

Managing Checklists and Service Indicators via File Transfer

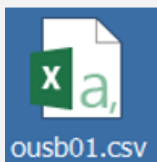
There are many different checklist items for the various modules. Changing the status or completing a checklist can be done in several ways (manually changing the status, API updates, ImageNow updates, or file transfer). This guide will demonstrate how to manage a checklist via upload files.

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

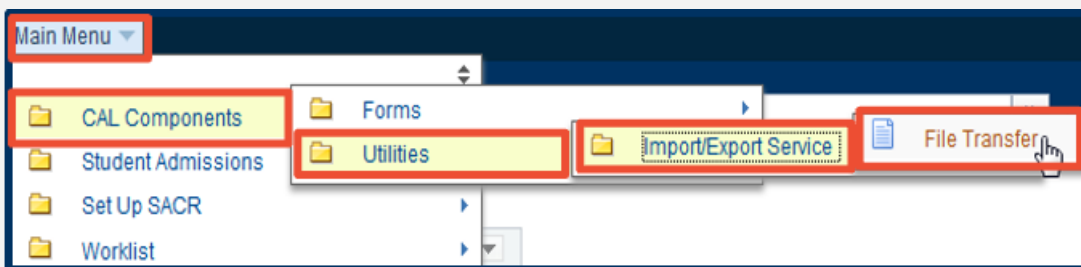
Note: You may need to disable your browser's pop-up blocker for Campus Solutions to be able to complete this process.



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

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



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

The screenshot shows the 'File Transfer' configuration page. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'CAL Components', 'Utilities', 'Import/Export Service', and 'File Transfer'. Below the navigation bar, there is a search bar and an 'Advanced Search' link. The main content area has two tabs: 'Transfer Files' and 'Transfer Files Log'. The 'Transfer Files' tab is active. Below the tabs, there are two dropdown menus: '*Process' and '*Source'. The '*Process' dropdown is set to 'Checklist Complete Copy' and the '*Source' dropdown is set to 'Berkeley Campus Solutions'. Below these dropdowns, there are two sections: 'Source' and 'Destination'. The 'Source' section has radio buttons for 'FTP Server', 'Application Server', 'Process Scheduler', and 'Local'. The 'Local' option is selected. There is a 'Folder' field with 'Inbound' and 'Outbound' radio buttons. The 'Destination' section has radio buttons for 'FTP Server', 'Application Server', 'Process Scheduler', and 'Local'. The 'Process Scheduler' option is selected. There is a 'Folder' field with 'Inbound' and 'Outbound' radio buttons. Below the 'Source' and 'Destination' sections, there are two tables. The 'Source' table has columns 'File', 'DateTime', and 'File Size'. The 'Destination' table has columns 'File', 'DateTime', and 'File Size'. At the bottom, there is a 'Save' button and a message 'Don't forget to choose Save before leaving'.

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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.

The screenshot shows the 'File Transfer' window with the 'Source' section highlighted by a red box. The 'Process' dropdown is set to 'Checklist Complete Copy' and the 'Source' dropdown is set to 'Berkeley Campus Solutions'. In the 'Source' section, the 'Local' radio button is selected, and the 'Nbr' field is set to '1'. The 'Folder' section has 'Inbound' selected. Below this, there are 'Find', 'Browse', 'Select All', and 'Deselect All' buttons, followed by a table with columns 'File', 'DateTime', and 'File Size'. The table shows one file with a size of 0. At the bottom, there is a 'Save' button and a reminder to 'Don't forget to choose Save before leaving'.

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

Find Browse Select All Deselect All

Find | First 1 of 1 Last

File	DateTime	File Size
1		0

Don't forget to choose Save before leaving

Save

Transfer Files | Transfer Files Log

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

The screenshot shows the 'File Transfer' window with the 'Destination' section highlighted by a red box. The 'Process' dropdown is set to 'Checklist Complete Copy' and the 'Source' dropdown is set to 'Berkeley Campus Solutions'. In the 'Destination' section, the 'Process Scheduler' radio button is selected, and the 'Folder' section has 'Inbound' selected. Below this, there are 'Find', 'Browse', 'Select All', and 'Deselect All' buttons, followed by a table with columns 'File', 'DateTime', and 'File Size'. The table shows one file with a size of 0. At the bottom, there is a 'Save' button and a reminder to 'Don't forget to choose Save before leaving'.

