



CTCLINK COURSE OFFERINGS

CTCLINK PROJECT TEAM

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Registration Information

Visit the [ctcLink Training](#) and [ctcLink Training Registration](#) web pages for the latest information.

You may register for PeopleSoft Fundamentals without the online web form.

All Pillars

PeopleSoft Fundamentals

The purpose of this course is to introduce the fundamentals of ctcLink (PeopleSoft). PeopleSoft is the name of the software the Washington State Board for Community and Technical Colleges (SBCTC) uses to manage all student (Campus Solutions or CS), human resources (Human Capital Management or HCM), and financial (Finance or FIN) data. By the end of this course, you should have a basic understanding of what ctcLink is and how to navigate throughout the system. Course information includes an overview of ctcLink, Frequently Asked Questions, videos relating to navigating the system, as well as additional resources such as Terms and Concepts, Quick Reference Guides (QRGs) and Navigation Guides.

Course Objectives

- Become familiar with the ctcLink project
- Describe each pillar/modules within
- Understand PeopleSoft
- Understand the PeopleSoft Layout
- Navigate within the PeopleSoft application
- Customize your environment
- Use search pages
- Work with grids
- Add and update data
- Run reports, jobs and queries
- Know basic PeopleSoft terms and concepts

Who should take this?

- All Staff

Cross-Pillar Global Design Adoption

This course is the first step in providing you the information necessary to understand what Global Design Adoption (GDA) means and how it relates to the overall framework for Business Process Fit/Gap (BPFG) and conversion activities.

This Cross-pillar Global Design Adoption course is required for anyone attending BPFG sessions in the future. The first module of the course introduces you to the global design adoption process, a slide deck presentation and an overview video.

After completing the Introduction module, you will be sent to the PeopleSoft Person Record module where you will gain insight into how the Human Capital Management (HCM) pillar and Campus Solutions (CS) pillar work together to establish valuable Bio/Demo information.

Once both modules are complete, you will be able to enroll in pillar specific global design adoption courses that encompass several GDA modules within. Participants are not required to complete all modules. However, the successful completion of specified GDA modules, is required prior to attendance of the BPFPG session(s). The corresponding BPFPG sessions are outlined within each GDA module.

Course Objectives

- Introduction to the global design adoption process
- Understand how the Human Capital Management (HCM) pillar and Campus Solutions (CS) pillar work together to establish bio/demo information
- Direct participants to additional pillar specific GDA courses

Who should take this?

- Any staff member attending BPFPG sessions in the future

Campus Solutions Global Design Adoption

This course offers CS Core related modules that are prerequisites for upcoming Business Process Fit/Gap (BPFPG) sessions. Participants are not required to complete all modules; however, the successful completion of specified GDA modules is required prior to attendance of the BPFPG session(s).

Course Objectives

- Academic Structure
- Installation Settings
- Student Self-Service
- Transcripts
- Online Admissions Application (OAA)

Who should take this?

- Any staff member attending Campus Solutions related BPFPG sessions in the future

Finance Global Design Adoption

This course offers Finance related modules that are prerequisites for upcoming Business Process Fit/Gap sessions. Participants are not required to complete all modules. However, the successful completion of specified GDA modules, are required prior to attendance of the BPFPG session(s).

Course Objectives

- Chart of Accounts Basics
- Finance is the Center of the Universe
- General Ledger
- Commitment Control
- Asset Management

- Treasury
- Purchasing and Accounts Payable
- Travel and Expense
- Grants, Project Costing and Customer Contracts
- Billing and Accounts Receivable

Who should take this?

- Any staff member attending Finance related BPFPG sessions in the future

Financial Aid Global Design Adoption

This course offers Financial Aid related modules that are prerequisites for upcoming Business Process Fit/Gap sessions. Participants are not required to complete all modules. However, the successful completion of specified GDA modules, are required prior to attendance of the BPFPG session(s).

Course Objectives

- Application Processing/SNG/College Bound Scholarship
- Awarding & Packaging
- Disbursement/Loans
- Pell, State & Fed Reporting, SAP & Return of Title IV/Work Study Reconciliation

Who should take this?

- Any staff member attending Financial Aid related BPFPG sessions in the future

Human Capital Management Global Design Adoption

This course offers HCM related modules that are prerequisites for upcoming Business Process Fit/Gap sessions. Participants are not required to complete all modules. However, the successful completion of specified GDA modules, are required prior to attendance of the BPFPG session(s).

Course Objectives

- Absence Management
- Benefits
- Payroll Setup and Processing
- Time & Labor
- Talent Acquisition Manager

Who should take this?

- Any staff member attending Human Capital Management related BPFPG sessions in the future

Student Financials Global Design Adoption

This course offers HCM related modules that are prerequisites for upcoming Business Process Fit/Gap sessions. Participants are not required to complete all modules. However, the successful completion of specified GDA modules, are required prior to attendance of the BPFG session(s).

Course Objectives

- Student and Third-Party Invoice Template Design
- Student Financials Item Types and Account Types

Who should take this?

- Any staff member attending Student Financials related BPFG sessions in the future

PeopleSoft Security Administration

PeopleSoft Security Administration includes features that enable you to maintain security for your college. How do students and staff gain proper access to the system? How do we safeguard highly sensitive data? And reports! We must have reports!

We serve as our college's Local Security Administrator. Students, faculty and staff count on us to provide them with timely, appropriate and auditable access to PeopleSoft.

Many of us understand, and perhaps even enjoy, this responsibility. Some of us already administer security under the SBCTC Legacy system; some for other higher education institutions; and some for other public and private entities. We live authentication and authorization and roles and permissions and such, each and every day.

What we're lacking is the PeopleSoft toolset that allows us to respond to these requests:

"I have a student on the phone who can't log in. Fix it!"

"Can you set up my new Registration clerk with the same screens as my other clerks?"

"Why aren't Expense Report approvals showing up in my Inbox?"

"The auditor wants a list of everyone who can see Social Security numbers".

Naturally, PeopleSoft has its own way of doing things, its own terminology, its own best practices. This course hopes to provide you a practical understanding of what your workday might look like.

Course Objectives

- Manage User Profiles
- Manage Roles
- Understand Dynamic Roles
- Manage Additional Campus Solutions (CS) Security
- Manage Additional Financials/Supply Chain Management (FSCM) Security
- Manage Query Reporting Security
- Talent Acquisition Manager

Who should take this?

- Staff responsible for managing, administering and auditing PeopleSoft security. Your job duties might be labeled “Local Security Administrator”, “Local Security Manager” or “Local Security Auditor”.

ctcLink Pillar Work Sessions

Work Sessions were created to offer community development by enhancing the support experiences offered to colleges live in ctcLink. This course is a compilation of work session recordings - topical presentations and discussions - spanning a wide variety of topics delivered collaboratively by multiple presenters (SBCTC and college staff).

Course Objectives

- Providing a common place to access previously recorded topical work session recordings

Who should take this?

- Staff from colleges live on PeopleSoft participating in weekly pillar specific Customer Support work sessions

Campus Solutions

The Campus Solutions pillar contains all of the modules related to student administration—from registration to graduation. Functionality in this pillar includes recruitment, admissions, student records, academic advising, financial aid, student financials, room scheduling (25Live), student communications components (Message Center and Campus Community), as well as self-service for students, faculty and advisors.

AS100: Academic Structure

Academic Structure is the foundation of the PeopleSoft Fluid 9.2 Student Administration modules and their functions. The academic structure and its elements are the building blocks for an academic institution. It encompasses the institution's schools and colleges, academic programs and departments, and subject areas. Academic Structure serves as the basis for the course catalog and schedule, grading scheme, and all related tables.

Course Objectives

- Identify key terms
- Recognize how the academic structure is organized from a high-level and institutional perspective.
- Understand the differences between Academic Institution, Academic Group, Academic Organization, Academic Career, Campus & Location, Academic Subject, Academic Program and Academic Plan.
- Recognize how the Academic Structure functionality applies to the Campus Solutions pillar.
- Recall the purpose of the integration with various functions and modules within the Campus Solutions pillar.
- Recognize each component and its contribution to the Academic Structure

Who should take this?

