Project Kickoff Information (Archive)

Purpose: College Project Managers and SMES can utilize this information to gain a high level understanding of the upcoming project activities.

Audience: Content is specific for Deployment Group 5 and 6 (with samples from DG3 and DG4) but all deployment groups can gain knowledge from the content.

Project Introduction

Project Introduction Information

WHY CTCLINK?

ctcLink is the implementation of a single, centralized system of online functions to give students, faculty and staff anytime, anywhere access to a modern, efficient way of doing their college business.

ctcLink is about much more than new software. As the current 35-plus-year-old administrative system is replaced, colleges will examine their core business processes and practices to align with the delivered software solution (Oracle PeopleSoft), making for streamlined, standardized practices across the 34-college system.

- 35-year-old Legacy system is not sustainable
- College system needs common suite of online tools and aligned core business processes to:
    - Compete in the educational marketplace
    - Provide modern, on-demand services and online tools students expect
    - Create more efficiencies system-wide
    - Respond to government regulatory and reporting demands
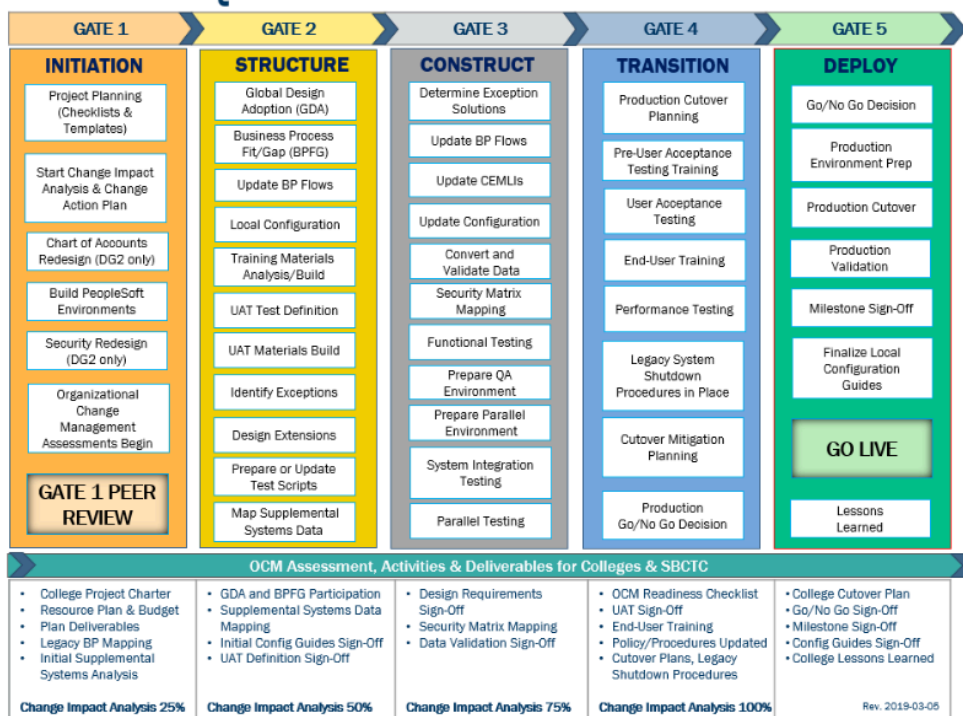
ctcLink Quality Gates and Milestones

CTCLINK QUALITY GATES AND MILESTONES INFORMATION
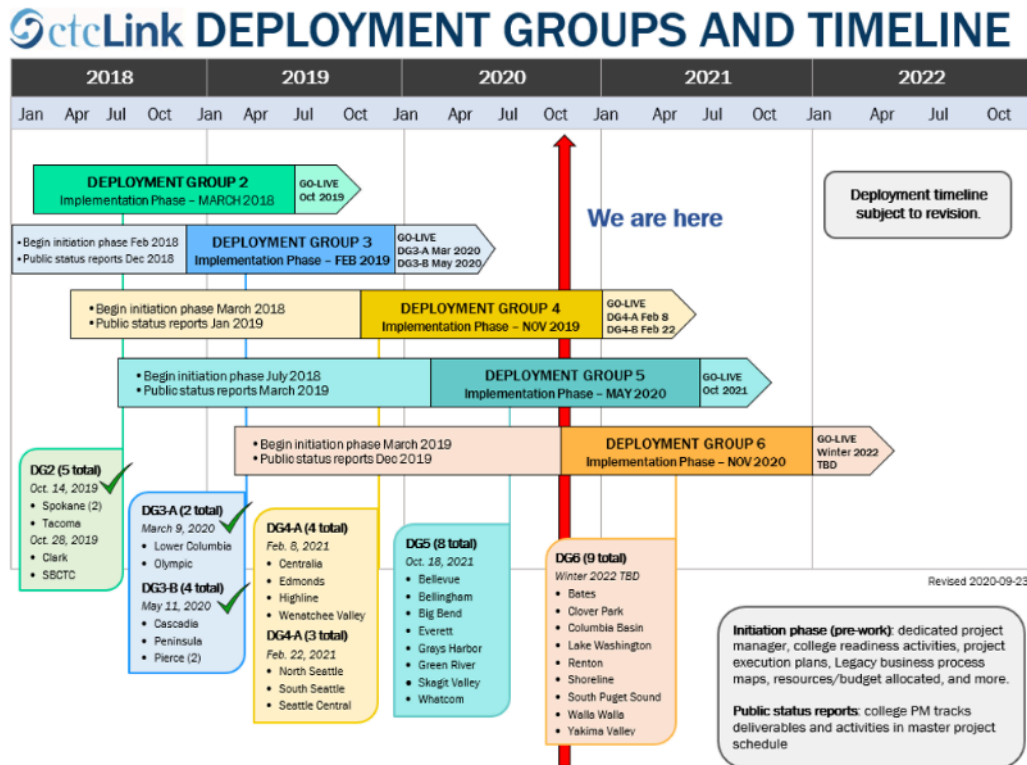
ctcLink Quality Gates & Milestones

Large projects can exceed time and budget because issues are not visible to management. By monitoring the quality of project results and steering a project through certain major milestones or "Quality Gates," such issues can be mitigated or avoided.

Quality Gates are key milestone moments at each of the multiple phases of a project that depend on the outcome of a previous phase.

