9.2 Checklist Process

Purpose: Use this document to manage checklist items in ctcLink. These items are assigned to a specific checklist; items can be assigned to multiple checklists.

Audience: Campus Solutions staff

You must have at least one of these local college managed security roles:

- ZC CC 3Cs Config
- ZZ CC 3Cs Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

The **Checklist Item Table** defines and manages items available for checklists, and it is also used to configure **Checklist Items** to appear in **Fluid Self Service** as a **"To-Do"** list.

Please consider starting the description line of your Checklist item with identifying information indicating your institution (LCC, OC, Peninsula, and so on). This will assist them by more easily distinguishing between items.

To view inserted information, click the caret " **>** " on the left side of each checkbox.

☐ Checklist Item Table

The **Checklist Item Table** establishes and manages items for checklists.

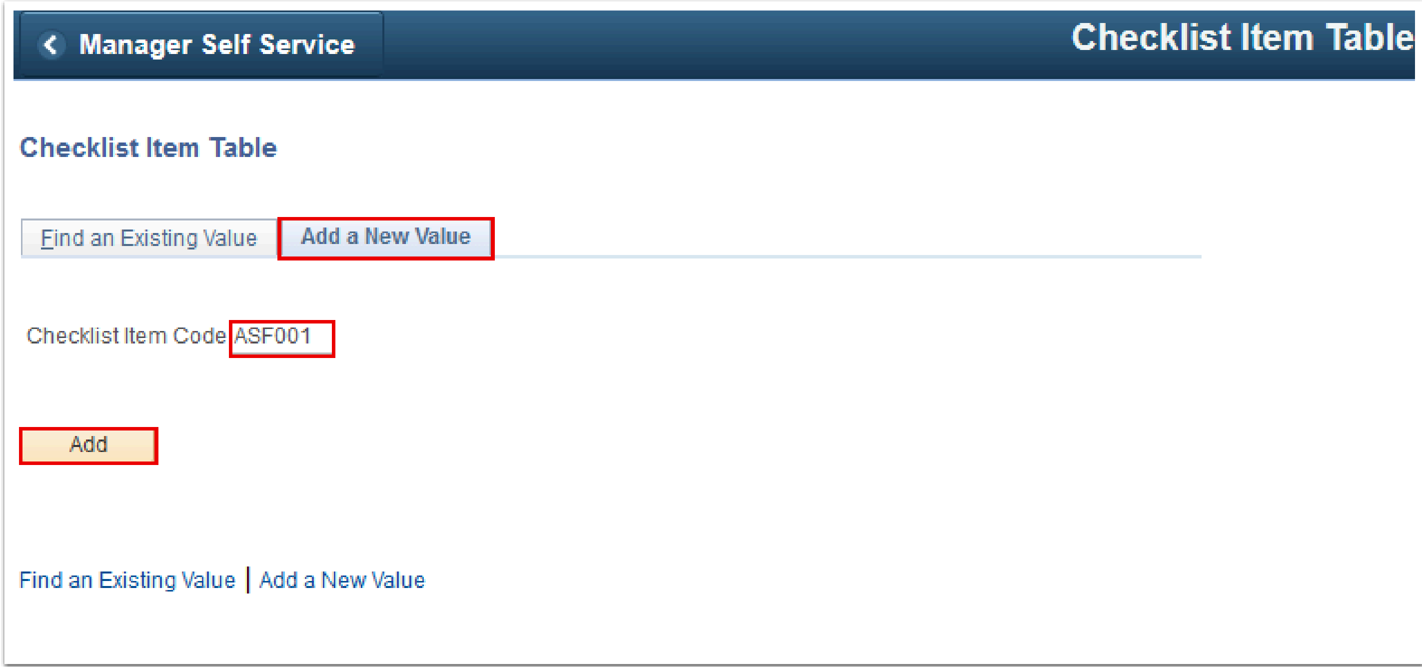
Checklist Item Table

Navigation: NavBar > Navigator > Campus Community > Checklists > Set Up Checklists > Checklist Item Table

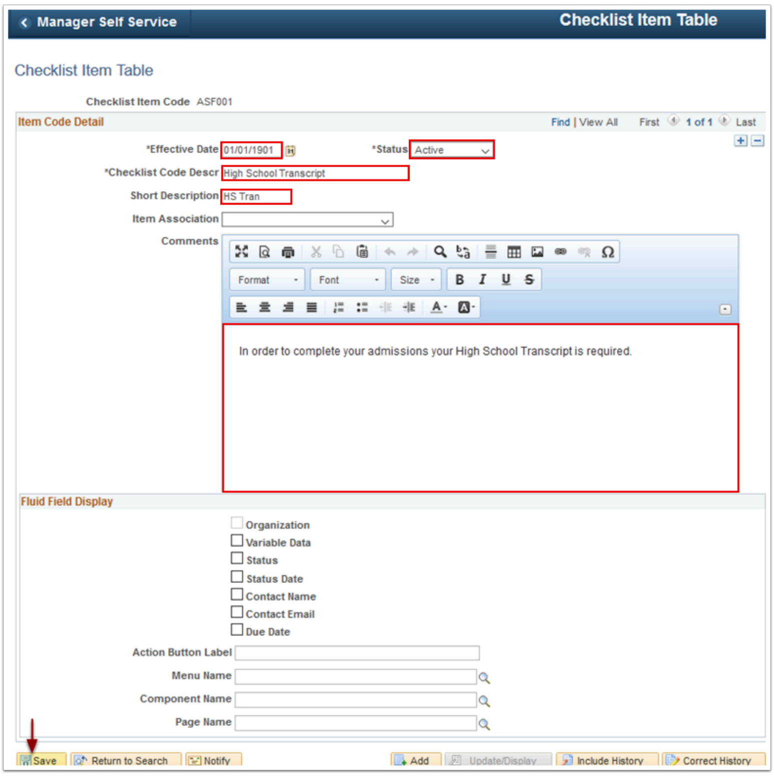
Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Item Table