- All Student Services Staff (Student Records, Enrollment, Curriculum)
- Instruction
- Financial aid

SR100: Curriculum Management: Course Catalog

The Course Catalog component contains several pages that enable you to enter all information for a course: the course title, units, workload hours, components, description, topics, prerequisites, and so on. Each of the pages will be reviewed in the order in which you use them to set up a new course offering.

Course Objectives

- Create and maintain courses
- Create course equivalency groups
- Search for courses

Who should take this?

- Staff responsible for building courses

SR101: Curriculum Management: Class Scheduling

Class scheduling addresses aspects of class building. This includes scheduling sections of a newly created course or adding to and maintaining already scheduled class sections. This will include class associations and permissions, adding and reviewing class fees, canceling classes and notifying students. Also included will be how to copy your prior term's class data as well rolling catalog data down to all the class sections.

Course Objectives

- Schedule new classes
- Maintain and update scheduled classes
- Cancel classes and notify students
- Define class associations
- Define class permissions
- Copy prior term

Who should take this?

- Staff responsible for creating, maintaining and scheduling classes

CC100: Campus Community (Biographic/Demographic)

Campus Community data serves as the foundation person record for all Campus Solutions data. The global data in Campus Community is shared by all institutions. Campus Community enables you to maintain and manage a wide range of biographic and demographic information on people and organizations of interest to your institution, both internal and external.

Course Objectives

- Search for students
- Maintain personal information
- Understand organization data
- View and assign service indicators
- Understand and navigate Student Services Center

Who should take this?

- Staff responsible for Student Services related activities

RA101: Admissions

Admissions helps you plan, manage, and track admissions activities. This course covers managing applicant records as well as evaluating, admitting and processing applicants both online and manually. Users will learn about the configuration, functionality, and business processes related to this PeopleSoft

module. Focus will be on the automated or online admissions process, the manual aspect of admissions processing from application to matriculation.

Course Objectives

- Understand the online admissions application process
- Add and delete applications
- Matriculate applicants

Who should take this?

- Admissions Staff
- Student Records Staff
- Special Populations Staff

RA201 Admissions – OAAP Suspense Management

PeopleSoft Admissions Application Transaction Management helps a college manage data stored in staging tables and track admissions activity. Suspended applications are applications in suspension via the Online Admissions Application Portal (OAAP). If a student submits an admissions application with slightly different information, a process referred to as Search/Match will identify the application and suspend the transaction.

Suspended applications remain in suspension until the admissions processor reviews the submissions. Once reviewed, the processor determines whether to post or cancel the application. Students will not know that their application has been suspended. For example, a student may call your office wondering why they have not received an acceptance letter email; therefore, it is recommended that suspended applications be maintained daily.

Course Objectives

- Manage OAA suspended applications
- Fix a record updated to the wrong ID

Who should take this?

- Staff responsible for processing and managing admissions applications

CC101: Managing 3C's and Message Center

The Managing 3Cs course will cover 3Cs: Communications, Comments, Checklists, as well as Message Center functionality in PeopleSoft. Participants will learn how to set up 3Cs security groups and how to manage 3Cs data.

Communications tasks include creating, assigning, updating, verifying communications, and sending individual and batch messages in message center.

Course Objectives

- Updating letter templates

- Running 3C process
- Manage and use comments
- Assign and manage checklists and checklist Items
- Manage and use communications
- Manage and send messages through Message Center

Who should take this?

- Staff responsible for managing and sending communications

CC201 3C's Communications – Set Up

Communication plays a vital role in a college's daily business. PeopleSoft offers colleges the ability to efficiently communicate important information to students. The CC101 Managing 3Cs course reviewed assigning and managing communications. In this course, you will walk you through setting up comments, checklists, and communications.

The 3Cs Communications - Set Up course will cover 3Cs: Communications, Comments, Checklists, as well as Message Center set up in PeopleSoft. Participants will learn how to set up 3C security groups, 3C events, and 3C triggers.

Communications tasks include creating, assigning, updating, verifying communications, and sending individual and batch messages in message center.

Course Objectives

- Administrative functions and 3C group security
- Set up comments
- Set up checklists
- Set up communications
- Set up Message Center

Who should take this?

- Staff responsible for 3Cs set up

AA100 Academic Advisement Rules

Academic Advising provides the structure, which is the foundation of the PeopleSoft Fluid 9.2 Student Administration modules and their functions. The academic structure and its elements are the building blocks for an academic institution. It encompasses the institution's schools and colleges, academic programs and departments, and subject areas.

Academic Rules serve as the basis for the degree audit process and establish the requirements and conditions students must satisfy as they progress towards degree or certification completion.

Course Objectives

- Academic advisement rules overview
- Build and setup academic advisement rules

- Generate the Academic Advisement Report and other advisement reports
- Create and manage student milestones
- Setup degrees, certificates, and course substitutions

Who should take this?

- Staff responsible for setting up academic advising rules (Graduation Evaluator, Credential Evaluator, Degree Audit Builder)

SR102: Student Records: Beginning of Term Processes

PeopleSoft Beginning of Term Process helps you go through the configuration, functionality, and the business process related to student records beginning of term processes. Enrollment Services provides student-centered administrative services supporting future and current students in their academic goals. When a student is admitted by your college, student records are collected and students begin to enroll in classes. Calendars are defined by dates, dynamic included, which drive daily business—allowing you to activate students into a term and assign them an enrollment appointment. The focus of this course will be on managing academic dates and deadlines, creating dynamic dates, activating students, and managing enrollment appointments.

Course Objectives

- Manage academic dates and deadlines
- Create dynamic class dates
- Activate students
- Manage enrollment appointments

Who should take this?

- Staff responsible for student records and enrollment services

SR103: Student Records: Enrollment Processes

Enrollment Processes includes features that enable you to process enrollment request such as: enroll, add, drop, swap, and manage the waitlist for the students. These features work in conjunction with the PeopleSoft Campus Solutions information you enter on the Records and Enrollment pages.

In addition to the enrollment pages, PeopleSoft also provides a process for Quick Enroll and managing student's Grades.

Course Objectives

- Student enrollment
- Waitlists
- Term withdrawals
- Enrollment requirements
- National Student Clearinghouse (NSC)
- Transcripts
- Student milestones

- Student attendance
- Extracurricular activities

Who should take this?

- Staff responsible for student records

SR104: Student Records: End of Term Processes

After applicants are admitted and matriculated, Student Records manages term activation, enrollment, grades, and evaluations. In concert with PeopleSoft Academic Advisement processes, you can track students through graduation.

This course presents the concepts and end-of-term activities used to manage the grade lapse and repeat checking processes and the assignment of academic standards, honors and awards.

Course Objectives

- End of term overview
- Grade rosters
- Grade lapse
- Repeat checking
- Academic standing, honors, and awards
- Post Enrollment Requirement Checking (PERC)

Who should take this?

- Staff responsible for end of term enrollment activities

SR105: Credentials Management — Evaluations & Transfer Credit

Credential Management is how we assign courses, tests, and credits earned outside of SBCTC to our students.

The Campus Solutions application includes features that enable you to complete transfer credit and equivalencies set up as well as reviewing, evaluating, and granting credits earned by SBCTC students from external courses, tests, and prior learning assessments.

These features work in conjunction with the Student Records, Academic Advisement, and Campus Community functions to maintain a student's academic record.

Course Objectives

- Credential management overview
- Set up transfer credit and equivalencies
- Review transfer data and assign transfer courses
- Process test and other transfer credits

Who should take this?

- Staff responsible for credential evaluations

SR106: Credentials Management – End of Term & Graduation

The Credential Management - End of Term and Graduation application includes the features and functionality to enable you to manage transcript requests and award degrees. These features work in conjunction with the Academic Advisement and Campus Community.

