CS Core - Data Validation - Course Catalog and Class Schedule

Purpose: This document is to provide colleges instructions on how to perform the validation of data in the PeopleSoft environment.

Colleges are being asked to review data that was converted from the legacy environment to PeopleSoft. The goal of data validation is to ensure legacy data was accurately converted into PeopleSoft. College Subject Matter Experts (SMEs) are included in data validation as a learning experience in navigating the PeopleSoft application, selecting records to review, and reporting issues discovered.

College executives are asked to support the time and effort expended by college SMEs necessary to complete the following:

- Develop a familiarity with navigating the relevant PeopleSoft menus and pages.
- Review selected records, comparing legacy data to the records as converted into PeopleSoft.
- Report issues discovered after careful review of converted data.
- Monitor resolution of reported issues for review in the next conversion testing round.
- Develop an approach for self-managing the data validation and issue reporting process in subsequent rounds of data conversion testing.

It is expected that College Data Validation SMEs will have already read the Data Validation Overview guides *before* beginning their validation activities:

- Data Validation Overview Getting Started
- Data Validation Overview Reporting Issues

Overview of Data Validation

Conversion Summary

This round of conversion validation includes the following areas:

- Course Catalog
- Class Schedule

Conversion Validation Due Date

The Validation Results and Feedback are due NO LATER THAN on the last day of the Data Validation Period. It is strongly recommended that issues are reported EARLY in the validation period and are not held until the end of the period. Validation Results and Feedback are for reporting closure of the college's validation activities for the conversion cycle. To view a list of the validation periods please refer to the <u>timeline topic in the Data Validation Overview - Getting Started Guide</u>.

Getting Help

Questions regarding the data validation activities can be directed to the ctcLink Project Team. Please ensure your college PM is included in all communications.

| Name | Title | Module | Email | Phone |
|-----------------------|--|--------------------------|---------------------|--------------|
| Karen Erickson | Campus Solutions Functional Analyst | Schedule of Classes | kerickson@sbctc.edu | 360-704-3946 |
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Conversion Detail - Course Catalog

Conversion Background

PeopleSoft has been populated with all course catalog data available in COURSE-D. If a course did not exist in COURSE-D, but was scheduled as a class, entered as transcript class, or awarded as transfer credit, a catalog entry was derived for conversion purposes from CLASS-D, TRAN-CLASS-D or TRNSFR-COURSE-D. The information extracted was converted to PeopleSoft using data crosswalks and direct data translations. Each conversion item is described in the Validation Steps section below.

Common Conversion Issues

The following common conditions identified in conversion testing:

- Courses Offered as UGRD & CNED Some colleges offered some courses in both academic careers. This results in a separate catalog entry for each career. These appear as duplicates.
- Blank CIP Codes Courses will convert with a blank CIP code if the course was assigned a 2010 or 2020 CIP in legacy without applying a new Eff YRQ Begin. Recommend colleges update CIP during the course catalog workshop in PeopleSoft.

Minimum Validation Requirements

Objective A - Validate course data is converting correctly.

Data validators should complete a thorough review of the course catalog and are recommended to review the following areas:

Active Courses for Go-Live:

• Validate at least 50% of the courses that will be scheduled in the go-live quarter. Field-by-field validation guidance is provided in the following sections

Transformations:

 Use your college's curriculum conversion mapping assignment to verify courses and classes were transformed as expected

· Exclusions:

 Use your college's curriculum conversion mapping assignment to verify courses and classes were excluded as expected

Course Career:

 Verify CNED courses and classes converted as expected based on the CE qualifier applied in legacy

Objective B - Identify Course Catalog Workshop Items

College SMEs will participate in hands-on maintenance of their Course Catalog to ensure any necessary data cleanup is completed prior class scheduling and go-live. Through validation of the Course Catalog, SMEs should identify and maintain a list of cleanup or change items to be completed during the maintenance workshop. Please see the field-by-field validation steps for recommended items to review for this workshop.