CTCLINK QUALITY GATES & MILESTONES

GATE 1	GATE 2	GATE 3	GATE 4	GATE 5
INITIATION	**STRUCTURE**	**CONSTRUCT**	**TRANSITION**	**DEPLOY**
Project Planning (Checklists & Templates)	Global Design Adoption (GDA)	Determine Exception Solutions	Production Cutover Planning	Go/No Go Decision
Start Change Impact Analysis & Change Action Plan	Business Process Fit/Gap (BPFG)	Update BP Flows	Pre-User Acceptance Testing Training	Production Environment Prep
Chart of Accounts Redesign (DG2 only)	Update BP Flows	Update CEMLIs	User Acceptance Testing	Production Cutover
Build PeopleSoft Environments	Local Configuration	Update Configuration	End-User Training	Production Validation
Security Redesign (DG2 only)	Training Materials Analysis/Build	Convert and Validate Data	Performance Testing	Milestone Sign-Off
Organizational Change Management Assessments Begin	UAT Test Definition	Security Matrix Mapping	Legacy System Shutdown Procedures in Place	Finalize Local Configuration Guides
	UAT Materials Build	Functional Testing		
	Identify Exceptions	Prepare QA Environment	Cutover Mitigation Planning	**GO LIVE**
	Design Extensions	Prepare Parallel Environment		
	Prepare or Update Test Scripts	System Integration Testing	Production Go/No Go Decision	Lessons Learned
GATE 1 PEER REVIEW	Map Supplemental Systems Data	Parallel Testing		

OCM Assessment, Activities & Deliverables for Colleges & SBCTC

• College Project Charter • Resource Plan & Budget • Plan Deliverables • Legacy BP Mapping • Initial Supplemental Systems Analysis	• GDA and BPFG Participation • Supplemental Systems Data Mapping • Initial Config Guides Sign-Off • UAT Definition Sign-Off	• Design Requirements Sign-Off • Security Matrix Mapping • Data Validation Sign-Off	• OCM Readiness Checklist • UAT Sign-Off • End-User Training • Policy/Procedures Updated • Cutover Plans, Legacy Shutdown Procedures	• College Cutover Plan • Go/No Go Sign-Off • Milestone Sign-Off • Config Guides Sign-Off • College Lessons Learned
Change Impact Analysis 25%	**Change Impact Analysis 50%**	**Change Impact Analysis 75%**	**Change Impact Analysis 100%**	Rev. 2019-03-05

Deployment Group Timeline

Deployment Groups

WHO DEPLOYS WHEN?

By the end of 2022, all the colleges and the Washington State Board for Community and Technical Colleges agency office in Olympia will implement in groups (formerly referred to as "waves") ranging from six to nine colleges each.

Deployment groups (DG) were created with an eye toward balancing many factors, including, but not limited to: deployment size, college readiness, colleges' preference, college type (technical or community college), and whether the summer quarter is the start or the end term ("header "or "trailer") for the college's financial and student calendar.

- ctcLink Deployment Groups

DG5 High Level Timeline

DG5 HIGH LEVEL TIMELINE

LEGEND

LDC	Legacy Data Cleanup
DV	Data Validation
S#	User Acceptance Testing Sprint #

DG6 HIGH LEVEL TIMELINE

LEGEND

Cycle 1	Cycle 1 was retired after DG4 as part of lessons learned
LDC	Legacy Data Cleanup
DV	Data Validation
S#	User Acceptance Testing Sprint #
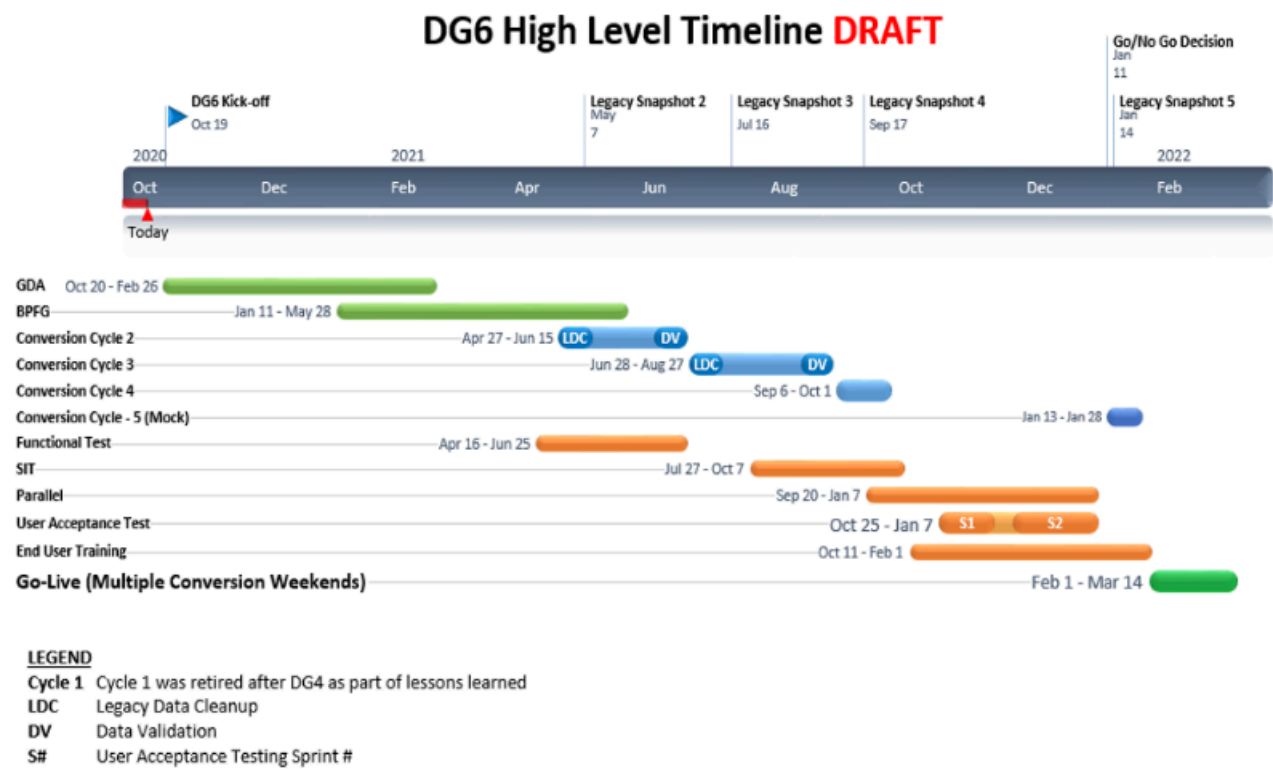
ctcLink Benefits

ctcLink will change many of the ways we do things at Washington's community and technical colleges. Once implemented, colleges will have a modern suite of online tools and a set of common core business processes. ctcLink benefits include:

CTCLINK BENEFITS FOR THE SYSTEM

- Access to information from anywhere, any time
- Single source of accurate, real-time data and common reporting tools
- Standardization of select administrative processes to support effectiveness across the system
- Ability to respond to changing business requirements
- Modern, consistent way to manage student records, enrollment reports, grades, class rosters, scheduling information, tuition and financial aid processes, accounting, state/federal reports

CTCLINK BENEFITS FOR STUDENTS

- A set of common, mobile-friendly tools to handle most college business online, any time
- A single ID and student record that follows students wherever they go within the Washington state community and technical college system
- 24/7 access to an online student center for registration, financial aid, tuition, contact instructors and advisors, view grades, track academic goals