Course Objectives

- Credential management – end of term and graduation overview
- Manage transcripts
- Manage student exceptions
- Award degrees, certificates, and degree honors
- Process NSC degree documents

Who should take this?

- Staff responsible for student records
- Staff responsible for end of term enrollment activities
- Staff responsible for credential evaluations

SR 107: Special Student Populations: Including Veterans, Running Start, International, Basic Education for Adults (BEA), Department of Corrections (DOC), and Apprenticeship

This course combines components of understanding student groups, student attributes, and the processing for the following populations:

- Veteran programs
- International, BEA, DOC and Workforce-Apprenticeship program
- Running Start, CitHS, and HS Re-Engagement

Course Objectives

- Manage special populations: student groups
 - Understand how veteran student groups are applied
 - Understand how student groups are applied to BEA, DOC, Workforce/Apprentice
 - Understand how student groups are applied to high school special programs
- Manage special populations: student attributes (program/plan)
 - Understand how attributes are applied to
 - Apprenticeship

- Worker retraining
- Workfirst
- Early Achievers Grant
- Manage special populations: veteran reporting
 - Certify quarterly enrollment for veterans
 - Track veteran benefit reporting
 - Understand veteran query options

Who should take this?

- Basic Education for Adults (BEA) Staff
- Department of Corrections Staff
- Running Start Staff
- Student Services Staff
- International Programs Staff
- Staff who manage Selective Admissions processes

CE100: Continuing Education

OSECE is the Online Student Enrollment for Continuing Education. OSECE is a system in which students are admitted and enroll for Continuing Education classes. College staff will learn about the tool and how to assist students with the self-enrollment experience. Users will learn about functionality, and business processes related to OSECE.

Course Objectives

- Creating an account
- Searching for classes
- Add classes to shopping cart
- Submit a payment in OSECE
- Confirm enrollment and complete payment

Who should take this?

- Staff responsible for Continuing Education enrollment

CH100: Campus Solutions Staff Self-Service (Staff Homepage)

Campus Self-Service offers role-based and function-based self-service functionality that provides staff with self-service access to information and transactions. Staff Homepage is a collection of tiles that staff select to access transactions. A homepage can display different tiles on different form factors. Selecting a tile on a homepage opens the corresponding transaction. Most of the delivered tiles open Fluid pages, but a few open Classic pages. Homepage tiles can also display dynamic information. Depending on how the homepage and tiles are set up, staff may be able to choose which tiles appear on each homepage. This course provides you with a high-level overview of which tiles are accessible through the Staff

Homepage and the processes that each tile allows you to perform.

Course Objectives

- Curriculum management tile
- Admissions processing tile
- Financial aid tile
- Student financials tile

Who should take this?

- Campus Solutions staff within the college

CS100: Student Self-Service (Student Homepage) & Mobile

Campus Student Self-Service offers role-based and function-based self-service functionality that enables you to access information and transactions over the internet.

The Student Homepage is a collection of tiles that you select to access specific transactions. Selecting a tile on a homepage opens the corresponding transaction.

Course Objectives

- Personalize your student homepage
- Review and update personal information
- Tasks and Message Center
- Manage classes
- Review your academic progress
- Review your academic record
- Review and manage your financial aid
- Review and manage your financial account

Who should take this?

- Students
- Student Services
- Advising

CF100: Faculty Self-Service

This course will go through the functionality and business processes related to using Faculty Center. This will include schedules, grade rosters, grading, contract information and searching for students.

Course Objectives

- Understand and navigate Faculty Center
 - View schedule information
 - Access class rosters
 - View Gradebook, enter and approve grades

- Enter and submit an early alert
- Search for classes
- Access the course catalog
- Use faculty search

Who should take this?

- Faculty

CA100: Advisor Self-Service

This course will go through the functionality and business processes related to using Advisor Center. This will include viewing your advisees, how to add, send and utilize advisor notes. The advisor center will also cover the student center (staff view) general information about students, advisee transfer credit and academic advisement reports.

Course Objectives

- Understand and navigate advisor homepage
 - Understand and view advisee information
 - Understand and view my advising notes and notify advisees
 - Generate degree progress reports
 - Generate what-if reports
 - Understand and view Advisee Student Center information; including advisee transfer credit report, grades, course history, class schedule, planner information, and holds.
 - Understand and use early alerts
 - Understand how to search for classes

Who should take this?

- Advising Staff

Financial Aid

Part of the Campus Solutions Pillar, Financial Aid covers topics such as processing financial aid applications, authorizing and disbursing financial aid, and reporting requirements.

FA100: ISIR Processing

This course covers ISIR processing in PeopleSoft. Financial Aid offices load Institutional Student Information Records (ISIRs) into PeopleSoft, after they are exported through the Department of Education (DOE) application, EdConnect. This course content also covers setting up User Defaults, uploading ISIR files, importing ISIRs, loading ISIRs, processing Ability to Benefit (ATB), running Suspense Management, and running INAS.

Course Objectives

- Set up user defaults and import and process ISIRs
- Process ability to benefit
- Understand overview of ISIR suspense management

Who should take this?

- Financial aid staff responsible for ISIR processing

FA101: Managing 3Cs and Processing Financial Aid Applications

This course covers processing Financial Aid applications. Processing FA applications is a multi-step operation performed by financial aid staff. This course allows participants to understand and participate in the various steps involved in processing applications successfully. Topics covered will include assessing need, maintaining FA term, working a student budget, managing 3Cs and any batch processes related to these topics.

Course Objectives

- Understand admin functions and manage checklists, communications and comments
- Manage financial aid terms
- Update financial aid progress units
- Manage student budgets
- Assess financial aid need

Who should take this?

- Financial aid staff responsible for preparing financial aid files in the system for awards within the college

FA102: Awarding Financial Aid and Satisfactory Academic Progress

This course covers the awarding of financial aid and SAP. Financial aid staff award financial aid and run SAP. In the Awarding process, a user will assign checklists, calculate state aid eligibility (SNG/CBS), run NSLDS Aggregate Push for inform files (FAH/TSM), and other jobs before Mass Packaging or Manual Packaging can be completed. This course will review the steps involved in the packaging process, and will then cover the types of packaging that exists in PeopleSoft.

Course Objectives

- Assign self-service, assigning a Shopping Sheet, and Bank Mobile Checklist
- Process State Need Grant
- Process College Bound Scholarship
- Process NSLDS Transfer Monitoring, financial aid history
- Manage satisfactory academic progress
- Manually award an online package financial aid
- Mass package financial aid
- Manage service indicators and financial aid self-service
- Repackage, revise, and view awards
- Generate and send award notifications
- Expire and view anticipated aid
- Override, view awards and adjust aggregate limits

Who should take this?

- Staff responsible for awarding/packaging federal and state aid, working NSLDS data (Transfer Monitoring), and running SAP, within the college

FA103: Authorizing and Disbursing Financial Aid

This course covers the Authorizing of and Disbursing of Financial Aid. Financial Aid Staff will authorize and disburse aid using ctcLink. In the Authorizing and Disbursing process, a user will assign UEMs, run the FLF service indicator process, and view and work the authorization failure report before Mass Authorization and Disbursing Financial Aid. After Financial Aid is disbursed, a user will view Customer Accounts to verify successful posting of aid to SF, as well run a query to track Agency Funding. Finally, users will have the options to run reconciliation queries after aid is disbursed, and track student continued eligibility after Authorization and Disbursement has run.

Course Objectives

- Manage User Edit Messages (UEMs)
- Run FLF and Resolve Service Indicator Process and packaging variable updates
- Run and work Authorization Failure report
- Manually and mass authorize and disburse financial aid
- View customer accounts after aid has been disbursed
- Understand and track agency funding process
- Run reconciliation queries after aid is disbursed

Who should take this?

