

Assigning a Bank Mobile Checklist in Batch

Purpose: Use this document as a reference on adding a bank mobile checklist item.

Audience: Financial Aid Staff.

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

- ZC CC 3Cs User
- ZZ CC 3Cs User

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

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Navigation: Campus Community > 3C Engine > Run 3C Engine

1. The Run 3C Engine run control page displays.
2. Enter a **Run Control ID** using **Add a New Value** (if building for the first time), or **Find an Existing Value**, if you are running an already built process.
3. Select the **Add** button, if adding a new value, or select the **Search** button if using **Find an Existing Value**.
4. The Run 3C Engine page displays.
5. In the **Process 3Cs** group box, select the **Population Selection** checkbox.
6. In the **Process Join Records** group box, ensure the **No Joint Processing** radio button is selected.
7. In the **Event Selection** group box, enter your **Academic Institution**, i.e., **WA140**
8. In the **Administrative Function** field, enter **GEN**.
9. In the **Event ID**, enter the event ID specific to your institution to Initiate a **BankMobile Biographic Extract**. i.e., **FSTECL042** for Clark College -- Use the lookup tool to ensure you are using the **I-BankMobile Biographic Extract** checklist item. I stands for "Initiate".
10. In your **Population Selection group** box, select **PS Query** from the drop down list options in the **Selection Tool** row.
11. In the **Query Name** field, enter the desired query name: **CTC_FA_HIGHER_ONE_SELECT_1** -- this query name adds a checklist to students with a financial aid file review status of complete.

💡 There are three **CTC_FA_HIGHER_ONE_SELECT_** queries from which to choose. Choose the query that fits your business process. Refer to the [FA Business Flow Guide](#) for a full definition on each **HIGHER_ONE_SELECT_** query. The **CTC_FA_HIGHER_ONE_SELECT_1** query is used in this QRG example.

12. Select the **Edit Prompts** hyperlink located at the bottom of the screen.
13. The **Query Prompts** pagelet displays.
14. Enter your **Academic Institution**, i.e., **WA140**.
15. Enter the **Aid Year** - use the Aid year in which you are processing.
16. On the **Edit Prompts** pagelet, enter the **%042 Checklist** code for your institution, i.e. Clark College's specific checklist code is **ECL042**.
17. Select the **OK** button.
18. Select the Manage Duplicate Assignment tab.
19. In the **Duplicate Checklist Check** group box, select the *Match* option from the **Variable Data** drop down list.
20. Select the **Run** button.
21. The **Process Scheduler Request** page displays.
22. Select the **OK** button.
22. The 3C Engine Parameters page displays.
23. Select the **Process Monitor** link, and ensure your job runs to **Success** and **Posted**.

End of procedure.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the link to [Assigning a Bank Mobile Checklist in Batch](#). This link will open in a new tab/window.