Validation Steps - Course Catalog

The mapping information included in this section provides tab-by-tab validation guidance for each page of the course catalog. For some items, the ctcLink Project team has created

PeopleSoft queries that college validators can run to review or identify data sets. Navigation for pages applicable to this validation are provided below:

Course Catalog: Navigator > Main Menu > Curriculum Management > Course Catalog > Course Catalog

Steps to Search for a Course:

- 1. Enter your Institution code
- 2. Enter the Subject
- 3. Enter the Catalog Number
- 4. Click Search
- 5. **TIP**: Click "Include History" at the bottom of the screen to review historic changes to a course
- 6. Use the [>] button to review these changes

Query Viewer: Navigator > Main Menu > Reporting Tools > Query > Query Viewer

- Steps to Search for a Query
 - 1. Enter the query name
 - 2. Click Search

Queries:

The below query can be used for general course catalog validation. Additional queries are listed in the following sections for more specific field validation. It is recommended to use a combination of both in validation activities.

CTC_VAL_COURSE_CATALOG_DATA returns most validation fields

Catalog Data

Below are the fields to validate for this round of conversion or preparation for the course catalog cleanup workshop.

- 1. **Current Description, Long Course Title, & Long Description** _ Populated based on your optional file, otherwise taken from COURSE-D, CLASS-D, or TRAN-CLASS-D.
 - What to Validate: Review for any necessary legacy cleanup or changes to optional file.
 - Identify for Cleanup Workshop: N/A
 - Query to review current course titles & descriptions: CTC_VAL_COURSE_TITLE_DESCRS
- 2. **Historical Description, Long Course Title, & Long Description** _ If the same legacy Course ID was used for different courses over time, they may have ended up merged into a single course in PeopleSoft. For example, if PE 101 was historically offered as both "Volleyball" and "Pickleball":

| Course ID | Effective Date | Status | Subject | Catalog Nbr | Descr |
|-----------|----------------|--------|---------|-------------|------------|
| 000001 | 01/01/1901 | Active | PE | 101 | Volleyball |
| 000001 | 09/20/1972 | Active | PE | 101 | Pickleball |
| 000001 | 01/01/2000 | Active | PE | 101 | Volleyball |
| 000001 | 04/01/2000 | Active | PE | 101 | Pickleball |

If a student re-enrolls who was not included in the ctcLink conversion, the student's transcript must be manually re-created in ctcLink. These students' transcripts will display the Description from the Course Catalog. In this example, the transcript will display:

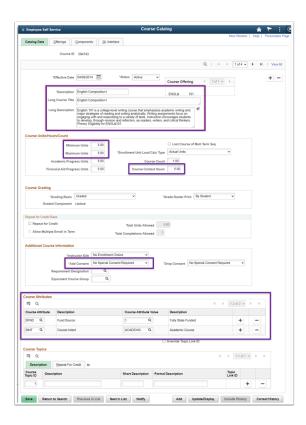
| Summer 1972 and earlier | Volleyball |
|-------------------------|------------|
| Fall 1972 – Fall 2000 | Pickleball |
| Winter 2000 | Volleyball |
| Spring 2000 and later | Pickleball |

- Query to review historical course titles and descriptions: CTC_VAL_CRSE_TITLE_HIST
- 3. Minimum/Maximum Units Units taken from COURSE-D, CLASS-D, or TRAN-CLASS-D3.
 - What to Validate: Review for accuracy and verify variable credit courses converted correctly.
 - Identify for Cleanup Workshop: Make note of any courses that are not eligible for Financial Aid. FA progress units will be set to 0 during the cleanup effort.
 - Query to identify variable credit courses: CTC_VAL_VARIABLE_UNIT
- **4. Course Contact Hours** Derived by dividing legacy total contact hours to weekly equivalent. This field represents total contact hours for the course.
 - What to Validate: Review weekly contact hours for accuracy.
 - Identify for Cleanup Workshop: Contact hours can be modified for individual class sections in the schedule of classes.
 - Query to review total course contact hours: CTC_VAL_COURSE_CONTACT_HOURS
- 5. Grading Basis All courses are converted with a grading basis of "GRD"
- What to Validate: N/A
- Identify for Cleanup: Review grading basis for accuracy Non-graded, pass/no pass, or satisfactory/unsatisfactory should be corrected during the course catalog clean-up workshop prior to go-live.
- · Query: N/A
- **6. Repeat for Credit Rules -** All courses are converted to abide by SBCTC repeat policy.
- What to Validate: Verify the "Repeat for Credit" box is unchecked.
- Identify for Cleanup Workshop: Courses that have been locally approved to be repeatable should be corrected during the course catalog cleanup workshop prior to go-live. Make note of repeatable courses to be corrected.