1. The **Checklist Item Table** search page displays.
2. Select the **Add a New Value** tab.

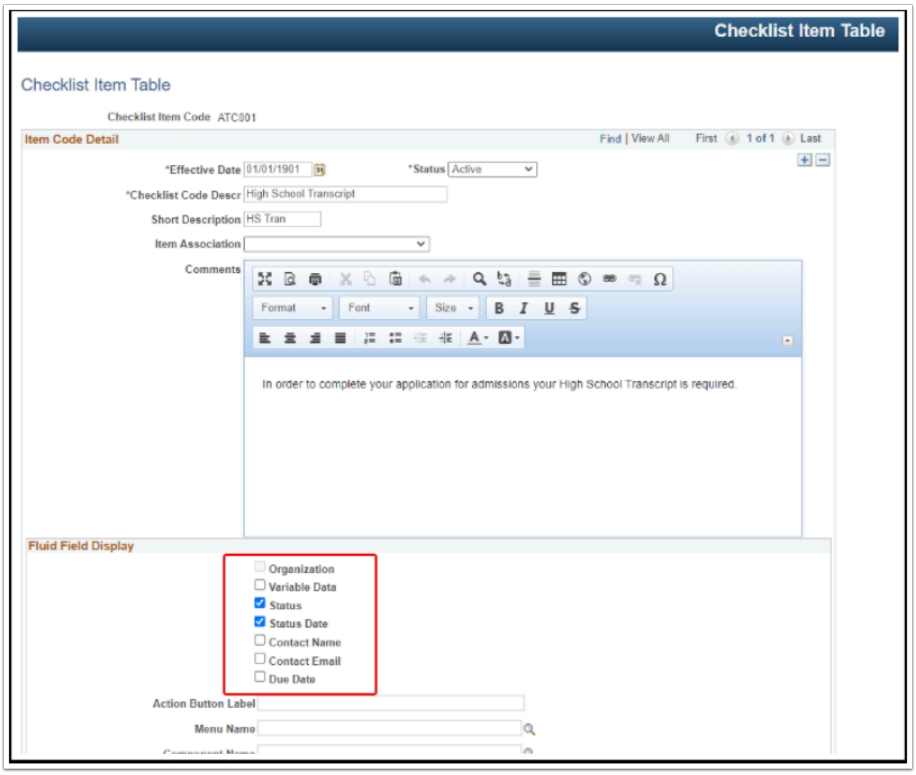
3. Enter **Checklist Item Code** following the 3C naming convention.
    a. Checklist Items are institution-specific; therefore, the 3Cs set up must follow 3Cs naming conventions. Naming conventions for checklist items follow the ***6 character*** naming convention found in the [9.2 3C Configuration-Campus Solutions 3Cs and Message Center Naming Conventions]().
4. Select **Add**.



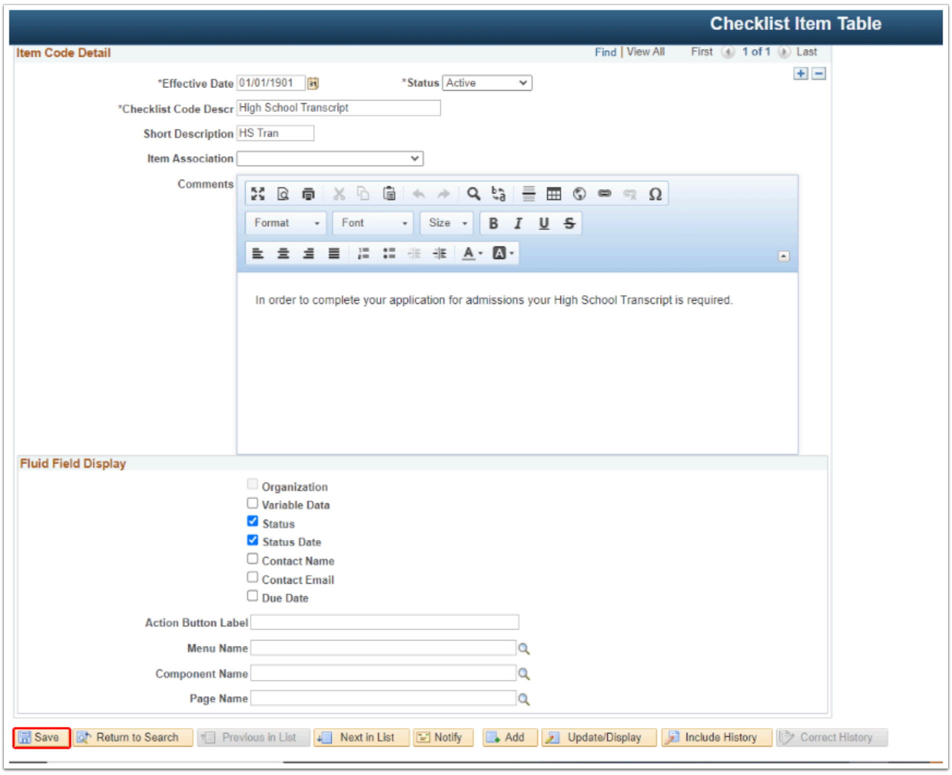
5. The **Checklist Item Table** page displays.
6. Enter **Effective Date** – date checklist created.
7. Enter **Status** – select the appropriate status –usually “Active.”
8. Enter **Checklist Code Descr** – full-text description.
9. **Item Association** – select the appropriate association or leave it blank. The **Item Association** you select here is used on checklist management pages when you assign checklists to IDs and several automated processes.
10. Enter **Short Description**.
11. Enter **Comments** – comments for the checklist item are viewable to students on their Tasks tile on the ctcLink Student Homepage.



12. **Fluid Field Display** (*Optional*) -Set up optional fields for **Fluid User Interface.**
    a. **Checkboxes** - Choose the **Fluid Field Display** option(s) to use the **Display Checklist Items** functionality on the **Checklist Table**.



