COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

ctcLink

CAMPUS SOLUTIONS CORE CTCLINK RESOURCE OVERVIEW DOCUMENT

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First Things First: Welcome!

This Overview Document was created to put security, processes, and tasks closer to your fingertips during your first moments in ctcLink.

Several teams at SBCTC work to develop, maintain and support ctcLink. We are part of the Customer Service Support Team and help campus staff use the system. Your **CS Core Team** supports the following modules: Campus Community, Student Records (Records and Enrollment, Curriculum Management), Student Admissions, and Academic Advisement. If it's Campus Solutions and doesn't involve money, it's us. If it's Campus Solutions and doesn't involve money, it's us!

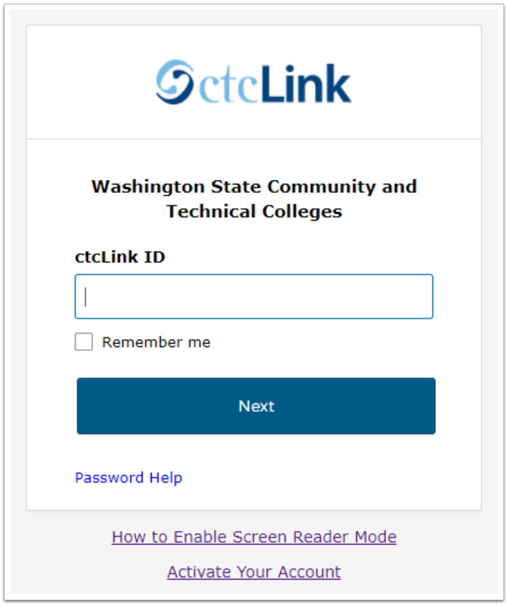
- We are here to help you learn, understand and leverage the **existing functionality**. We organize our work with the ticketing system.
- **Changing functionality** involves different processes depending on the nature and impact of the proposed change. To make change requests or recommendations, consult your campus PM for guidance.
- For guidance about **campus business processes**, work with your campus partners and decision-makers. We also encourage you to consult with your counterparts across the state for their experience and approach.

We have a team of functional analysts: Mandy Mineard, Michelle Kuwasaki, Maria Sultan, Marissa Baker, Ryan Jackson, Hillary Raj, Karen Erickson, Matt Sargent, and Rebecca Clayton. Kyrsten Catlin is the Associate Director. Trainer for CS is Tanjagay Martin.

First Steps: Getting Yourself Started

ctcLink Account Activation and Reset

A critical first step, of course! All ctcLink users, whether employees or students, follow the same Activating your ctcLink Account steps. You can Reset Your ctcLink Password as needed. Login and verify that you have access to the pages you need.



Browsers & ctcLink

Don't use the new tab or the back button on your browser to navigate through ctcLink. Use the New Window link just under the little house (top right on your ctcLink toolbar). To go back, use tabs on the transaction pages, return to search or navigate to a homepage as appropriate. Other tips and tricks to use:

- Clear Browser Cache
- Try another browser (Chrome, Firefox, Edge, Safari, Internet Explorer, Opera)
- Check your pop-up blockers

User Defaults

Set it now! Setting your User Defaults will save you a few keystrokes and a great deal of frustration. Many pages respond specifically to your User Defaults.

Personalization

There are many options for making yourself at home in your new workspace! Among other options, you can: Add a favorite to your navigation bar, create your own custom homepage, manage tab order or personalize the way your Enrollment Request Search results return. This may not be stuff for the first day but at some point you will want to take advantage of these options. *There is a great presentation that was done by Barbara Rissmann (formerly of Spokane Community College) and it is available to you in the [9.2 PS Fundamentals](#) Canvas class.*

First Aid Kit: Solution Checklist

Security

If you can't get to a specific page, it's probably security. Individuals are assigned to one role, whether it be a ZZ Process Role (process and view) or a ZD View Only Role (view). Supervisory or High Level Managers will also have the ZC Correct History Role. *Please check with your supervisor to ensure you have the correct set of security roles to run your daily business operations.*

SACR Security

If you can't find a lookup value, check your SACR security. For example, do you see Service Indicators available to you but the one you want to assign is not among them? Are you trying to run a query but can't use the lookup prompts? *It's probably SACR. Contact your campus IT security administrator.*

User Defaults

If you're not getting results for your institution, it may be your User Defaults.