- Query: N/A
- 7. Add Consent Converted if legacy "permission only" flagged, otherwise no consent required
 - What to Validate: Verify permission only courses converted with add consent. Correct in legacy as needed.
 - Identify for Cleanup Workshop: Make note of any courses that should require consent to drop.
 - Query to identify permission only courses: CTC_VAL_PERMISSION_COURSES
- **8. Course Equivalencies -** Course equivalency groups are configured for your college but are not a part of conversion.
- What to Validate: N/A
- Identify for Cleanup Workshop: Course equivalency groups will be added to the catalog during the cleanup workshop.
- Query: N/A
- **9. Course Attributes -** Fund Source and Course Intent are converted to the equivalent course attribute in PeopleSoft.
- What to Validate: Ensure course attributes for SFND Fund Source and SINT Course Intent were populated correctly. SFND and SINT are critical for FTE calculation and reporting.

| Legacy Field | PeopleSoft Course Attribute |
|----------------------|-----------------------------|
| Funding Source | SFND – Funding Source |
| Institutional Intent | SINT – Course Intent |

• Identify for Cleanup Workshop: Additional course attributes may be added to a course during the workshop, including local course attributes, Job Skills Training, I-Best, and Work Based Learning. Make note of any necessary additions.



Offerings

- 1. Academic Group This field was populated based on your crosswalking.
 - What to Validate: Review for accuracy and note any necessary crosswalk changes.
 - Identify for Cleanup: N/A
 - Query to verify Academic Group ownership: CTC_VAL_CRSE_CAREER_GROUP_ORG
- 2. Subject & Catalog Number This field was populated based on your crosswalking.
 - What to Validate: Review for accuracy and note any necessary crosswalk changes. Also verify that any subjects or courses on your exclusion list were not brought over.
 - Identify for Cleanup: N/A
 - Query: N/A
- 3. Academic Organization This field was populated based on your crosswalking.
 - What to Validate: Review for accuracy and note any necessary crosswalk changes.
 - Identify for Cleanup Workshop: N/A
 - Query to verify Academic Organization ownership: CTC_VAL_CRSE_CAREER_GROUP_ORG
- 4. **Academic Career -** Courses converted to the Academic Career unless the Continuing Education qualifier was present on legacy classes. If "CE" was entered in the MISC-2 field, the course was converted to Continuing Education.
 - · What to Validate: Review for accuracy.
 - Identify for Cleanup Workshop: N/A
 - Query to identify course career: CTC_VAL_CRSE_CAREER_GROUP_ORG
- 5. **Course Typically Offered -** This field will be populated during the cleanup workshop based on local department lists.

- What to Validate: N/A
- Identify for Cleanup: Make note of courses in your current catalog that will require this information.
- · Query: N/A

