How to Mass Delete a Checklist

OBJECTIVE:

Explain steps taken to delete a checklist for a group of students

CONTENTS:

NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at *http://www.sonoma.edu/it/cms/contact.html* to locate the **ADMISSIONS AND CAMPUS COMMUNITY FUNCTIONAL LEAD** .
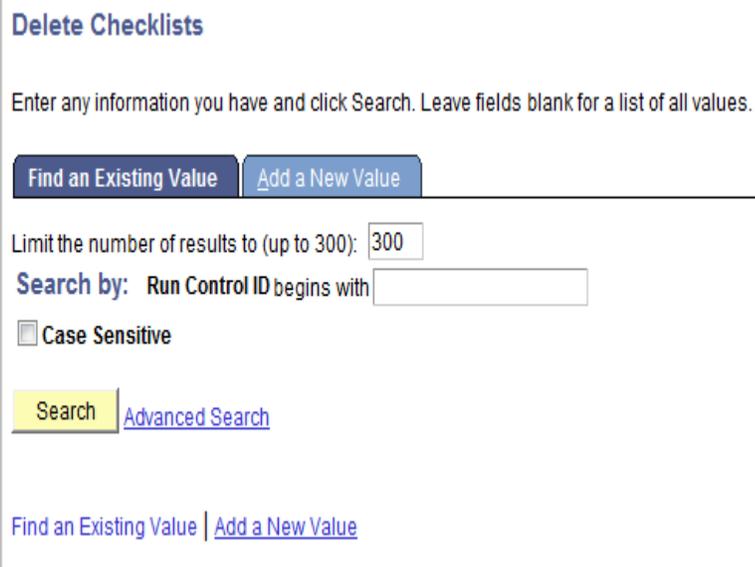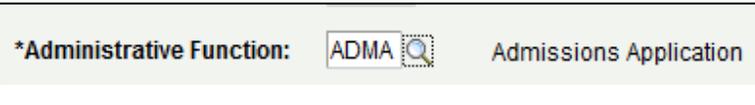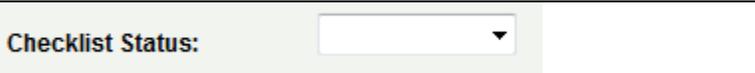
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Lesson 1:
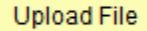# Delete Checklists Using an External File

Before you begin:
- Make sure your file has the key fields to run this process (See Appendix for details)

Navigation:
Main Menu > Campus Community > Checklists > Delete Checklists

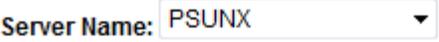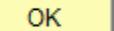| Step	Action		Screenshot
1.	**If**	**Then**	**Delete Checklists** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value | Add a New Value Limit the number of results to (up to 300): 300 Search by: Run Control ID begins with _____ ☐ Case Sensitive Search Advanced Search Find an Existing Value | Add a New Value
	A run control exists and you know the ID…	Enter it in the **Run Control ID** box and click **Search.**	
	A new run control needs to be created…	Click on **Add a New Value**, enter a name for the run control, and click **Add.**	
2.	Academic Institution should default to SOCMP		**Academic Institution:** SOCMP 🔍
3.	Enter the Administrative Function for the Checklist Code that you would like to delete		*Administrative Function: ADMA 🔍 Admissions Application
4.	Enter the Checklist Code that you would like to delete		*Checklist Code: ADMREQ 🔍
5.	Checklist Status can be left blank		**Checklist Status:** [▼]

Step	Action	Screenshot
6.	Under Population Selection select External File under the Selection Tool drop down menu	**Selection Tool:** External File ▾
7.	Click the yellow Upload File button	Upload File
8.	Click the Browse button and select the file you wish to upload	Browse...
9.	Click the yellow Upload button	Upload
10.	The file you uploaded should now show up under the Attached File section	**Attached File:** Deletetest.csv
11.	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:** 3C DELETE 🔍
12.	Click on the Preview Selection Results link to see if your file looks correct	Preview Selection Results
13.	Click on the yellow Return button to return back to the main page	Return
14.	Click the yellow Run button	Run
15.	Server Name should be PSUNX	**Server Name:** PSUNX ▾
16.	Click the yellow OK button to return to the 3C Engine Parameters screen	OK
17.	Click on the Process Monitor link	Process Monitor
18	Click on the yellow Refresh button	Refresh
19.	Until Success is under Run Status and Posted is under Distribution Status	**Run Status** / **Distribution Status** — Success / Posted
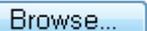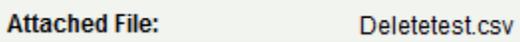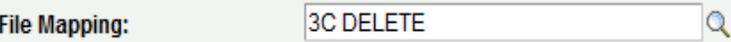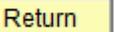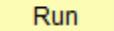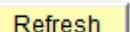
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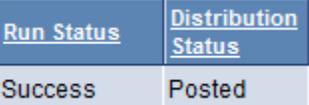
Step	Action	Screenshot
20.	Click on the Details link	Details
21.	Click on the Message Log link	Message Log
22.	Make sure Total Checklist Records Deleted matches what was in your file	10 11:38:43AM Total Checklist Records Deleted: 54

