

## 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**.

< Manager Self Service Checklist Item Table

Checklist Item Table

Find an Existing Value Add a New Value

Checklist Item Code ASF001

Add

Find an Existing Value | Add a New Value

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.

Manager Self Service Checklist Item Table

Checklist Item Table

Checklist Item Code ASF001

Item Code Detail Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Checklist Code Descr High School Transcript

Short Description HS Tran

Item Association

Comments

In order to complete your admissions your High School Transcript is required.

Fluid Field Display

☐ Organization

☐ Variable Data

☐ Status

☐ Status Date

☐ Contact Name

☐ Contact Email

☐ Due Date

Action Button Label

Menu Name

Component Name

Page Name

Save Return to Search Notify Add Update/Display Include History Correct History

## 12. Fluid Field Display (Optional) -Set up optional fields for Fluid User Interface.

- Checkboxes** - Choose the **Fluid Field Display** option(s) to use the **Display Checklist Items** functionality on the **Checklist Table**.

Checklist Item Table

Checklist Item Table

Checklist Item Code ATC001

Item Code Detail Find | View All First 1 of 1 Last

\*Effective Date 01/01/1901 \*Status Active

\*Checklist Code Descr High School Transcript

Short Description HS Tran

Item Association

Comments

In order to complete your application for admissions your High School Transcript is required.

Fluid Field Display

☐ Organization

☐ Variable Data

☒ Status

☒ Status Date

☐ Contact Name

☐ Contact Email

☐ Due Date

Action Button Label

Menu Name

Component Name

Page Name

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

**Checklist Item Table**

**Item Code Detail** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active

\*Checklist Code Descr: High School Transcript

Short Description: HS Tran

Item Association: [v]

Comments

In order to complete your application for admissions your High School Transcript is required.

**Fluid Field Display**

☐ Organization  
☐ Variable Data  
☒ Status  
☒ Status Date  
☐ Contact Name  
☐ Contact Email  
☐ Due Date

Action Button Label: [text box]  
Menu Name: [text box]  
Component Name: [text box]  
Page Name: [text box]

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

## Add an Action Button

**i** 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).

**Checklist Item Table**

Short Description

Item Association

Comments

Format - Font - Size - **B** *I* U ~~S~~

**B** *I* U ~~S~~

Submit **Resume** outlining nursing and/or academic clinical experience.

☐ Organization  
☐ Variable Data  
☒ Status  
☒ Status Date  
☐ Contact Name  
☐ Contact Email  
☒ Due Date

Action Button Label

\*Menu Name

\*Component Name

\*Page Name

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

**ctcLink Student Homepage** **Additional Resources**

Links

**Upload Documents**

Request Information

Upload Documents

\*Select Institution

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

### Additional Resources

Browser	CHROME/111.0
Operating System	WIN10
Browser Compression	ON (gzip)
Tools Release	8.57.21
Application Release	Campus Solutions 9.20.27.000
Service Pack	27
Page	CTC_DOC_UPL_SS_PG
Component	CTC_DOC_UPL_SS_CMP
Menu	CTC_E034_DOC_UPLOAD_SS
User ID	CTC_TMARTIN
Database Name	ACSTRD
Database Type	ORACLE
Application Server	//app:9000
Component Buffer Size (KB)	5

[continue](#)

WebSocket connection to 'wss://cs-trd.people PT COMMON FMODE MTN 1.js:8031 soft-nanonod-aws.ctclink.shctc.edu/ws/cstrd/PSWebsockServlet?portalName=EMPL OYEE' failed:

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.

### Checklist Item Table

Short Description

Item Association

Comments

Format

Font

Size

Submit Resume outlining nursing and/or acad...

