COMMUNITY AND
TECHNICAL COLLEGES
Washington State Board

CTCLINK REPORT CATALOG

Revisions

Change reference	Date
Original Version	7/29/2020
Added to Finance Sub System to Journal Recon the new Daily recon queries	10/26/2020
Updated SF GL Recon description; added Work Study FA Recon report and configuration details	11/13/2020
Separated SBCTC reports into new document; updated CS SF Recon to include query names; added SF CASH RECON; added Security section	01/06/2021
Added BI reports: FTE Summary and 3rd Party Invoice w/Student Data	01/07/2021
Added BI report Basic Education for Adults (BEdA) Transcript and BEdA related queries. Added Basic Skill Class related queries. Updated BCS_FTE_SUM report description. New headcount and FTE queries have also been added	04/30/2021
Added BI report BCS_SR_ACPL	06/04/2021
Added BI reports BCS_HCFNDETH and BCS_FW_CNTRT	06/29/2021
Notified of change in Item Type configuration making our SF to GL Reconciliation queries no longer valid – will be researched to see if can be converted to match new configuration. In mean time referencing available CS QRG that has SF to GL reconciliation	07/21/2021
Added BI report BCS_FTECLSIN and pivot grid FTE Summary for CS. Updated pivot grids for Finance	07/22/2021
Added BI report BCS_SR_ACCOM	07/30/2021
Updated to include COVID-19 Vaccinations Reporting. Also updated Links in document to Running a BI Report, Pivot Grid, and Query Schedule instead of repeating the instructions per report.	08/27/2021
Added BI Report BHC_HR_IMMUN to the HR COVID-19 Vaccination Reporting section.	09/03/2021
Add pivot grid PGCS_AD_ENRL_VS_APP_RT to the Enrollment Management section. Corrected FTE query name by changing it from QCS_SR_DOC_HC_FTES to QCS_SR_DOC_FTES. Added BI Report BHC_HR_IMMUN to HR COVID reporting section.	10/19/2021
Added BI report BFS_KK_BOOPR and BFS_KK_BOGNT	11/22/2021
Update to the Fully Vaccinated definition per CDC guidance	11/29/2021
Add BI report BFS_KK_GRANT	12/02/2021
Updated Security Reporting section	01/03/2022

Added additional Security Reporting queries	01/26/2022
Added nVision reports in Finance, including IPEDS; Additional Security Reporting	03/10/2022
Add BI Report that includes budget, expenses and revenue. New query to provide overview of all departments either by manager or by operating unit. Add new FTE/Headcount pivot grids.	03/15/2022
Add BI report for student enrollment verification.	03/21/2022
Add second version of FTE Summary pivot grid and update description of original to identify the differences between the two pivot grids. Additional Security Reporting	04/01/2022
Add BI Report for FS Security Opr Def and other operator Security – BFS_SEC_OPDF	04/15/2022
Add CS Student Academic Program for Institution but no Portal Role CTC_%_CC	04/20/2022
Added additional User & CS SACR security queries	05/24/2022
Added BI Report BFS_GL_BERGN	05/27/2022
Add companion query for BERGN report.	06/01/2022
Add Purchase Order queries and report	06/15/2022
Added new Security reporting items	06/16/2022
Added OAAP and Student Schedule BI Reports. Updated verbiage on purchase order reports/queries.	06/23/2022
Added Data Privacy Acknowledgement related reporting	07/12/2022
Add new queries for HCM affirmative action and jobcode aggregate count.	07/20/2022
Add new report BHC_HR_JCCNT for jobcode aggregate count showing counts for all colleges except tech colleges (250, 260, 270, 280, and 290).	08/02/2022
Added new security reporting and updates to existing reports noted	08/24/2022
Add new report BFS_VPA_RECN.	09/06/2022
Added new FTE Exception queries QCS_SR_FTES in FTES folder	09/16/2022
Added new query security & other security reporting	10/19/2022
Add plan inventory report and queries	01/24/2023
Add Building and Innovation Fee report	01/25/2023
Add SF Receivables report	02/01/2023
Added Note about CTC_STATE_PAYDT dates overlapping causing duplicating in HCM Workstudy reports	03/17/2023

