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

1. Run the checklist process manually?
   - Yes: Enter Student's ID
   - No: Enter Run Control ID or Search for Existing

2. Enter Data for ID Selection
3. Enter Checklist Item Code
4. Enter Data Selection Parameters
5. Save and Run

6. Save

7. Enter Run Control ID or Search for Existing
8. Navigate: Home, Build Community, Checklists, Process, Item Update-by Person, Checklist Items Update

9. Enter Data on Checklist Items Update page
10. Click Save.

11. Use Report Manager, Process Monitor
12. Run.

13. Save
14. Terminate
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.

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 **Search**. A list of values that meet your search criteria will be displayed.

   c. Click on the student you wish to update.
4. The **Checklist Items Update** page is displayed.

![Checklist Items Update Table]

5. 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.

6. **Item Status**: Select the updated status of the checklist item from the drop list.

7. **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.

8. 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.

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**.

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 SelectionParms tab.
2. The Data SelectionParms page is displayed.

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.

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 webpage](image)

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.

<table>
<thead>
<tr>
<th>Server</th>
<th>Description</th>
<th>Begin Date/Time</th>
<th>Last Update Date/Time</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSNT</td>
<td>NT Server Agent</td>
<td>06/15/2004 00:00:00AM</td>
<td>06/15/2004 04:50:34PM</td>
<td>Running</td>
<td>Details</td>
</tr>
</tbody>
</table>

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.

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.

   **Find an Existing Value**
   - Run Control ID: 
   - [Case Sensitive]
   - [Search] [Clear] [Basic Search] [Add a New Value]

3. **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.

4. **OR** click [Add a New Value].

   **Add a New Value**
   - Run Control ID:
   - [Add]
   - [Find an Existing Value]

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

6. Click [Add].
ITEM SELECTION

1. The Item Selection page is displayed.

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 Page]

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.

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.

```
[Image showing a table of servers]
```

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 Form]

   1. **Server Name**: 
   2. **Run Date**: 08/15/2004
   3. **Run Time**: 8:47 33PM
   4. **Recurrence**: 
   5. **Time Zone**: 

   ![Process List Table]

<table>
<thead>
<tr>
<th>Select</th>
<th>Description</th>
<th>Process Name</th>
<th>Process Type</th>
<th>Type</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Checklist Item Update</td>
<td>COCCHLIER</td>
<td>90F Report</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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