

# CS - Data Validation - Other Student Records

**i 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 from the NavBar.
- 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

## Other Student Records Conversion Summary

This round of conversion validation includes the following areas:

- Academic Standing
- Service Indicators
- Student Groups
- Test Scores

Note: Quarterly Honors & Awards is covered in the Enrollment, Transfer Credit, and Transcript Text guide. Please see that guide for validation instructions of Quarterly Honors & Awards.

## 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 [timeline topic in the Data Validation Overview - Getting Started Guide](#).

## Getting Help

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• Test Scores	<ul style="list-style-type: none"> <li>• Student Groups</li> <li>• Service Indicators</li> <li>• Academic Standing</li> </ul>	Campus Solutions Lead	CS Project Management

## Conversion Detail – Academic Standing

### Conversion Background

Colleges have the option to convert student Academic Standing statuses by providing this data in a file to be loaded to PeopleSoft. Statuses are converted to the student's Academic Standing page in PeopleSoft. These can be used for batch processing once your college goes live.

If your college utilizes unusual action codes for punitive measures, these are converted to an equivalent Service Indicator. Please see section for Service Indicators to validate converted punitive unusual actions.

### Common Conversion Issues

A student's Academic Standing status for a given term is only converted if the student has enrollment in that term. Any standing statuses provided for a term where the student has no enrollment will be excluded from conversion.

Academic Standing conversion is impacted by upstream conversions including Bio/Demo and Enrollment. Conversion issues will be addressed in these validation activities.

## Minimum Validation Requirements

Your validation process should confirm your legacy data submitted in your college file converted correctly to PeopleSoft Academic Standing page. It is recommended to validate a broad range of Academic Standing scenarios:

- Select at least 10 terms and validate at least 25% of Academic Standings were converted correctly
- Review students with a variety of Academic Standings for each term

## Validation Steps – Academic Standing

The mapping information included in this section provides step-by-step guidance for validating Academic Standing. The ctCLink Project team has created a PeopleSoft query to identify applicable students. You can validate Academic Standing along with the corresponding Service Indicator assigned using this query as well as navigating to the PeopleSoft pages where this information is housed. Navigation for pages applicable to this validation is provided in the steps below. Conversion results should be compared to the legacy screen SM5003 and your submitted Academic Standing file.

### Step 1 - Run Query to Identify Students with Academic Standing

**Navigate to Query Viewer:** NavBar Icon > Navigator Icon > Reporting Tools > Query > Query Viewer

- Enter the query name: **CTC\_VAL\_ACAD\_STANDING**
- Click Search.
- Click the Run to Excel option
- Enter your Institution code
- Enter Term by clicking the lookup glass
- Click View Results
- **TIP:** This query provides all students assigned Academic Standing. If you would like to look up individual students with either their legacy or ctCLink ID, you may also do that with this query.

### Step 2 - Review Individual Student's Academic Standing

**Navigate to Academic Standing:** Main Menu Records and Enrollment Student Term Information Term History (5<sup>th</sup> tab is Academic Standing)

- Steps to view student Academic Standing:

1. Enter the student's ID
2. Click search
3. Use the [ > ] button to find the Academic Standing Action you are validating
4. **TIP:** Validate the term of the converted Standing matched the legacy YRQ

## What to Validate

Using the Query results or data from the Academic Standing table in PeopleSoft, verify these fields to the Optional File you provided:

- Term = YRQ in legacy
- Academic Standing Action = Your college converted data based on file submitted
- **TIP:** Click arrows or View All to validate all Standing Actions assigned

*Academic Standing page in PS the 5<sup>th</sup> tab in Term History*

The screenshot shows the 'Academic Standing' page in PeopleSoft. The page title is 'Term History'. The 'Academic Standing' tab is selected. The page displays a search form for 'Academic Career' with the following fields and values:

- Academic Career: Academic Career
- Term: SPRING 2017
- Effective Date: 06/16/2017
- Effective Sequence: 0
- Manual Override:
- Academic Program: [Empty]
- Academic Standing Action: AC
- Formal Description: Academic Concern
- Internal Description: Academic Concern
- Academic Standing Status: Warning - Academic Deficiency
- Action Date: 10/05/2018

Annotations on the screenshot include:

- A green box around the 'Term' field with an arrow pointing to a callout: "Validate the term matches the legacy YRQ".
- A green box around the 'Academic Standing Action' field with an arrow pointing to a callout: "Validate the students' Academic Standing correctly converted.".
- A green box around the 'View All' button with an arrow pointing to a callout: "Click View All to validate all terms.".