CTCLINK BENEFITS FOR EMPLOYEES

- Self-service tools to manage personal information and other college business online
- Consolidated payroll processing and online HR tools and services
- An online, integrated suite of financial tools to create automated approval workflow processes for purchasing, travel, expenses and more
- A modern, consistent way of managing and sharing state and federal reports; payroll, purchasing and employee records; recruitment tools and benefits administration

Project Governance

CTCLINK GOVERNANCE FRAMEWORK
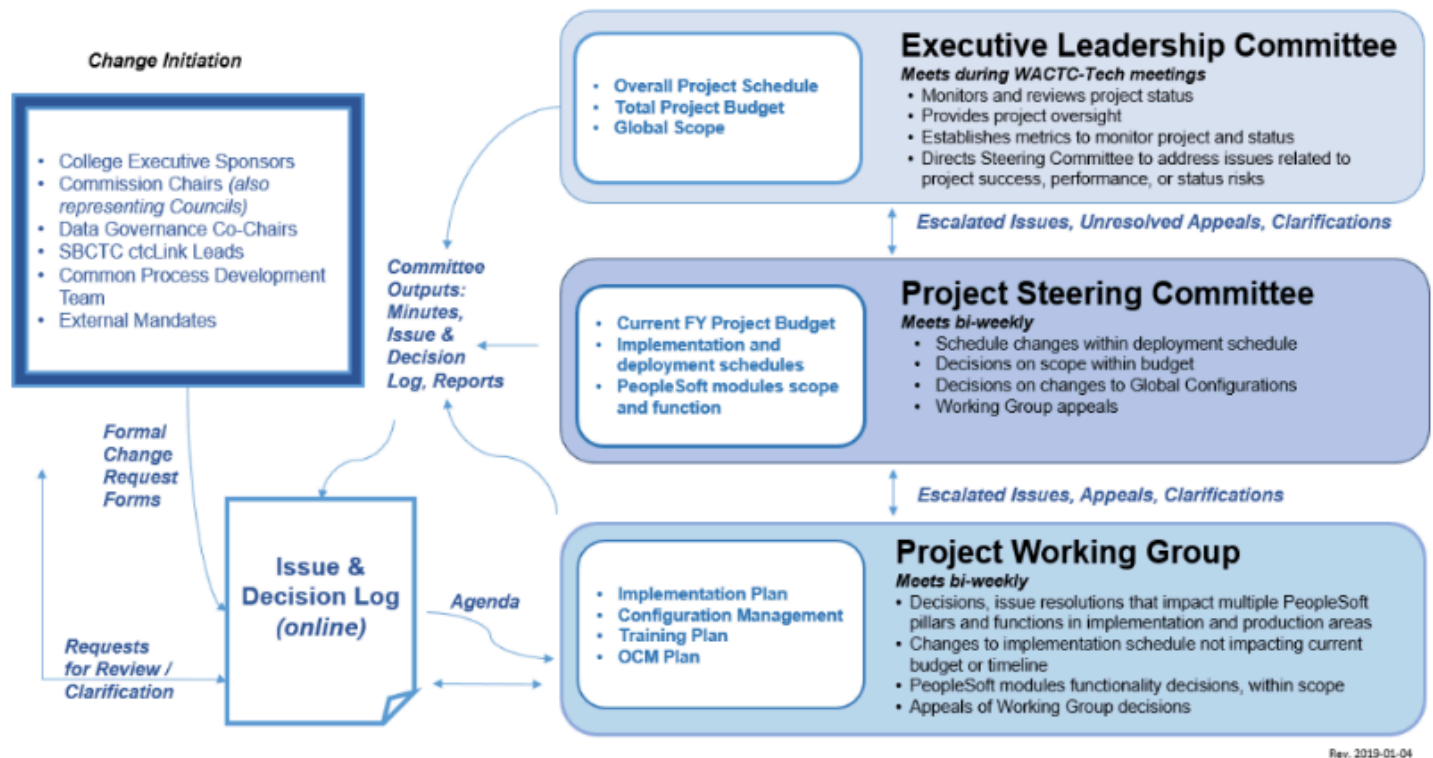
ctcLink Governance Framework Description

- [ctcLink Governance Framework Description](#)

ctcLink Executive Leadership Committee (cELC)

- [ctcLink Executive Leadership Committee](#)

ctcLink Project Steering Committee

- [ctcLink Project Steering Committee](#)

ctcLink Working Group

- [ctcLink Project Working Group](#)

Communications

Status Reports

- [ctcLink Project Status Reports](#)

PM/OCM Roster

- [ctcLink Project Managers and Organizational Change Managers](#)

ctcLink Documents and Resources

- [Where to Find ctcLink Documents and Resources](#)

Communication Toolkit

- [ctcLink Communications Toolkit](#)

Organizational Change Management (OCM)

Project Manager Resources

College Readiness

- [College Readiness Information](#)

Project Web App (PWA)

Project Web App (PWA) is the ctcLink Project Management Office (PMO) site, a centralized location for ctcLink Project schedules, plans and logs. Content is added and revised as the PWA continues to grow.

- [PWA Information](#)

Microsoft Project Information

- [Microsoft Project Tutorial](#)

Additional Resources

PPT DG6_Kick-Off_Presentation.pptx

PDF DG_Kickoff_ctcLink_Terminology.pdf

PDF Organization_Chart_-_ctcLink_Project.pdf

Work Packages

Work Packages

WORK PACKAGES: ONE THING LEADS TO ANOTHER

GDA
- Colleges get familiar with global design
- Precursor to BPFG

BPFG
- Your completed homework will inform the ctcLink project and functional teams about how to configure

CONFIG
- Local configuration is based on the homework you turned in

CONVERT
- ctcLink does its PeopleSoft conversion thing!