- Staff responsible for authorizing and disbursing financial aid at the college

FA104: Processing Pell Payments and Direct Loans

This course covers the processing of Pell and Direct Loans (DL) records in PeopleSoft to COD via EdConnect. Financial Aid Staff will create and load Pell and DL origination and response files for the file transfer process between PeopleSoft and COD. During the Pell and DL inbound and outbound process, Financial Aid staff will run validation error reports to ensure record accuracy. This course also covers the loading of COD entrance and exit counseling and MPN files, as well as tracking for SULA, and the reconciliation of Pell and DL.

Course Objectives

- Process Pell payments in PeopleSoft
- Process Pell Multiple Reporting Records (MRR)
- MPN processing
- Process entrance Counseling
- Process DL and PLUS in PeopleSoft
- Process post sequestration set up (aid year roll over)
- Assign loan communications
- Process for SULA
- Process year-round Pell
- Process DL Recon

Who should take this?

- Financial aid staff responsible for processing Pell grants and direct loans
- Financial aid director

FA105: Processing Return to Title IV (R2T4)

This course covers the Return to Title IV process in PeopleSoft. Financial Aid Staff run the R2T4 process continually throughout the term. Within the R2T4 process, financial aid staff will process financial aid withdrawals to include federal and state aid changes. Staff will set service indicators, create worksheets, run queries and adjust awards.

Course Objectives

- Identify R2T4 students
- Run R2T4 queries
- Process R2T4
- Process the return of state funds

Who should take this?

- Financial aid staff responsible for Return to Title IV

- Financial aid director

FA106: Financial Aid Reporting (SNG URR, FISAP)

This course covers state and federal financial aid reporting in PeopleSoft. Financial Aid Officers complete the quarterly State Need Grant Interim Report, the annual Unit Record Report, and the annual FISAP report. This course content covers running the State Need Grant Interim report, the Unit Record Report, and the FISAP report in PeopleSoft.

Course Objectives

- Run and work the quarterly State Need Grant Interim Report
- Run and work the annual Unit Record Report
- Run and work the annual FISAP report

Who should take this?

- Financial aid staff responsible for state and federal reporting

FA206: Intermediate Financial Aid Reporting (WCG Interim, FISAP)

This course covers intermediate state and federal financial aid reporting in PeopleSoft. Financial Aid Officers complete the quarterly State Need Grant Interim Report and the annual FISAP report. This course content covers a deeper dive into the review of common Interim report errors and troubleshooting the FISAP report in PeopleSoft.

Course Objectives

- Understand and troubleshoot common WCG Interim errors
- Understand and troubleshoot common FISAP errors

Who should take this?

- Financial aid staff responsible for state and federal reporting

FA107: Reconciliation, Including Work-Study (Financial Aid-Student Financials-GL)

This course covers the FA Reconciliation in PeopleSoft. Financial Aid office staff perform preliminary and final reconciliation every 15 days for DL and monthly for all other funds. This course content includes the CS queries to reconcile both awards in FA and the amounts disbursed to Student Financials in PeopleSoft.

Course Objectives

- Run a Fund Roster for all financial aid item types.
- Run FA801 award data Item type

- View fiscal item types page
- Run reconciliation queries

Who should take this?

- Financial aid staff responsible for preliminary and final reconciliation (FA-SF)

FA207: Intermediate Financial Aid Reconciliation (FA-SF)

This course covers the Reconciliation in PeopleSoft. Financial Aid office staff perform preliminary and final reconciliation every 15 days for DL and monthly for all other funds. This course content includes the CS queries to reconcile both awards in FA and the amounts disbursed to Student Financials in PeopleSoft, and offers a deeper dive on common reconciliation error examples you may see as you reconcile.

Course Objectives

- Troubleshoot and work common examples found in the Fund Roster
- Troubleshoot and work common examples found in the Award Data by Item Type query
- Troubleshoot and work common examples found in the Additional Reconciliation Queries

Who should take this?

- Financial aid staff responsible for preliminary and final reconciliation

Student Financials

Part of the Campus Solutions pillar, Student Financials covers topics such as tuition, student-involved financial transactions, payment plans, and third-party contracts.

SF100: Tuition Calculation

This course will go through the various processes designed to assess student tuition and fees including tuition calculation components. This course will also review the steps required to apply waivers to student accounts to offset tuition charges.

Course Objectives

- Understand the Tuition Calculation page
- Calculate and view tuition for students
- Understand and process waivers/adjustments
- Assign fees and recalculate tuition
- Complete the enrollment cancellation process
- Understand common calculation errors

Who should take this?

- Bursar
- Head/Lead Cashier
- Staff that take money and/or apply charges

SF101: Cashiering

This course will go through processes that take place in the Cashier's Office. On a daily basis, the cashiering office collects and tracks a large number of transactions as students and other customers pay tuition, library fines, and fees. With the Student Financials cashiering program, you can perform a variety of transactions quickly, securely, and accurately. The system's inquiry and report features support your audit trails for maintaining integrity in the system. In addition, the system enables you to easily design how each transaction interfaces with the general ledger.

Course Objectives

- Open a cashiering office
- Process student and corporate payments
- Generate departmental receipts
- Create interim deposits
- Use cash replenishment
- Void receipts
- Reconcile register/cashier
- Close the cashiering office
- Reopen a cashiering office

Who should take this?

- Bursar
- Head/Lead Cashier
- Cashiers
- Staff that take money and/or apply charges

SF102: Refunds

Many variables contribute to proper refunding. This course is organized by first discussing individual/single refunds and then reviewing the batch/group refunding processes. Lastly, we will review how to cancel/reverse a refund prior to it being disbursed.

Course Objectives

- Individual refunding
- Batch refunding
- Interface processing
- Reverse a refund for a student/corporation
- Processing refunds with ePayments
- Reverse a refund for a student

Who should take this?

- Bursar
- Head/lead cashier
- Cashiers
- Staff that take money and/or apply charges

SF103: Payment Plans

This course will go through the steps required to create a payment plan as well as assign students to the payment plan to allow students to pay tuition and fees in installments throughout a given term. Use payment plans to offer students the flexibility of paying their education expenses over a period of time rather than in one lump sum. With Student Financials, you have three types of payment plans: calculated, existing, and lump sum.

Course Objectives

- Create and copy a payment plan
- Assign and cancel a student to/from a payment plan
- Post payment and recalculate a payment plan

Who should take this?

- Staff that take money, refund money, process third party billing and process payment plans (NOT Nelnet)

SF104: Third-party Contracts

This course will go through the various processes that assist in the process of managing third party contracts. We will review the following processes: creating third party contracts, assigning students to contracts, invoicing third party contracts, processing payments, and how to refund a third party.

Course Objectives

- Create and copy students to a third-party contract
- Assign and cancel students from a third-party contract
- Recalculating a third-party contract
- Create third party invoice
- Post a third-party contract payment
- Issue a refund to a third-party sponsor
- Rollover third party contracts

Who should take this?

- Staff that take money, refund money, process third-party billing (sponsorships)

SF105: Collections

This course contains the concepts and processes relating to student billing, collections, past due interest, and write-offs. It will also cover functionality to track the efforts the institution has taken to collect past due accounts.

Course Objectives

- Generate a student statement
- Run and review credit history process
- Put students in the collections que
- Use collections communications
- Create a collection agreement

Who should take this?

- Staff responsible for AR billing (Finance)
- Staff responsible for student billing (SF)

SF205: Intermediate Collections

This course contains the concepts and processes relating to collections communications, such as the 30, 60, and 90 day past due letters. Our goal for this course is to provide a systematic approach to collections communications that can be incorporated into an institution's current past due (student) receivables process. This approach incorporates communication through email, snail mail, and PeopleSoft's Message Center through a single set of processes. We will provide additional instruction and details on top of the SF105 Collections Communications Canvas Course in order to convey this process.

Course Objectives

- Understand how ctcLink can provide your institution with a method for collecting past

due student receivables

Who should take this?