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'. The page footer includes navigation links: 'Term Statistics | Cumulative Statistics | Term Withdrawal | Session Withdrawal | Academic Standing | Student Grade Review | Student Special GPA'.

## Conversion Detail – Service Indicators

## Conversion Background

PeopleSoft service indicators (also referred to as holds in student self-service) can be used to restrict or enable services to students. For example, a service indicator could be assigned to prevent a student from enrolling in classes. A service indicator could also be placed to indicate expected third-party funding to cover tuition and fees (considered to be a positive or descriptive service indicator).

In legacy, holds or descriptors are assigned to students with an Unusual Action code (UA) and an associated Year Quarter code (YRQ) on the SM5003 screen. Unusual Action codes that are punitive will be converted to a PeopleSoft service indicator code and reason based on crosswalks maintained by the Project Team. Data for this conversion is extracted from the legacy records UNUSUAL-ACTN-D. Use the SM5021 screen to view Unusual Action code descriptions and determine if the UA is punitive.

In PeopleSoft, when a service indicator is assigned to a student it can be effective for a specific term, date range, or both. The legacy YRQ Z999 will convert to the PeopleSoft term "9999" along with a start date. The first day available from your legacy YRQ setup table will be selected. For example, Clark College had used Z999 for some punitive unusual actions and it converted to the 9999 term with a start date of 1/2/1968.

When assigning a service indicator, staff will first select the code, then they will select one of the available reasons. For example, an admissions hold with a code of A01 can have multiple reasons such as INFO (student missing information) or UAGE (student under 18). It is possible to map multiple legacy unusual action codes to a single service indicator code and reason combination.

## Common Conversion Issues

Only punitive Unusual Action codes are considered in the conversion process. Any non-punitive UAs will not be converted to Service Indicators.

If a punitive Unusual Action code is mapped to an empty value or not present in the crosswalk, it will be excluded from conversion. A list of college-specific excluded UAs will be provided for review.

## Minimum Validation Requirements

Your validation process should confirm that punitive unusual action codes from SM5003 converted to a PeopleSoft service indicator as mapped on the crosswalk. It is recommended to validate a broad range of service indicator scenarios:

- Subject matter experts from Admissions, Student Records, Financial Aid and Student Financials should select at least 5 terms and validate a minimum of 25% of service indicators.
- Validate the Unusual Action converted to the correct service indicator and reason code.
- Validate the YRQ converted to the correct PeopleSoft term.

## Validation Steps – Service Indicators

The mapping information included in this section provides step-by-step guidance for validating service indicators. The ctcLink Project team has created a PeopleSoft query to identify applicable students. You can validate indicators using this query as well as navigating to the

PeopleSoft page where this information is housed. Navigation for pages applicable to this validation is provided in the steps below. Conversion results should be compared to the legacy screen SM5003

## Step 1 - Run Query to Identify Students Assigned a Service Indicator

**Navigate to Query Viewer:** Navigator > Reporting Tools > Query > Query Viewer

1. Enter the query name: CTC\_VAL\_SRVC\_IND
2. Click Search
3. Select the "HTML" hyperlink to run the query in your browser. You can download the results directly from this page.
4. Enter your institution code
5. Enter Service Indicator Code Name or use look up glass to choose from list. You can leave this blank if you would like to return all indicators.
6. Click View Results

## Step 2 - Review Individual Student's Service Indicator

**Navigate to Manage Service Indicators:** Navigator > Campus Community > Service Indicators (Student) > Manage Service Indicators

- Steps to view individual students indicator status:
  1. Enter the student's ID
  2. Click search

**Manage Service Indicators**

Display Effect: All Institution: Cascadia College Refresh

+ Add Service Indicator

**Service Indicator Summary**

Code	Code Description	Reason Description	Institution	Start Term		End Term	End Term Description	Start Date
B01	Past Due Balance	Past Due Balance	WA300	2185	2018 SUMMR	9999	End Term	07/02/2018
F01	FA Disbursement Hold	Owes repayment of FA Funds	WA300	2185	2018 SUMMR	9999	End Term	07/02/2018

+ Add Service Indicator

Return to Search Notify

Validate Service Indicator Code and Reason correctly converted from SM5003

Validate the Term correctly converted from SM5003

Navigate to Audit Service Indicators: Navigator > Campus Community > Service Indicators (Student) > Audit Service Indicators