VALIDATE
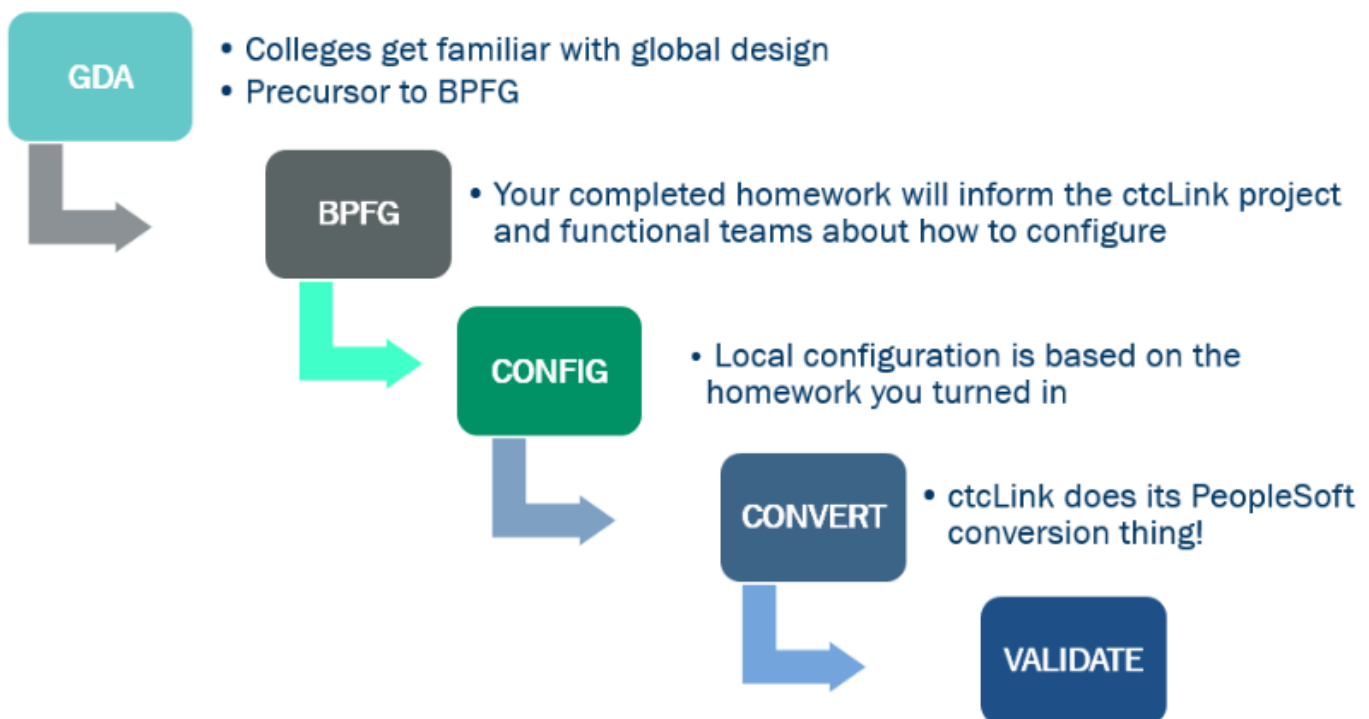
Global Design Adoption

- Colleges get familiar with global design
- Precursor to BPFG

Business Process Fit Gap

- Your completed homework will inform the ctcLink project and functional teams about how to configure

Configuration

- Local configuration is based on the homework you turned in

Conversion

- ctcLink does its PeopleSoft conversion thing!

Validate

Global Design Adoption (GDA)

Global Design Adoption Information

WHO, WHAT, WHEN, WHERE...

Who should participate?

- All college SMEs who are going to be engage in Business Process Fit Gap (BPFG) Sessions

What are GDA Canvas Courses?

- These courses are self-paced

When does GDA begin for DG6?

- Tuesday, October 20, 2020

When should SMEs target completing GDA for DG6?

- GDA Canvas Courses will remain open and should be completed before the BPFG session begins

When does BPFG begin for DG6?

- Some pillar-specific sessions are estimated to begin January 2021

WHY GDA?

- Canvas courses to review the Global Configuration Framework and understand enterprise processes

- Self-paced courses intended to educate staff on the global elements within the system in preparation for Business Process Fit/Gap (BPFG) sessions
- Skills assessments meet prerequisite requirement for BPFG session participation

SELF-PACED CANVAS COURSES

Self-paced courses that include a combination of overview information, videos, Quick Reference Guides (QRGs) and assessments. Coursework includes:

- Review of the Global Configuration Framework to help SMEs understand enterprise processes
- Global elements within PeopleSoft in preparation for Business Process Fit/Gap (BPFG) sessions
- Skills assessments to meet BPFG session participation prerequisite

The Cross-Pillar GDA course is the **prerequisite to all other GDA courses**. It is the first step to help you understand what Global Design Adoption (GDA) means and how it relates to the overall framework for Business Process Fit/Gap (BPFG) and conversion activities. Upon completion of the Cross-Pillar GDA course, additional pillar-specific courses will become available. Course completion times vary depending on the number of courses/modules required.
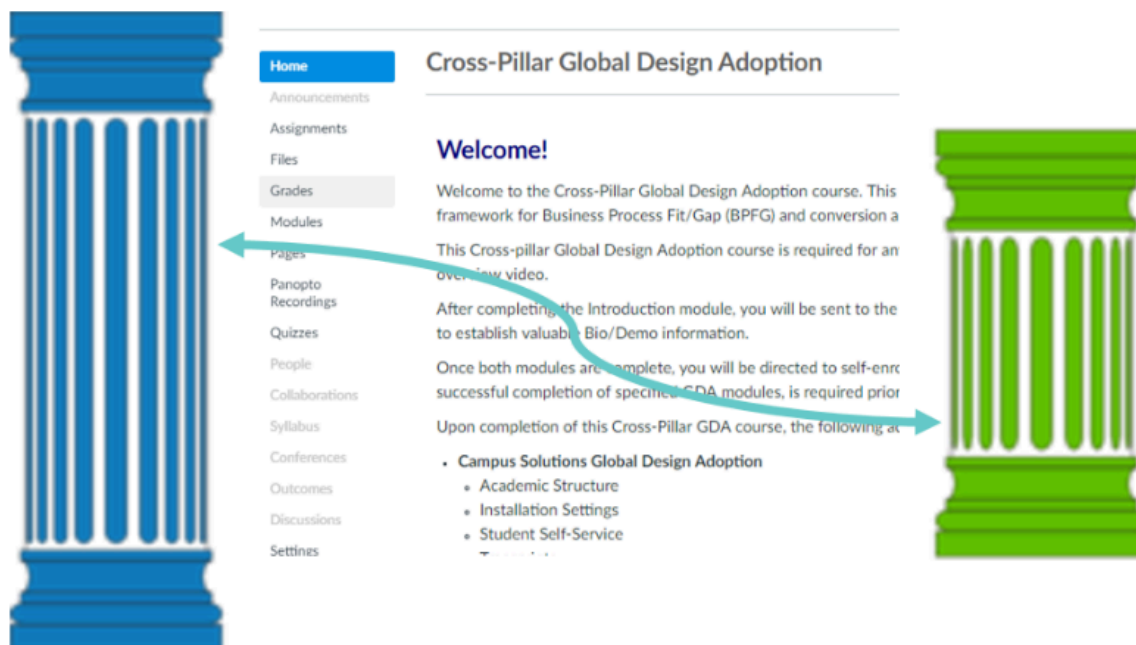
Additional available GDA courses:

- Campus Solutions Global Design Adoption
- Human Capital Management Global Design Adoption
- Finance Global Design Adoption

- Financial Aid Global Design Adoption
- Student Financials Global Design Adoption

Register for all GDA courses through the online [ctcLink Readiness (Initiation Phase) Canvas Registration](#) form.