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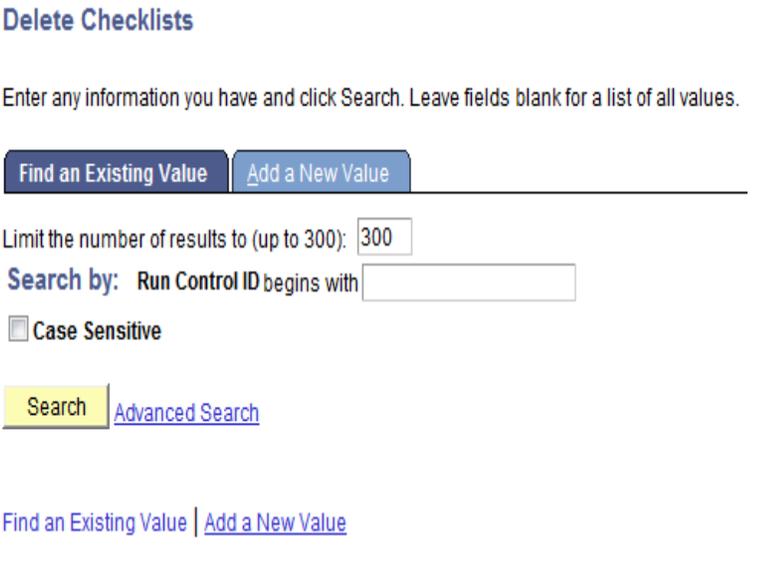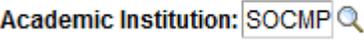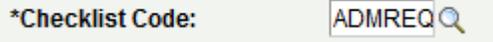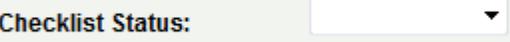STAFF - http://www.sonoma.edu/it/cms/documentation.html
Last Updated: 10/27/14

Lesson 3:
Delete Checklists using the Query Option

Before you begin:
- Make sure the appropriate Bind Record is attached to the query you would like to use.

Navigation:
Main Menu > Campus Community > Checklists > Delete Checklists

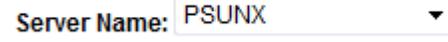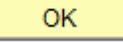| Step	Action		Screenshot
1.	**If**	**Then**	**Delete Checklists** Enter any information you have and click Search. Leave fields blank for a list of all values. **Find an Existing Value** | Add a New Value Limit the number of results to (up to 300): 300 **Search by:** Run Control ID begins with [ ] ☐ Case Sensitive [Search] Advanced Search Find an Existing Value | Add a New Value
	A run control exists and you know the ID…	Enter it in the **Run Control ID** box and click **Search.**	
	A new run control needs to be created…	Click on **Add a New Value**, enter a name for the run control, and click **Add.**	
2.	Academic Institution should default to SOCMP		**Academic Institution:** SOCMP 🔍
3.	Enter the Administrative Function for the Checklist Code that you would like to delete		***Administrative Function:** ADMA 🔍 Admissions Application
4.	Enter the Checklist Code that you would like to delete		***Checklist Code:** ADMREQ 🔍
5.	Checklist Status can be left blank		**Checklist Status:** [▼]

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Last Updated: 10/27/14

Step	Action	Screenshot
6.	Under Population Selection select PS Query under the Selection Tool drop down menu	**Selection Tool:** PS Query ▼
7.	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.	**Query Name:** [ ] 🔍
8.	If the query requires prompts the Edit Prompts link will appear click on it to enter your prompts	Edit Prompts
9.	Enter the prompt and click the yellow OK button	OK
10.	Click on the Preview Selection Results link to see what the query returns	Preview Selection Results
11.	Click on the yellow Return button to return back to the main page	Return
12.	Click the yellow Run button	Run
13.	Server Name should be PSUNX	**Server Name:** PSUNX ▼
14.	Click the yellow OK button to return to the 3C Engine Parameters screen	OK
15.	Click on the Process Monitor link	Process Monitor
16.	Click on the yellow Refresh button	Refresh
17	Until Success is under Run Status and Posted is under Distribution Status	**Run Status** / **Distribution Status** — Success / Posted
18.	Click on the Details link	Details
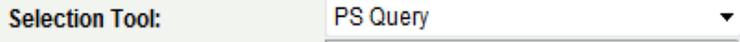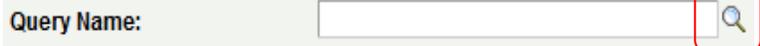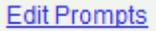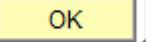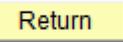
Step	Action	Screenshot
19.	Click on the Message Log link	Message Log
20.	Make sure Total Checklist Records Deleted matches what was in your file	10 11:38:43AM Total Checklist Records Deleted: 54
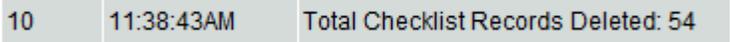
Appendix:

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, FINA and ADMA**: File must have EMPLID in the first column and SA ID Type in the second column. SA ID Type is always P.

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