6. Dynamic Class Date Rule

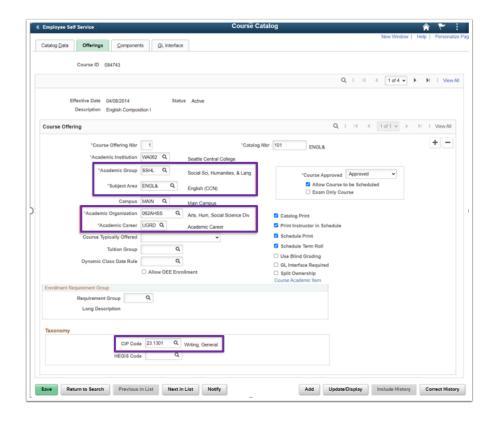
- What to Validate: For Continuing Education courses, verify the CERULE is populated.
- Identify for Cleanup Workshop: N/A
- Query to identify courses with a dynamic class date rule: CTC_VAL_COURSE_DYNAMIC_RULE
- 7. Allow OEE Enrollment & Rule Converted if legacy continuous enrollment marked "yes."
 - What to Validate: Verify OEE field is checked as necessary
 - Identify for Cleanup Workshop: N/A
 - Query to identify courses with OEE enrollment enabled: CTC_VAL_COURSE_OEE
- 8. **Course Approved Box -** For conversion purposes, all courses will be set to approved and allowed for scheduling.
 - What to Validate: Verify the course is approved and allowed to be scheduled.
 - Identify for Cleanup Workshop: Make note of historic courses that should no longer be scheduled.
 - · Query: N/A
- 9. **Catalog and Schedule Print Checkboxes -** All courses are converted to display in the self-service course catalog and class searches.
 - · What to Validate: N/A
 - Identify for Cleanup Workshop: Make note of any courses that should no longer be searchable in self-service.
 - · Query: N/A

10. Enrollment Requirement Group

- · What to Validate: N/A
- Identify for Cleanup Workshop: N/A
- Query: N/A

11. CIP Code

- What to Validate: Verify CIP code was populated and review for accuracy.
- Identify for Cleanup Workshop: Ensure that the courses you currently offer are assigned the correct CIP Code.
- Query to identify courses missing a CIP code: CTC_VAL_COURSE_MISSING_CIP



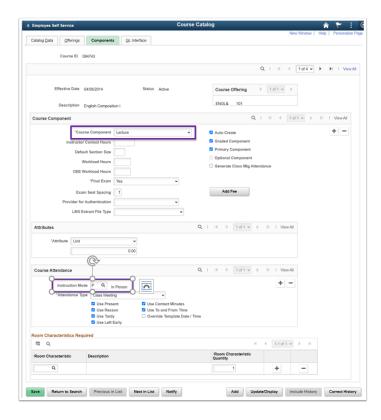
Components

- 1. **Course Components -** Components were created based on legacy contact hours in the lecture, lab, clinical, other, and system fields. If contact hours were present in more than one field, a multi-component course was created.
 - What to Validate: Verify conversion accurately assigned components to the course.
 - Identify for Cleanup Workshop: N/A
 - Query: N/A
- 2. **Primary/Graded Component -** Multi-component courses must designate a single component as the primary/graded component. This was converted for you based on the following hierarchy: lecture, lab, clinical, other.
 - What to Validate: Verify a primary/graded component was flagged.
 - Identify for Cleanup Workshop: The primary/graded designation can be modified during the cleanup workshop based on local business decision. Make note of any necessary changes.
 - Query: N/A

3. Instructor Contact Hours

- · What to Validate: N/A
- Identify for Cleanup Workshop: Component-specific hours will be updated during the cleanup workshop.
- · Query: N/A
- 4. **Component Attribute Units -** This custom field was populated during the cleanup workshop and is critical for Faculty Workload processing.

- What to Validate: N/A
- Identify for Cleanup Workshop: All current catalog offerings must have this field populated. Make note of necessary courses.
- Query: N/A
- 5. **Course Attendance Instruction Mode -** Populated based on legacy Distance Education field, otherwise defaults to "In Person." This field is used for attendance tracking only.
 - What to Validate: Verify the correct Instruction Mode was populated.
 - Identify for Cleanup Workshop: Make note of any necessary changes if attendance tracking will be utilized by your college.
 - Query to identify course instruction modes: CTC_VAL_CRSE_INSTRUCTION_MODE



Conversion Detail - Class Schedule

Conversion Background

Conversion Detail - Class Schedule

Conversion Background

All historic classes are converted to PeopleSoft in order to convert student enrollment records. Class data is extracted from CLASS-D and includes both Academic and Continuing Education (if applicable).