In Canvas, per pillar
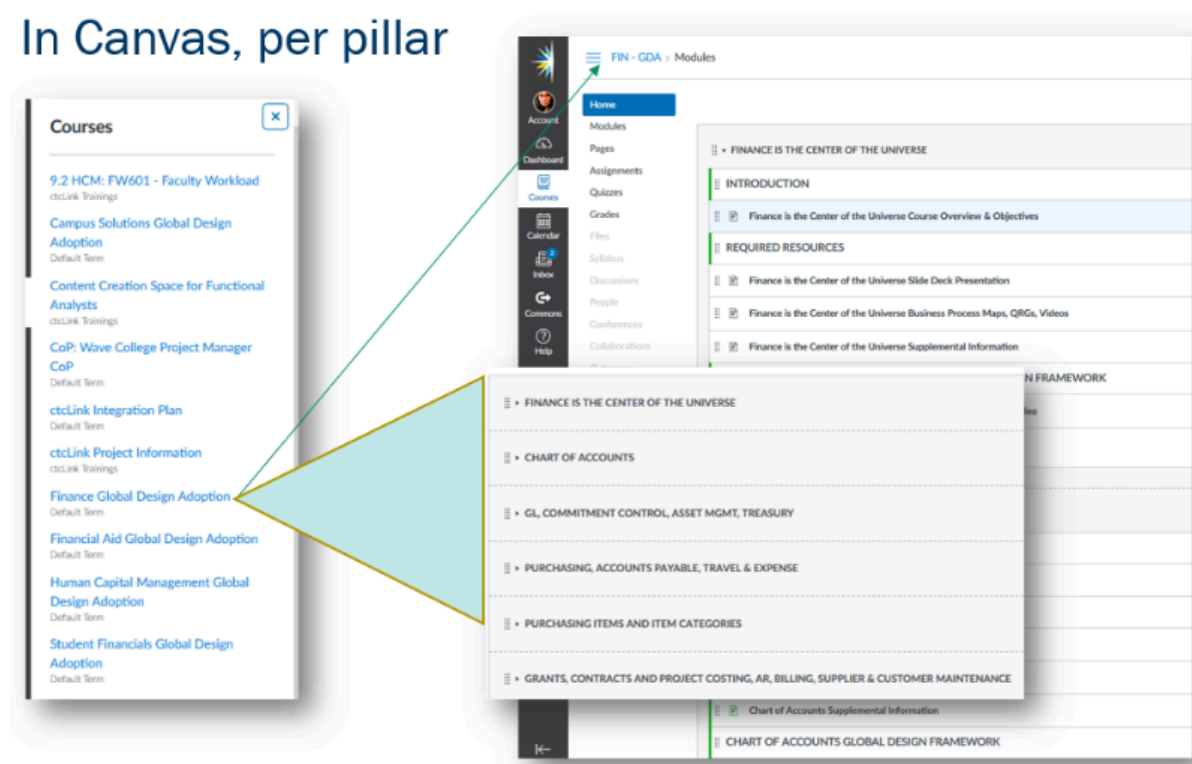
GDA LEADERSHIP SUPPORT OPPORTUNITIES

Communicate with Subject Matter Experts (SMEs) who participated in GDA courses

PMs are encouraged to ask SMEs about their GDA learning experience, knowledge gained from the course(s) and how they might apply it to the college's Change Action Plan to move toward the future state. Your interest in their participation and their ideas for how they will move forward into the next step of project work demonstrates to staff that leaders feel their engagement has value to the college.

> ℹ️ GDA course completion is required to prepare college SMEs to attend Business Process Fit/Gap (BPFG) sessions in the future!

Business Process Fit Gap Sessions (BPFG)

Business Process Fit Gap Session Information

Business Process Fit/Gap Presentation

📄 BPFG_Intro_Info_-_For_PMs_and_SMEs_(003).pptx

WHO, WHAT, WHEN, WHERE…

Who should participate?

- College SMEs and 1-2 back-up SMEs for your college. These SME should have current legacy business process knowledge and have mapped out their current processes and can make configuration decisions.

What are BPFG Sessions?

- These are remote sessions via WebEx. These sessions are facilitated by our functional project team members.

When do BPFG sessions begin for DG6?

- Some pillar-specific sessions are estimated to begin January 2021.

When are BPFG scheduled to end for DG6?

- For some pillars, sessions will end in May 2021.

When will the "DG6 ctcLink Project Information" Canvas course (includes BPFG session information) be released to DG6 PMs/SMEs?

- Early December 2020

WHY BPFG?

Goals

- Increase college SMEs knowledge of PeopleSoft and business processes in PeopleSoft.
- Build on knowledge of global design learned in Global Design Adoption (GDA) courses.
- Prepare SMEs for data validation.

Outcomes

- College SMEs will have a better understanding of the differences between their Legacy business processes and the new business processes in PeopleSoft, and document these changes in Change Action Plans.
- College SMEs will complete configuration homework assignments which will be used for college's local configuration.

Homework

Help Us Build Your College's Configuration!

- "Homework assignments" range from local functional requirements gathering to detailed configuration
- **These local configuration** details are the blueprint to build PeopleSoft
- Configurations let you to convert Legacy data into PeopleSoft data

BPFG LEADERSHIP SUPPORT OPPORTUNITIES

Check in with subject matter experts (SMEs) who participated in BPFG Sessions

Ask them to share any "aha" moments from the BPFG session that they want to include to improve your college's Change Action Plan

- Your recognition of the importance of incorporating "aha" moments into the college Change Action Plan lends value to that local planning effort

Ask SMEs if they understand their role in the change

- Your interest in their role in the change shows support for their commitment to making that change successful

Ask your project team if they need your help to close any gaps in their understanding about their role in the change

Data Conversion and Validation

Data Conversion and Validation Information

At a glance, conversion is a repeatable process in each cycle, though some exceptions apply.

PM Oversees Work
Reports Completion in OTM

Homework | Configure/Test | Initial Data Extracts 'Error Files' | Clean Up Bad Data | College Data Files | Cross-Walk Values | Run Conversion | Internal Validation Publish Materials | Data Validation Workshops | SMEs Validate Data & Reports Issues in OTM
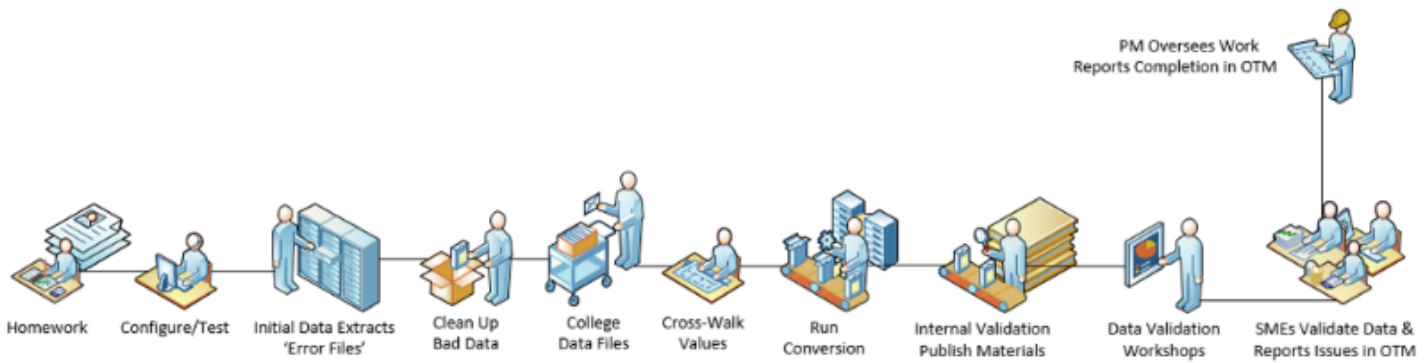
Pre-Conversion Cycle Work

