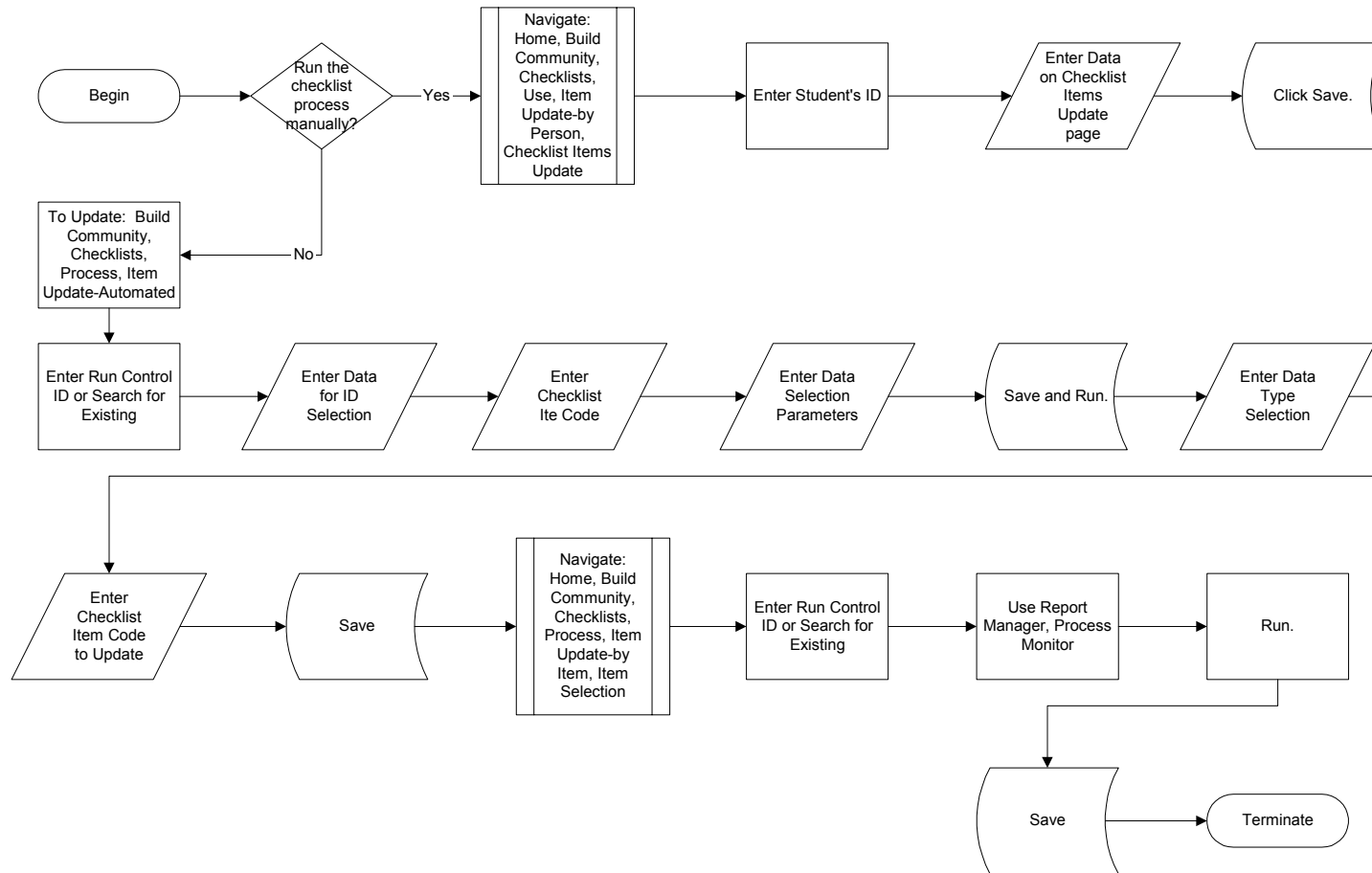
OBJECTIVES

After completing this section, you will be able to:

1. Update the status of checklist items manually.
2. Run the automated process to update the status of checklist items.
3. Specify the checklists item to update.