Added QFS_GL_SMARTER_REPORT; update FTE_Repeat Exception query name; QCS_SEC_SEGREGATION_OF_DUTIES and additional Security queries, reordered some queries to pillar specific security menu	04/21/2023
Added link to SBCTC Student and Course Coding Manual in reference to Program Reporting Tools program QCS_CC_SBCTC_ATTR_GROUP	05/03/2023
Student Financials Financial Aid Recon Queries	06/30/2023
Added QFS_GL_SF_JRNL_VERIFY_ACCT_101 to Sub System to Journal Reconciliation Queries	07/24/2023
Added Veterans 85/15 Percent Enrollment Report Query info	08/02/2023
Perkins Comprehensive Local Needs Assessment (CLNA) BI Report and Queries	01/08/2024
Asset Management Fixed Asset BI Publisher Report	02/20/2024
Shared Courses; CNED FTE Exceptions added to list and exceptions put in order of processing	04/25/2024
Removed reference to Apprenticeship (SAPR) and changed heading to "Early Achievers, Work First, and Worker Retraining Program Data Quality Reporting" since QCS_CC_SBCTC_ATTR_GROUP can no longer be run for Apprenticeship (SAPR)	07/02/2024
New query QCS_SR_SAPR_HC_FTE to replace QCS_SR_APPRENTICESHIP_STDNTS.	10/03/2024
New BI Report added to Campus Solutions - Enrollment Management, Program Headcount and FTE Queries section: BCS_FTE_YEAR.	10/21/2024
Added information on existing BI Publisher report BHC_CO_00002 for Time and Effort Reporting in HCM	11/5/2024
Add TIAA queries	12/5/2024
Added new query QCS_SR_CIHS_HC_FTE to the 'Program Headcount and FTE Queries' list.	01/07/2025
New BI Report added to Campus Solutions: BCS_NACUBO - NACUBO Dscnts and Allwncs Rpt	03/03/2025
New headcount and FTE queries for Aerospace 1000 (SARO), Career Launch (SCAR), Aerospace Apprenticeship (SAPA), and Tribal Stewards (STRB).	03/07/2025

Contacts

For questions related to ctcLink reporting and the Report Catalog, please email: dataservices@sbctc.edu

Table of Contents

DOCUMENT DESCRIPTION

This document was created to provide information about reporting solutions; a collection of reporting objects and tools designed to support specific and common business processes. Not all reports and queries are referenced in this document, only specific business processes that contain multiple reporting solutions that when used together provide the overall solution.

Campus Solutions

COVID-19 Vaccination Reporting

Audience: Colleges

There is a combination of delivered, custom and Data Services views used in this reporting set. We offer this data via Data Services Views for efficient college query development, queries and pivot grid reports. Immunization/Vaccination data is considered highly sensitive data requiring special handling (Category 4 data). ZD_DS_QRY_CC_VACCINE_HIGH_SENS is the Role which allows access to query Vaccine data within Campus Solutions.

Codes and Descriptions

The codes and descriptions have been configured the same in both Campus Solutions and HCM.

- CEXMD - Exemption - Medical
- CEXPH - Exemption – Philosophical (this option is not available to employees)
- CEXRL - Exemption – Religious
- CJJ1 - Johnson & Johnson / Janssen
- CMO1 - Moderna - 1st dose
- CMO2 - Moderna - 2nd dose
- COT1 - Other COVID-19 Vaccine
- CPB1 - Pfizer-BioNTech - 1st dose
- CPB2 - Pfizer-BioNTech - 2nd dose

Fully Vaccinated Flag

The SBCTC Data Services ctcLink Reporting team have created custom queries and views including a derived fully vaccinated flag. This flag represents the completion of the required vaccination series. It does not factor in nor evaluate the time between shots or since the last shot.

A value of "Yes" represents:

- The Student or Staff have received 1 Johnson & Johnson/Janssen vaccine
  or
- The Student or Staff have received both Moderna vaccines

or
- The Student or Staff have received both Pfizer-BioNTech vaccines
 or
- The Student or Staff have received one Pfizer-BioNTech and one Moderna vaccine
 or
- The Student or Staff have received 1 Other COVID-19 Vaccine

Data Services Custom Views (available to query developers)

- VCS_IMMUN_VAX_V – Institution in view is associated with student from Admission Program or Academic Program data. Uses maximum Received Date for each Immunization/Vaccine Type. Contains a fully vaccinated flag.

- VCS_IMM_VAX_DTL – Institution associated with student from Admission Program or Academic Program data. All rows returned.

- VCS_IMM_VAX_CS – All students eligible to enroll in the Term by Institution and Academic Career that are not in a discontinued or completed program status as of term start date. Contains an Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. Eligible to enroll means that a student is Term Active in the term and the Eligible to Enroll checkbox is checked on Student Career Term.

- VCS_IMM_VAX_AGG – Count students eligible to enroll in the Term by Institution and are not in a discontinued or completed program status as of term start date by the various flags: Enrolled, Online Only (Instruction Modes considered: OL, WA), Responded, and Fully Vaccinated. - Not Highly Sensitive

*Immunization Status is not included/considered in reporting this data in CS.

