



# GLOBAL DESIGN REVIEW (GDR) RECOMMENDATION SUMMARY DOCUMENT

Campus Solutions GDR Recommendation Summary  
Document 5/9/2019

## [Abstract](#)

This document contains a summary of the recommendations produced through the Global Design Review (GDR) sessions and contains recommendations from all PeopleSoft pillars.

## CHANGE HISTORY

VERSION	DATE	CHANGED BY	CHANGE
1	6/13/2018	Joe Carl	Original Document
2	6/25/2018	Joe Carl	Added summary for Working Group
3	6/27/2018	Joe Carl	Edits to summary for Working Group
4	5/9/2019	John Henry Whatley	Document has been revised to include only those items that are actionable



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## INTRODUCTION

Global Design Review (GDR) was a onetime event involving all 34 colleges participating in workshops aimed at helping attendees understand the Global Framework of ctcLink and how we have adapted PeopleSoft to support our unique model of multiple colleges in a single, shared instance of the product. In some sessions, this involved closing outstanding gaps in the Global Framework that require system-wide input. These items were reviewed and voted on through the various GDR sessions, and the resulting recommendations are documented here for review by the ctcLink Governance Working Group.

This document contains a summary of the recommendations produced from the GDR sessions for all PeopleSoft pillars, including cross-pillar topics. Detailed information about the sessions can be found in the ctcLink Project Information Canvas site (<https://sbctc.instructure.com/courses/1620486>) under the following modules:

- CROSS-PILLAR GDR SESSION ARCHIVE (MAY 2018)
- CS GDR SESSION ARCHIVE (MAY 2018)
- FIN GDR SESSION ARCHIVE (MAY 2018)
- HCM GDR SESSION ARCHIVE (MAY 2018)

## SUMMARY

See the corresponding sections below for more detail.

1.1	<ul style="list-style-type: none"> <li>• Add “Mx” Name Prefix to production</li> <li>• Add “Temporary” Address Type to production</li> <li>• Remove “Dormitory” Email Type</li> <li>• Change DORM Address Type description from “Dormitory” to “Residence Hall”</li> </ul>	Updates made in CSPRD 1/28/2019 (ticket 65791)	Joe Carl
1.1	Remove all education specific suffix types (see list)	Updates made in CSPRD 4/5/2019 (ticket 59027)	Carmen McKenzie
2.1	Add new values to the Room Characteristics Table in production	Updates made in CSPRD 11/21/2018 (ticket 62543)	Joe Carl
2.2	Classic Class Search Warning Message	Recommendations received from ARC on 3/28/2019	Joe Carl
2.3	Course Catalog Warning Message Class Search Warning Message Class Meeting Times Class Meeting Days	Recommendations received from ARC on 3/28/2019	Joe Carl
2.5	Student Financials Invoice Templates	Updates made in CSPRD 5/9/2019 (ticket 21505 & 64023)	Joe Carl
2.6	Student Financials Reconciliation	Functional project team will work with Spokane, Tacoma, and Clark to develop any needed reconciliation reports	Joe Carl
2.7	Financial Aid	No requested changes to global design	N/A

## 1.0 CROSS-PILLAR SESSION RECOMMENDATIONS

### 1.1 HCM/CS: BIO-DEMO MERGE/PERSON ATTRIBUTE INFORMATION

#### SESSION DESCRIPTION

In this session, the project team will review the cross-functional/integration tables between Campus Solutions (CS) and Human Capital Management (HCM). It will cover bio-demo data elements, the conversion process, and how the conversion logic processes students and employees who have been active at multiple institutions. We will also discuss best practices for processing employees who have an existing CS record and vice versa. Additionally, we will seek system-wide consensus on the common values that each table must contain in order for a successful sync from CS to HCM.