UPDATE CHECKLISTS – MANUAL AND AUTOMATED BUSINESS PROCESS FLOW

This business process updates the status of checklist items



WALKTHROUGH – CHECKLIST ITEM UPDATE – BY PERSON

1. **Navigation:** Home > Build Community > Checklists > Use > Item-Update-by Person > Checklist Items Update
2. The **Item Update – by Person, Find an Existing Value** page is displayed.

Item Update - by Person

Find an Existing Value

ID:

Sequence Number:

Administrative Function:

Checklist Code:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

3. **Find an Existing Value**
 - a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).
 - b. Click . A list of values that meet your search criteria will be displayed.
 - c. Click on the student you wish to update.

- The **Checklist Items Update** page is displayed.

Checklist Items Update

ID: 10001 ⊘

| Item | Seq | Function | Checklist | *Item Status | *Status Date |
|------------|-----|----------|------------------------------|--------------|---|
| SWT Form | 300 | FINA | RQL Verification Independent | Initiated | 10/31/1997 <input type="button" value="⌵"/> |
| Tax Return | 200 | FINA | RQL Verification Independent | Initiated | 10/31/1997 <input type="button" value="⌵"/> |
| Ver Wks I | 100 | FINA | RQL Verification Independent | Initiated | 10/31/1997 <input type="button" value="⌵"/> |

- The system displays the Item, Sequence Number, Function, and Checklist code and Checklist name from all the checklists assigned to the individual on the Checklist Management 1 page.
- Item Status:** Select the updated status of the checklist item from the drop list.
- Status Date:** When you update the status of a checklist item, the system automatically changes the status date to the system's current date. You can override this date.
- Click **SAVE** to commit your changes to the database.

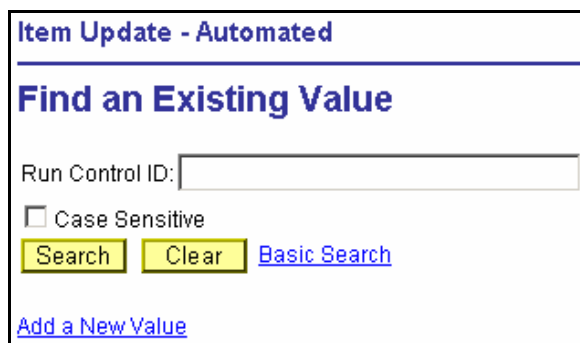
WALKTHROUGH – CHECKLIST ITEM UPDATE – AUTOMATED PROCESS

ITEM UPDATE - AUTOMATED

This process updates the items across all checklists in batch, and once set up, does not require manual intervention. It automatically checks the status indicator in each applicable area (test scores, transcripts, general materials) and when the process detects a status of complete, updates the specified checklist items.

9. **Navigation:** Build Community > Checklists > Process > Item Update – Automated > Checklist Item Update Parameters

10. **Item Update – Automated, Find an Existing Value** page is displayed.

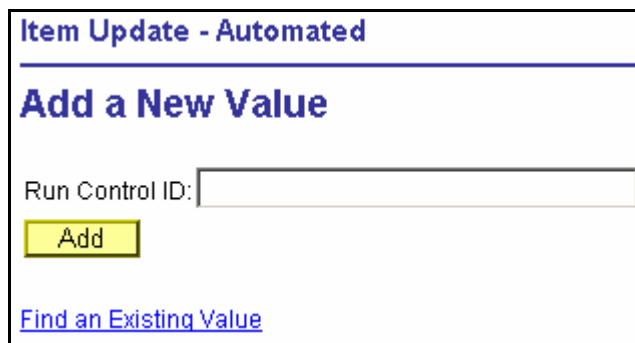


The screenshot shows a web interface titled "Item Update - Automated" with a sub-header "Find an Existing Value". It contains a text input field for "Run Control ID:", a checkbox for "Case Sensitive", and three buttons: "Search", "Clear", and "Basic Search". A blue link "Add a New Value" is located at the bottom left of the form area.