So often it's Effective Dating . . .

Your enrollment requirement (or plan stack, enrollment action, anything) JUST WON'T WORK! Check your effective dates, all the way through the list of dependencies.

. . . Or Plain Old Dates!

Why did my student get (or not get) a W? Why can't the student add a class? If it's a date issue like this, take a look-see through the dates on your Academic Calendar and Term/Session Table.

Test It!

If your question begins with "what will happen if," you can probably pop into PCD and find out! Here you can try things out in a safe space as it won't affect real data. Restoring key data that may affect other testers is recommended. On your first adventure into PCD, you will need to activate your ctcLink account for that environment.

Answer Your Query WITH a QUERY!

Does your question start with "How many students…" or "Do we have a class that…?" Consider a query. To find one, use MetaLink. A handy how-to overview is available.

We All Need a HEUG Sometimes

Start with the Reference Center. And, unlike Legacy, PeopleSoft is a delivered product. That means other users at these other institutions have lots of ideas. And answers. Google. Oracle. HEUG. Listserv. *More information on the next page!*

Decoder Rings

- Legacy SIDs: Use Query CTC_VAL_LEGACY_SID_LOOKUP
- Legacy & PeopleSoft Term Calculator
- Legacy to PeopleSoft Crosswalk Glossary

First Toolkit: Resources

While we hope that you have been introduced to all of the information below prior to Go-Live, we are including them here so that you have them handy and accessible.

The Reference Center: QRG (Quick Reference Guide) Collection

This library of knowledge is constantly being updated. The Reference Center is organized into different sections. You'll spend the majority of your time in the section titled 9.2 Campus Solutions. In addition to direct content organized by chapter, you'll find these useful:

- **Crosswalks and Glossaries**
- QRGs Related to Navigation
- QRGs Related to Security Roles
- QRGs Related to SACR Security
- Business Flow Diagrams

Chapters
- Academic Structure
- Academic Advisement
- Admissions
- Campus Community
- 3Cs: Comments, Communications and Checklists
- Curriculum Management
- Student Records

Online Courses

- Register
- Canvas Overview
- Full List of Canvas Courses, include these in the Campus Solutions Pillar:
  - PeopleSoft Fundamentals
  - AA100 Academic Advisement
  - AS100 Academic Structure

- CC100 Campus Community (BioDemo)
- CC101 Managing 3Cs and Message Center
- CC201 3Cs Communications Setup
- RA101 Admissions
- RA201 Admissions: OAAP Suspense Management
- SR100 Curriculum Management: Course Catalog
- SR101 Curriculum Management: Class Scheduling
- SR102 Student Records: Beginning of Term Processes
- SR103 Student Records: Enrollment Processes
- SR104 Student Records: End of Term Processes
- SR105 Credentials Management: Evaluations & Transfer Credit
- SR106 Credentials Management: End of Term & Graduation
- SR107 Special Student Populations

If you have not previously registered for this Canvas course, you will receive an "Access Denied" message. If your access is specific to your institution, you may need to modify it (i.e., in the URL, replace SBCTC with your institution). To register: Go to the ctcLink Training Registration page. Here is a link to a recording that will walk you through the registration process.

You will receive an "Access Denied" message if you have not registered. Enrollment into the ctcLink Work Session Information course can be completed by navigating the ctcLink Training Registration page.

Previous Session Recordings

For the past few years, CS Core has regularly hosted sessions on different topics. Recordings of these are located in the related Canvas course and a list of these sessions is available to you.

