

Managing Checklists 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.

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.

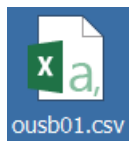
1. Prepare the data file for upload, using the correct naming convention and document type. In most cases, it will be a list of student ids who have fulfilled the task assigned (e.g. attended Summer Bridge). Do not add header columns and make sure to not add any extra spaces after the ID#. Save the file 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.

The data file needs to be saved as a .csv file. The naming convention is to name the file the same as the checklist item code. A list of codes is in the Appendix.

Name= checklistcode.csv

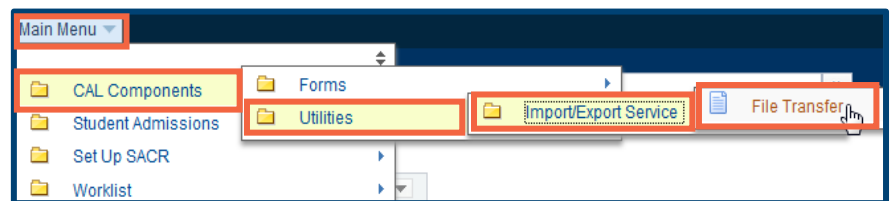
Example: Checklist code “ousbo1” should have a corresponding file name ousbo1.csv



2. 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**.

Transfer Files | Transfer Files Log

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

Find: [] Browse Select All Deselect All

File	DateTime	File Size
1		0

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.

Transfer Files | Transfer Files Log

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

Find: [] Browse Select All Deselect All

File	DateTime	File Size
1		0

Don't forget to choose Save before leaving

[Save](#)

Transfer Files | Transfer Files Log

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

Transfer Files | Transfer Files Log

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

Find: [] Browse Select All Deselect All

File	DateTime	File Size
1		0

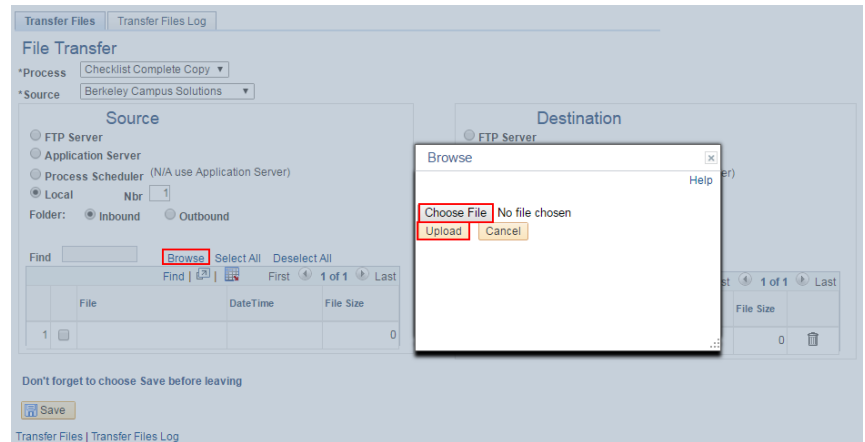
Don't forget to choose Save before leaving

[Save](#)

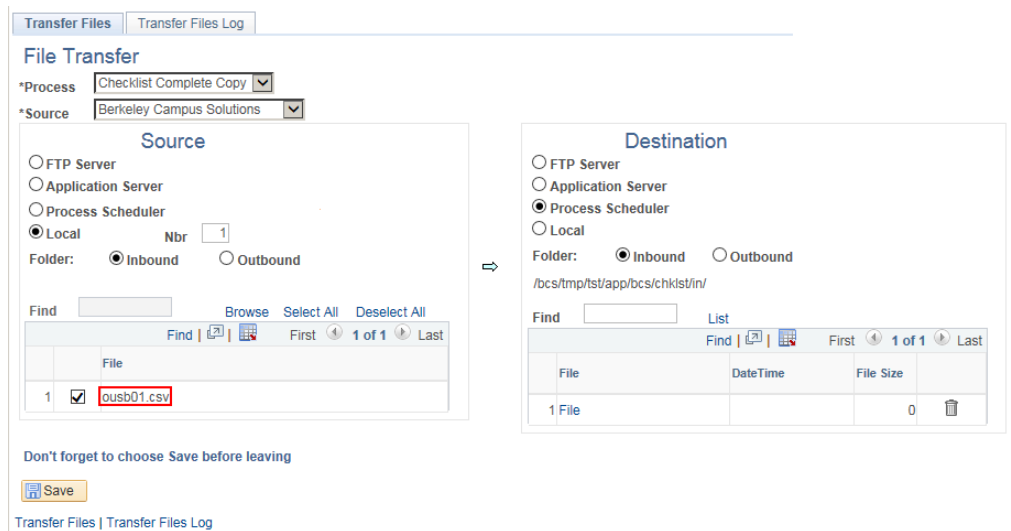
Transfer Files | Transfer Files Log

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

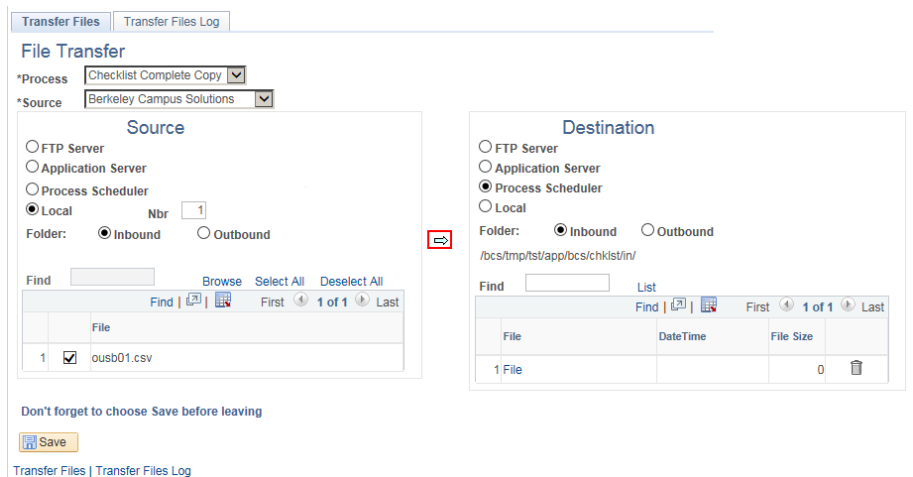
Click the “**Choose File**” button to choose the appropriate .csv file.
Then click the “**Upload**” button.



7. The file name will appear, listed under **Source**.



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



9. Your file should now be listed under **Destination**.

Click the **Save** button at the bottom of the page to save this 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.

10. 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.

	File Name	Input File	User	Date/Time	Action	Source Server	Source Folder	Destination Server	Destination Folder
1	chklist ousb01.csv	/bcs/tmp/tst/app/bcs/chklist/in/ousb01.csv	12657	03/31/16 3:54:02PM	CPY	Local	Inbound	Application Server	Inbound
2	chklist ousb01.csv	/bcs/tmp/tst/app/bcs/chklist/in/ousb01.csv	12657	03/31/16 3:50:55PM	CPY	Local	Inbound	Application Server	Inbound
3	chklist o002.csv	/bcs/tmp/tst/app/bcs/chklist/in/o002.csv	1120281	03/31/16 11:39:49AM	CPY	Local	Inbound	Application Server	Inbound

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	OCOC1P1
Prepare for CoC Advising	OCOC2P1
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

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 Campus Shared Services IT.:

- Call **510-664-9000** (press **option 6** to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident