

# How to Mass Assign a Checklist Using 3C Engine

## **OBJECTIVE:**

Explain steps taken to assign a checklist to a group of students using 3C Engine

## **CONTENTS:**

<b>LESSON 1: SETUP 3C ENGINE EVENT DEFINITION</b>	.....2
<b>LESSON 2: RUN 3C ENGINE USING AN EXTERNAL FILE</b>	.....4
<b>LESSON 3: RUN 3C ENGINE USING THE QUERY OPTION</b>	.....7
<b>APPENDIX</b>	.....10

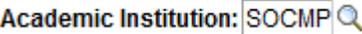
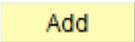
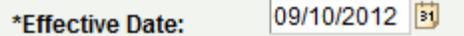
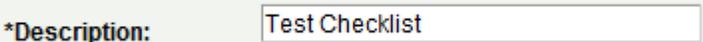
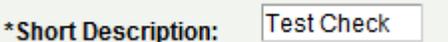
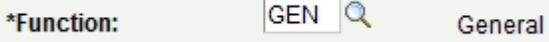
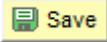
### ***NEED ADDITIONAL INFORMATION?***

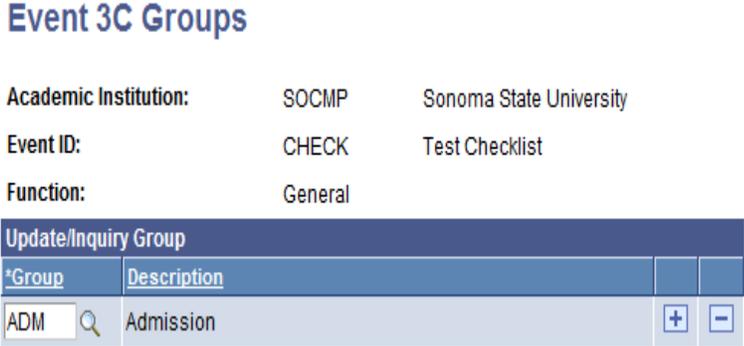
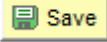
For further questions on this process please contact the CMS  
**ADMISSIONS AND CAMPUS COMMUNITY FUNCTIONAL LEAD .**

## Lesson 1: Set up 3C Engine Event Definition

**Navigation:**

Main Menu > Campus Community > 3C Engine > Set up 3C Engine > Event Definition

Step	Action	Screenshot
1.	Click on Add a New Value to create a new Event Definition. If your Event Definition is already set up you can skip this lesson and go to Lesson 2 or 3 depending if you are using an external file or query to run the process.	
2.	Academic Institution should default to SOCMP	
3.	Enter the Event ID that you wish to use for the Event you are creating	
4.	Click the yellow ADD button	
5.	Enter in an Effective Date or keep it as today's date	
6.	Status should default to Active	
7.	Enter in a Description	
8.	Enter in a Short Description	
9.	Enter in the Function that you would like this event to fall under	
10.	Under Checklists enter the Checklist Code that you wish to use for this event	
11.	Click the yellow SAVE button	

Step	Action	Screenshot												
12.	Navigate to Campus Community > 3C Engine > Set up 3C Engine > Event 3C Groups													
	On this page you will tie your Event Definition to a group, if you don't know what group to tie your event to, please contact your CMS Lead.	 <p><b>Event 3C Groups</b></p> <p>Academic Institution: SOCMP Sonoma State University</p> <p>Event ID: CHECK Test Checklist</p> <p>Function: General</p> <table border="1"> <thead> <tr> <th colspan="2">Update/Inquiry Group</th> <th></th> <th></th> </tr> <tr> <th>*Group</th> <th>Description</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>ADM</td> <td>Admission</td> <td>+</td> <td>-</td> </tr> </tbody> </table>	Update/Inquiry Group				*Group	Description			ADM	Admission	+	-
Update/Inquiry Group														
*Group	Description													
ADM	Admission	+	-											
13.	Once you enter the Group, click the yellow SAVE button													

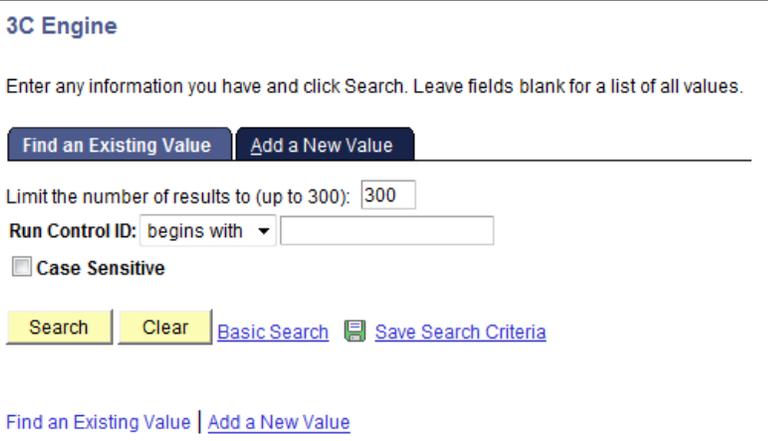
## Lesson 2: Run 3C Engine using an External File

**Before you begin:**

- Ensure you have your Event Definition set up. To do this, refer to Lesson 1 on page 4. This process is only required the first time you run this process.
- Also make sure your file has the key fields to run this process (See Appendix for details)

**Navigation:**

Main Menu > Campus Community > Checklists > Run 3C Engine

Step	Action		Screenshot
1.	<b>If</b>	<b>Then</b>	
	A run control exists and you know the ID...	Enter it in the <b>Run Control ID</b> box and click <b>Search</b> .	
	A new run control needs to be created...	Click on <b>Add a New Value</b> , enter a name for the run control, and click <b>Add</b> .	
2.	Under Process 3Cs click the box next to Population Selection		
3.	Under Process Joint Records No should be the default		

Step	Action	Screenshot
4.	Under Event Selection enter SOCMP for the Academic Institution	Academic Institution: <input type="text" value="SOCMP"/> Sonoma State University
5.	Administrative Function is going to be the same as the Function used in Lesson 1. (See step 9 under Lesson 1)	Administrative Function: <input type="text" value="GEN"/> General
6.	Enter the Event ID that you created in Lesson 1	Event ID: <input type="text" value="CHECK"/> Test Checklist
7.	The checklist you wish to send out should now show up under the Checklist Code section	<div style="border: 1px solid #ccc; padding: 5px;"> <p>▼ Checklist Code</p> <p>RACETH F09 Race &amp; Ethnicity Resurvey</p> <p>▼ Checklist Item</p> <p>100 RACETH Race &amp; Ethnicity Resurvey</p> </div>
8.	Under the selection Tool drop down select External File	Selection Tool: <input type="text" value="External File"/>
9.	Click the yellow Upload File button	<input type="button" value="Upload File"/>
10.	Click the Browse button and select the file you wish to upload	<input type="button" value="Browse..."/>
11.	Click the yellow Upload button	<input type="button" value="Upload"/>
12.	The file you uploaded should now show up under the Attached File section	Attached File: <input type="text" value="checklist_test.csv"/>
13.	Click on the hour glass to choose the correct File Mapping (See the Appendix at the end of this document to see what File Mapping you should use)	File Mapping: <input type="text" value="CHECKLIST"/>
14.	Click on the Preview Selection Results link to see if your file looks correct	<a href="#">Preview Selection Results</a>
15.	Click on the yellow Return button to return back to the main page	<input type="button" value="Return"/>
16.	Click the yellow Run button	<input type="button" value="Run"/>

Step	Action	Screenshot				
17.	Server Name should be PSUNX	Server Name: PSUNX ▼				
18.	Click the yellow OK button to return to the 3C Engine Parameters screen	OK				
19.	Click on the Process Monitor link	<a href="#">Process Monitor</a>				
20.	Click on the yellow Refresh button	Refresh				
21.	Until Success is under Run Status and Posted is under Distribution Status	<table border="1"> <tr> <td>Run Status</td> <td>Distribution Status</td> </tr> <tr> <td>Success</td> <td>Posted</td> </tr> </table>	Run Status	Distribution Status	Success	Posted
Run Status	Distribution Status					
Success	Posted					

## Lesson 3: Run 3C Engine using the Query Option

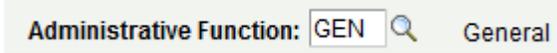
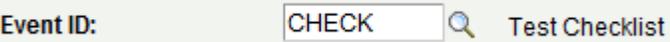
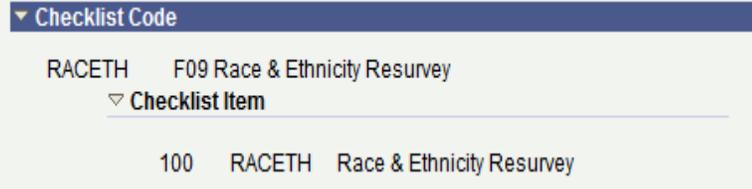
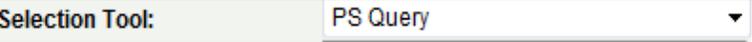
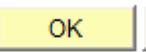
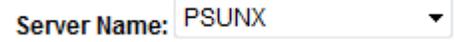
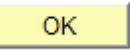
**Before you begin:**

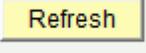
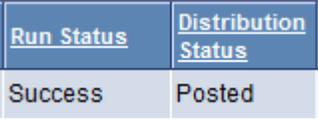
- Ensure you have your Event Definition set up. To do this, refer to Lesson 1 on page 4. This process is only required the first time you run this process.
- Make sure the appropriate Bind Record is attached to the query you would like to use.