- Staff responsible for student collections (Student Financials)

SF106: Term Rollover/Item Types/GL

This course will go through the necessary steps required each term to enable tuition calculation. It also includes the configuration that is required for 1098-T processing on an annual basis. Topics addressed will include updating tuition calculation controls, copying and updating fees to a new term, updating 1098-T, copying calendars, updating term defaults, updating master fee schedules, and copying payment plans.

Course Objectives

- SF term default
- Adjustment calendars
- Billing and due calendars
- Tuition calculation controls
- Term fees
- Min/max fees
- Transaction setup
- Class/course list fees
- Optional fees
- 1098-T taxes
- Total tuition schedule
- Item Type Understanding
- Item Type Priority
- Second Journal Set (SJS)
- Recon SF to GL

Who should take this?

- Bursar
- Head/lead cashier
- Staff that move fees from term-to-term or year-to-year

Finance

The Finance pillar contains all the modules for managing finances and budgets. Functionality in this pillar includes budget planning, general ledger, accounts payable and receivable, expenses, billing, grants, projects, project costing, contracts, cash management, purchasing and asset management.

KK100: Commitment Control

The Commitment Control is a budgetary application that is integrated within PeopleSoft. Commitment Control can enforce budgetary controls when needed for financial transactions.

PeopleSoft Commitment Control enables entering budgets and budget checking features for transactions originating from PeopleSoft applications or third-party systems.

This course focuses on the features mentioned above and provides a foundation for basic Commitment Control use cases. This course also introduces a knowledge base to build upon in intermediate or advanced courses.

Course Objectives

- Understand the commitment control structure
- Reviewing budget check exceptions
- Perform budget inquiries
- Run commitment control reports

Who should take this?

- Staff that supervise finance staff

GL100: General Ledger Basics

The General Ledger application includes features that help you view, manage, and maintain financial data within PeopleSoft.

At a basic level, PeopleSoft allows authorized users the ability to inquire upon financial information, define allocations, and use the GL Work Center.

This course focuses on the features mentioned above and provides a foundation for basic GL use cases. This course also introduces knowledge base to build upon in intermediate or advanced courses.

Course Objectives

- Identify key general ledger terms
- Identify general ledger processes
- Describe the difference between manual, spreadsheet, and batch processes
- Monitor general ledger activities
- Describe the pages used in the general ledger WorkCenter

Who should take this?

- Central/College Finance Employees who view financial data within the State Board or college

GL200: Intermediate General Ledger

The General Ledger application includes features that help you view, manage, and maintain financial data within PeopleSoft.

Because General Ledger is integrated with other modules in PeopleSoft, pulling financial data into GL can be done easily using a process called Journal Generator. GL also provides automation for audit logging and the ability to define schedules and Journal templates, which can automate journal entry.

This course focuses on the features mentioned above and pages for journal management, the spreadsheet upload tool, pages to post journals, and tools to process Year End Close to name a few.

Course Objectives

- Identify key general ledger terms
- Create a journal, including reversals, recurring journals, and spreadsheet uploads
- Edit a journal using both single edit and run control, including submitting for approval
- Copy a journal to create a new one, using both single copy and run control
- Initiate the journal generator process including checking for errors
- Identify rules, settings, and schedules that are user defined
- Enable or disable journal audit logging
- Process year end close

Who should take this?

- Central/college finance general ledger accountants responsible for the management and maintenance of financial data within the State Board or college

GL300: Advanced General Ledger

The focus of this course is to provide conceptual information for the General Ledger processes which work in conjunction with the administrator user role in PeopleSoft. Advanced General Ledger tasks include initiating the Journal Generator process, defining closing rules, and processing year-end close.

Course Objectives

- Identify new general ledger terms.
- Describe the difference in run control parameters when initiating the journal generator process.
- Identify various chartfield value set and closing rule parameters.
- Describe the closing process and the functions of generating preliminary opening balances for the balance sheet accounts and opening balances for any adjusting entries.

Who should take this?

- General ledger administrators

GR100: Grants

PeopleSoft Grants for North America application includes features that enable you to plan, manage and track your grant activities. Grants administrative functions include proposal and budget preparation and submission, award processing, award management/reporting and award closeout. Grants delivers tools that support all these administrative requirements.

A Grant for ctcLink is defined as funding received from one source outside the college, that has a specific budget, has a prescribed start and end date, requires a way to collect the funds (Invoice) at a given time and reports its expenses and cash received to the sponsoring agency. To enter information into the system, colleges will use the sponsor's award letter and back up documentation; however, each college may require different documentation to create the Grant. The Grants, Project Costing and Customer Contracts are all separate Modules in PeopleSoft, however they are required to work together to be successful.

Course Objectives

- Understand grant basics
- Create and submit a grant proposal
- Generate an award
- Manage awards and budgets
- Modify and amend grant awards
- Close a grant by project or activity
- Review grant queries and reports

Who should take this?

- Staff responsible for grant-related activities (grant administrators, grant writers, supervisors or assistant directors)

GR200: Intermediate Grants

Recall that a Grant for ctcLink is defined as funding received from one source outside the college that has a specific budget, has a prescribed start and end date, requires a way to collect the funds (Invoice) at a given time and reports its expenses and cash received to the sponsoring agency. The Grant, Project Costing and Customer Contracts are all separate Modules in PeopleSoft, however they are required to work together to be successful.

PeopleSoft Grants for North America application includes features that enable you to plan, manage and track your grant activities. Grants administrative functions include proposal and budget preparation and submission, award processing, award management/reporting and award closeout. Grants delivers tools that support all these administrative requirements.

This course explores other Grant Module options such as copying a Proposal, correcting project-related accounting entries at the source, and understanding commitment control summary.

Course Objectives

- Copy a proposal/proposal version
- Correct a grant Expense at the Source:
- Understand commitment control in grants/projects/contracts
- Manage the BFET grant
- Explore the grantsportal

Who should take this?

- Staff responsible for grant-related activities (grant administrators, grant writers, supervisors or assistant directors)

PC100: Project Costing

PeopleSoft Project Costing is a fully integrated management system for Budgeting, Costing and Analysis. Its powerful application will allow you to efficiently track and analyze project costs and allocate project resources. Project Costing integrates with other PeopleSoft modules that generate expenditures or revenue transactions such as Billing, Customer Contracts, General Ledger, Grants, Payables, and Purchasing.

Programs and Capital Projects are required to have at least 1 Project and 1 Activity. However, 1 Project may have more than 1 Activity. Programs are created and budgeted at the Business Unit level and organized and analyzed at the Activity level. Transactions are attached at the Activity level that provides the basis for Project Reporting, Analysis and Billing. Capital Project is budgeted at the State Board Capital Projects by using User Field #5. Transactions are also attached at the Activity level that provides the basis for Reporting and Analysis. User Field #5 is a unique identifier that the State Board will use to monitor, track and report up to the State level. If you have further questions regarding Capital Expenditures, please select the following link to view the [SBCTC Policy Manual - Chapter 6: Capital Expenditures and Real Property Transactions](#).

This course focuses on the features mentioned above and provides you a foundation and guidance on how to create and manage Programs or Capital Projects in the Project Costing Module.

Course Objectives

- Demonstrate basic understanding of project costing
- Create and manage a program
- Create and manage a capital project
- Understand the importance of user field #5
- Modify the various changes in project costing, such as;
- Understand the basics of project costing integration

Who should take this?

- Staff responsible for grants, non-grant programs and/or capital projects

CN100: Customer Contracts

Customer Contracts enables you to define the services you use and administer the billing rules for your Grant. When a Grant is awarded and generated, the Proposal ID automatically becomes the Contract ID number. Each contract has a Billing Plan, such as a Cost Reimbursable or Fixed Price Contracts, that controls how the Grant should be billed. A Billing Plan stores the schedule of billing events (when to bill) and the corresponding billable lines (what to bill) for these events. Revenue is recognized in a manner that makes sense for SBCTC's needs. You can also amend a Grant Customer Contract's budget, add a project line, and modify the start or end dates. While Fund 145 is dedicated to Grants that have a defined budget, set start and end date, billing parameters and reports its expenses and cash received back to the sponsoring agency, a Stand-Alone Contract can be created for those individual cases that are not tied to a Grant but a specific one-time contract. Before creating a Stand-Alone Contracts, please check with your college's Business Practices and collaborate with your Assistant Director and/or Budget Manager.