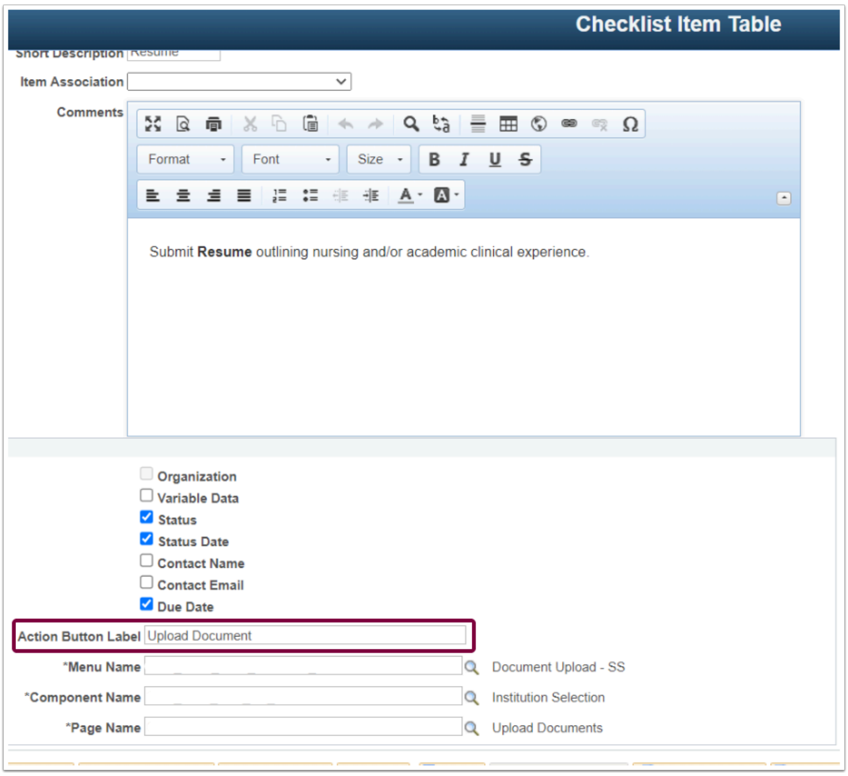
13. Select **Save** to save the Checklist Item Code.



Add an Action Button

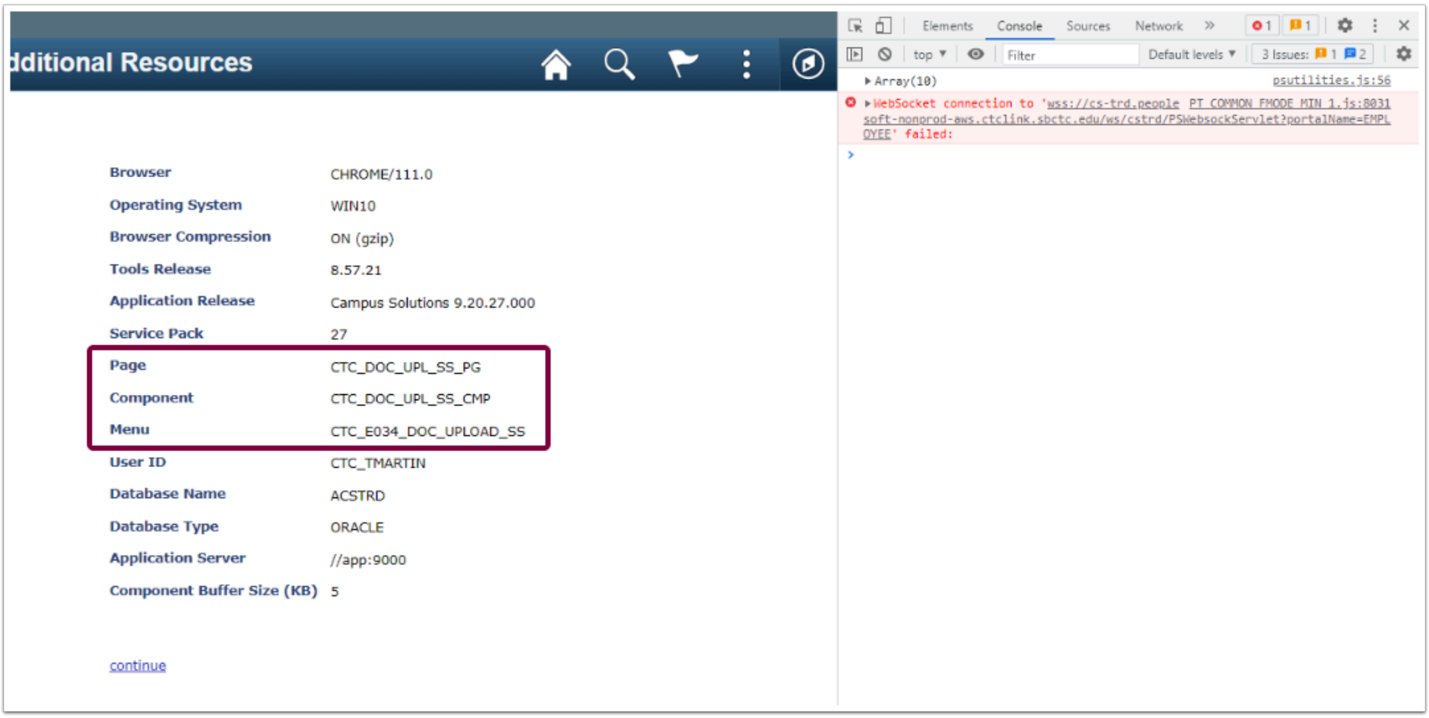
> By clicking on an Action Button, a student will be directed to another Fluid Student Self-Service page to complete the requested task.

1. **Action Button Label** - Name the action button (e.g., Upload Documents).