Data Services Queries

- QCS_CC_COVID_FULLY_VAX_YN_FLAG - Institution is associated with student from Admission Program or Academic Program data. Contains Student Id, Name, FERPA Block, Preferred Email address, vaccination type(s) and the fully vaccinated flag.

- QCS_CC_COVID_VAX_DETAILS - Institution is associated with student from Admission Program or Academic Program data. All rows returned, no derived flags.

- QCS_CC_COVID_ENROLL_ELIG - Students eligible to enroll in the prompted Term, Institution and Academic Career (optional). Contains Student Id, Name, FERPA Block, Preferred Email address, an Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. Eligible to enroll means that a student is Term Active in the term and the Eligible to Enroll checkbox is checked on Student Career Term and are not in a discontinued or completed program status as of term start date.

- QCS_CC_COVID_VAX_STNDT_COUNT – Count of students eligible to enroll that are not in a discontinued or completed program status as of term start date in the prompted Term and

Institution. Counts by Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. - Not Highly Sensitive

Data Services Pivot Grid

PGCS_CC_COVID_VAX_STNDT_CNT- Student Vaccination Count

To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Prompt on Institution and Term and then click the "Search" button to populate the pivot grid with data

Click on the All+ hyperlink to open the grid section. Click on the total "Eligible to Enroll" value to view the grid detail.

The chart opens as a bar chart but can be changed to a pie or horizontal bar chart. Data can be filtered using the options found on the left side of the pivot grid page.

Data Services BI Publisher Report

BCS_CC_IMMUN - Student Immunization Stats

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Student Financials GL Reconciliation Queries

Audience: Colleges

http://ctclinkreferencecenter.ctclink.us/m/79557/l/1193961-9-2-student-financials-to-finance-gl-recon

In Finance pillar but related to SF Accounting Line from CS and FS:

QFS_GL_SF_JRNL_VERIFY_ACCOUNT

QFS_GL_SF_JRNL_VERIFY_BY_CF

These queries show the Amounts by Account (or various chart fields) from CS SF Accounting Line, FS SF Accounting Line, all other Sources that are in the Journal accounts and the total of those accounts in the Ledger.

Student Financials Financial Aid Reconciliation Queries

Audience: Colleges

These queries were developed to provide data to assist college staff in reconciling financial aid. The queries can all be found in the SF GL RECON folder in CS Query Viewer. These may need to be run from Query Schedule depending on the prompt values entered. If you run from Query

Schedule, you can still choose to run to HTM output so that the drilldown queries will still be able to drill into detail.

1) **QCS_SF_FA_RECON** - SF Accounting Line 9 Item Type FA

   Sums the amount from SF Accounting Line by financial aid Item Type (9%) by student, Item Term, Aid Year, SF Account 1(beginning with 100), SF Account 2 (not beginning with 100), and FA Disbursed Amount from the Student Awards and Disbursement table. This query shows amounts disbursed in Financial Aid versus amounts accounted for in Student Finance. Ideally, these amounts should be equal and if not, further research needs to be done to make necessary corrections.

   a) QCS_SF_FA_SF_RECON_DRILL- Item SF Drill (Drill Down on SF Amount 1)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

      i. QCS_SF_FA_SF_LINE_RECON_DRILL- Item Line SF Drill (Drill Down on Item Number)
         Returns detail transaction(s) for the Item Number selected in the Drill Down on SF Amount 1.

   b) QCS_SF_FA_RECON_SF_DRILL- SF Accounting Line Drill (Drill Down on SF Amount 2)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

   c) QCS_SF_FA_RECON_FA_DRILL- SF FA Recon FA Drill (Drill Down on FA Disbursed Amount)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the financial aid Student Awards and Disbursement table.

2) **QCS_SF_FA_SF_RECON_DIFF**- SF Accounting ItemType FA Diff Acct

   Returns only lines with differences. Sums the amount from SF Accounting Line by financial aid item type (9%) by student, Item Term, Aid Year, SF Account 1 like 100%, SF Account 2 like 100%, and FA Disbursed Amount from the Student Awards and Disbursement table but returns only lines with differences between amounts fields.

   a) QCS_SF_FA_SF_RECON_DRILL- Item SF Drill (Drill Down on SF Amount 1)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

      i. QCS_SF_FA_SF_LINE_RECON_DRILL- Item Line SF Drill (Drill Down on Item Number)
         Returns detail transaction(s) for the Item Number selected in the Drill Down on SF Amount 1.

   b) QCS_SF_FA_RECON_SF_DRILL- SF Accounting Line Drill (Drill Down on SF Amount 2)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

   c) QCS_SF_FA_RECON_FA_DRILL- SF FA Recon FA Drill (Drill Down on FA Disbursed Amount)
      Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the financial aid Student Awards and Disbursement table.