- Steps to generate a list of students with a specific Service Indicator. \*This is the best method to validate your college data.
  1. Enter Service Indicator Code
  2. Enter Reason or leave blank to return all results for the Indicator
  3. Enter Institution
  4. Click Search

### ***Audit Service Indicators Screen***

Audit Service Indicators

Service Indicator Audit Search

Search Reset

ID

Last Name

National ID

Service Indicator Code  Past Due Balance

Reason

Institution  Clark College

Start Term

Start Date

Department

Assigned By

Placed Process

User ID

Service Indicator Date

Audit Date

Action

First Name

Campus ID

End Term

End Date

Release Process

Service Indicator Time

Audit Time

Process Instance

Enter Service Indicator Code you want to pull full list of students for

### ***Legacy Unusual Action Screen***





**UNUSUAL ACTION CODES**

The following student groups are converted based on assigned UNUSUAL-ACTN codes.

Unusual Action Code	Student Group Assigned	Dependent on Go-Live YRQ
BI	SBFT	Yes
P&	SCLD	Yes
F\$	SFCY	
A+	SHEE	Yes
MI	SMSA	Yes
V\$	SVET	

*Legacy Unusual Action screen (SM5003). Example of student with a V\$ UA that will be converted to student group SVET (Veteran Information). The effective date in PeopleSoft will be the first day of Fall 2017.*

```

SM5003-005          STUDENT UNUSUAL ACTION
SID [940][ ][ ]      Stu Name [ ]
Unusual  Abbr      Bad Debt  Pun      Actn  Actn
Actn     Title     Amt      Actn     Title  Orig  Entr
                               Id      Date
[V$] [Veteran ] [ ] [ ] [ ] [WEBA] [B782]
[F!] [1ST GEN ] [ ] [ ] [ ] [ ] [Z999]
[W1] [WR-ELIGIB ] [ ] [ ] [ ] [ELRK] [B782]
    
```

*Legacy Unusual Action screen (SM5003). Example of student with multiple entries for BI UA that will be converted to student group SBFT (Basic Food, Employment & Training). Only the entry for the go-live term will be converted, in this example B893 or Winter 2019. The effective date in PeopleSoft will be the first day of Winter 2019.*

```

SM5003-005          STUDENT UNUSUAL ACTION
SID [ ][ ][ ]      Stu Name [ ]
Unusual  Abbr      Bad Debt  Pun      Actn  Actn
Actn     Title     Amt      Actn     Title  Orig  Entr
                               Id      Date
[F!] [1ST GEN ] [ ] [ ] [ ] [ ] [Z999]
[B!] [BFET ] [ ] [ ] [ ] [ELRK] [B782]
[02] [OR V2 ] [ ] [ ] [ ] [ ] [B782]
[B!] [BFET ] [ ] [ ] [ ] [ELKT] [B784]
[B!] [BFET ] [ ] [ ] [ ] [ELKT] [B891]
[B!] [BFET ] [ ] [ ] [ ] [ELKT] [B892]
[E+] [ECEAP HSRT] [ ] [ ] [ ] [EAG ] [B891]
[E+] [ECEAP HSRT] [ ] [ ] [ ] [EAG ] [B892]
[B!] [BFET ] [ ] [ ] [ ] [ELKT] [B893]
[E+] [ECEAP HSRT] [ ] [ ] [ ] [EAG ] [B893]
    
```

## Common Conversion Issues

A student must have a valid program for student groups to convert.

If a student was assigned the same student group code in the college-provided file more than once, only one student group and effective date will be assigned in the conversion process.

# Minimum Validation Requirements

Your validation efforts should confirm that college defined student groups were converted with the correct effective date based on the student group excel file. Also validate student group conversions dependent on Fee Pay Status, Veteran Benefit code or Unusual Action code.

- Select at least 5 terms and validate a minimum of 25% of the student groups assigned

## Validation Steps – Student Groups

Student group conversion can be validated by comparing PeopleSoft data (generated by a query) to legacy screens, and the file containing local student group data for your college. The query CTC\_VAL\_STUDENT\_GROUPS contains both the legacy and PeopleSoft student ID.

In addition to the query, student group data can also be viewed directly in PeopleSoft pages. See the directions below for these validation methods.

### Step 1 - Run Query to Identify Students Assigned to a Student Group

**Navigate to Query Viewer:** Navigator > Reporting Tools > Query > Query Viewer

- Enter the query name: CTC\_VAL\_STUDENT\_GROUPS
- Click Search
- Select the “HTML” hyperlink to run the query in your browser. You can download the results directly from this page.
- Enter your institution code
- Enter student group Name
- Click View Results
  - **TIP:** Leave group name blank to return ALL student groups assigned and filter each through the excel spreadsheet.