11. **Find an Existing Value**

- a. Enter an existing Run Control ID or click **Search**.
- b. A list of values that meet your search criteria will be displayed.
- c. Click on the ID that you wish to process.

12. **OR** select [Add a New Value](#).



The screenshot shows a web interface titled "Item Update - Automated" with a sub-header "Add a New Value". It contains a text input field for "Run Control ID:" and a yellow "Add" button. A blue link "Find an Existing Value" is located at the bottom left of the form area.

13. **ID:** Enter a new ID.

14. Click [Add](#).

15. The **Checklist Item Update Parameters** page is displayed.

ID SELECTION

1. **Process All IDs:** When selected, indicates that the process should update all eligible checklist items for all IDs in your system.
2. **ID:** The ID of the specific individual whose checklist item the process should update.

DATA TYPE SELECTION

Date Type Selection relates to logic in the process that provides a linkage to admissions records where the applicable data resides.

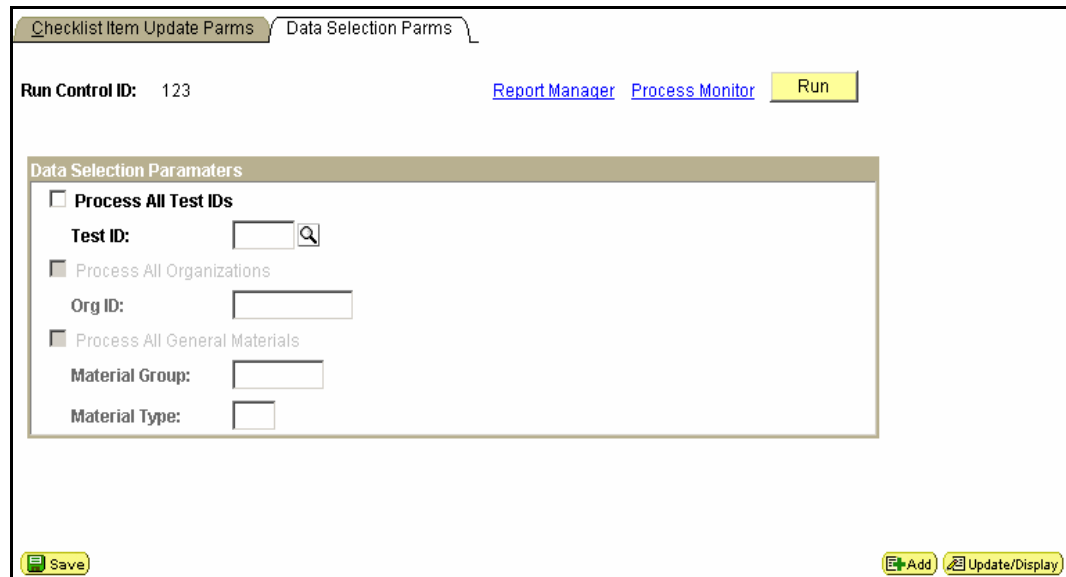
1. **Test Scores:** When selected, indicates that the process should evaluate test score data in PeopleSoft Recruiting and Admissions to update checklist items.
2. **Transcripts:** When selected, indicates that the process should evaluate transcript data in Recruiting and Admissions to update checklist items.
3. **General Materials:** When selected, indicates that the process should evaluate general materials data in PeopleSoft Recruiting and Admissions to update checklist items.

CHECKLIST ITEM SELECTION

1. **Checklist Item Code:** The code for the checklist item that the process should update for the specified individuals.