PCD Environment

The PCD Environment is a recent replication of real data. It is a useful place to test-drive new processes or to answer the question "what would happen if?" Be sure to activate your PCD login.

Testing IDs

Each institution has been provided with three approved accounts: XX###CS01, XX###CS02, XX###CS03 *(replace ### with your college's three digit WA### code),. Using unapproved accounts can have severe impacts on a number of critical systems, including data, reporting, FTEs and Financial Aid. For more information, please contact your PM or Registrar. If you are, or become aware of, any testing (fake, not real, duplicate) accounts please bring it to our attention with a ticket. ***Pro Tip! Set up student login credentials for your approved Testing Accounts.***

MetaLink

The MetaLink application includes a Reporting Library, which has wonderful search tools that will help you locate a query and other data information.

Coding Manual

Much appreciation goes to the Data Services & Reporting team for developing the Coding Manual. We also encourage you to review BEdA Course and Class Coding. ***Student Groups, Service Indicators, Student Attributes and Course Attributes that start with S mean State Board. Don't add any that start with S!***

Oracle

Our system, ctcLink, is our instance of PeopleSoft. PeopleSoft is a product of Oracle. While the information provided on Oracle's pages will not be specific to our instance, the delivered functionality is universal. You can find a wealth of information on the Oracle pages.

HEUG [Higher Education User Group]

HEUG is a collective of users that support one another in making the most of PeopleSoft. Similar to Oracle, you will not find information specific to ctcLink here, but you will find a community of higher education users who also work with PeopleSoft. You'll find HEUG users are incredibly helpful and generous in their knowledge. You will also have access to prior recordings from conferences and other knowledge-sharing events.

ctcLink Listservs

THIS is where you will find the users who can speak about ctcLink! Use this to network with your counterparts in ctcLink. We also use the listserv to disseminate important information. If you haven't signed up, sign up! The email address is ctclinkcssupport@lists.ctc.edu

A Ticket is the Ticket when . . .

Exhausted your checklist and all resources? Submit a ticket to SBCTC Customer Support.

ctcLink Resources

Check out the following ctcLink resources to help you get connected quickly:

Beginning of Term Processes

There is a full chapter on Beginning of Term Processes, including a specific Beginning of Term Processes QRG that provides a step-by-step checklist:

1. Reviewing Term Session Table and Academic Calendar
2. Scheduling New Classes
3. Copying the Prior Term
4. Scheduling Rooms/25 Live

5. Generating Dynamic Class Dates
6. Handling Student Groups
7. Running Batch Term Activation
8. Assigning Enrollment Appointments
9. Creating Class Permission Codes
10. Applying Service Indicators
11. Managing Waitlists
12. Processing Enrollment Cancellation (Drops for Non-Payment)

End of Term Processes

There is a full chapter on End of Term Processes, including a specific End of Term Processes QRG that provides a step-by-step checklist:

1. Generating Grade Rosters and Grading
2. Lapsing Grades
3. Running Repeat Check Process
4. Awarding Academic Standing, Honors and Awards
5. Setting and Removing Academic Standing Service Indicators
6. Running PERC (Post Enrollment Requirement Checking)
7. Posting Credentials, including Degrees
8. Processing Term Withdrawals
9. Identifying Students Term-Activated to an inactive Student Program/Plan
10. Discontinuing Student Program/Plans

First To-Dos by Module

Set Up SACR: Foundation Tables

In PeopleSoft, the Set up SACR module is where many setup values are defined for all areas, including Foundation Tables (Academic Structure and Term Setup).

As your First Steps, we recommend that you

- ☐ Verify every date in the current and future Term/Session Table for all sessions in UGRD (Regular, DYN and OEE)
- ☐ Verify every date in the current and future Term/Session Table for CNED, if applicable
- ☐ Verify every date on your current and future Academic Calendar
- ☐ Verify every entry in your Grade Scheme Table.

