# 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.

- 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).
- Do <u>not</u> 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 <u>https://bcsint.is.berkeley.edu/</u>.

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





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

5. 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.

6. Under Destination, choose "Process Scheduler" and "Inbound."

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🔚 Save Transfer Files | Transfer Files Log 7. 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.

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8. The file name will appear, listed under Source.

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

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Berkeley Student Information Systems

**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.

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3	chklst	o002.csv	/bcs/tmp/tst/app/bcs/chklst/in/o002.csv	1120281	03/31/16 11:39:49AM	CPY	Local	Inbound	Application Server	Inbound		

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Transfer Files | Transfer Files Log

## Appendix:

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

Checklist Name	Checklist Item Code
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	OFPFAD
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 •