DATA SELECTION PARMS

1. Click on the **Data Selection Parms** tab.
2. The **Data Selection Parms** page is displayed.



Checklist Item Update Parms Data Selection Parms

Run Control ID: 123 [Report Manager](#) [Process Monitor](#) [Run](#)

Data Selection Parameters

Process All Test IDs
 Test ID: 🔍

Process All Organizations
 Org ID:

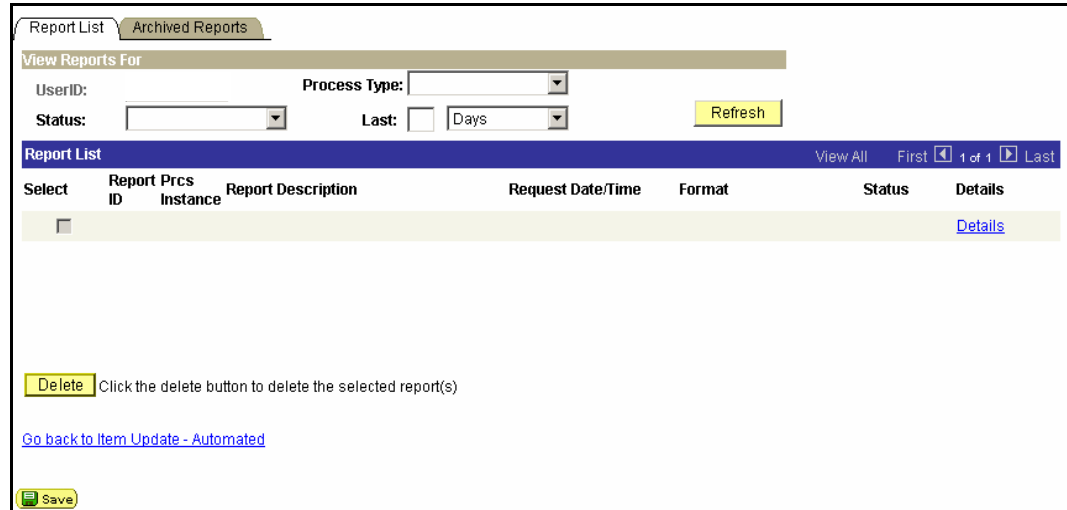
Process All General Materials
 Material Group:
 Material Type:

[Save](#) [Add](#) [Update/Display](#)

3. Only the data selection parameters associated with the data types selected on the Update Parameters page are available.
4. Click [Report Manager](#) to access the **Report List** page.

REPORT MANAGER

1. The **Report List** page is displayed.



Report List Archived Reports

View Reports For

UserID: Process Type:

Status: Last: Days Refresh

Report List View All First 1 of 1 Last

| Select | Report ID | Prcs Instance | Report Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|---------------|--------------------|-------------------|--------|--------|-------------------------|
| <input type="checkbox"/> | | | | | | | Details |

Delete Click the delete button to delete the selected report(s)

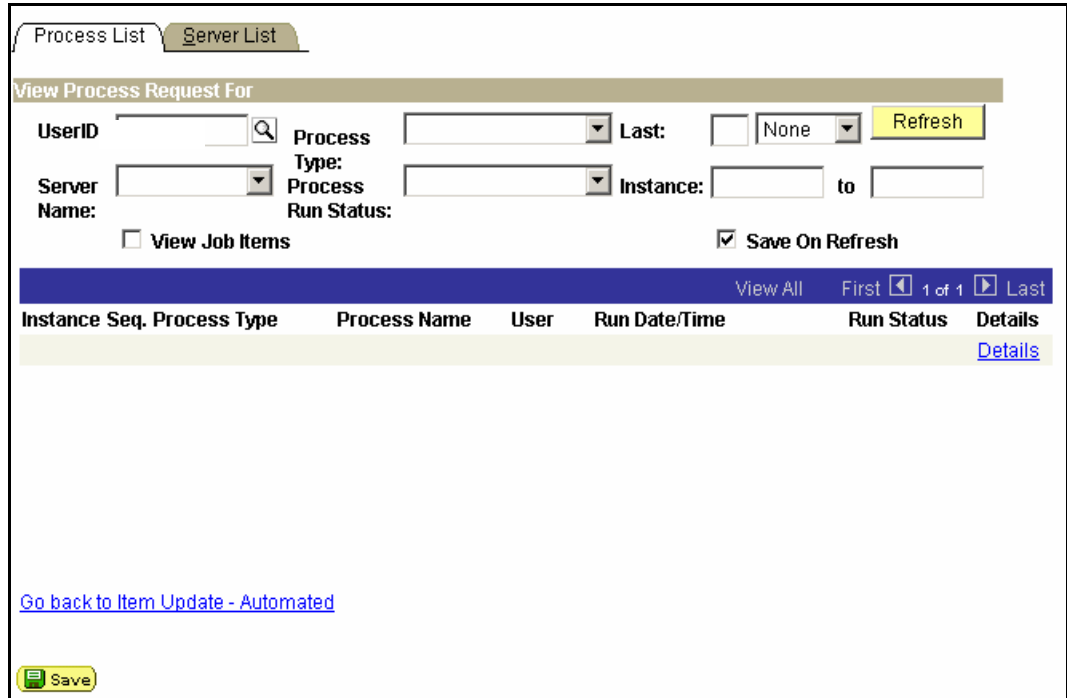
[Go back to Item Update - Automated](#)