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

Find Browse Select All Deselect All

Find | First 1 of 1 Last

File	DateTime	File Size
1		0

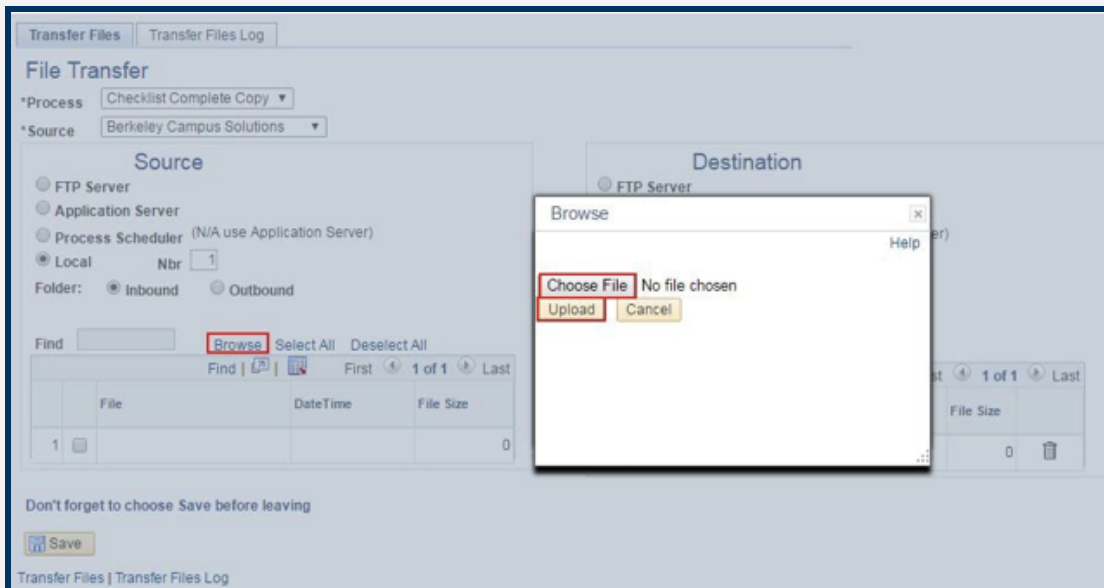
Don't forget to choose Save before leaving

Save

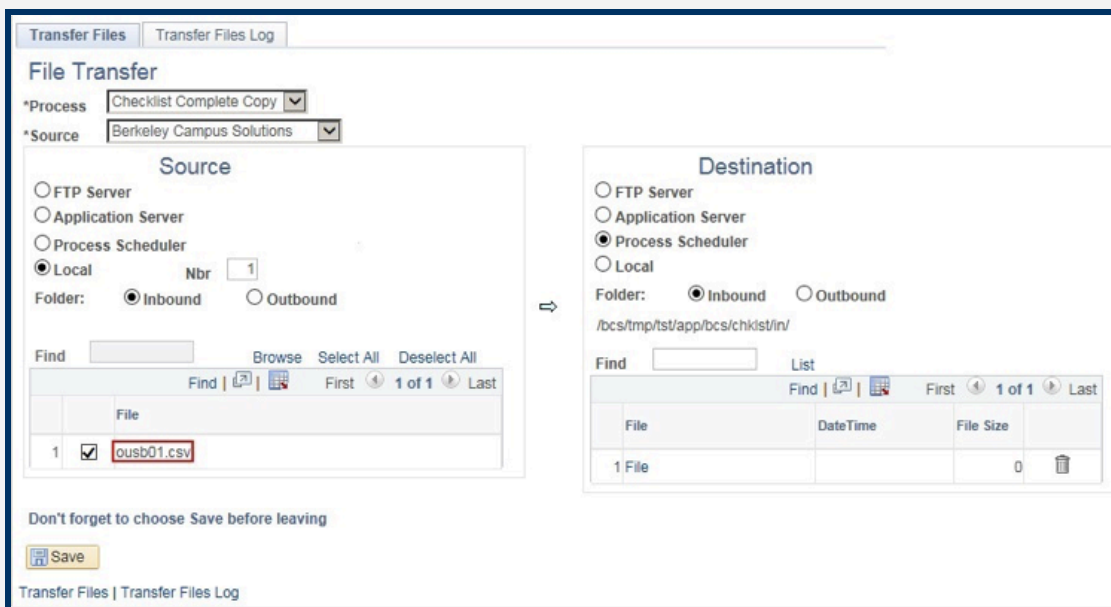
Transfer Files | Transfer Files Log

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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.



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**.

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

Find: [] Browse Select All Deselect All

	File
1	<input checked="" type="checkbox"/> ousb01.csv

Don't forget to choose Save before leaving

Transfer Files | Transfer Files Log

Destination

☐ FTP Server
☐ Application Server
☒ Process Scheduler
☐ Local

Folder: ☒ Inbound ☐ Outbound

/bcs/tmp/tst/app/bcs/chkist/in/

Find: [] List

File	DateTime	File Size
1 File		0

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.

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

Find: [] Browse Select All Deselect All

	File
1	<input checked="" type="checkbox"/> ousb01.csv

Don't forget to choose Save before leaving

Transfer Files | Transfer Files Log

Destination

☐ FTP Server
☐ Application Server
☒ Process Scheduler
☐ Local

Folder: ☒ Inbound ☐ Outbound

/bcs/tmp/tst/app/bcs/chkist/in/

Find: [] List

File	DateTime	File Size
1 ousb01.csv		

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.

Transfer Files

Transfer Files Log

File Transfer Log

*Process

Checklist Complete Copy

*Source

Berkeley Campus Solutions

From Date

02/01/2016

To Date

03/31/2016

Find

ACTIONS:

CPY(Copy),

DEL(Delete),

DWN(Download)

	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

Save

Transfer Files | Transfer Files Log