

Managing Checklists and Service Indicators via File Transfer

There are many different checklist items for the various modules. Changing the status or completing a checklist can be done several ways (manually changing the status, API updates, ImageNow updates or file transfer). This guide will demonstrate how to manage a checklist via upload files.

The same process can be used for service indicators.

In this example, we will resolve an Admissions checklist item, by uploading a file into Campus Solutions. For this example, we will upload a list of Student IDs for incoming students who attended Summer Bridge.

1. Prepare the data file for upload, using the correct naming convention and document type. In most cases, it will be a list of student ids who have fulfilled the task assigned (e.g. attended Summer Bridge).

The data file needs to be saved as a .csv file. The convention is to name the file the same as the checklist item or service indicator. A list of checklist codes used by Admissions is in the Appendix.

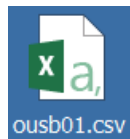
Name= checklistcode.csv

Examples: Checklist item code "ousb01" would have a corresponding file name: ousb01.csv

Service Indicator "ROI" would have a corresponding file name: ROI.csv

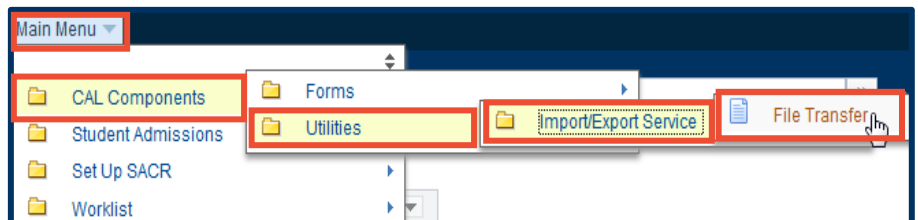
2. Do not add header columns and make sure to not add any extra spaces after the ID#. Save the file as a comma delineated file (.csv)

Note: You may need to disable your browser's pop-up blocker for Campus Solutions to be able to complete this process.



3. Log into **Campus Solutions** <https://bcsint.is.berkeley.edu/>.

From the Main Menu, navigate to:
Cal Components > Utilities >
Import/Export Service >
File Transfer.



- From the **Process** drop down list, choose **Checklist Complete Copy**. Then from the **Source** drop down list, select **Berkeley Campus Solutions**.

File Transfer

*Process: Checklist Complete Copy

*Source: Berkeley Campus Solutions

Source

FTP Server
 Application Server
 Process Scheduler
 Local Nbr: 1
 Folder: Inbound Outbound

Destination

FTP Server
 Application Server
 Process Scheduler
 Local
 Folder: Inbound Outbound
 /bcs/tmp/tst/app/bcs/chklist/in/

Don't forget to choose Save before leaving

Save

Transfer Files | Transfer Files Log

- Under **Source**, “**Local**” and “**Inbound**” will default (after choosing your **Source** from the drop list above). Change the **Number** field only if you will need to transfer more than one file at once.

File Transfer

*Process: Checklist Complete Copy

*Source: Berkeley Campus Solutions

Source

FTP Server
 Application Server
 Process Scheduler
 Local Nbr: 1
 Folder: Inbound Outbound

Destination

FTP Server
 Application Server
 Process Scheduler
 Local
 Folder: Inbound Outbound
 /bcs/tmp/tst/app/bcs/chklist/in/

Don't forget to choose Save before leaving

Save

Transfer Files | Transfer Files Log

- Under **Destination**, choose “**Process Scheduler**” and “**Inbound**.”

File Transfer

*Process: Checklist Complete Copy

*Source: Berkeley Campus Solutions

Source

FTP Server
 Application Server
 Process Scheduler
 Local Nbr: 1
 Folder: Inbound Outbound

Destination

FTP Server
 Application Server
 Process Scheduler
 Local
 Folder: Inbound Outbound
 /bcs/tmp/tst/app/bcs/chklist/in/