Save

2. You can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
3. Click [Go back to Item Update - Automated](#) to return to the previous page.
4. Click [Process Monitor](#) to access the **Process List** page.

PROCESS MONITOR

1. The **Process List** page is displayed.



Process List **Server List**

View Process Request For

UserID Process Type: Last: None

Server Name: Process Name: Instance: to

View Job Items Save On Refresh

View All First 1 of 1 Last

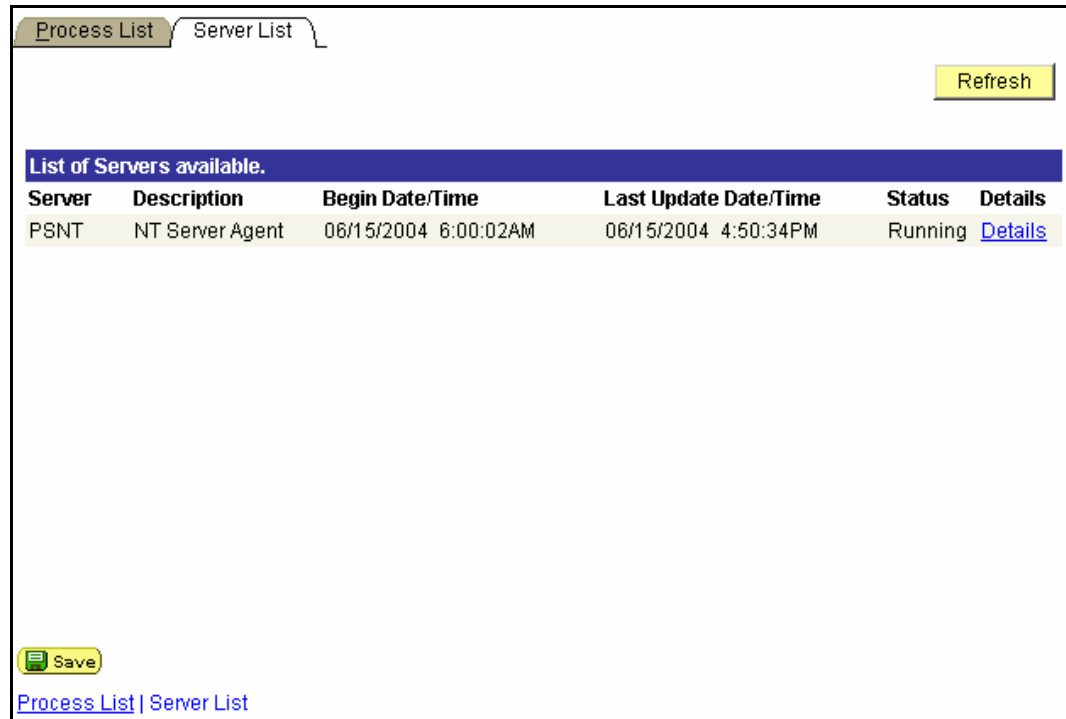
| Instance Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Details |
|-------------------------|--------------|--------------|------|---------------|------------|---------|
| Details | | | | | | |

[Go back to Item Update - Automated](#)

2. You can view the status of submitted process requests.
3. Click the **Server List** tab to access the Server List page.

