Assign a Milestone to a Group of Students

Purpose: Use this document as a reference for assigning a milestone to a group of students in ctcLink.

Audience: Registration Staff

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

- **ZC SR Milestones**

You must also set these SACR Security permissions:

- **CS 9.2 SACR Security: Basic Requirements for Staff**
- **CS 9.2 - SACR Security: Milestone Security**

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

Navigation: Records and Enrollment > Enroll Students > Process Milestones

1. The **Process Milestones** 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.
3. 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_Batch_Milestones.
4. On the **Process Milestones** page, input the following fields:
    1. **Academic Institution**
    2. **Academic Career**
    3. **Academic Program-**This field is required if using the Student Select List feature.
    4. **Academic Plan**
    5. **Effective Date -**When you assign a student a milestone intended to meet an enrollment requirement, the effective date is at least one day before the Start Date of the enrollment term. If you don’t, the Enrollment Requirement will not recognize the milestone for the current enrollment term.

Process Action

5. Select a **Process Action** based on the population selected in the steps below.
6. **Delete Milestone**: This will remove the specified milestone from the records. Please note you cannot delete a milestone from a student that has a milestone status of completed.
7. A milestone row with no data (i.e., no milestone included) is not considered for student-facing display purposes. Adding a "blank" row hoping to obscure existing data from student visibility will not work.
8. Rather than deleting milestones, consider replacing them with a non-displaying milestone you create **to remove** a milestone. A milestone with the specific purpose of nullifying previously awarded ones (1) gives a workaround that supports the original goal of deleting milestones without using correct history and, even better, (2) provides you an opportunity to document who removed it and why.
9. **Insert Milestones**: This process option will only add a new Milestone to the student's record. If the milestone being processed already exists on the student's record, an update to the milestone will not occur for that student.
10. **Insert/Update Milestones**: This process option will insert (add) a new milestone to a student's record and update an existing milestone on a student's record.
11. **Update Milestone**: This process option will only update an existing milestone on the student's record. If the student does not already have that milestone on their record, the process will not insert (add) the new milestone to the student.
12. **Milestone Copy:** Create milestones by copying the milestone information from a milestone template to the student's transcript.

Duplicate Milestone

12. **Duplicate Milestone Options:** The process looks for duplicates at the Milestone code or the Milestone Level code depending on the option selected (Milestone or Milestone Level).
13. **Process Duplicate Milestone**: Select this check box to indicate that if duplicate milestones are found, they should be inserted/updated based on the process action selected in the Process Action field.

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.

View Tutorial Via Panopto

View the external link to **Process Milestone**. This link will open in a new tab/window.

Population Selection

PS Query

Population Selection: Milestones can be assigned via query or external file load. If users want to identify the list of students for milestone assignment manually, use **Student Select List** instead of **Population Selection,** as shown in the step below.

1. Select the **Population Selection** checkbox to select the Selection Tool to use.
2. If using **PS Query**, look up or enter the **Query Name** and select **Edit Prompts** to edit any prompts in the selected query. The only queries available for selection are those using the required milestone bind record (SSR_MLSTN_BND).
3. Select **Launch Query Manager** or **Preview Selection Results** to view query or query results to validate students before running the process. The **Preview Selection Results** option is a quick way to validate that the query selected and the defined prompts are picking up results for the process. The preview results page will only display the first 300 results (rows) of any extensive query result list.

External File

1. Format your Microsoft Excel file in .csv format. To Create a File Mapping, you **must include the process-specific required fields.** Identify required fields by taking the following steps:
   a. **Selection Tool**: External File
   b. Click the **Upload File** button and upload your saved Microsoft Excel file in .csv format (you may need to reformat your file if you do not have the required fields included in it).
   c. The **Attached File** displays.

2. After the Excel .csv file is uploaded, click the **Create File Mapping** link to create a new option.
3. The **Population Selection File Map** page displays.
4. Enter a name in the File Mapping field (you can reuse this next time you run the process).
5. Verify that the **File Type** is **Delimited**.
6. Verify the **Field Delimiter** is **Comma**.

7. In the Field Mapping area, enter the **Field Number** that corresponds to the column number of your .csv file for the required fields (image below).
8. "**Yes**" displays in the Required column if the field name is required in your .csv file.
9. Click **Ok.**
10. Select **Preview Selection Results** to review the formatting of the upload file, ensuring no blank rows exist.
11. Select **Return** after viewing results.
12. Select the **Run** button at the top of the page to complete the desired process.

Student Select List

1. **Student Select List**: Selection via a hand-entered list of students
2. Select the **Use Student Select** checkbox and manually enter student IDs.
3. Select the **Add a New Row** [+] button to add a row.
4. Select the **Delete Row [-]** button to remove the

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Milestone Detail

1. In the **Milestone Detail** section, enter the **Milestone** details to be assigned to the student's record.
2. **Milestone Detail**, **Advisors** and **Attempts** are inputted based on the **Milestone** needs for the student population selected.
3. Select the **Run** button near the top of the page. The **Process Scheduler Request** page will display.
4. On the **Process Scheduler Request** select the **OK** button. The **Process Milestones** page will display with a **Process Instance** number.
5. On the **Process Milestones** page, note the **Process Instance** number.

6. Select the **Process Monitor** link. (See the [Process Scheduler/Process Monitor]() QRG for more information about using the **Process Monitor**.)
7. On the **Process Monitor** page, note if the **Instance** Number matches the **Process Instance** Number on the **Process Milestone** page. Typically the first item in the Process List will be the process currently being run, in this case the Process Milestones (SSR_MLSTN_PR) process.
8. To refresh the **Run Status** select the **Refresh** button. The process has run successfully when the Run Status shows **Success**.
9. Once the Run Status shows **Success** select the **Details** link. The **Process Detail** page will display.
10. On the **Process Detail** page, select **View Log/Trace**. The **View Log/Trace** page will display.
11. On the **View Log/Trace** page, select the file link (AE_SSR_MLSTN_PR_XXXXXXXX.log report, where the XXXXXXXX equals the process instance number) to view a report of the students for whom a milestone was assigned.

Verify Milestone on the Student Milestones Page

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

- ZC SR Milestones
- ZD SR Milestones
- ZD SR Super User
- ZZ SR Milestones

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

Navigation: Records and Enrollment > Enroll Students > Student Milestones

1. On the **Student Milestones** search page, select the **Find an Existing Value** tab.
2. Enter or look up a Student **ID** from the process run above.
3. Enter or look up the **Academic Institution**.
4. Select **Search**. The **Student Milestones** page will display.

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.

View Tutorial Via Panopto

View the external link to **Assign and Verify Milestone**. This link will open in a new tab/ window.