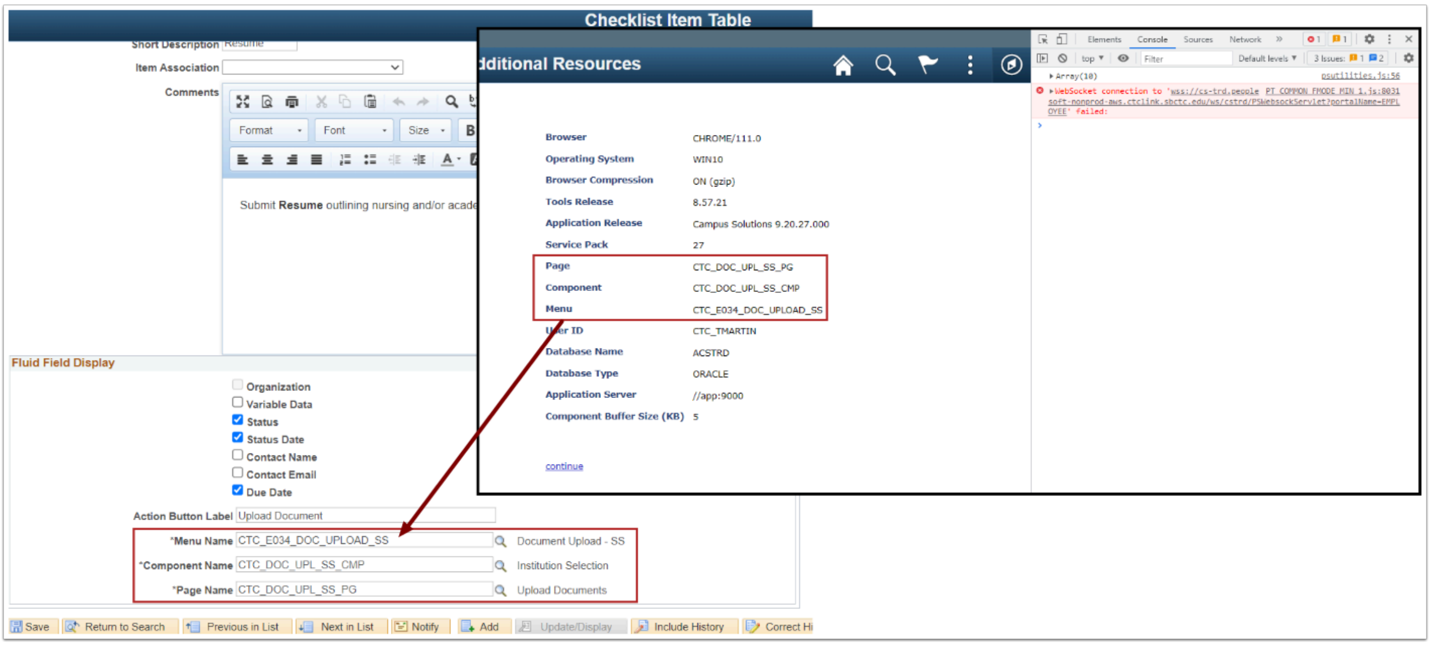


2. Navigate to the page where the student should perform the action.

3. In Chrome, enter CTRL+SHIFT+J shortcut keys (or CTRL+SHIFT+C and PSChrome Extension)



4. In the **Fluid Field Display** panel (Checklist Item Table), input or look up the **Menu Name**, **Component Name**, and **Page Name** from the step above.



5. Select **Save**.

ℹ The GIF below demonstrates the student's **Action Button** interaction.

▢ Checklist Item Functions Table

Connect checklist items with **administrative functions**.

Checklist Item Functions Table

You must have at least one of these local college managed security roles:

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

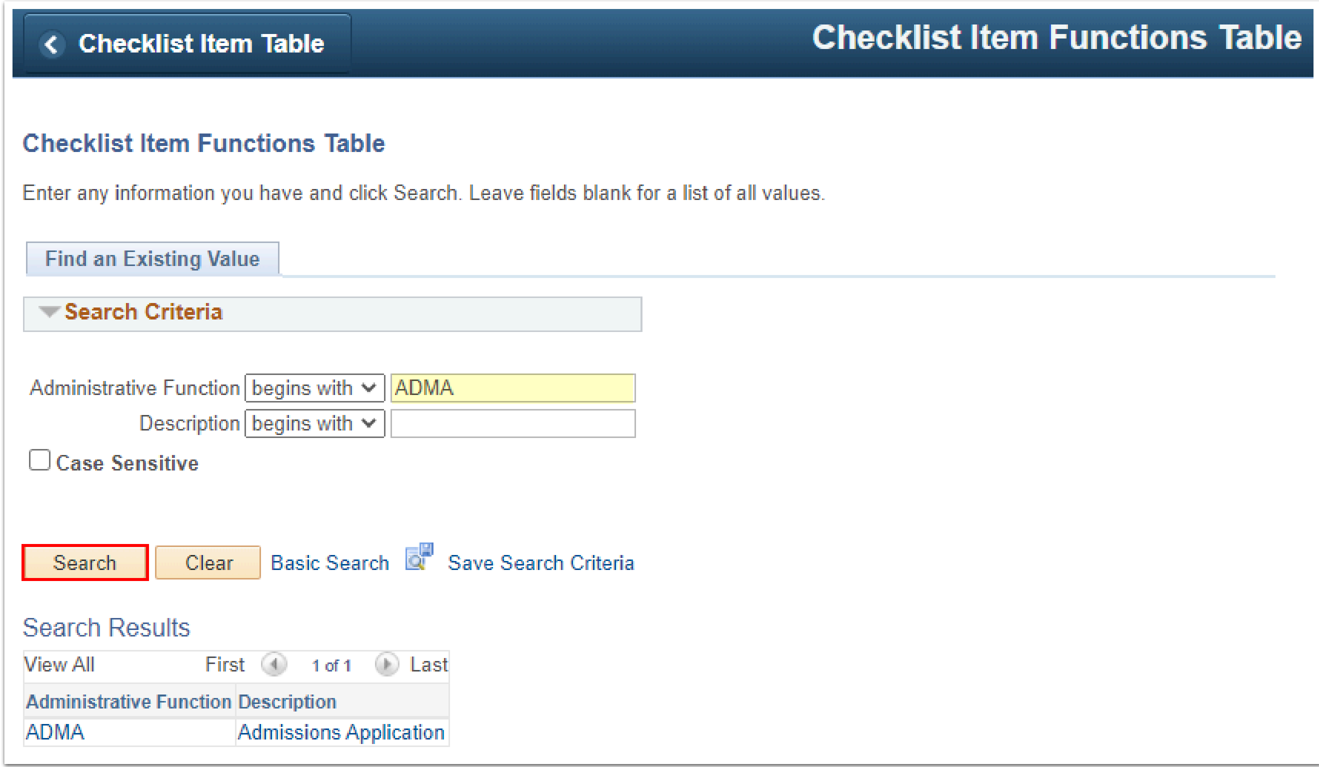
Use the **Checklist Item Functions Table** to associate the Checklist Item Code(s) with an **Administrative Function**(s). This will make the **Checklist Items** available for selection from the **Item Code** field on the **Checklist Table** page.