SERVER LIST

1. The **Server List** page is displayed.



The screenshot shows a web interface with two tabs: "Process List" and "Server List". The "Server List" tab is active. In the top right corner, there is a yellow "Refresh" button. Below the tabs, a blue header reads "List of Servers available." followed by a table. The table has six columns: "Server", "Description", "Begin Date/Time", "Last Update Date/Time", "Status", and "Details". One row is visible with the following data: "PSNT", "NT Server Agent", "06/15/2004 6:00:02AM", "06/15/2004 4:50:34PM", "Running", and a blue link "Details". In the bottom left corner, there is a green "Save" button and a breadcrumb trail "Process List | Server List".

| Server | Description | Begin Date/Time | Last Update Date/Time | Status | Details |
|--------|-----------------|----------------------|-----------------------|---------|-------------------------|
| PSNT | NT Server Agent | 06/15/2004 6:00:02AM | 06/15/2004 4:50:34PM | Running | Details |

2. You can view the List of Servers available.
3. Click [Process List](#) to return to the **Process List** page.
4. Click [Go back to Item Update - Automated](#) to return to **Item Update - Automated** page.

RUN

1. Click **Run** to access the **Process Scheduler Request** page.

Process Scheduler Request

User ID: _____ Run Control ID: 123

Server Name: Run Date:

Recurrence: Run Time:

Time Zone: **Reset to Current Date/Time**

| Process List | | | | | |
|-------------------------------------|-----------------------|--------------|--------------|--------------------------|--------------------------|
| Select | Description | Process Name | Process Type | *Type | *Format |
| <input checked="" type="checkbox"/> | Checklist Item Update | CCCHKLER | SQR Report | Web <input type="text"/> | PDF <input type="text"/> |

2. You can specify where a process or job runs and the process output format.

WALKTHROUGH – CHECKLIST ITEM UPDATE – BY ITEM

1. **Navigation:** Build Community > Checklists > Process > Item Update – by Item
2. **Item Update – by item, Find an Existing Value** page is displayed.

Item Update - by Item

Find an Existing Value

Run Control ID:

Case Sensitive

[Basic Search](#)

[Add a New Value](#)

3. **Find an Existing Value**
 - a. Enter an existing Run Control ID or click .
 - b. A list of values that meet your search criteria will be displayed.
 - c. Click on the ID that you wish to process.
4. **OR** click [Add a New Value](#) .

Item Update - by Item

Add a New Value

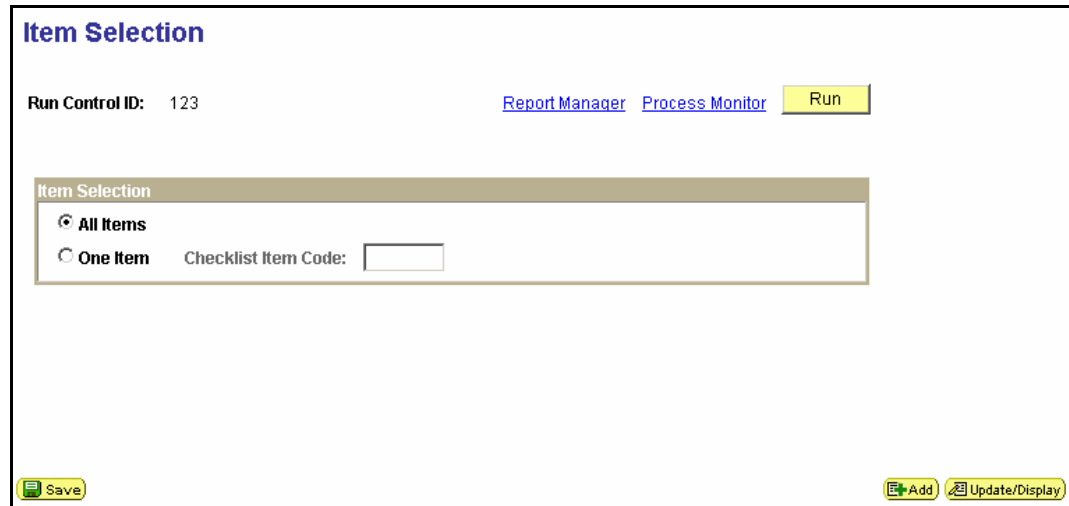
Run Control ID:

[Find an Existing Value](#)

5. **ID:** Enter a new ID.
6. Click .