Course Objectives

- Understand the basics of customer contracts
- Activate cost reimbursable and fixed price customer contracts
- Understand billing and revenue plans
- Manage customer contracts
- Modify customer contracts
- Create a stand-alone contract

Who should take this?

- Staff responsible for managing the fiscal operations for all Grants within the college with roles such as Grants Administrators, Supervisors or Assistant Directors

PU100: Purchasing — Requisitions

The purpose of this course is to introduce the basics of **ctcLink** (PeopleSoft) transactions for the Purchasing module as it pertains to Managing Requisitions. A Requisition is the first step in the *Procure-To-Pay* business process. By the end of this course, you should have a basic understanding of entering and managing requisitions in **ctcLink**, how to navigate throughout the system locating requisition pages and how commitment control is applied specifically to purchasing components. Course information includes an overview of the Procure-To-Pay process, adding supplier information into ctcLink, entering – maintaining requisitions and an understanding of commitment control for requisitions.

Course Objectives

- Manage requisitions
- Change requisitions
- Understand and use commitment control

Who should take this?

- Staff who will be requesting goods/services (requesters, approvers)
- Staff who will work with purchase orders (buyers, approvers, receivers, etc.)
- Staff that will be sourcing requisitions, procuring the goods/services
- Staff identified to receive goods/services.

PU101: Purchasing — Purchase Orders

The purpose of this course is to introduce the basics of **ctcLink** (PeopleSoft) transactions for the Purchasing module with respect to Purchase Order Processing. You can select requisitions to create the purchase orders from as well as create purchase orders online or from copying other documents (requisitions, purchase orders, contracts, etc) for goods and services that are necessary to run the daily operation. After you enter purchase orders, an authorized person can review and approve them. After approval, purchase orders are dispatched to the supplier. Purchase Order processing transfers into Receipts processing when the supplier fills the order and ships the goods or performs the services for the company.

By the end of this course you should have a basic understanding of sourcing requisitions to create purchase orders; entering and managing purchase orders in **ctcLink**; how to navigate throughout the system to support the purchase order processes; and how commitment control is applied specifically to purchasing components. Course information includes an overview of the Procure-To-Pay process, sourcing requisition, creating purchase orders online, managing purchase orders, and an understanding of commitment control for purchase orders.

Course Objectives

- Create purchase orders
- Process purchase orders
- Manage purchase order change orders
- Manage purchase orders
- Understand and use commitment control (budget check)
- Administer procurement contracts

Who should take this?

- Staff who will work with purchase orders (buyers, approvers, receivers, etc.)
- Staff that will be sourcing requisitions, procuring the goods/services
- Staff identified to receive goods/services
- Staff who will be requesting goods/services (requesters, approvers)

PU102: Purchasing — Receipts and Maintenance

The overall purchasing business process is that of procuring goods and services from suppliers in order to continue business operations. The procurement process is made up of several individual processes. For example, it involves requesting good and/or services; managing items and supplier information; creating contracts; managing purchase orders; receiving goods and remitting payments. The efficiency of an institution's purchasing process has a direct and material effect on their ability to manage their funds.

This course will focus on how PeopleSoft Purchasing provides components that enable you to receive goods, create receipts, and enter receiving details. These components facilitate the tracking of receipt information such as distributions and assets.

Course Objectives

- Create and manage receipts in ctcLink

Who should take this?

- Staff responsible for managing receipts within the college

PU103: Purchasing (Procurement Card)

The overall purchasing business process is that of procuring goods and services from suppliers in order to continue business operations. The procurement process is made up of several individual processes. For example, it involves requesting goods and/or services; managing items and supplier information; creating contracts; managing purchase orders; receiving goods and remitting payments. The efficiency of a college's purchasing process has a direct and material effect on their ability manage their funds.

This course will focus on all the elements that are part of using the Procurement Card processes. The procurement card feature supports credit card purchases made by card holding employees in your organization and enables you to reduce the number of small purchases that go through your procurement department. You must have PeopleSoft Payables installed to implement the procurement card feature in PeopleSoft Purchasing.

Course Objectives

- Using procurement cards
- Running reports

Who should take this?

- Staff responsible for purchasing (P-Cards)

EX100: Travel & Expenses - Traveler/General User

This course provides the fundamentals you will need to use PeopleSoft Expenses. Travel and Expenses explains how travelers can submit travel documents. The three travel documents covered in this course are Cash Advances, Expense Reports, and Travel Authorizations. Upon completion of this course, you will understand how to create, modify, and delete travel documents. You will also learn how to view employee profiles and accounting transactions and learn some basics about the budget checking process.

Course Objectives

- Understand basic overview of Travel and Expense terms and processing
- Create travel authorizations and expense reports
- Modify travel authorizations and expense reports
- Prepare cash advances
- Budget check and accounting transactions
- View employee profiles

Who should take this?

- Staff responsible for finance expense management

- General users/travelers

EX101: Travel & Expenses – Approver

This course provides the fundamentals you will use as a PeopleSoft Expenses Approver. The Travel and Expenses module enables Approvers to manage and approve travel documents effortlessly. This course will explain how to complete the approval process for travel and expense documents. You will learn how to review, budget check, and approve expense transactions.

Course Objectives

- Understand basic overview of travel and expense terms and processing
- Manage approvals in expenses
- Use commitment control with expenses

Who should take this?

- All Expense Approvers

EX102: Travel & Expenses – Travel Admin/Finance

This course provides the fundamentals you will need to use PeopleSoft Expenses. The Travel and Expenses module enables Financial Administrators to manage and process expenses. This course will explain how to edit and maintain employee profiles, process expense transactions, budget check in batch, and review and edit exceptions and accounting transactions.

Course Objectives

- Understand basic overview of travel and expense terms and processing
- Maintain employee profiles
- Process expense report exceptions
- Use commitment control with expenses
- Process expense payments
- View accounting transactions in expenses

Who should take this?

- Staff responsible for finance expense management (Financial Administrators)

AP100: Accounts Payable

The overall purchasing business process is that of procuring goods and services from suppliers in order to continue business operations. The procurement process is made up of several individual processes. For example, it involves requesting good and/or services; managing items and supplier information; creating contracts; managing purchase orders; receiving goods and remitting payments.

This course will focus on how PeopleSoft Accounts Payable provides components that enable you to create vouchers and remit payments. These components facilitate the completion of the Procure-2-Pay process.

Course Objectives

- Manage vouchers
- Manage payments

Who should take this?

- Purchasing staff who have any part in the procure-to-pay process
 - Requisition requesters/approvers
 - Purchase order buyers/approvers/receivers
 - Staff responsible for managing vouchers and payment for goods/services

AR200: Intermediate Accounts Receivable

The Accounts Receivable Module is a subsidiary ledger that updates the General Ledger via batch process. The Intermediate Accounts Receivable module tracks incoming payments and other processes associated with billing/receipts. It includes reviewing and posting pending items, creating deposits, applying payments, reviewing customer accounts and activity, un-posting an item group, generating a statement, managing accounts, using a maintenance worksheet, running the aging process, creating pending items, and creating a dunning letter. The review functions of this module allow the users to effectively monitor the status of both billing and accounts receivable items. This course will provide you the basic foundation of the Accounts Receivable Module.

Course Objectives

- Understand the payment life cycle in PeopleSoft
- Distinguish the difference between AR regular payments vs. AR direct journal payments
- Understand the process of receiving a regular deposit
- Recognize when to use worksheets in applying regular payments
- Apply AR regular payments to non-grant and grant Bills
- Understand the process of receiving a direct journal Deposit
- Understand direct journal payments do not have an item (bill) attached to it
- Create accounting entries for AR direct journal payments
- Credit and rebill non-grant bills in both current and closed months
- Understand the basics of the AR update and review error codes
- Analyze a customer's account and create a statement
- Run basic AR reports and queries

Who should take this?