Administrative functions are connected to other data in the system. For example, a student's specific admissions application or a specific program plan stack. For more information on administrative functions and what variable data is connected to these functions, please review the **3C Communications: Administrative Functions** QRG.

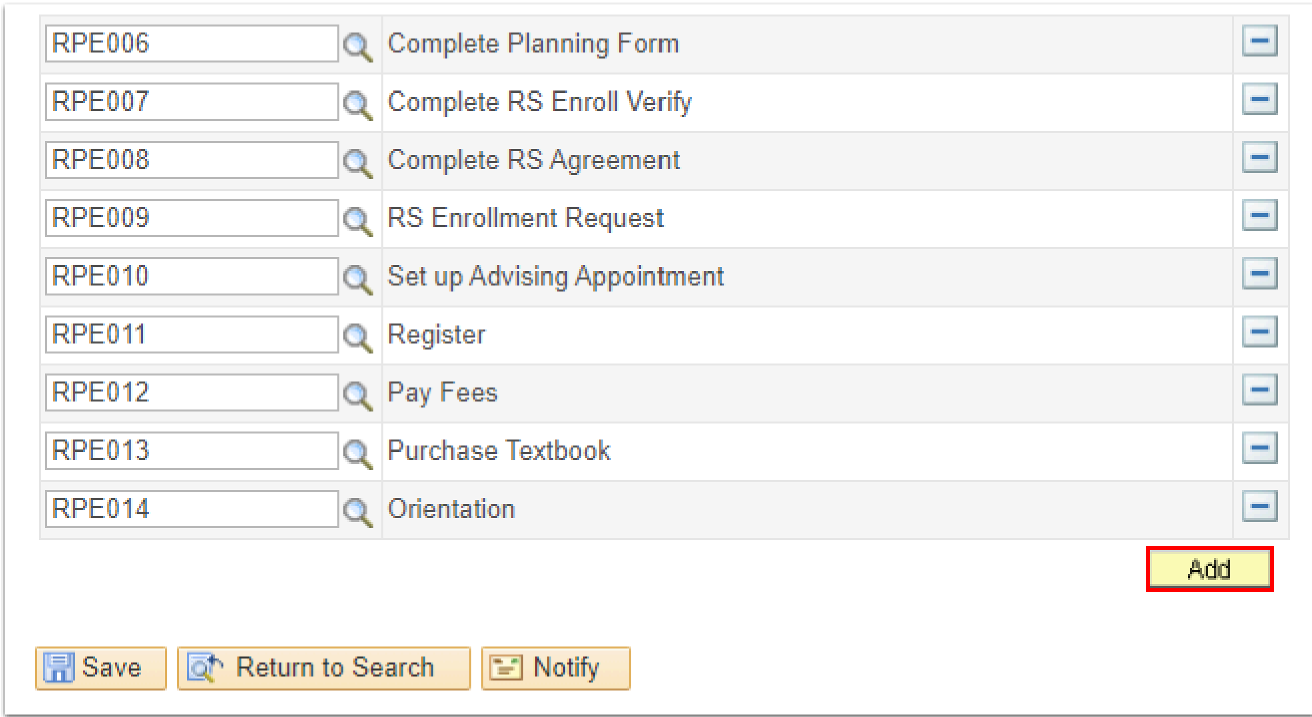
Navigation: NavBar > Navigator > Campus Community > Checklists > Set Up Checklists > Checklist Item Functions Table

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Item Functions Table

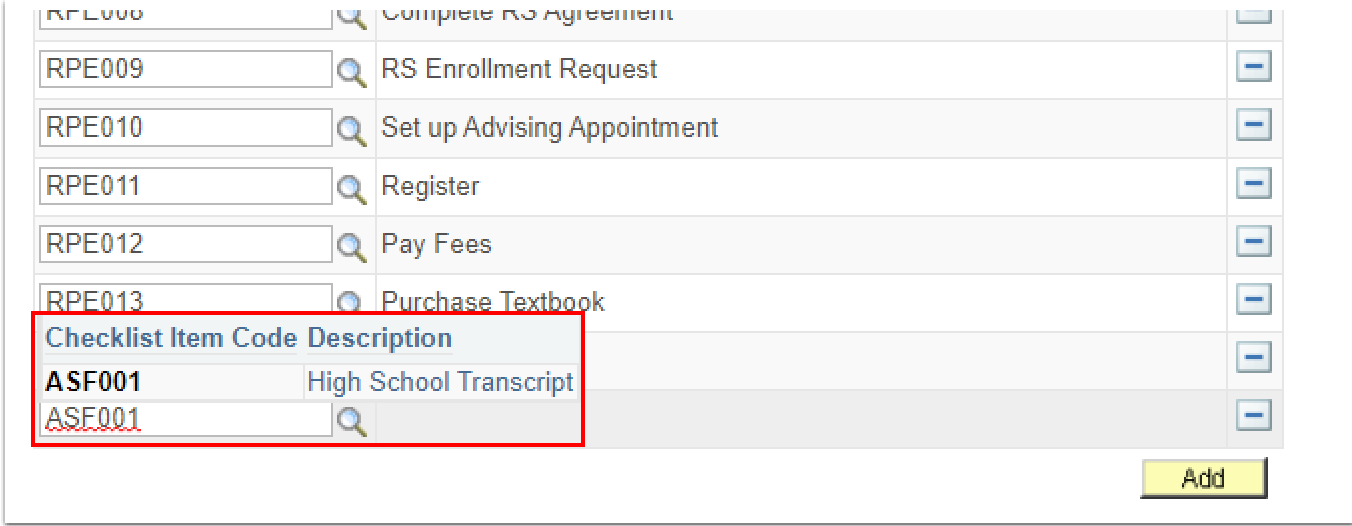
1. Enter the **Administrative Function** (*e.g., ADMA, STRM, or GEN*) you want to associate with your new **Checklist Item** and select **Search**. The **Checklist Item Functions Table** page will display.