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  SR102 Student Records: Beginning of Term Processes
- ☐ Reference Center
  Maintaining the Term/Session Table
  Reviewing Term and Session Table
  Maintaining the Academic Calendar
  Running Batch Term Activation

GOTCHAS common in this area are:

- ✔ Inaccurate Academic Calendar entries
- ✔ Check the Term Calendar 3 tab of the Academic Calendar to confirm that the dates for Enrollment and Statistics to show align with each other
- ✔ Changes to your Term/Session Table could affect Financial Aid Term build. Before making any changes, be sure to coordinate with your Financial Aid Office.

Records and Enrollment

In PeopleSoft, the Records and Enrollment module encompasses almost everything involved in the student record. This content is divided into Records & Enrollment and Curriculum Management. Under **Records & Enrollment,** we include Enrollment, Term Activation, Program/Plan, Student Groups, Transcripts, Graduation, Degrees and Transfer Credit Evaluation.

As your First Steps, we recommend that you:

- ☐ CONFIRM your inbound and outbound transcript delivery setup is working.
- ☐ Set up Run Controls for and schedule as needed: Batch Term Activation, Enrollment Appointments, Repeat Process, Waitlist Process, Grade Lapse
- ☐ Then, move on to catching-up on any work that came in post shut-down and use this as an exercise to test drive your routine responsibilities (Program/Plan updates).
- ☐ Once you are comfortable with your routine responsibilities, review and determine the need to manage Program/Plan Batch Discontinuation (includes four query options).

Queries to familiarize yourself with and consider adding as favorites are:

QCS_SR_CRSENR_BY_STUGRP	Enrollment by Student Group
QCS_SR_STUDENT_GROUP_GRDES	Grades by Student Group
QCS_SR_ENRLSTATUS_INFO	Enrollment, Grade, Contact Info Summary
QCS_SR_NSC_DISCONTINUED_STACKS	Program/Plan Stacks Discontinued Mid-Term
CTC_SR_TERM_ACTIVATED_ERROR	Term-Activated but not Enrolled
CTC_SR_ENROLLED_STUDENTS	Enrolled Students by Term
QCS_SR_STDNT_TRANSFER_COURSES	Student Course Transfer Credit

Queries for Identifying Transcripts for Evaluation

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  - SR102 Student Records: Beginning of Term Processes
  - SR103 Student Records: Enrollment Processes
  - SR104 Student Records: End of Term Processes
  - SR105 Credentials Management: Evaluations & Transfer Credit
  - SR106 Credentials Management: End of Term & Graduation
- ☐ Reference Center
  - Beginning of Term Processes
  - End of Term Processes
  - Enrollment
  - Enrollment Appointments
  - Student Program and Information
  - Running Batch Term Activation
  - Student Groups
  - Transfer Credit
  - Transcripts
  - Awarding Degrees and Graduation

GOTCHAS common in this area are:

- ✔ Sending transcripts from the wrong system. Also, you can still SEND transcripts from Legacy.

- ✔ Inaccurate Academic Calendar dates and Effective-Dating, especially until you are familiar with how Program/Plan Stack rows work.
- ✔ Be prepared for high NSC errors, especially if your previous report came out of Legacy.

Academic Advisement

In PeopleSoft, the Academic Advisement module is used to manage advisees and to build Academic Advisement Reports (AARs), also known as degree audits. The AAR contains the requirements for academic programs and measures student progress toward a degree or certificate. From the ctcLink Student Homepage, students can access their AAR and plan enrollment for future terms.

As your First Steps, we recommend that you

- ☐ Test your Academic Advisement requirements.
- ☐ Then, move on to catching-up on any work that came in post shut-down and use this as an exercise to test-drive your routine responsibilities (assign advisors).