ITEM SELECTION

1. The **Item Selection** page is displayed.

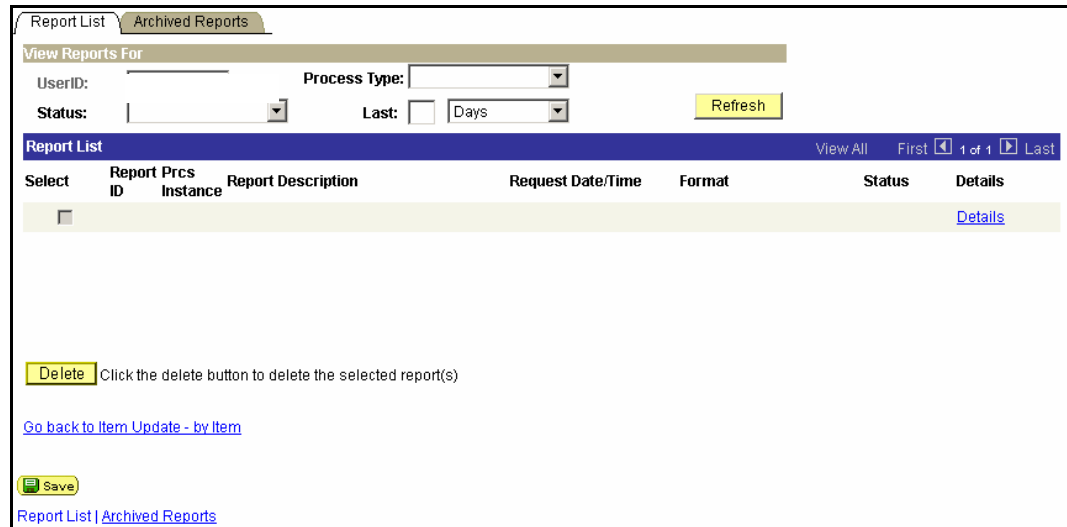


The screenshot shows the 'Item Selection' page. At the top left, it says 'Run Control ID: 123'. To the right are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below this is a section titled 'Item Selection' with two radio buttons: 'All Items' (which is selected) and 'One Item'. Next to 'One Item' is a text input field labeled 'Checklist Item Code:'. At the bottom left is a yellow 'Save' button, and at the bottom right are yellow buttons for 'Add' and 'Update/Display'.

2. **All Items:** When selected, indicates that the process should update all checklist items specified on the Item Update – by Item table to a status of *Complete*.
3. **One Item:** When selected, indicates that the process should update one specific checklist item to a status of *Complete*. You must specify the checklist item to be updated.
4. **Checklist Item Code:** The code for the specific checklist item to be updated.
5. Click [Report Manager](#) to access the **Report List** page.

REPORT MANAGER

1. The **Report List** page is displayed.



Report List Archived Reports

View Reports For

UserID: Process Type:

Status: Last: Days Refresh

Report List View All First 1 of 1 Last

| Select | Report ID | Pracs Instance | Report Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|----------------|--------------------|-------------------|--------|--------|-------------------------|
| <input type="checkbox"/> | | | | | | | Details |

Delete Click the delete button to delete the selected report(s)

[Go back to Item Update - by Item](#)

Save

Report List | Archived Reports

2. You can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
3. Click [Go back to Item Update - by Item](#) to return to the previous page.
4. Click [Process Monitor](#) to access the **Process List** page.