**Navigation:**

Main Menu > Campus Community > Checklists > Run 3C Engine

Step	Action		Screenshot					
1.	<table border="1" style="width: 100%;"> <tr> <th style="text-align: center;">If</th> <th style="text-align: center;">Then</th> </tr> <tr> <td style="vertical-align: top;">A run control exists and you know the ID...</td> <td style="vertical-align: top;">Enter it in the <b>Run Control ID</b> box and click <b>Search</b>.</td> </tr> <tr> <td style="vertical-align: top;">A new run control needs to be created...</td> <td style="vertical-align: top;">Click on <b>Add a New Value</b>, enter a name for the run control, and click <b>Add</b>.</td> </tr> </table>	If	Then	A run control exists and you know the ID...	Enter it in the <b>Run Control ID</b> box and click <b>Search</b> .	A new run control needs to be created...	Click on <b>Add a New Value</b> , enter a name for the run control, and click <b>Add</b> .	<div style="border: 1px solid black; padding: 5px;"> <p><b>3C Engine</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <hr/> <p>Limit the number of results to (up to 300): <input type="text" value="300"/></p> <p>Run Control ID: begins with <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a> <input type="button" value="Save Search Criteria"/> </p> <p> <a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a> </p> </div>
If	Then							
A run control exists and you know the ID...	Enter it in the <b>Run Control ID</b> box and click <b>Search</b> .							
A new run control needs to be created...	Click on <b>Add a New Value</b> , enter a name for the run control, and click <b>Add</b> .							
2.	Under Process 3Cs click the box next to Population Selection	<div style="border: 1px solid black; padding: 5px;"> <p><b>Process 3Cs</b></p> <p><input checked="" type="checkbox"/> Population Selection</p> </div>						
3.	Under Process Joint Records No should be the default	<div style="border: 1px solid black; padding: 5px;"> <p><b>Process Joint Records</b></p> <p> <input checked="" type="radio"/> No  <input type="radio"/> Yes, all Joint IDs  <input type="radio"/> Yes, if match exists                 </p> </div>						
4.	Under Event Selection enter SOCMP for the Academic Institution	<div style="border: 1px solid black; padding: 5px;"> <p><b>Academic Institution:</b> <input type="text" value="SOCMP"/> <input type="button" value="Search"/> Sonoma State University</p> </div>						

Step	Action	Screenshot
5.	Administrative Function is going to be the same as the Function used in Lesson 1. (See step 9 under Lesson 1)	
6.	Enter the Event ID that you created in Lesson 1	
7.	The checklist you wish to send out should now show up under the Checklist Code section	
8.	Under the selection Tool drop down select PS Query	
9.	Click on the hour glass next to Query Name to select the query you wish to use. If your query is not showing up it means you don't have the appropriate bind record attached to your query. In order to add this bind record to your query, please contact your CMS lead.	
10.	If the query requires prompts the Edit Prompts link will appear click on it to enter your prompts	
11.	Enter the prompt and click the yellow OK button	
12.	Click on the Preview Selection Results link to see what the query returns	
13.	Click on the yellow Return button to return back to the main page	
14.	Click the yellow Run button	
15.	Server Name should be PSUNX	
16.	Click the yellow OK button to return to the 3C Engine Parameters screen	

Step	Action	Screenshot
17	Click on the Process Monitor link	
18.	Click on the yellow Refresh button	
19.	Until Success in under Run Status and Posted is under Distribution Status	

## Appendix:

When using the external file option you need to make sure that the file contains key fields based on the administrative function, in order to run the process:

- Administrative Function **GEN**: File must have EMPLID in the first column and Institution in the second column.
- Administrative Function **FINA**: File must have EMPLIID in the first column, AID Year in the second column and Institution in the third column.

### File Mapping:

- 3C DELETE: Use with the 3C Delete process
- SERVICE INDICATOR LOAD: Use with the Service Indicator Load process
- STUDENT GROUP LOAD: Use with the Student Group Load process
- COMMUNICATION: Use with the 3C Engine Communication process
- CHECKLIST: Use with the 3C Engine Checklist process