Queries to familiarize yourself with and consider adding as favorites are:

QCS_AA_ADVISING_NOTES	Advising Notes by Category
QCS_SR_ADVISEES	Enrolled Students by Advisor and Plan with Contact Info
QCS_AA_ADVISOR_ASSIGN_1	Advisee List by Advisor

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  - AA100 Academic Advisement
- ☐ Reference Center
  - Advising Students
  - Building Academic Advisement Reports
  - Generating Advisement Reports

GOTCHAS common in this area are:

- ✔ The AAR is automatically updated in response to specific actions (e.g. grade posted, program change). The most current version will be accessible to the student and, depending on the most recent action, that current version may have been generated today or several days, weeks, months or even years ago.
- ✔ All active Student Program/Plan stacks will display on the student's AAR view.
- ✔ Advisor will need to be updated when you make a change to a Program/Plan.

- ✔ Effective-Dating, Advising Requirements also involve dependencies (Academic Requirement Group on Academic Requirement on Requisite Group).

Curriculum Management

In PeopleSoft, the Records and Enrollment module encompasses almost everything involved in the student record. This content is divided into Records & Enrollment and Curriculum Management. Under **Curriculum Management,** we include Course Catalog, Schedule of Classes, Enrollment Requirements, PERC (Post Enrollment Req Checking), and grade rosters.

As your First Steps, we recommend that you

- ☐ Establish Run Controls and run the Dynamic Dates Process
- ☐ Verify class conversions and compare Legacy to ctcLink section data
- ☐ Test frequently used Enrollment Requirements
- ☐ Then, move on to catching-up on any work that came in post shut-down and use this as an exercise to test-drive your routine responsibilities (class/course changes, including adding the EMPLIDs of any instructors who were hired after EMPLIDs were generated to Maintain Schedule of Classes). *As things settle, study how these function differently in ctcLink than Legacy: combined classes, waitlists, instructor status related to grade approval*

Queries to familiarize yourself with and consider adding as favorites are:

QCS_CLASS_ENROLLMENTS_EXPANDED	Information about class sections by term
QCS_AC_CRSECATLG_CHNGS_ALL	Course Catalog changes by ED and Subject
QCS_CM_ENROLLMENT_REQ_GROUPS	All ERGs in Use by Institution
CTC_SR_NO_GRADE_APPROVAL	Instructors without Grade Approval

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  - SR100 Curriculum Management: Course Catalog
  - SR101 Curriculum Management: Class Scheduling
- ☐ Reference Center
  - Course Catalog Best Practices QRG
  - Creating New Courses in the Course Catalog QRG
  - Schedule New Classes QRG

GOTCHAS common in this area are:

- ✔ Changes, especially with combined or associated classes, can be tricky and sometimes impossible. Check CAREFULLY. Rebuilding and moving enrollment is not fun.
- ✔ Effective-Dating and the dependencies of ERG to ER to Course List.
- ✔ Test data source must be included as a valid data source in Define Test for Requisites
- ✔ Instructor can't enter grades? Check approval status. Ensure a roster has been generated.
- ✔ Be prepared for Enrollment Requirement errors. After the first year, it does subside.

Student Admissions

In PeopleSoft, the Student Admissions module is where we manage and track all aspects of admissions activities, from applications to test scores. Once admitted, the information becomes a student record and moves to Records and Enrollment. *Technically, Quick Enroll is a part of the Records & Enrollment module. In our instance, the actual application was a developed and not delivered functionality.*

As your First Steps, we recommend that you

- ☐ Availability for terms in OAAP Term Setup is dependent upon the Term/Session Table being populated.
- ☐ Set up Run Controls for batch-assigning any Communications and Checklists.
- ☐ Then, move on to catching-up on any work that came in post shut-down).
- ☐ That's it! You are now ready to settle in and focus on your regular work. Start with managing any suspended (QCS_RA_APPLICATION_STAGING) applications and then work your way through applications (QCS_RA_ADM_APPLS) ready to be processed.