### Step 2 - Review Individual Student's Student Group

**Navigate to Student Groups:** Navigator > Records and Enrollment > Career and Program Information > Student Groups

- Steps to view individual student group:
  - Enter a student ID
  - Click search
    - **TIP:** A student could have more than one student group assigned, you can click the arrows at the top to view each one.

#### What to Validate:

Compare the PeopleSoft student group data to the student group excel file submitted by your college, and the various legacy screens containing the conversion fields. Refer to SM5017 for Fee Pay Status and Veteran Benefit Code. Refer to SM5003 for student Unusual Action codes. Verify these fields:

1. Academic Institution = Your Institution
2. Effective Date = the first day of the term for a YRQ
3. Student Group = Correct legacy status (Fee Pay Status, Unusual Action, Vet Benefit) or student group provided in the optional excel file

### **Individual Student Group page**

The screenshot displays the 'Student Groups' page in PeopleSoft. At the top, there is a navigation bar with 'External System ID' and 'Student Groups'. Below this, the 'Academic Institution Details' section shows search criteria: '\*Academic Institution' with value 'WA140' (Clark College) and '\*Student Group' with value 'ACLB' (College Bound). A callout box points to the Student Group field with the text 'Validate the correct Student Group was converted.' To the right, there are navigation controls: 'Find | View All', 'First', '1 of 1', and 'Last'. A callout box points to 'View All' with the text 'Click View All if there is more than 1 row listed to show all Groups assigned.' Below the search criteria is the 'Details' section, which includes '\*Effective Date' (07/09/2018) and '\*Status' (Active). A callout box points to the Effective Date field with the text 'Validate the effective date reflects the YRQ you provided in Optional File.' At the bottom of the details section, it shows 'Last Update Date/Time 10/04/2018 1:44:34PM by CTC\_CONVERSION Type Manual'. At the very bottom of the page are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

## Step 3 - Review Students Assigned to a Specific Group

**Navigate to View Student Groups by Student:** Navigator > Records and Enrollment > Career and Program Information > View Student Groups by Student

- Steps to view all students assigned to a specific group:
  - Enter Academic Institution
  - Enter the specific Student Group or click the look up glass to choose
  - Click search
  - Click the Get Results button to return all students
  - Click "Details" for any student you would like to validate Student Group page data \*on right side of grid
    - **TIP:** You can follow same instructions listed in Step 2 above to validate

### **Students by Group Name page 1**

**< Student Groups**

### View Student Groups by Student

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Academic Institution =

Student Group =

Description begins with

Case Sensitive

[Basic Search](#)

#### Search Results

View All First  1-72 of 72  Last

Academic Institution	Student Group	Description
WA140	ACLB	College Bound
WA140	ARST	Running Start Admission

*Note: A callout box points to the Student Group input field with the text: "Enter the college-specific Student Group you want"*

## Students by Group Name page 2

**< Student Groups** **View Student Groups by Student**

### View Student Groups by Student

Academic Institution   7

Student Group   Change the Select Effective Dates to All.

Effective Date

Effective Status  2

Select Effective Dates  Click Get Results to return students assigned to the specific group.

Range Selection

Personalize | Find | View 100 |  |  | First  1-100 of 1026  Last

Name	ID	Effective Date	Effective Status	Comment	Details
██████████	██████████	07/09/2018	Active		<a href="#">Details</a>
██████████	██████████	07/09/2018	Active		<a href="#">Details</a>
██████████	██████████	07/09/2018	Active		<a href="#">Details</a>
██████████	██████████	07/09/2018	Active		<a href="#">Details</a>
██████████	██████████	07/09/2018	Active		<a href="#">Details</a>

# Conversion Detail – Test Scores

## Conversion Background

Student test scores are converted via an external file provided by the colleges. This data was populated to the Test Results page in PeopleSoft.

## Common Conversion Issues

Common conversion issues include:

- Multiple Student PeopleSoft IDs that match incoming Test Score
- Test Score out of range for the Test Component
- Test ID or Test Component used in the college file did not match the PeopleSoft configuration
- Different test scores for the same Test ID, Component and Date
  - Only one test score per test date is allowed
- Students with a bio/demo record only from FAM or the SF conversion pull will not have test scores loaded
- If a student took the same placement test at another institution on the same date, test data may be overwritten by converting colleges

## Minimum Validation Requirements

Your validation process should confirm your legacy data submitted in your college file converted correctly to PeopleSoft Test Results page. It is recommended to validate a broad range of students with test scores:

- Validate at least 25% of Test Scores were converted correctly.
  - This includes Test ID and its corresponding Test Component, Test Date and the Test Score.