- BPFG Session Homework Assignments related to conversion are entered and tested in the system in time for the first major conversion test (Cycle #2).
- Additional Configurations are entered from BPFG Session Homework Assignments and tested before the next conversion test (Cycle #3).
- An initial 'delta' extract is run in Legacy Production:
  - Provide colleges with a set of Excel files showing the errors written out by the extract programs for records that won't be picked up in the Extract Files OR will be included the Extract Files, but missing data in certain fields on load into PeopleSoft.
  - Colleges work to "clean up" Legacy Production to avoid extract errors when the conversion test is run using online materials in our ctcLink Reference Center.

Conversion Cycles

Cycle #1 - Bio/Demo Merge

- Bio/Demo Conversion-Merge (Completed by SBCTC)

Cycle #2 - First Full Conversion

- **PeopleSoft configuration values are cross-walked to their equivalent legacy values to ensure proper conversion.**
  - Project runs early extracts and populates our cross-walk tables to identify all legacy values that need to be cross-walked in the weeks leading up to each conversion.
  - Project staff will reach out to colleges for assistance in cross-walking if questions.

- **Colleges provide necessary data files used by the extract programs or as data to load into the system outside of programmatic load processes:**
  - CS: Test Scores File, Student Email File, Student Groups File, Academic Standing File, International Student Citizenship File, International Student Birth Country File
  - FIN: Asset Data File, Grants/Project File, 1099 Balance File

- HCM (Optional): Employee Email/Phone File, Position Description File

- **Project Team Converts the Data:**
  - Extracts records from a snapshot copy of legacy data, which colleges can refer to in their 'C' accounts.
  - Loads the transformed data in a PeopleSoft Conversion Test environment, which is a snapshot of PS Production.

- **Project Teams Internally Validate the Conversion**
  - Identify common errors or unique issues specific to a college.
  - Publish material updates in Canvas ("Known Issues") and update the online Validation Guides ("Common Issues), as needed in preparation for Validation Workshops with college SMEs.
  - Refresh Conversion Validation & Solution Validation environments.

- **Project Teams Hold Data Validation Workshops**
  - Providing guidance to college SMEs on using the materials and executing queries to verify data converted properly in Conversion Validation environment.

- **Report Issues & Completion in Oracle Test Manager**
  - Clean up legacy data identified as source of conversion issue before next snapshot.
  - PMs report completion of validation activities as 'Passes' in OTM.

Cycles #3 and #4 - Rinse and Repeat

"Rinse and Repeat" except:

- **Conversion Cycle #3 – Establish Course ID**
  - Begin Dual Maintenance of Course Data in PS Production
  - Clean up activities in Pre-Production means Course Validation in the Conversion Validation Environment is not required.
  - SF converted terms only, not inclusive of 'Go-Live' term activities.

- **Conversion Cycle #4 – PS Courses, Permanent EMPLIDs**
  - Cleaned Course Data in PS Production used for conversion.
  - Permanent EMPLIDs pushed to PS Production BEFORE conversion so UAT and Security will use those EMPLIDs.
  - Final work in Solution Validation (SVX) environment will be on the user's Permanent EMPLID as colleges ready themselves for move to Production Deployment.

TRANSITION PHASE
PRODUCTION CUTOVER PLANNING
ESTABLISH COURSE AND CLASS IN PS PROD
Conversion Cycle 3 Data Validation complete
PS PRD Workshop Kickoff (PM Orientation)
#1 Course Catalog
#2 Class Scheduling (Required before DG4)
#3 Enrollment Requirements
#4 Academic Advisement Report (AAR)
#5 Transfer Credit Rules
#6 Course/Class Fees

Cycle #5 - Dry Run of Cutover

- Project Team practices deployment of colleges in near real time.
- Final refinement of College Go-Live Validation materials.
- True exercise of SF Go-Live Term conversion with Go-Live Term classes built in PS Production to support a clean enrollment conversion and Customer Account charge/payment application.
- College SME Go-Live Validation 'Practice' opportunity:
    - 3-4 hour validation activity over the cutover weekend
    - Soft Start activities in the first days of using PeopleSoft
    - Verification of Security access migration.
    - Last chance for minor adjustments to Security in the Solution Validation environment prior to migration.

What Are We Converting for DG6?

FMS to Finance (FSCM)

- **Via "Extract" and "Load" Programs**
    - General Ledger Data (no error logs)
        - * Opening Balances and Current FY Details
    - Accounts Receivable Open Invoices
- **Via Excel File Based Conversion (no error logs)**
    - Asset Data
    - Grants and Non Grant Projects
    - 1099-M Balances

FMS to Campus Solutions (CS)

- **Via "Extract" and "Load" Programs (no error log on load)**

- Customer Account Details
  - Open and Paid Charges
  - Charge Payments (Includes FA)
  - Refunds/Financial Aid Balance Checks
  - Student Waivers
- Historical Unpaid Open Charges
- **Via Excel File-Based Conversion (no error logs)**
  - Go-Live Term Miscellaneous Charges and Waivers

SMS to Campus Solutions (CS)

- **Via "Extract" and "Load" Programs**
  - Student Bio/Demo
  - Program Plan Stack (EPC)
  - Residency
  - Test Scores
  - Course Catalog*
  - Class Schedule*
  - Hand-Entered Classes from Transcripts
  - Enrollment
  - Academic Standing
  - Academic Degrees
  - Degree Honors
  - Transcripts
  - Transcript Text
  - Transfer Credits
  - Student Groups (FB)
  - Service Indicators
    - Legacy Unusual Action Codes

FAM to Campus Solutions (CS)

- **Via "Extract" and "Load" Programs**
  - Student Bio/Demo
  - Student Academic Progress

PPMS to Human Capital Management (HCM)

- **Via "Extract" and "Load" Programs**
  - Employee Bio/Demo
  - Emergency Contacts
  - Accommodations/Disability
  - Employee Degree Data
  - Position Data

- Job Codes
- Employment (Job) Data
- Leave Balances
- Pre-Pay Balances
- Direct Deposit Data
- Balance Conversions (Earnings, Garnishments, Deductions, Taxes)
- Salary Administration Plans
- W4 Tax Data
- Benefit Participant Data
- Employee Citizenship/Visa

- **Via HCA Interface Program**
  - Dependent Beneficiary

FIN	CS	HCM
• Opening Balance from Current Fiscal Year • Current Fiscal Year Detail in General Ledger	• Applied for Admissions within two (2) years of Go Live Term • Enrolled in a Class within 6 years of Go Live Term **Customer Accounts (SF)** • Winter Go Live: Current Financial Aid Award Year Term Details	• Active Job Record in Current Calendar Year of Go Live • Terminated Job Record Paid in Current Calendar Year of Go Live • Payroll History for Two (2) Years Prior to Current Calendar Year of Go Live

Conversion Recap

College Prep

- Conversion Workshops
- Crosswalks, data validation
- Tracking/reporting issues in Oracle Test Manager (OTM)
- Open Webex follow-up sessions facilitated by
- ctcLink functional team members

Why

- Change action planning
- Level of involvement increases
- Building block of learning

PM Role in Validation Sucess

- **Prepare SMEs for Validation In Advance**:

- Encourage previews of Validation Guides before Validation workshops to come prepared with questions.
- Encourage SMEs/Leads to Spread the Love (load).