PROCESS MONITOR

1. The **Process List** page is displayed.

Process List
Server List

View Process Request For

UserID:

Server Name:

Process Type:

Process Run Status:

Last: None

Instance: to

View Job Items

Save On Refresh

View All First 1 of 1 Last

| Instance Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Details |
|---------------|--------------|--------------|------|---------------|------------|-------------------------|
| | | | | | | Details |

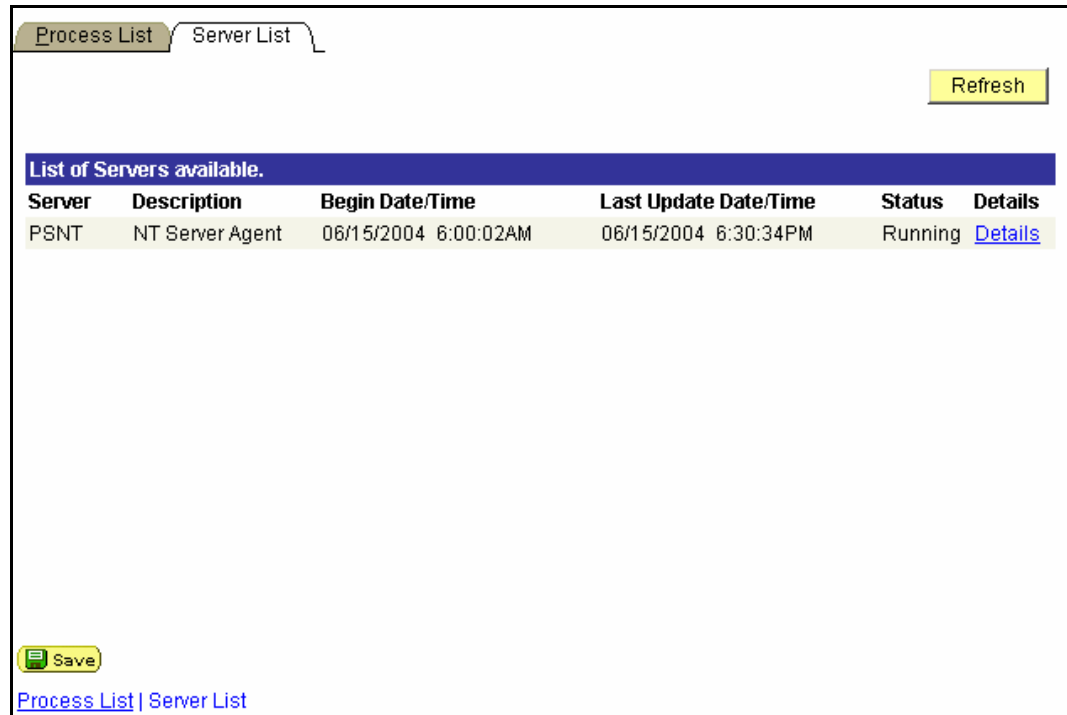
[Go back to Item Update - by Item](#)

[Process List](#) | [Server List](#)

2. You can view the status of submitted process requests.
3. Click the **Server List** tab to access the Server List page.

SERVER LIST

1. The **Server List** page is displayed.



The screenshot shows a web interface with two tabs: "Process List" and "Server List". A "Refresh" button is in the top right. Below the tabs is a blue header "List of Servers available." followed by a table:

| Server | Description | Begin Date/Time | Last Update Date/Time | Status | Details |
|--------|-----------------|----------------------|-----------------------|---------|-------------------------|
| PSNT | NT Server Agent | 06/15/2004 6:00:02AM | 06/15/2004 6:30:34PM | Running | Details |

At the bottom left, there is a "Save" button and a breadcrumb link "Process List | Server List".

2. You can view the List of Servers available.
3. Click [Process List](#) to return to the **Process List** page.
4. Click [Go back to Item Update - by Item](#) to return to **Item Update - Automated** page.

RUN

1. Click **Run** to access the **Process Scheduler Request** page.

Process Scheduler Request

User ID: _____ Run Control ID: 123

Server Name: Run Date:

Recurrence: Run Time:

Time Zone: **Reset to Current Date/Time**

Process List

| Select | Description | Process Name | Process Type | *Type | *Format |
|-------------------------------------|-----------------------|--------------|--------------|-------|---------|
| <input checked="" type="checkbox"/> | Checklist Item Update | CCCHKLER | SQR Report | Web | PDF |

OK **Cancel**

2. You can specify where a process or job runs and the process output format.