## Validation Steps – Test Scores

The mapping information included in this section provides guidance for validating Test Scores. Due to Test Scores being global, it is recommended to use the students in your supplemental file to validate in the conversion environment.

## Step 1 - Run Query to Identify Students With Test Scores

**Navigate to Query Viewer:** Navigator > Reporting Tools > Query > Query Viewer

1. Navigate to the Query Viewer page
2. Use the following queries to assist with your college validation:
  - **CTC\_VAL\_TEST\_SCORES** Returns select students from your college with Test Scores in PeopleSoft, based on a variety of optional criteria entered into the query prompts.
    - Note: Since Test scores are global, this query will also show existing test scores or scores converted from other colleges in addition to those converted from your college.
  - **CTC\_VAL\_PS\_ID\_LOOKUP** Based on the legacy ID entered, returns the PeopleSoft ID of a student from your college Test Score file.
3. Click Search
4. Select the "HTML" hyperlink to run the query in your browser. You can download the results directly from this page.
5. Enter values into the prompts as needed
  - The **CTC\_VAL\_TEST\_SCORES** query requires an institution code prompt to filter results to PeopleSoft records that have test scores and are associated with your college. You can click on the look-up tool if you do not know your institution code.
  - The **CTC\_VAL\_TEST\_SCORES** query provides additional optional prompts to narrow results further. Please note that in order to prompt on a Component, you must first select the applicable Test ID.
6. Click "View Results"

## Step 2 - Review Individual Student's Test Score

**Navigate to Test Results:** Navigator > Records and Enrollment > Transfer Credit Evaluation > Test Results

1. Navigate to the Test Result page
2. Enter the Student's PeopleSoft ID
3. Click Search
4. Click on View All or scroll between pages to view all Test IDs for a college

### **What to Validate:**

Using the Query results or data from the Test Results page in PeopleSoft, compare the following fields to your college's Test Score file submission or the legacy Test Scores screen SD1002

- Test ID = Name of Test (example: SBA)
- Test Component = Section of Test taken (example: SBAEP)
- Score = Placement or score you decided from the college specified bucket in SD1002.

- Test Date= Date provided in the optional file based on your college conversion of the month/year in SD1002

\*Tip: Click arrows or View All to validate all Tests for each student

### PeopleSoft Test Results Page

**In the "Tests" section click arrows or "View All" to see all Test IDs for a student and for each Test ID click arrows or "View All" to view all components for each Test ID**

*Component	Score	Percentile	*Test Date	*Data Source	*Acad Level	Letter Score	Date Loaded	Index	Std Admin
1 PALG	50.00		10/01/2013	Extract	Unknown		08/22/2015		<input checked="" type="checkbox"/>

  

*Component	Score	Percentile	*Test Date	*Data Source	*Acad Level	Letter Score	Date Loaded	Index	Std Admin
1 READ	70.00		10/01/2013	Extract	Unknown		08/22/2015		<input checked="" type="checkbox"/>
2 WRITE	18.00		10/01/2013	Extract	Unknown		08/22/2015		<input checked="" type="checkbox"/>

### Legacy SD1002 Test Score Page

SD1002-004 TEST SCORES

SID [ ] Stu Name [ ]

Test Name	WRITG SKILL	READ SKILL	NUM SKILL	LANG/TRIG	ELEM ALGB	INT ALGB	COLL ALGB	MONTH	YEAR	ESSAY
	01	02	03	04	05	06	07	08	09	10
ALEKS SMRTBL	[ 10 ]	[ ]	[ 26 ]	[ ]	[ ]	[ ]	[ ]	[ 05 ]	[ 17 ]	[ ]

9023:INQUIRY complete. Enter key data, press function key

UPDATE PRINT REFRESH DELETE NEXT SCREEN HELP MENU/CANCEL

# 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 ctLink 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 [Data Validation 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
  - Student Groups, Service Indicators, Academic Standing = Matt Sargent
  - Test Scores = Kyrsten Catlin
- **Status:** *(Leave as NEW)*
- **College or Location :** *(Specify the college or district)*
- **Priority:** *(Leave blank - not used)*