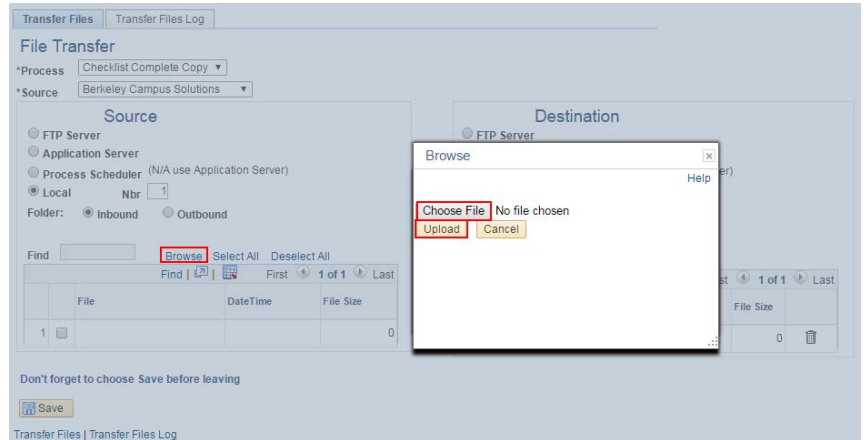
Don't forget to choose Save before leaving

Save

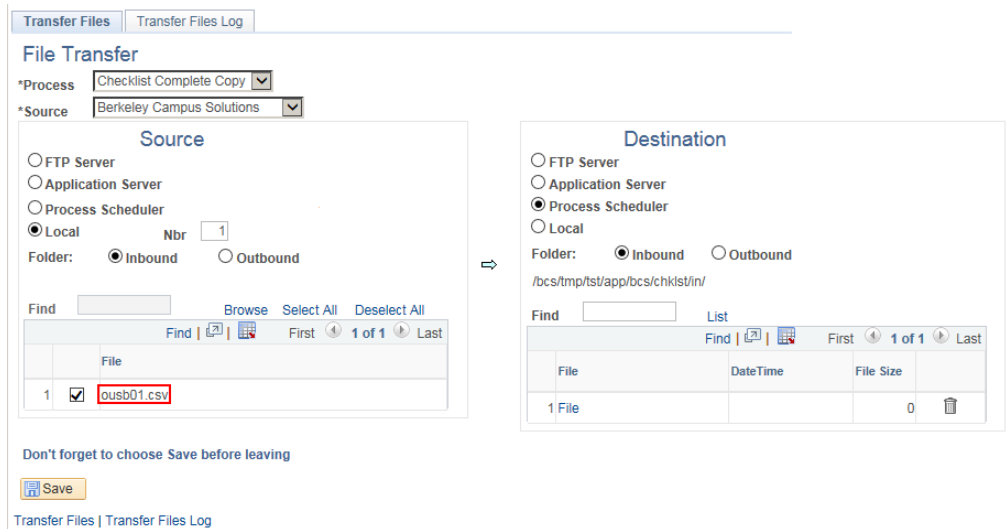
Transfer Files | Transfer Files Log

- Back at the Source section, click the Browse link. A pop-up window will appear.

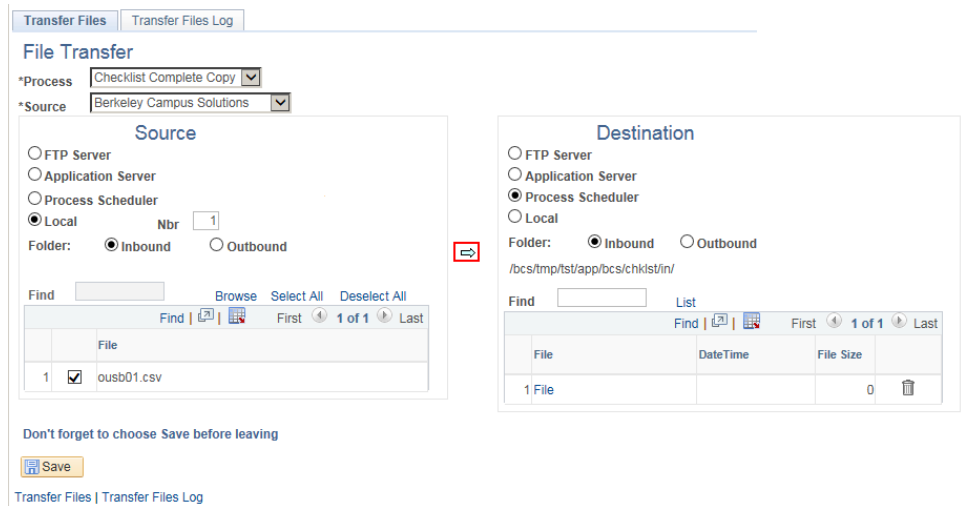
Click the **“Choose File”** button to choose the appropriate .csv file. Then click the **“Upload”** button.



- The file name will appear, listed under Source.



