QBlock condition processing

During these steps, create a Passura list for each QBlock condition, then use these lists to update Approval data.

Before you begin

- Ensure that the *Final Decisions* spreadsheet matches the conditions that were decided in the meeting.

  - **A/AL**: Approved

  - **D/O**: Deleted

  - **D/R**: Rewritten

  - **D/T**: To Rewrite

  - **M/SXD**: Move to Affiliated Exam

  - **M/SX**: Move to Sibling exam

- Make any no-new-number (NNN) text changes. NNN changes are minor changes (missing comma, type-o, etc.) that do not require a duplicate.

- Investigate and finalize any coding changes in your approved (A, AL) QBlocks.

- Review the **NUMBER** column to ensure that each condition group's QBlocks are in the correct order. This facilitates later proofreading.

Create lists

1. In your *Final Decisions* spreadsheet, delete all columns except **QBLOCK_ID**, **NUMBER**, **ACTION**, and **TARGET**.

2. Create lists for each QBlock condition by uploading CSVs.

- Name the list according to this convention: *20XX SiblingX CMTX Approved QBlocks* (X = Year, Sibling, and CMT numbers).

- Do NOT select Publish Changes to this list.

- Select **QBlock Name** when downloading the CSV template from Passura.

3. Copy the **QBLOCK_ID** column for each Passura condition group into the CSV template's **QBlock Name** column.

4. Update your Passura QBlock Approval using the Passura List ID from the list's URL.

Update Approval
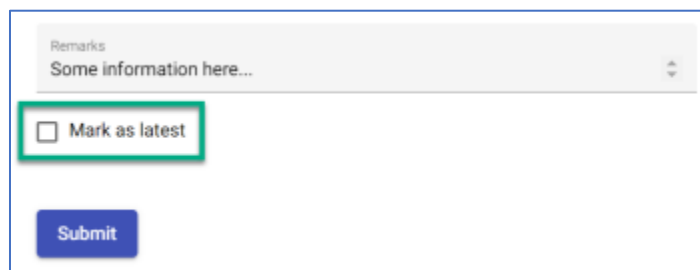
1. Click here to open Bulk Update in PassApps.

2. Update your Approval conditions by entering or selecting information in the following required fields:

   - Passura **List ID**
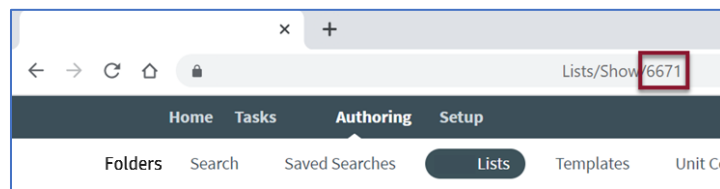
   - **Approval Code** - Select an option from the drop-down or type the code. The values in this dropdown are populated from HelperDatabase Setup, and your selection automatically populates the **Description**.

   - **Approval Role** - Select an option from the drop-down or type the code. There can only be one Primary (P) approval record per QBlock.

- **Approval Date** - Enter the date (MM/DD/YYYY) or click the calendar to select it. This value cannot be duplicated for any QBlock.

- **Review Action** - Select an option from the drop-down or type the code. The values in this dropdown are populated from HelperDatabase Setup.

- **Target** - Select an option from the drop-down or type the code. The values in this dropdown are populated from HelperDatabase Setup.

3. If needed, enter the **Next Review Date** (MM/DD/YYYY) and **Remarks** (up to 500 characters).

4. Select the **Mark as Latest** checkbox to indicate this as the most recent Approval update.

5. Click **Submit**.

6. Select Downloads from the main menu to track the **Status** of your request and to download file(s) when the request is **COMPLETE.**

7. Update the *Final Decisions* spreadsheet, noting each list name and ID number.

Publish lists

1. Publish each list after adding Approval by clicking the **Edit** button on the list screen and selecting the **Publish Changes to this list** checkbox.

2. Record the HLI numbers generated for each published list in the *Final Decisions* spreadsheet for each list/condition.

3. Check your *Final Decisions* spreadsheet for QBlocks that have an earlier **Next Review Date** than the standard three years. Update the review date manually in each applicable QBlock in Passura.

Next Steps

Make [redacted] QBlocks being moved to another Sibling or an Affiliated folder underline unavailable to your directory.