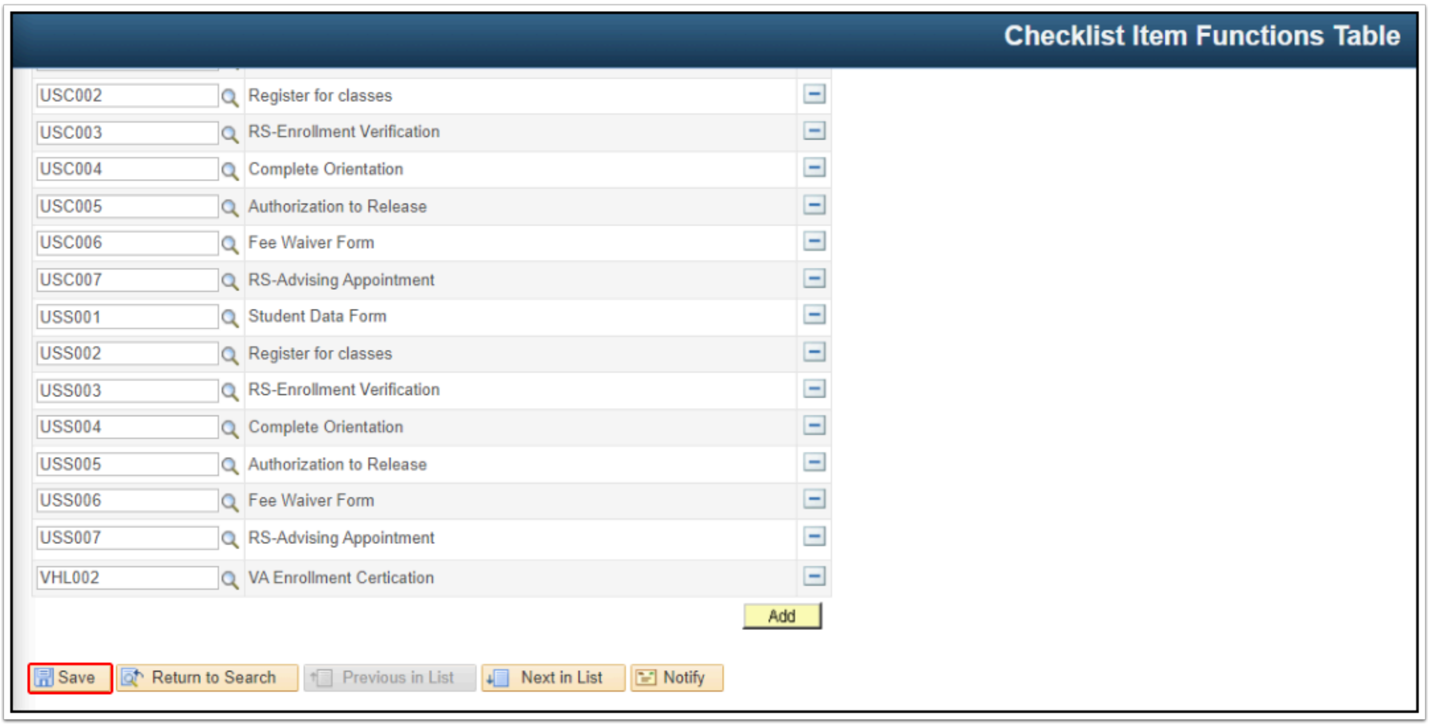
2. The **Checklist Item Functions Table** displays. Scroll to the bottom of the page and select **Add.**



3. Start typing in the Checklist **Item Code** field to select the new **Checklist Item**. Tab out of the field to display the **Description**.



4. Select **Save**.



▢ Checklist Table

Following the connection of checklist items to administrative functions, the grouped items are attached to the respective checklist code on the **Checklist Table**. If a checklist code is assigned to a student, the system assigns individual items within the checklist.