- Accounts receivable staff
- Grants specialist
- Assistant finance directors or supervisors

BI100: Billing

Billing integrates with Contracts, Project Costing and Grants to enable you to generate invoices for contracts and awards. A contract controls the transfer of billing information from each of these applications. A number of steps and decision points in the billing flow occur within the source

applications before the data reaches Billing. The Contracts application coordinates the flow of billable transactions from Contracts, Project Costing and Grants through how the selected Contract Type or Billing Plan. Transactions that are ready for billing are sent to the billing interface when you run the Contracts to Billing Interface. Invoice data from Grants, Projects and Contracts can pass through Billing and then into Receivables.

This course will provide you a basic understanding of the difference between the two basic Bill Types; Non-Grant and Grant Bills. Also provide some tips and tricks to help run bills (also known as invoices or items) to success.

Course Objectives

- Understand the difference between non-grant and grant billing
- Navigate using the billing WorkCenter
- Understand and create an express, a standard and a program bill
- Run the process to generate a non-grant bill; single action invoice process
- Understand and create a bill for a cost reimbursable contract
- Understand and create a bill for a fixed price contract
- Run the process to generate a grant bill; single action w/ Commitment Control invoice process
- Understand the basics how to correct billing errors
- Review billing interface errors
- Understand the basics of billing adjustments

Who should take this?

- Staff responsible for creating, generating, approving and posting invoices
 - Accounts receivable admins
 - Grants administrator/specialist
 - Billing supervisor/assistant director

BI200: Intermediate Billing

Intermediate Billing provides further information and functionality of the Billing Module in PeopleSoft.

Recall that Billing integrates with other modules in the following ways:

- PeopleSoft Grants integrates with Billing through Customer Contracts to manage Grant Billing for your Awards.
- Invoices from PeopleSoft Billing flows into PeopleSoft Receivables. Relevant accounting entries are sent to PeopleSoft Receivables.
- Billing accounting entries are also sent to the General Ledger through the Journal Generator Application Engine process.
- Invoice data from Grants, Projects, and Contracts can pass through Billing and then into Receivables.

Also when Billing integrates with Contracts, Project Costing and Grants, it enables you to generate

invoices for Contracts and Awards. A Contract controls the transfer of Billing information from each of these applications. The Contracts application coordinates the flow of billable transactions from Contracts, Project Costing and Grants through how the selected Contract Type or Billing Plan. Transactions that are ready for billing are sent to the billing interface when you run the Contracts to Billing Interface.

This course will provide you a deeper understanding of the Billing Module and what other functions are available within the system to utilize. Also provide some tips and tricks to help run processes to success.

Course Objectives

- Create and run additional bill processes:
 - Copy a non-grant or single bill
 - Create a recurring bill
 - Create a VPA Express bill
- Delete unnecessary bills:
 - Cancelled bills
 - Temporary grant bills
- Adjust and credit billing:
 - Credit an entire invoiced bill
 - Adjust an invoiced bill, add a bill line, and re-finalize
- Manage grant billing:
 - Correct OLT lines
 - Credit and rebill a grant bill
 - Deferring a billable line
- Reprint non-grant and grant invoices

Who should take this?

- Staff responsible for creating, generating, approving and posting invoices
 - Accounts receivable
 - Grants administrator
 - Grants supervisor

CT100: Treasury (Cash Management)

The Treasury (Cash Management) application discusses cash management, banking and bank reconciliation. In this class you will learn to process and establish bank account reconciliation methods. You will also learn to manage the Financial Gateway, perform bank transfers, manage treasury-specific account entries and review the Treasury WorkCenter.

Course Objectives

- Apply knowledge of funds settlement and bank integration
- Explain the bank reconciliation process including configuration set up, loading bank

statements, types of reconciliation, statement activities types and process, statement accounting rules, external transactions and force reconciliation.

- Describe the bank transfer process, create EFT request and bank to bank transfer, create fees and select and approve settlements.
- Explain the functionality of the Financial Gateway including creating payment files, troubleshooting payments and defining Financial Gateway security.
- Explain the Treasury Account, create the Treasury Account using a template, and run the Automated Account process.
- Explain how to use the Treasury WorkCenter.

Who should take this?

- Accounting Manager
- Finance Office Manager
- Budget Manager

AM100: Asset Management

This training course is designed for staff who work within the Finance (FIN) pillar specifically within Asset Management.

Asset Management can be added to Purchasing documents to help capture purchased assets. Some common integration points associated with Asset Management are:

- Financials requires that you transfer journals from Asset Management to PeopleSoft General Ledger (GL). You will distribute accounting entries for asset transactions and depreciation and generate journals to the GL.
- When you use Asset Management with Payables, you can share asset information between these applications. This interface eliminates the need for dual maintenance of vouchers and their corresponding asset data. Payables sends all asset additions, adjustments, and retirements for unposted vouchers to Asset Management. The integration between Asset Management lease payments and Payables automatically generates vouchers for lease payments that are calculated in Asset Management. This includes both capital and operating leases. Additionally, the lease payment schedule segregates the principal and interest of each payment and is used to generate the payment accounting entries. Asset Management generates the associated monthly accrual accounting entries.
- Asset Management integrates with Project Costing by sharing information about assets associated with ongoing projects. Assets that originate in Project Costing are usually the outcome of construction projects.
- You can share asset information between Asset Management and Purchasing. You will have real-time access to the supplier, voucher, and order data in this system. The interface between these applications eliminates the need for dual maintenance of receipts and their corresponding asset data. Purchasing sends all asset additions, adjustments, and retirements for unposted receipts to PeopleSoft Asset Management.

Course Objectives

- Maintain assets
- Maintain parent and child assets
- Adjust and transfer assets
- Perform physical inventory
- Work with leased assets
- Retire assets
- Archive asset information
- Depreciate assets
- Create accounting entries
- Work with other PeopleSoft applications
- Change assets in mass
- Run reports

Who should take this?

- Asset manager
- Physical inventory specialist
- Accounting manager
- Finance office manager
- Budget manager

AR100: Accounts Receivable

The Accounts Receivable module is a subsidiary ledger that updates the General Ledger via batch process. The Accounts Receivable module tracks incoming payments and other processes associated with billing/receipts. It includes reviewing and posting pending items, creating deposits, applying payments, reviewing customer accounts and activity, un-posting an item group, generating a statement, managing accounts, using a maintenance worksheet, running the aging process, creating pending items, and creating a dunning letter. The review functions of this module allow the users to effectively monitor the status of both billing and accounts receivable items. This course will provide you the basic foundation of the Accounts Receivable module.

Course Objectives

- Understand the payment life cycle in PeopleSoft
- Distinguish the difference between AR regular payments vs. AR direct journal payments
- Understand the process of receiving a regular deposit
- Recognize when to use worksheets in applying regular payments
- Apply AR regular payments to non-grant and grant bills
- Understand the process of receiving a direct journal deposit
- Understand direct journal payments do not have an item (bill) attached to it
- Create accounting entries for AR direct journal payments

- Credit and rebill non-grant bills in both current and closed months
- Understand the basics of the AR update and review error codes
- Analyze a customer's account and create a statement
- Run basic AR reports and queries

Who should take this?

- Staff who work within non-student related receivables
 - Accounts receivable staff
 - Grants specialist
 - Assistant finance directors/supervisors

Human Capital Management

The Human Capital Management pillar contains the human resources and payroll modules—from hiring to retirement. Functionality in this pillar includes Talent Acquisition Management (hiring), all the core HR components, payroll, benefits, absence management, time and labor, and self-service for managers and employees.