#### RECOMMENDATION SUMMARY

Three areas for consideration by the Working group

1. Personal Attributes-the following Cross-Pillar recommendations were made
  - a. Name Type-No Changes
  - b. Name Prefix Type- Add Mx
  - c. Name Suffix Type-Remove all Educational titles including DDS, DR, EDD, JD, RN, PhD
    - i. It was suggested in the session by HCM that these be moved to the title table, which upon review after the GDR may not be the best place to store this data. Further review and recommendation about a place to move these values would need to be addressed by both pillars
    - ii. After the session, using query it was determined that these name suffix are not currently being used in HCM and there are 84 IDs in Campus solutions using these titles, breakdown below
    - iii. If these suffixes are removed, the group must designate a data solution to identify employees with medical credentials.

DDS	52
Dr	1
EdD	9
JD	4
PhD	4
RN	14
<b>Grand Total</b>	<b>84</b>

- d. Address Type-Add Temporary
- e. Phone Type- Change Description of Dormitory to "Residence Hall"

- f. Email Type-Remove Dormitory; If centralized email is not used, additional student and employee email types for each college should be added (see consideration 2 below for additional details on Email type discussion)
- g. Voting Summary
  - i. 19 colleges voted to approve these changes
  - ii. 2 college districts voted to approve these changes
  - iii. State Board approved these changes
  - iv. 9 colleges Abstained due to no decision maker present

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#### VOTING SHEET(S)



GDR Decision  
Tracking Sheet - HCI

## 2.0 CAMPUS SOLUTIONS (CS) SESSION RECOMMENDATIONS

### 2.1 ROOM SCHEDULING

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#### SESSION DESCRIPTION

The Room Characteristics Table is a globally-defined list of attributes that can be assigned to a Facility ID (building and room). Examples currently include "Facilities-Sink" and "Science-Anatomy/Physiol Equip". These Room Characteristics can be used when leveraging room scheduling software programs, including 25Live. The system supports 100 global values. The project team will review the current list and discuss whether updates should be made.

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#### RECOMMENDATION SUMMARY

The group recommended adding the following 13 values to the Room Characteristics Table:

- Teleconferencing
- Printer 3D
- Wired Microphone
- Maps
- Smartboard
- Interactive Projector
- Interactive Display
- Dark Room
- Room Configuration Style 1
- Room Configuration Style 2
- Room Configuration Style 3
- Room Configuration Style 4
- Room Configuration Style 5

Since only 83 of the available 99 values are currently in-use in production, no current values need to be removed at this time. The vote was unanimously accepted.

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#### VOTING SHEET(S)



GDR Decision  
Tracking Sheet - Roc

### 2.2 INSTALLATION SETTINGS AND CLASS SEARCH

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#### SESSION DESCRIPTION

The Campus Solutions Installation pages are used to configure various settings and defaults for specific business processes throughout the Student Records and Academic Advisement modules. In



this workshop, the project team will review these global settings and their impacts to their corresponding business processes. The Student Records Installation page sets defaults for the Class Search used by students, staff, and faculty. This page also establishes global settings for the Post-Enrollment Requisite Checking (batch drops for unmet requisites) business process. The Academic Advisement Installation page will be used to configure the student activities (enrollment, grading, graduation, transfer credit posting, etc.) that will cause the nightly batch job to create a new or refreshed Academic Advisement Report (degree audit). A system-wide consensus must be reached if the current settings for Class Search, Requisite Checking, and Advisement Reports need to be changed.

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## RECOMMENDATION SUMMARY

During this session, participants were asked to evaluate and vote on subtopics separately. The following recommendations were made for each subtopic.

### Classic Class Search

1. The classic view of Class Search displays a warning message when 50 or more results are returned but allows the user to proceed. An error message is displayed if 10,000 or more results are returned and also prevents the user from proceeding. Participants recommended no changes be made to either limit value.
  - a. This recommendation passed with the following dissent:
    - i. One college recommended the warning limit be increased to 300 results.
2. The search criteria used to narrow results was reordered with FirstLink feedback shortly after go-live. Participants recommended the criteria values and sequencing remain as-is.
  - a. This recommendation passed with the following dissent:
    - i. One college recommended the Subject search criterion be changed from a drop-down list to a prompt search.
3. Participants recommended enabling instructions to display on the class results page and agreed the verbiage should be edited to provide more detail to a user. This configuration is currently disabled in the production environment.
  - a. This recommendation passed with the following notes:
    - i. Exact verbiage of the updated instructions will be decided upon via a working group at a future ARC meeting.
4. Additional class details can be enabled/disabled to display on the class details page. Participants recommended removing Campus from displaying.
  - a. This recommendation passed with no notes or dissention.