Checklist Table

You must have at least one of these local college managed security roles:

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Use the **Checklist Table** to create and manage **Checklists.**

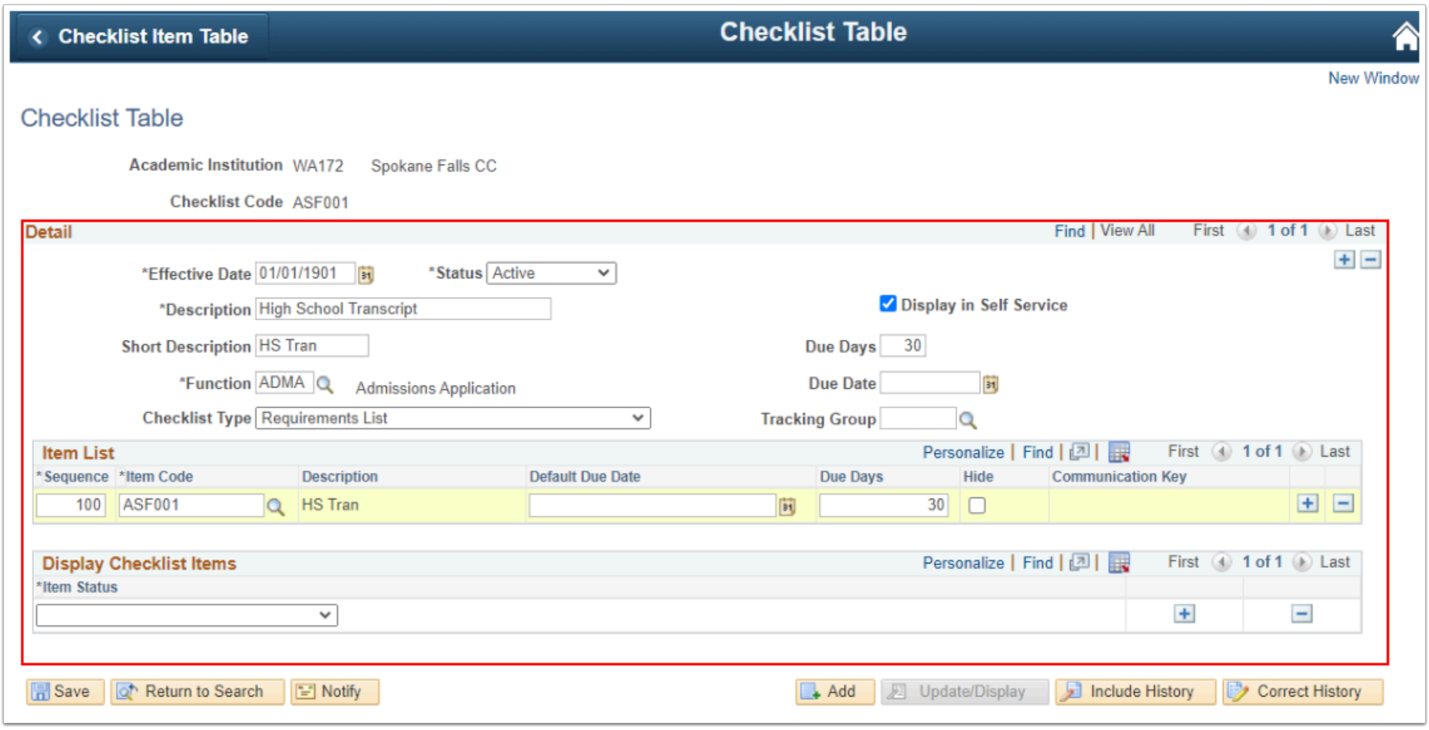
Navigation: NavBar > Navigator >Campus Community > Checklists > Set up Checklists > Checklist Table

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist Table

1. From the **Checklist Table** search page, select **Add a New Value**.

2. In the **Detail** section of the **Checklist Table** page, populate the following fields:
   a. **Effective Date** – date of the checklist creation.
   b. **Description** – enter a description that matches the description created in the previous section.
   c. **Short Description** – enter a short description that matches the short description in the previous section.
   d. **Function** – select the appropriate function by clicking on the lookup icon.
   e. **Checklist Type** – select the checklist type.
   f. **Display in Self Service** – select the checkbox to allow students to view this checklist item in **Self Service.**
   g. **Due Days** – Select the appropriate number of days the checklist item is due from the date of assignment.
   h. **Due Date** – Enter the appropriate **Due Date** (O*ptional*).
   i. **Tracking Group** – SBCTC is not configured for tracking groups.
   j. In the **Item List** section populate the following fields:
      I. **Sequence** – the appropriate **Sequence** number (Currently SBCTC is using 100 for all checklist items).
      II. **Item Code** – enter or use the lookup tool to select the **Item Code** for the **Checklist** created.
      III. **Default Due Date** – SBCTC is not using default due dates at this time.
      IV. **Due Days** – enter the **Due Days** from the **Detail** section in the previous step.
      V. **Comm Key** – SBCTC is not using **Communication Key** at this time.

   k. **Display Checklist** section is only used for the **Fluid User Interface**.
      I. The grid only appears if the **Display in Self Service** check box in the **Detail Section** is selected.
      II. Select **Item Status** value(s) from the drop down lists.
         A. ***Note:*** This setup determines if these checklist items appear in the To Do List if Status values are defined at the Checklist level. If Status values are not defined for the checklist then the setup at institution-level determines which items to display. This option is applicable to items not set to Hide.



3. Select **Save**.

▢ Checklist 3C Group

3C Group Security grants access to the checklists.

Checklist 3C Group

You must have at least one of these local college managed security roles:

- ZC CC 3Cs Config
- ZD CC 3Cs Config
- ZZ CC 3Cs Config

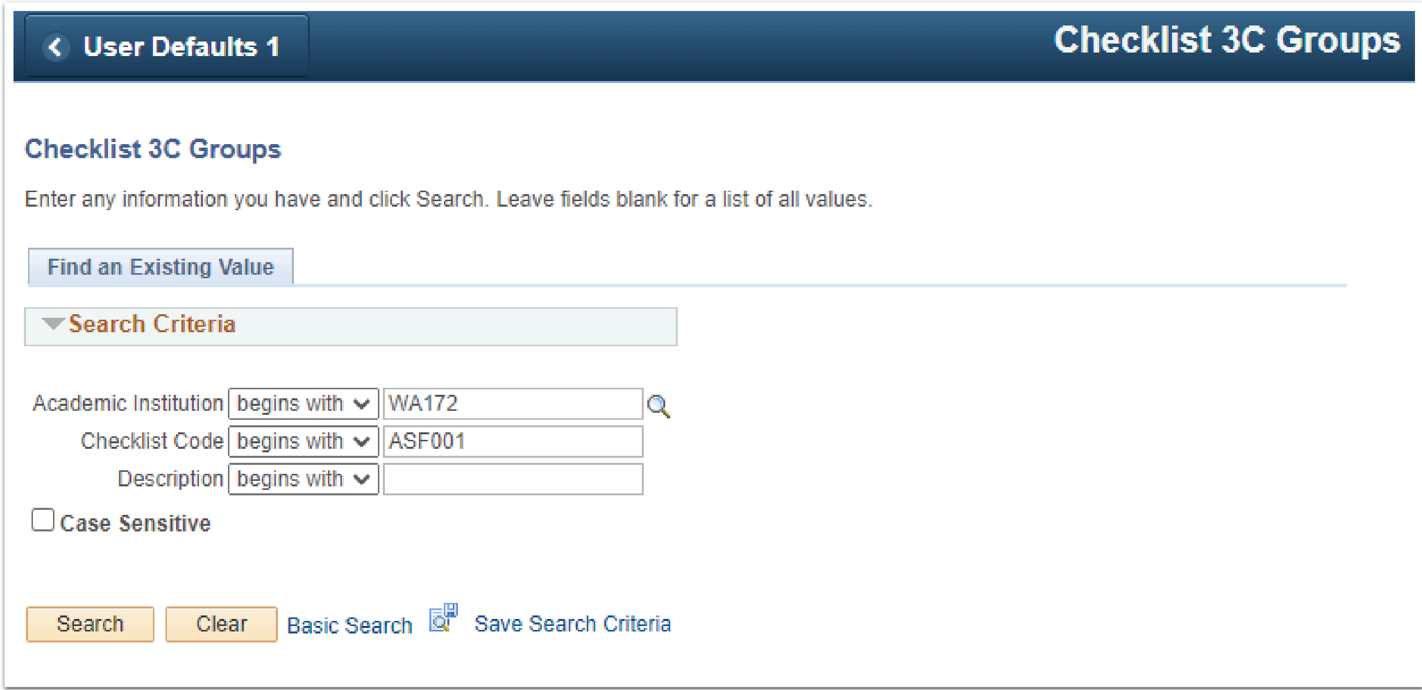
If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

3C Groups are part of a row level security that is assigned to a specific user. Users will have access to all of the Checklist Codes that are assigned to a 3C Group. For more information on Checklist 3C Groups and what variable data is connected to these functions, please review the **Checklist 3C Groups** QRG.

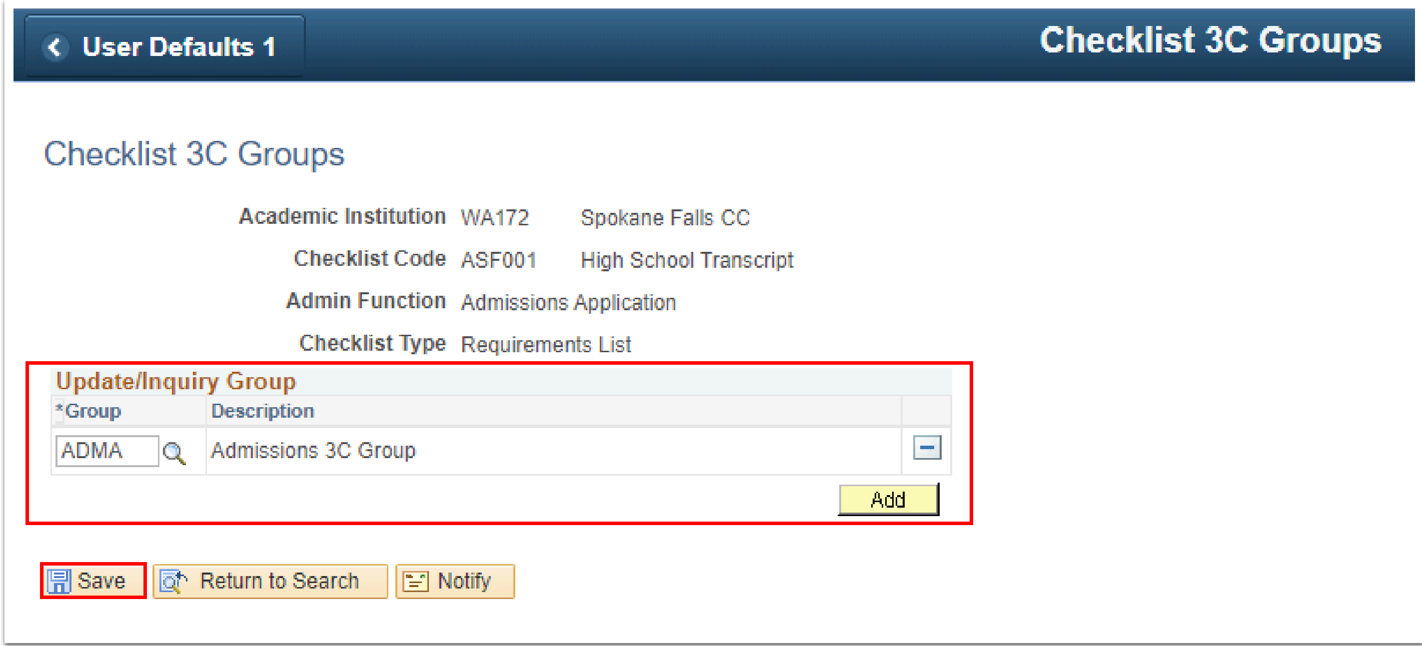
Navigation: NavBar > Navigator > Campus Community > Checklists > Set up Checklists > Checklist 3C Groups

Navigation: NavBar > Navigator > Set Up SACR > Common Definitions > Checklists > Checklist 3C Group

1. Enter the **Academic Institution** and newly created **Checklist Code** and select the **Search** button.



2. Enter or look up the user **Group(s)** to work with this **Checklist Item**. Select the **Add** button to add additional **Groups**
3. Select **Save** to save your work.



4. Process complete.