

Checklist

Currently, Checklist is used to build a file structure for candidates to upload documents. Each dossier is associated with one Checklist, and a checklist is comprised of sections.

Attribute	Description	Requirement
Effective Date	The date for which the Checklist will be effective. This date needs to be on/prior to the date the Checklist takes effect. When editing, it will determine the date the new values go into effect.	<ul style="list-style-type: none"> Accepts various date format entries displays MM/DD/YYYY Option to select date with Date Selector Required field
Dossier Type	The Dossier Type which the Checklist is associated with.	<ul style="list-style-type: none"> Option to Lookup and return value from Dossier Type table Validates against the Dossier Type table Required field
Department ID	The candidate's promotion/tenure department that the Checklist is specific to	<ul style="list-style-type: none"> Option to Lookup and return value from Department table Validates against the Department table
Organization Code	The candidate's organization code (school ID) that the Checklist is specific to	<ul style="list-style-type: none"> Option to Lookup and return value from Organization table
Description	The text field used to describe of the Checklist	<ul style="list-style-type: none"> Allow text values
Group Key	Institution Location Campus attributes KPME-3476	<ul style="list-style-type: none"> Option to Lookup and return values from Group Key table Validates against the Group Key table Required field
Active	Status of the Checklist, checked indicates Active, unchecked indicates Inactive. If the Checklist is being eliminated, change effective date to when Checklist will be eliminated and uncheck the active box.	<ul style="list-style-type: none"> Checkbox Default value checked

Checklist selection

To make the system as flexible as possible, eDossier allows the use of multiple checklists. Each department may have its own checklist; each school may have its own checklist; each campus may have its own checklist; each institution may have its own checklist.

When a candidate's dossier is created, the eDossier application will automatically assign the appropriate checklist to it. The selection of checklist for this assignment will be based on dossier type and the attributes of the checklist as compared to the attributes of the candidate.

Dossier type: checklists may be specific to a certain type of dossier. For instance, an institution may have a checklist for promotion dossiers and a different one for tenure dossiers. The checklist's dossier type code must match the dossier's dossier type code. Some checklists have a wildcard for dossier type, which means they match any dossier type code.

The **checklist attributes** that are considered when selecting a checklist to be assigned to a dossier are:

1. Department ID – if there is a checklist that is specific to the candidate's primary department, that checklist is selected. Otherwise:
2. School ID – if there is a checklist that is specific to the candidate's primary school, that checklist is selected. Otherwise:
3. Campus ID – if there is a checklist that is specific to the candidate's primary campus, that checklist is selected. Otherwise:
4. Institution ID – if there is a checklist that is specific to the candidate's primary institution, that checklist is selected. Otherwise:
5. If there is a checklist that is a catch-all (wildcarded for all attributes), that checklist is selected. Otherwise:
6. An error should be generated as the system is unable to assign a checklist to the dossier.

Thus, when setting up a checklist, these attributes need to be populated or wildcarded:

1. Dossier type code (T[tenure], P[promotion], TP[tenure and promotion], *[wildcard])
2. Department ID
3. School ID - Any valid School ID or a wildcard. However, if department ID is filled in, this must be either blank/wildcarded or the ID of the school to which this department is attached.
4. Campus ID – Any valid campus ID or a wildcard. However, if department ID or school ID is filled in, the campus ID must be either blank/wildcarded or the ID of the campus to which the department/school is attached.
5. Institution ID – Any valid institution ID or a wildcard. However, if department ID or school ID or campus ID is filled in, the institution ID must be either blank/wildcarded or the ID of the institution to which the department/school/ campus is attached.