Fluid Field Display

Organization

Variable Data

Status

Status Date

Contact Name

Contact Email

Due Date

Action Button Label

Upload Document

\*Menu Name

CTC\_E034\_DOC\_UPLOAD\_SS

Document Upload - SS

\*Component Name

CTC\_DOC\_UPL\_SS\_CMP

Institution Selection

\*Page Name

CTC\_DOC\_UPL\_SS\_PG

Upload Documents

Additional Resources

Browser	CHROME/111.0
Operating System	WIN10
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Application Release	Campus Solutions 9.20.27.000
Service Pack	27
Page	CTC_DOC_UPL_SS_PG
Component	CTC_DOC_UPL_SS_CMP
Menu	CTC_E034_DOC_UPLOAD_SS
User ID	CTC_TMARTIN
Database Name	ACSTRD
Database Type	ORACLE
Application Server	//app:9000
Component Buffer Size (KB)	5

[continue](#)

WebSocket connection to 'wss://cs-trd.people PT COMMON FMODE MTN 1.js:8031 soft-nanonod-aws.ctclink.shctc.edu/ws/cstrd/PSWebsockServlet?portalName=EMPL OYEE' failed:

5. Select **Save**.

 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.

[Checklist Item Table](#)

Checklist Item Functions Table

### Checklist Item Functions Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Administrative Function

begins with ▼

ADMA

Description

begins with ▼

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

#### Search Results

View All

First

1 of 1

Last

Administrative Function	Description
ADMA	Admissions Application

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

RPE006	Complete Planning Form	-
RPE007	Complete RS Enroll Verify	-
RPE008	Complete RS Agreement	-
RPE009	RS Enrollment Request	-
RPE010	Set up Advising Appointment	-
RPE011	Register	-
RPE012	Pay Fees	-
RPE013	Purchase Textbook	-
RPE014	Orientation	-

Add

Save

Return to Search

Notify

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



RPE008	Complete RS Agreement	-
RPE009	RS Enrollment Request	-
RPE010	Set up Advising Appointment	-
RPE011	Register	-
RPE012	Pay Fees	-
RPE013	Purchase Textbook	-
<b>Checklist Item Code Description</b>		
ASF001	High School Transcript	-
ASF001		-

**Add**

4. Select **Save**.

Checklist Item Functions Table		
USC002	Register for classes	-
USC003	RS-Enrollment Verification	-
USC004	Complete Orientation	-
USC005	Authorization to Release	-
USC006	Fee Waiver Form	-
USC007	RS-Advising Appointment	-
USS001	Student Data Form	-
USS002	Register for classes	-
USS003	RS-Enrollment Verification	-
USS004	Complete Orientation	-
USS005	Authorization to Release	-
USS006	Fee Waiver Form	-
USS007	RS-Advising Appointment	-
VHL002	VA Enrollment Certification	-

**Add**

## ☐ 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**.

[< Checklist Item Table](#)

Checklist Table

Checklist Table

Find an Existing Value

Add a New Value

Academic Institution

WA172



Checklist Code

ASF001

Add

Find an Existing Value

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** (*Optional*).
  - 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.



**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.

[< User Defaults 1](#)

Checklist 3C Groups

Checklist 3C Groups

Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

▼ Search Criteria

Academic Institution 

begins with ▼

WA172



Checklist Code 

begins with ▼

ASF001


Description 

begins with ▼

☐ Case Sensitive

Search

Clear

Basic Search 

Save Search Criteria

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.

User Defaults 1

Checklist 3C Groups

Checklist 3C Groups

Academic Institution

WA172

Spokane Falls CC

Checklist Code

ASF001

High School Transcript

Admin Function

Admissions Application

Checklist Type

Requirements List

Update/Inquiry Group

*Group	Description	
ADMA	Admissions 3C Group	-

Add

Save

Return to Search

Notify

4. Process complete.

ctcLink

ctcLink Student Homepage

Message Center

Tasks

Academic Progress


Manage Classes


Financial Aid

Financial Account


Academic Records


Profile








5 To Do's 5 Holds














CTC\_TMARTIN