- **Help SMEs Manage Validation Minimums:**
  - Limit the page by page review in the system to a number of records for understanding PeopleSoft.
  - Utilize the offered queries, reports, worksheets for economy of scale to expedite the work
  - Talk with you IR or IT departments to see if other technical tools can be prepared in advance of the workshops based on Validation Guide information.

- **Check In Daily:**
  - SMEs will put off the work and be overwhelmed if they delay getting into the activity.
  - Encourage SMEs to report discoveries from Data Validation into the Change Action Plan?

Security

Security Information

PEOPLESOFT SECURITY
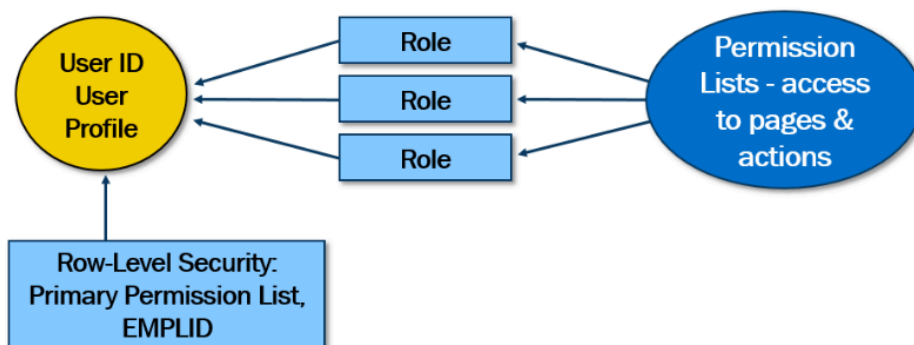
SECURITY MAPPING

Legacy to PeopleSoft Mapping

- Use Security Guides and DG3 Security Trainings listed below

Job Role to New Security Z Role Mapping

- Assigned presumptive roles based on
- Job
- Department
- Supervisory responsibility
- Review by Department Security Approvers
- Add missing roles
- Remove incorrect access

Roles/Users

- Assigning Roles to Users and General Tab Information
- Using Launchpad to Copy Security Information
- Viewing Menu Item Detail
- Applying Roles Through Launchpad
- Using Launchpad to Produce a Security Matrix
- Understanding Process Profile, Row and Primary Permission Lists in the User Profile

FIN Security

- FSCM 9.2 - Grants Security
- FSCM Procurement - Buyer and Requester Setup
- FSCM - Copy FS
- Manually Assign FS User Preferences

CS Security

- Assigning SACR Security Using User Replacement Security
- CS 9.2 SACR Security: Basic Requirements for Staff
- CS 9.2 SACR Security - Academic Program Security
- CS 9.2 SACR Security - Service Indicator Security
- CS 9.2 - SACR Security: Test ID Security
- CS 9.2 - SACR Security: Milestone Security
- CS 9.2 - SACR Security: Enrollment Security
- CS 9.2 - SACR Security: Student Financials
- CS 9.2 SACR Security: Program Action Security
- Student Group Security

- [Giving Access to Checklists](#)
- [Admissions Action Security](#)
- [User Security Replacement](#)
- [Using Launchpad Tool](#)
- [Academic Plan Security](#)
- [Role Security Analysis Using Launchpad](#)
- [Distributed User Profiles](#)
- [SACR- 3Cs Group Security (Financial Aid)](#)
- [Set Up SACR](#)

HCM Security

- [HCM Security - Assigning Roles to Users](#)

Security Glossary of Terms

- [PeopleSoft Security Glossary](#)

Security Training Videos

- [Student Group Security Video](#)
- [User Security Replacement Video](#)
- [Test Security Video](#)
- [Service Indicator Security Video](#)
- [Secure Student Financials Video](#)
- [SACR Required Items Video](#)
- [Program Action Video](#)
- [Launchpad Video](#)

CS - PS Security Re-Design

- [S 9.2 All 'ZD' Security Roles (View Only)](#)
- [CS 9.2 All 'ZC' Security Roles (Correct History)](#)
- [CS 9.2 All 'ZZ' Security Roles (Processor)](#)

FSCM - PS Security Re-Design

- [FSCM 9.2 Purchasing Module Security Roles](#)
- [FSCM 9.2 All 'Z' Security Roles](#)
- [FSCM 9.2 General Ledger Module Security Roles](#)
- [FSCM 9.2 All 'ZD' Security Roles (View Only)](#)
- [FSCM 9.2 All 'ZZ' Security Roles](#)

- [FSCM 9.2 All 'ZC' Security Roles (Correct History)](#)

HCM - PS Security Re-Design

- [HCM 9.2 All 'Z' Security Roles](#)

Project Security Information

- [Security and the Solution Validation Environment](#)
- [Define User Preferences in FSCM](#)

User Acceptance Testing (UAT)

User Acceptance Testing (UAT)

USER ACCEPTANCE TESTING OVERVIEW

Scope to be refined during FIT/GAP sessions

Self-paced training courses will be delivered prior to UAT to ensure knowledgeable testers

New UAT test documentation format

- UAT Articles in ctcLink Reference Center
- Links to flow diagrams and Quick Reference Guides arranged by business process
- Includes information on data scenarios, error conditions and security
- Linked to next step in the end-to-end business flow
- No Excel spreadsheets or "staged" data.

Will require departments involved in the end-to-end business flow to coordinate and plan their tests.

Tracking of test defects/success status in OTM and supported by QA Team.

- [User Acceptance Testing Information](#)

Training

ctcLink Training

CTCLINK TRAINING INFORMATION

A flipped classroom or hybrid model of training is being introduced, in which the user completes a majority of their coursework online, as well as attends instructor led workshops remotely through WebEx. Required materials will be available through Canvas, allowing self-paced learning being the bulk of the user's experience, with workshops offered for topics that have concepts that are best taught through Instructor Led Training (ILT). These workshops will be offered remotely through WebEx, with staff attending from their own campuses.