Queries to familiarize yourself with and consider adding as favorites are:

QCS_RA_ADM_APPLS	Applications to be Processed
QCS_RA_APPLICATION_STAGING	Applications in Suspense
QCS_RA_APP_OAA	Document Uploaded through OAA
QCS_AD_OAA_PAPER_APPLICATIONS	List of OAA & Paper Applications
QCS_RA_APPLICATION_NOT_SUBMIT	Applications not yet Submitted
QCS_SR_ADMITTED_NOT_ENROLLED	Students Admitted and not Enrolled
QCS_CC_FOREIGN_STUD_RESDNCY	Foreign Students Residency (FA Office)
QCS_CC_F_VISA_CTZNSHP_PROGPLAN	F Visa Students' Citizenship, Res, Prog/Plan

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  - RA101 Admissions
  - RA201 Admissions: OAAP Suspense Management
- ☐ Reference Center
  - Admissions Chapter of QRGs (Quick Reference Guides)

GOTCHAS common in this area are:

- ✔ SEARCH-MATCH. *Avoid duplicates AND avoid updating the wrong record.*
- ✔ Do not have multiple tabs open when processing suspended applications.
- ✔ Add a row to MATR (don't overwrite APPL).

Campus Community

In PeopleSoft, the Campus Community module is where we manage information about and communication to people. It includes 3Cs, Communications, Checklists and Comments. *We also use Message Center, a HighPoint product. Both are useful tools, each with different advantages*

As your First Steps, we recommend that you

- ☐ Set up Run Controls and recurrences for timely communications such as Admissions letters.
- ☐ Verify your access to any pages critical to your work. Frequently used pages in Campus Community include Student Services Center, Service Indicators and Personal Information. Review Student Information Navigation and Communication Navigation.
- ☐ Then, move on to catching-up on any work that came in post shut-down and use this as an exercise to test-drive your routine responsibilities.

Queries to familiarize yourself with and consider adding as favorites are:

QCS_CC_CURRENROL_WEMAIL	Contact Info for Currently Enrolled Students
QCS_SR_REVERSE_PHONE_LOOKUP	Lookup by Phone Number
QCS_CC_GRP_CONTACT_INFO	Students in a Student Group
QCS_CC_DRNP_POPSEL	**[STRM]** Dropped for nonpayment in last 24 hours
QCS_CC_PLAN_ACTIVATION_POPSEL	**[SPRG]** Currently Active in Plan Code
QCS_CC_SI_GEN_POPSEL	**[GEN]** With Specific Date-Based Service Indicator
QCS_CC_SI_STRM_POPSEL	**[STRM]** With Specific Term-Based Service Indicator
QCS_CC_SI_WAITLIST_ENRL_POPSEL	**[STRM]** Enrolled from Waitlist "today"

Resources to bookmark are:

- ☐ Canvas Classes. *If you have not registered, see Page 6.*
  - CC100 Campus Community (BioDemo)
  - CC101 Managing 3Cs and Message Center
  - CC201 3Cs Communications Setup

- ☐ Reference Center
  - 3Cs: Comments, Communications and Checklists Chapter of QRGs
  - Campus Community Chapter of QRGs (Quick Reference Guides)

GOTCHAS common in this area are:

- ✔ Some communications have already been setup for you. Double-check the QRGs and your canvas homework before trying to build one from scratch.
- ✔ 3C Communication involves two steps. Run 3C Engine to assign the communication to the student. Run Communication Generation to send that communication to the student.
- ✔ Be prepared for a lot (a lot) of set up. 3Cs, like other parts of ctcLink, requires multiple layers of setup. HEUG presentations are an excellent resource for 3Cs setup.


Search/Match
Student Groups
Dynamic Dating
Enrollment Requirements
QRG
Permission Codes
Academic Calendar
First
MetaLink
Welcome
Program/Plan
Coding Manual
3Cs
Solution
Run Controls
Taco
SACR
PCD
Student Attributes
Term Withdrawal
ctcLink
Add a Row
Term Setup
Term Cancellation
Enrollment Cancellation
HEUG
Effective-Dating
Term Activation
Message Center
Running PERC