

# Generate Student Statements

**Purpose:** Use this document as a resource for how to generate a student billing statement in ctcLink.

**Audience:** Student Financials Staff.

! You must have at least one of these local college managed security roles:

- ZZ SF Processing
- ZZ SF Student Stmts
- ZD\_DS\_QRY\_STUDENT\_FINANCE

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## Generate Individual Student Statements

**Navigation:** Student Financials > CTC Custom > CTC SF Reports > Generate Student Statements

1. The Generate Student Invoice run control search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
  - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220\_ADM\_FYR\_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Student Statement page displays.
4. In the *Student Invoice Parameters* section, enter or search for the:
  - A. **Business Unit.**
  - B. **Student ID.**
  - C. Beginning term to include on the billing statement in the **From Term** field.
  - D. Ending term to include on the billing statement in the **To Term** field.
5. Select the **Generate Report** button.
6. A confirmation Message displays.

7. Select the **OK** button and the Student Statement page displays.
8. Please refer to the [Report Manager](#) steps for further instructions.

 When the time comes to make updates to this statement, please submit a ticket to SF Customer Support with a copy of the desired changes/as much detail as possible. All template updates/adjustments need to have a ticket submitted.

9. Process complete.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## Video Tutorial via Panopto

View the external link to [Generate Individual Student Statement](#). This link will open in a new tab/window.

## BI Publisher Batch Student Statements

 The BI-Report allows you to run one student, a batch up to 25 students (separated with commas), or all students. You can also run the process for one specific term or a term range.

### Navigation: Reporting Tools > Bi Publisher > BIP Query Report Scheduler

1. The Query Report Scheduler search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.

- NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220\_ADM\_FYR\_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Query Report Scheduler page displays.
  4. Select the **Data Source Type** drop-down and select **Query**.
  5. Enter or look up the **Report Name BCS\_SF\_STMNT**.
  6. Select the **Update Parameters** hyperlink if you have run this process before utilizing an old Run Control ID.
  10. The Report dialogue box displays.
  11. Enter the **Business Unit**.
  12. Enter the **From Term**.
  13. Enter the **To Term**.
  14. **Optional:** Enter the **EMPLID**.
  15. Select the **OK** button.
  16. The Query Report Scheduler page displays.
  17. Enter or look up the **Template ID BCS\_SF\_STMNT\_1**.
  18. Enter the **Template As Of Date** as the **Current Date**.
  19. Select the **Run** button. Please refer to the [Report Manager](#) steps for further instructions.
  20. Process complete.

 This BI-Report allows you to run one student, a batch up to 25 students (separated with commas), or all students. You can also run the process for one specific term or a term range.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## Video Tutorial via Panopto

View the external link to [Batch Generate Student Statements](#). This link will open in a new tab/window.