### Post-Enrollment Requisite Checking (PERC)

1. Participants recommended a configuration change to display an enrollment warning message to students who have conditionally met a class requisite.
  - a. This recommendation passed with no notes or dissention.

2. When reviewing students for unmet pre-requisites, the PERC roster page automatically displays class details, requisite information, and filter options. Participants recommended no changes be made to this area.
  - a. This recommendation passed with the following dissention:
    - i. Four colleges recommended the class detail and requisite information areas be collapsed by default.
3. Upon enrollment in a class with requisites, students are assigned a status of how they met the requisite; satisfied, not satisfied, permitted, enrollment component, conditionally satisfied, overridden, and unknown. All status filters are checked to display by default except for satisfied and unknown. Participants recommended the filter defaults remain as-is.
  - a. This recommendation passed with the following dissention:
    - i. Ten colleges recommended flagging the unknown status as well.
4. PERC is currently configured to allow drops for unmet requisites in batch or for an individual class. Participants recommended both options be kept available and processing options remain as-is.
  - a. This recommendation passed with no notes or dissention.

#### Academic Advisement

1. Student Activities used to Trigger New/Refreshed Report: No changes to current production configuration values.
  - a. Recommendation passed with no objections/comments
2. Display Refresh Link (Button) in Student Self Service Academic Advisement Report
  - a. Recommendation passed with the following comment:
    - i. Change wording of the Refresh link
3. Enable students to update Advising Notes
  - a. Recommendation passed with the following comment:
    - i. Verified local configuration option

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#### VOTING SHEET(S)

Classic Class Search –



GDR Voting -  
Classic Class Search

Post-Enrollment Requisite Checking –



GDR Voting - PERC

Academic Advisement –



GDR Decision  
Tracking Sheet Acad

## 2.3 STUDENT SELF-SERVICE

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### SESSION DESCRIPTION

The student Self Service enrollment process has been overhauled in Campus Solutions 9.2. The project team will demonstrate the upgraded student enrollment process to ensure it aligns with college business processes and policies.

Additionally, the out-of-the-box error messages displayed to students when their enrollments are unsuccessful (e.g., due to unmet pre-reqs, a business office hold, etc.) are generic and do not always give students enough information about next steps. We will review the enrollment error conditions, the corresponding error messages, and, in some cases, the portions of the messages that cannot be edited. Due to the large number of error conditions and messages, re-crafting any message's wording will most likely need to take place by a separate working group.

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### RECOMMENDATION SUMMARY

#### **Fluid Browse Course Catalog**

1. **Maximum Courses to Display & Warning Message** – When browsing through the fluid Course Catalog, a configurable maximum of 50 results will display to a student. A warning message indicating this limit and instructions to narrow down the search is also displayed. Participants recommended the maximum number of results remain at 50 but agreed the message verbiage needs editing to be more student friendly and provide clearer instructions.
  - a. This recommendation passed with the following notes and dissention:
    - i. Exact verbiage of the updated warning message will be decided upon via a working group at a future ARC meeting.
    - ii. Two colleges agreed with the recommendation to change message verbiage but recommended increasing the maximum to 75 results.
2. **Search Filters** – Participants recommended removal of Campus and Academic Organization filters and to re-sequence to the following:
  - i. Subject

- ii. Number of Units
  - 1) 0 Units
  - 2) 1 – 2 Units
  - 3) 3 – 4 Units
  - 4) 5 Units
  - 5) 6 – 11 Units
  - 6) 12+ Units
- iii. Typically Offered
- iv. Grading Basis
- v. Requirement Designation
- vi. Course Attribute
- vii. Open Entry/Exit
- viii. Career
- ix. Component
  - a. This recommendation passed with the following dissention:
    - I. One college recommended leaving Academic Organization as a filter.
    - II. Two colleges recommended changing the filter descriptions. One recommended changing the Typically Offered filter to Quarter Offered.
    - III. One college agreed with the recommendation to remove Academic Organization but abstained from voting on the other options.