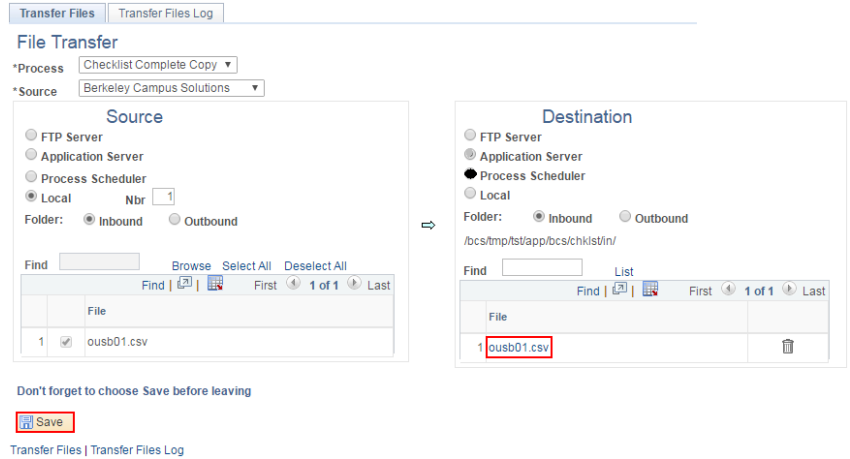
- Click the blue arrow to move your Source file to the Destination Process Scheduler.



10. Your file should now be listed under Destination.

Click the **Save** button at the bottom of the page to save the upload/transfer.

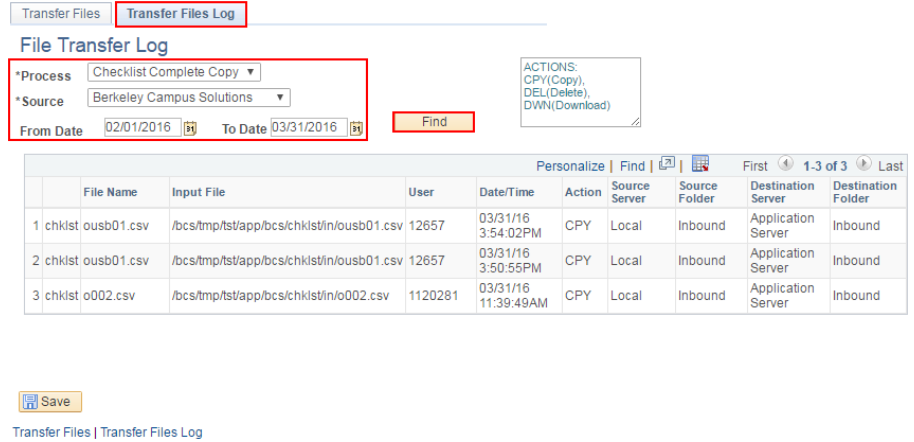
An update process runs once a day, so depending on the timing of the upload, the checklist in CalCentral will show to the student as **“Completed”** within a day or less.



11. To confirm the file has been successfully transferred, you can click the **Transfer Files Log** at the top of the page.

Choose the same **Process** and **Source** as you did for the file transfer, and adjust the date range, if desired.

Click the **Find** button to see files transferred within the date range.



Appendix:

List of Checklist Item Codes that can be resolved with a File Upload

| <u>Checklist Name</u> | <u>Checklist Item Code</u> |
|------------------------------|----------------------------|
| Summer Bridge Enrollment | OUSB01 |
| Prepare for CNR Advising | OCNRP1 |
| Prepare for COE Advising | OCOEP1 |
| Prepare for CoC Advising | OCOCP1 |
| Prepare for CoC Advising | OCOCP2 |
| Prepare for FPF Advising | OFFPAD |
| Attend “Bear Pact” | OBRPAC |
| Attend “Bear Pact” | OBRPC1 |
| Connect to Campus Department | OLTSVR |
| Immunizations | OIMM01 |

| | |
|----------------------------|-------------------|
| TB Risk Questionnaire | OTB01 |
| Prepare for CED Advising | OCEDP1 |
| Law Transcripts | ALTRN1 |
| Sexual Harassment training | OTHK01- online |
| Sexual Harassment training | OTHK02- online |
| Sexual Harassment training | OTHK03- in person |

If you are done uploading files, use the menu to navigate to a new page or click **Sign Out**. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.

Support

For questions or assistance, please contact SIS Support:

- Call **510-664-9000** (press option 6 to reach SIS support)
- Email: sishelp@berkeley.edu