TM100: Talent Acquisition Manager (TAM)

This course will walk through the steps of creating a position to prepare to hire an applicant. Some “touchpoints” will include; creating a job opening, searching and applying for jobs, managing job openings, managing interviews, the interview evaluation process and preparing to hire. Each section we will explore entering valid values through the system to prepare data for HR Core activities.

Course Objectives

- Create a job opening
- Approve job openings
- Manage job openings and applicants
- Manage interviews
- Prepare and approve job offers
- Prepare to hire applicant
- Recruiting insight (TAM reports)

Who should take this?

- Staff responsible for recruitment activities
- Human resources administrators
 - HR manager
 - Talent acquisition manager

HR100: HCM Core

HR Core functions allows you to manage positions, manage profiles, and administer and increase workforce. This course will cover processes such as entering additional data in HR records, updating person and job information, managing compensation, viewing summary workforce information, tracking faculty events and running HCM reports.

Course Objectives

- Create position and job codes
- Manage positions
- Administer workforce
- Enter additional data in HR records
- Updating person and job information
- Manage compensation
- Track faculty events
- Manage education credentials

Who should take this?

- HR administrator
- WorkForce administrator
- WorkForce specialist

HR200: Intermediate HR Core

HR Core functions allows you to manage positions, manage profiles, and administer and increase workforce. This course will provide details for the following actions;

- Job effective data process (to include Short Break)
- Employee classification
- Approvals

Course Objectives

- Mass update processing
- Additional job data transactions

Who should take this?

- HR administrator
- WorkForce administrator
- WorkForce specialist

AB100: Absence Management

This training course is designed for staff who work within the Human Capital Management (HCM) pillar specifically within Absence Management.

Absence Management includes schedules, entitlements, absence types and reasons, takes, absence entry, absence approvals, self-service features, and integrations. Absence Management is a rules based engine that contains no specific application rules or code. Using items called elements you are able to build absence rules that apply to your organization. The rule-based engine will process complex absence and accrual logic. You can also tailor the application for self-service transactions and modify the approval logic.

Absence Management shares the same relational data framework, user interface, reporting tools, and customization capabilities as Oracle's PeopleSoft Enterprise Human Resources. This enables Absence Management to automatically retrieve personal data, job data, and other information from PeopleSoft Enterprise Human Resources for absence processing.

Course Objectives

- Enter absences
- Enter and approve self-service absence requests
- View and finalize absence results
- Transfer leave time
- Manage off cycle processing
- Run custom reports

Who should take this?

- Staff responsible for tracking, approving and delegating authority for absence actions

BN100: Benefits

PeopleSoft Base Benefits is used to manage employee benefits in your organization. Base Benefits is used in conjunction with customizations to manage data owned by outside organizations but viewable in PeopleSoft.

Course Objectives

- Understand base benefits fundamentals
- Manage benefits
- Run reports
- Customize interfaces and processes

Who should take this?

- Staff responsible for benefits administrator tasks
- Stat responsible for payroll administrator tasks

PR100: Payroll

This training course is designed for staff who work within the Human Capital Management (HCM) pillar specifically within Payroll. PeopleSoft Payroll for North America application includes features that enable you to maintain payroll-specific data, such as tax details, additional pay, general deductions, direct deposit, and garnishments information. These features work in conjunction with the PeopleSoft Human Resources information you enter on the Administer Workforce pages and the benefit deduction data maintained in the Benefits pages.

In addition to the payroll data that is required for payroll processing, PeopleSoft also provides payroll data pages where you can maintain and override optional information concerning check distribution and payroll deductions.

The payroll system enables you to calculate gross-to-net or net-to-gross pay, leave accruals, and retroactive pay. You can automatically calculate imputed income for group-term life insurance and process unlimited direct deposits.

Course Objectives

- Understand the payroll for North America business processes
- Setting up employee data
- Processing garnishments
- Working with paysheet concepts
- Performing pay calculations
- Running custom pay processes (BEFORE confirm) (Mention AFTER confirm)
- Performing pay confirmation
- Working with checks and direct deposits
- Processing periodic payroll events/adjusting employee balances
- Running payroll reports

Who should take this?

- Payroll analyst
- Payroll administrator
- Payroll assistant
- Payroll tax administrator
- Payroll tax analyst

TL100: Time and Labor

This training course is designed for staff who work within the Human Capital Management (HCM) pillar specifically within Time and Labor.

Time and Labor provides complete control over tracking employee time and labor. It enables you to create schedules for employees, track employee time, and approve time.

You can use Time and Labor to edit and approve time. In addition, you can produce reports and adjust time reported in prior periods.

PeopleSoft Time and Labor is integrated with PeopleSoft Human Resources, Payroll, and Absence Management allowing you to access and use employee and payroll information during the Time and Labor process.

Course Objectives

- Understanding time and labor fundamentals
- Approve and manage time
- Use self-service components
- Use manager self-service components
- Run reports

Who should take this?

- Time and labor administrator
- Absence management administrator

MS100: HCM: Manager Self-Service

The Manager Self Service module in PeopleSoft allows the user to view and work in Recruiting Activities to include; searching applicants, applications and job openings. Create applicants and job openings, view interview calendars, review saved searches and configure recruitment question sets. This module also allows managers to view pending approvals for job openings and job offers. The My Team tile allows managers a dashboard view of stats to include current headcounts, performance status and current salary analysis. Team Time allows managers to report time, view weekly time entries and summaries, view requests and analyze workforce availability. Absence Analytics will allow managers to view reports around absence data.

Course Objectives

- Recruiting activities tile

- Approvals tile
- My team tile
- Team time tile
- Open jobs tile
- CTC team time tile

Who should take this?

- All managers

ES100: HCM: Employee Self-Service

The Employee Self Service module in PeopleSoft allows the user to view Careers to include; job notifications, saved searches and contact information. It also allows the employee to track time, enter time, report leave/comp time, request an absence and view requests and time summaries. The employee has the ability to view Payroll information, Personal Details and Benefit Details. In addition, in the Finance area of self-service the employee can create travel authorizations and review expense reports.

Course Objectives

- Accept and reject delegation request
- Manage personal Information
- Use timesheet and modify reported time, report time and enter time
- Reporting comp time
- Requesting overtime
- Requesting absences
- Provide W2 consent

Who should take this?

- All employees

FW100: Faculty Workload (Payroll, HCM)

Higher-education institutions need to set maximum limits on the workload that is assigned to faculty and other individuals. These institutions also need to track and report actual workload assignments. To accommodate these needs, there is a feature called Faculty (Instructor) Workload, which performs full-time equivalency tracking.

The Faculty Workload (FWL) feature enables you to monitor the instructional and non-instructional workload for selected faculty, instructors, and staff. This feature enables you to define workload limits for groups or individuals. In addition, you can define multiple types of instructional and non-instructional work assignments, using different workload standards for each type of assignment. You can have separate workload upper limits for part-time and full-time individuals and can set automated controls that prevent workload assignments beyond those limits.

The PeopleSoft system automatically updates full-time equivalency workload values when you enter data on the class scheduling pages. You can also use a background process to copy workload data from one term to another, to update term workload records, or to produce a simple report.

Course Objectives

- Assigning instructor work
- Calculate and review contract pay
- Generate contract
- Submit contract for approval
- Send faculty pay to HCM

Who should take this?

- Staff responsible for class scheduling and HR/Payroll tasks

FW200: Intermediate Faculty Workload

The PeopleSoft system automatically updates full-time equivalency workload values when data is entered on the class scheduling pages. In this course you will learn how to enter valid values for the class scheduling pages, use tables (including the Instructor/Adviser table) and work with pro-rate contracts that have "special circumstances".

Course Objectives

- Participants will gain knowledge to be able to effectively process class adjustments for faculty workload in PeopleSoft
- Effectively use tables and options in the Schedule Class Meetings section of PeopleSoft
- Add approved courses to an instructor using the Instructor/Adviser Table
- Work with pro-rate contracts with special circumstances

Who should take this?

- Staff responsible for faculty contracts and scheduling



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