#### **Fluid Class Search**

- 1. Number of Quarters to Display – The setting that controls which terms can be selected in the Class Search is a global configuration. Currently in production, summer and fall terms open on May 1, winter opens October 1, and spring opens January 1. Participants discussed remaining as-is versus the potential of moving to an annual schedule. However, many colleges have or will move to year-round scheduling. Due to business and student impacts of changing these settings, no recommendation could be made at the time.
  - a. Participants abstained from voting on this item with the following notes:
    - i. Further discussion amongst the ARC and IC groups is needed.
    - ii. Four colleges recommended an annual schedule.
- 2. Add Class Option – Participants recommend configuring the option for students to either enroll directly or add to shopping cart from the class search.
  - a. This recommendation passed with no notes or dissention.
- 3. Maximum Courses to Display & Messages Displayed – When searching through the fluid Class Search, a configurable maximum of 50 results will display to a student. A warning message indicating this limit and instructions to narrow down the search is also displayed. An error message is displayed if 10,000 or more results are returned and also prevents the user from proceeding. Participants recommended the maximum number of results remain at 50 but agreed the message verbiage needs editing to be more student friendly and provide clearer instructions.
  - a. This recommendation passed with the following notes:

- i. Participants agreed the messages displayed should reflect the same verbiage as that shown in Browse Course Catalog. The same working group appointed by ARC will determine verbiage.
4. Default to Open Classes Only – Search results are defaulted to display open classes only, with the ability to remove this filter. Participants recommended removing this setting so all class statuses display by default.
  - a. This recommendation passed with the following dissention:
    - i. One college recommended the setting be left as-is to display open classes only.
5. Instructor Contact Options – An instructor’s contact information including photograph, phone number, email, and address details can be enabled to display on the Class Search. Due to necessary input from Instruction SMEs, no recommendation was made at that time.
  - a. Participants abstained from voting on this item with the following notes:
    - i. A recommendation is required with participation from both ARC and IC groups.
    - ii. Two colleges recommended displaying instructor’s photograph, phone number, and email in the schedule.
    - iii. This decision is contingent upon the email task force’s recommendations. The Working Group will re-open this issue once email-related decisions have been made.
6. Class Search Filters –Participants recommended removal of Campus as a search filter and to re-sequence to the following:
  - I. Subject
  - II. Class Status
  - III. Course Career
  - IV. Number of Units
    - 1) 0 Units
    - 2) 1 – 2 Units
    - 3) 3 – 4 Units
    - 4) 5 Units
    - 5) 6 – 11 Units
    - 6) 12+ Units
  - V. Location
  - VI. Instruction Mode
  - VII. Academic Session
  - VIII. Academic Shift
  - IX. Class Meeting Days\*
  - X. Class Start & End Times\*
  - XI. Class Component
  - XII. Requirement Designation
  - XIII. Class Attribute
    - a. This recommendation passed with the following notes:
      - i. Participants agreed unanimously on the filter values and sequencing, but could not reach consensus on the value options within Class Meeting Days or Class

Start & End Times. Colleges agreed to provide a recommendation after further discussion amongst the ARC group.

### Fluid Enrollment Process & Enrollment Messages

1. Due to time constraints, the remainder of fluid enrollment could not be demonstrated during this session. Participants were briefed on the enrollment message catalog and shown where documentation of these messages lives on the ctclink Reference Center.
  - a. Participants agreed to review messages at a future ARC meeting and recommend changes as needed.