Note that all historic classes are converted as one section. After cycle 3, classes scheduled for the go-live term will be built directly in PeopleSoft (by your class schedulers) in a hands-on

workshop. Multi-component classes built directly in PeopleSoft will have multiple sections representing the different components (for example lecture/lab, lecture/clinical etc.).

Common Conversion Issues

• The class schedule conversion is directly impacted by conversion of the course catalog. If a course fails to convert, scheduled class sections will not be converted. Please refer to your curriculum mapping assignment for decisions made on course conversion.

Minimum Validation Requirements

As stated above, college staff will build Class Schedules for the go-live quarters (and later quarters) directly in ctcLink. Because the majority of class data is inherited from the Course Catalog, most class validation issues (e.g., credits, course title, course career, etc.) will be addressed during the Course validation activities above. Run the queries listed below to identify conversion issues, if any.

Validation Steps - Class Schedule

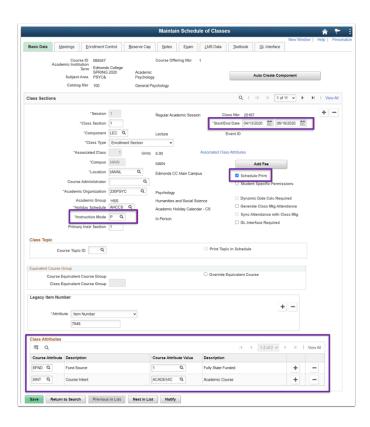
The mapping information included in this section provides tab-by-tab validation guidance for each page of the class schedule. For some items, the ctcLink Project team has created PeopleSoft queries that college validators can run to review or identify data sets. Navigation for pages applicable to this validation are provided below:

- Class Schedule: Navigator > Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes
 - Steps to Search for a Class
 - 1. Enter your Institution code
 - 2. Enter the Term
 - 3. Enter the Subject Area
 - 4. Enter the Catalog Number
 - 5. Click Search
 - 6. **TIP** Legacy item number can be found on the Basic Data tab
 - 7. Use the [>] button to find the class section
- Query Viewer: Navigator > Main Menu > Reporting Tools > Query > Query Viewer
 - Steps to Search for a Query
 - 1. Enter the query name
 - 2. Click Search

Basic Data

1. **Class Section -** The Class Section value from legacy will not be converted to PeopleSoft, you will see a numerical value in this field.

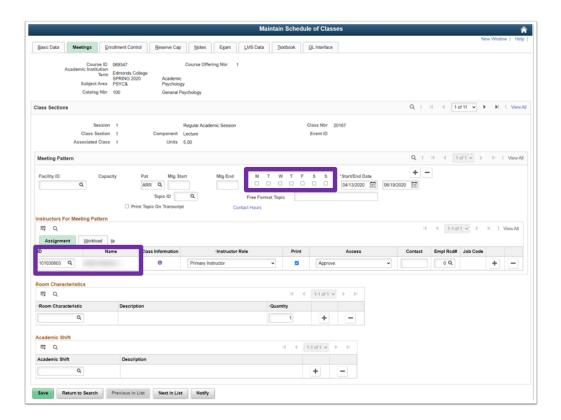
- What to Validate: Verify valid classes for the term were converted.
- Query to review converted classes: CTC_VAL_CLASSES_BY_SUBJECT
- 2. **Start/End Date -** Populated in conversion based on CLASS-D start and end dates. If legacy fields were blank, term start and end dates were used.
 - Query: CTC_VAL_CLASS_START_END_DATES
- 3. **Instruction Mode -** Converts as in-person unless legacy Distance Education code was present.
 - What to Validate: Verify the correct instruction mode was applied.
 - Query to review classes by instruction code: CTC_VAL_CLASS_INSTRUCTION_MODE
- 4. **Schedule Print** Defaults to print unless legacy class has SECT-STAT-4 of "M" or "S."
 - What to Validate: Verify the correct classes are not flagged to print on schedule.
 - Query to identify classes that are not flagged to print on the schedule: CTC_VAL_CLASSES_NOT_PRINTED
- Class Attributes Fund Source and Course Intent are converted to the equivalent class attribute in PeopleSoft.
 - · What to Validate:
 - Query: CTC_VAL_CLASS_ATTRIBUTES