Training courses provide basic instruction on how to use ctcLink PeopleSoft. Your organization will provide local ctcLink training specific to your agency or campus procedures (e.g. deadlines for travel forms, purchasing policies). Courses are self-paced.

TRAINING PHASES/PREP

End-User Training

- Self-paced training courses, Instructor-led training sessions and study group participation for more integrated learning

Local College Training

- Smaller, business-practice trainings offered by college staff to address college-specific needs or practices to help staff learn how to use the system "your way."

College Prep

- PM to track participation and completion of training
- Identify Training Lead to coordinate and facilitate training activities
- Register for all Training courses through the ctcLink Training page

Why?

- Ability to demonstrate new skills
- and behaviors
- Change action planning

- Building block of learning and adoption
- Working cross-departmentally to collaborate

TRAINING LEADERSHIP SUPPORT OPPORTUNITIES

Be A Role Model

- Take a self-paced or instructor-led ctcLink course.
- Connect with other SMEs taking ctcLink courses and exchange ideas about what was learned and how it can be incorporated into improving college Change Action Plan.
- Ask about what might be creating barriers to change and help others to creatively identify ideas to remove barriers.
- Local training events to help remove barriers?
- Mentor and coach others through the change.
- Encourage staff to leverage what they learned in training to provide guidance to others.
- Positively engage and demonstrate behaviors you want to see in your college staff.

Go-Live Planning

Go-Live Planning

Sample DG3 College Readiness Template

- [Sample DG3 College Readiness Template](#)

Legacy Shutdown Procedures

- [DG3 - PPMS Legacy Process Shutdown Procedures](#)

Go-Live Checklists

This link will redirect you to the DG4 Project Information Canvas course.

- [College Validation Guides](#) (DG3 examples)

First Week / First Month Activity Guides

- [Campus Solutions ctcLink First Week / First Month Activity Guide](#)
- [Finance ctcLink First Week / First Month Activity Guide](#)
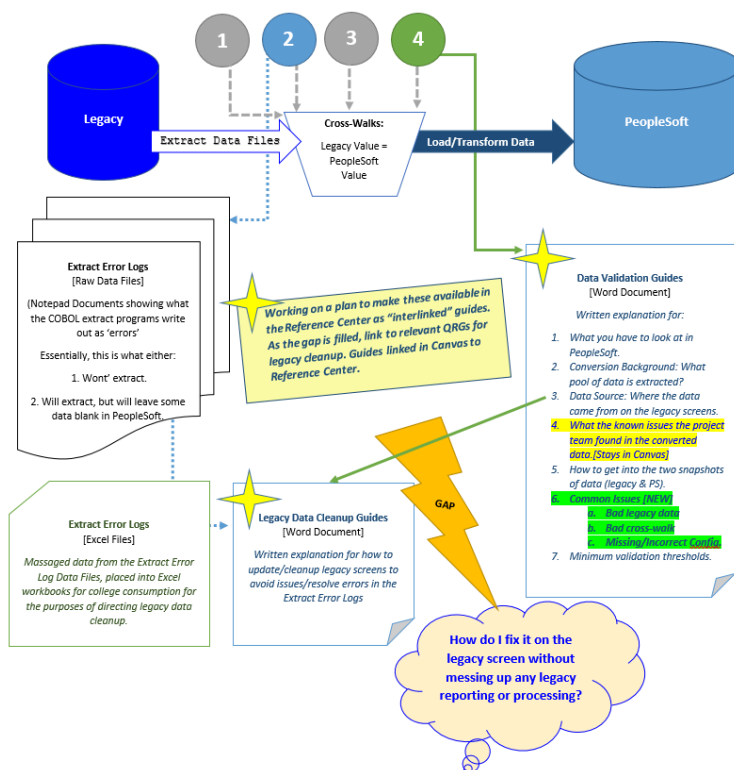- [Financial Aid Dual Processing Business Processing Guide](#)

- [Human Capital Management (HCM) ctcLink First Week / First Month Activity Guide](#)
- [Student Financials ctcLink First Week / First Month Activity Guide](#)

Local Configuration Guides

- [Local Configuration Guides](#)

Legacy Clean Up

Legacy Clean Up

Extract Error Logs *(Raw Data Files)*

Notepad Documents showing what the COBOL extract programs write out as 'errors'. Essentially, this is what either:

- Won't extract.
- Will extract, but will leave some data blank in PeopleSoft.

Extract Error Logs *(Raw Data Files are converted to Excel Files for college use)*

The excel files contain all data elements that will not convert to PeopleSoft correctly.Essentially, this is data that:

- Will prevent a record from converting to PeopleSoft.
- Will leave some data elements blank in PeopleSoft.

Most of the information in these files contains incorrect data. While Legacy may have "allowed" this incorrect data to be stored in a data element, PeopleSoft will not allow data which is outside of a specified range. Correcting this data in Legacy ensures that you have accurate information in Legacy for historical purposes, and accurate information converts to PeopleSoft.

Data Validation Guides (Word Document)

Written explanation for:

- What you have to look at in PeopleSoft.
- Conversion Background: What pool of data is extracted?
- Data Source: Where the data came from on the legacy screens.
- What the known issues the project team found in the converted data.[Stays in Canvas]
- How to get into the two snapshots of data (legacy & PS).
- Common Issues [NEW]
  - Bad legacy data
  - Bad cross-walk
  - Missing/Incorrect Config.

- Minimum validation thresholds.

How do I fix it on the legacy screen without messing up any legacy reporting or processing?

Legacy Data Cleanup Guides (*Word Document*)

Written explanation in the ctcLink Reference Center of how to cleanup legacy data errors. These guides provide a list of errors, Legacy screen where the data element can be cleaned up, and information on how to resolve errors noted in the Extract Error Logs.

> 💡 These links will redirect you to the DG4 Project Information Canvas course.
>
> - Legacy [SMS] Data Cleanup Information + Extract Error Files
> - Legacy [PPMS] Data Cleanup Information + Extract Error Files
> - Note: There are no documents for FMs available at this time

> ℹ️ Working on a plan to make these available in the Reference Center as "interlinked" guides. As the gap is filled, link to relevant QRGs for legacy cleanup. Guides linked in Canvas to Reference Center.

Key:

1. **Delta Extract Run in Legacy Production:** Intended for project team to get an early indication of new legacy values to configuration for in PeopleSoft. May result in college SME outreach from project staff.

2. **Delta Extract Run in Legacy Production + College Legacy Data Cleanup Files:** Intended for project team to get an early indication of new legacy values to configuration for in PeopleSoft. May result in college SME outreach from project staff. AND Alert for colleges for data that will not properly extract to allow time to clean up legacy data prior to the snapshot.
3. **Delta Extract Run in Legacy Production:** Intended for project team to get an early indication of new legacy values to configuration for in PeopleSoft. May result in college SME outreach from project staff.
4. **Conversion Test Extract Run in Legacy Snapshot:** Intended for project team to perform test conversion. May result in college SME outreach from project staff. Will result in colleges participating in data validation activities in PeopleSoft.