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### VOTING SHEET(S)

Fluid Browse Course Catalog –



GDR Voting - Fluid  
Browse Course Cata

Fluid Class Search



GDR Voting - Fluid  
Class Search

## 2.4 SF THIRD PARTY CONTRACT INVOICE & STUDENT STATEMENT TEMPLATES

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### SESSION DESCRIPTION

In this session the project team will review the system-defined invoice templates. It will cover the invoice configuration and invoice template for both third party contacts as well as student. Finally, we will seek system-wide consensus on the layout of the invoice and statement template within the WACTC system.

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### RECOMMENDATION SUMMARY

Two recommendations were voted on through this session:

- 1) Student Statement – Statement should include college logo, student name, address, date, amount due, student ID, single or multiple terms, detail for charges, payments and refunds, term and total balance due.
  - a. Recommendation passed with no objections
- 2) Third Party Contract Invoice #1 – Invoice should include college logo, invoice number, invoice date, term, amount due, organization name & address, student name, student ID,

social security number (for military billing), charge description, charge amount and individual student total.

Invoice #2 should include college logo, invoice number, invoice date, term, amount due, organization name & address, student name, student ID, reference number (if applicable), charge description, charge amount and individual student total.

In addition a working group be created to investigate the working gap with 2<sup>nd</sup> notification invoices within Legacy and is rolling up charges an option. Further clarification is needed on whether student schedules can be printed on the third party contract invoice or does this violate FERPA regulations.

- a. Recommendation passed with no objections.

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#### VOTING SHEET(S)



GDR Decision  
Tracking Sheet - SF I

## 2.5 STUDENT FINANCIALS RECONCILIATION PROCESS

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#### SESSION DESCRIPTION

The purpose of the session was to provide an introduction to the Student Financials module and its integration points with Finance; and an overview of best practices and tools available to reconcile Student Financials to Finance and identify any gaps. The session covered reconciliation topics such as daily cashing functions and reconciliation, 2<sup>nd</sup> journal set, accounts receivable, liability accounts and AP refunding.

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#### RECOMMENDATION SUMMARY

The recommendation is to work with Spokane, Tacoma and Clark to develop a reconciliation process for year end closing FY18 using queries, reports and delivered Student Financials components. The reconciliation process will be documented and reviewed with the each college during their respective implementation to evaluate the fit and identify any gaps. The group does not anticipate any major differences in the reconciliation process between the colleges.

This recommendation passed the vote unanimously.

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#### VOTING SHEET(S)



GDR Decision  
Tracking - SF Recon

## 2.6 FINANCIAL AID

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### SESSION DESCRIPTION

1. App Processing/SNG/College Bound Scholarship: This session includes reviewing global and common configuration values that impact ISIR processing, State Need Grant and College Bound business processes. In addition, this session will review the global queries developed for ISIR Suspense, Ability to Benefit, SNG and College Bound Eligibility.
2. Awarding and Packaging: This session includes reviewing global and common configuration values that impact awarding and packaging. In addition, this session will review the global queries developed for mass packaging and tuition hold processes.
3. Disbursement/Loans: This session includes reviewing global and common configuration values that impact authorizing & disbursing financial aid and student loan processes. In addition, this session will review the global queries developed for Bank Mobile checklist assignment, loan disbursement & exit counseling notification processes.
4. Pell, SAP, R2T4, NSLDS, Work Study: This session includes reviewing global and common configuration values that impact Pell Grant, Satisfactory Academic Progress, Return of Title IV, Work Study Reconciliation, and Unit Record Reporting processes. In addition, this session will review the global queries developed for FISAP, R2T4, and NSLDS Transfer Monitoring processes.

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### RECOMMENDATION SUMMARY

No recommended changes from the current Financial Aid global design.

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### VOTING SHEET(S)



GDR Decision

Tracking Sheet\_FA\_F



GDR Decision

Tracking Sheet FA\_P



GDR Decision

Tracking Sheet FA\_D



GDR Decision

Tracking Sheet FA\_A