Meetings

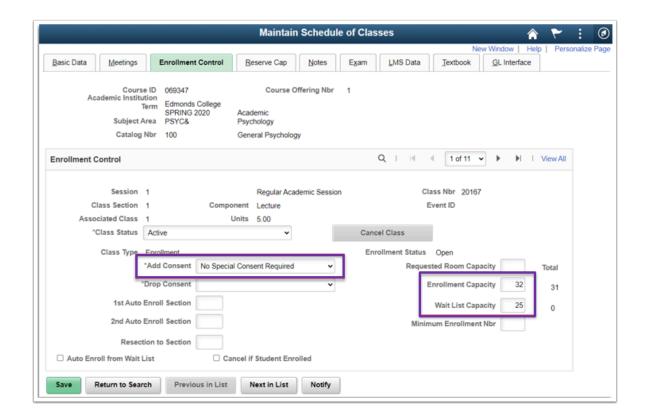
Meeting Pattern: Meeting pattern detail is converted for the prior two years of classes only. Classes for the go-live quarter and any future quarters will be scheduled manually by college staff.

Query: CTC_VAL_CLASS_MTG_FACILITIES



Enrollment Control

- 1. Class Status Only active classes were converted to PeopleSoft.
 - What to Validate: Verify cancelled classes or those in your class exclusion list were not converted.
- 2. Add Consent Defaults to no consent required unless legacy class has SECT-STAT-1 of "P.".
 - What to Validate: Verify correct classes have instructor consent required to add class
 - The following query can be run to identify permission only classes: CTC_VAL_PERMISSION_CLASSES
- 3. **Enrollment and Wait List Capacity -** Converted for prior two years of classes only and extracted from legacy class cap.
 - What to Validate: Verify the correct enrollment capacity was populated for classes within the last two years
 - Query to review class enrollment capacity: CTC_VAL_CLASS_ENROLL_CAPACITY



Reserve Cap

This page is not included in conversion and does not require validation. Information needed on this page for go-live classes will be entered during the class scheduling workshop prior to go-live.

Notes

Free Format Text - This field is populated only if your college elected to convert legacy footnotes.

- What to Validate: If your college elected to convert footnotes, verify that text is present.
- Query to identify converted notes: CTC_VAL_CLASS_NOTES

Exam

This page is not included in conversion and does not require validation. Information needed on this page for go-live classes will be entered during the class scheduling workshop prior to go-live.

Textbook

This page is not included in conversion and does not require validation. Information needed on this page for go-live classes will be entered during the class scheduling workshop prior to go-live.

Submitting Data Validation Results

College Data Validation SMEs will communicate any conversion issues they encounter during their data validation via the Oracle Test Manager (OTM) application. The ctcLink Testing Team will provide OTM orientation materials before the data validation period for any College Data Validation SMEs who are not familiar with the tool. Please refer to the <u>Data Validation</u> Overview - Reporting Issues guide for more information on using OTM.

When logging a new issue in OTM related to data being validated through this guide, remember to use the following values for these specific required fields in your issue entry under the project tied to this Deployment Group and CS Data Validation Cycle:

- **Summary:** (*Provide a title for the issue discovered*)
- Assigned To: select the functional analyst responsible for the specific conversion
 - Course Catalog = Rebecca Poe
 - Schedule of Classes = Karen Erickson
- **Status:** (*Leave as NEW*)
- College or Location: (Specify the college or district)
- Priority: (Leave blank not used)