3) **QCS_SF_FA_RECON_DIFF_TOTAL** - SF Accounting ItemType FA Diff Tots

   Returns only lines with differences in the sum of amounts from SF Accounting Line by financial aid item type (9%) by student, Item Term, Aid Year, SF Account 1 Amount, SF Account 2 Amount, and FA Disbursed Amount from the Student Awards and Disbursement table but

returns only lines with differences between amounts fields. Account values from SF Account 1 like 100% and SF Account 2 like 100% are not included.

a) QCS_SF_FA_SF_RECON_DRILL- Item SF Drill (Drill Down on SF Amount 1)
    Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

    i. QCS_SF_FA_SF_LINE_RECON_DRILL- Item Line SF Drill (Drill Down on Item Number)
        Returns detail transaction(s) for the Item Number selected in the Drill Down on SF Amount 1.

b) QCS_SF_FA_RECON_SF_DRILL- SF Accounting Line Drill (Drill Down on SF Amount 2)
    Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the Item SF table.

c) QCS_SF_FA_RECON_FA_DRILL- SF FA Recon FA Drill (Drill Down on FA Disbursed Amount)
    Provides summed transactions for all years and all terms by EMPLID (student ID) and Item Type in the line selected in the primary query from the financial aid Student Awards and Disbursement table.

Work Study Earnings and Financial Aid Reconciliation

Audience: Colleges

There are a set of configuration tables and corresponding queries that have been developed to compare Time and Labor payable time by Term and Pay Period with the amount of work study Financial Aid awarded by Term and Year. The Time and Labor Reporting Code that are picked up are SWS, FWS, WFS, IWS. These codes should be added by Item Type to your configuration table. There may be situations where the tracking by a more detailed Earn code is desired, an Earnings Distribution earn code can be added to use a more distinct value; this earn code value would need to be added to the configuration table as well.

The reporting uses the TRC code from Time and Labor Payable Time first. The report then looks to see if an alternate Earn Code has been entered on the CTC_EARNS_DIST table for the EMPLID and EMPL_RCD as of the Pay End Date. If so, the Earn Code from the Earnings Distribution table is used for the reporting instead of the TRC from Time and Labor. NOTE: The TRC/Earn Codes by Item Type must be setup in the configuration tables in order to be selected in the report.

The configuration tables required are located at:

Set Up SACR > Product Related > Financial Aid > CTC Custom > State Work Study Report

   NOTE: The Pay Period Dates should not Overlap between Pay Periods. If the Pay Period Begin Date is entered as the 15th and a different Pay Period End Date is set to that same 15th date, it will duplicate data in the HCM queries. Please review dates carefully.

These queries must be run through Schedule Query.

QCS_FA_WORKSTUDY_PAY_PERIOD

QCS_FA_WORKSTUDY_TERM

Third-Party Invoice Including Student and Course Data

Audience: Colleges

This BI Report creates a third-party invoice combining student and course data.

Security

Highly sensitive data element National ID is included in this report. Staff who need to run this invoice will need the highly sensitive SSN role.

- ZD_DS_QRY_FA_SSN_HIGHSENS

BI Report

Report Name: BCS_3PST_IVC – 3rd Party Invoice w/Stdnt Data

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

SF Student Statement (Single Student or Batch)

Audience: Colleges

This BI Report creates an SF Student Statement. One student or a batch of students may be included in the prompts and then the PDF report can be printed.

BI Report

Report Name: BCS_SF_STMNT – SF Student Statement

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

Faculty Workload (FWL) Contract Print Report

Audience: Colleges

This BI Report creates a batch report of FWL Contracts. One faculty member or a batch of faculty members may be included in the prompts to produce one or more PDF contracts to print.

Additional Security

In addition to the query roles listed under BI Report, the running of this report is restricted. Only employees with the following role will be able to see and run the report.

- ZD_DS_BIP_FWL_CONTRACT

Approval for this role should come from the HR ctcLink pillar lead. Once the approval has been given, the college ctcLink Security Admin will be able to assign the role to the user.

BI Report

Report Name: BCS_FW_CNTRT – FWL Contract Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Online Admissions Application Portal Report (OAAP)

Audience: Colleges

Use this document as a reference for how to identify applications submitted through the Online Admissions Application Portal (OAAP).

BI Report

Report Name: BCS_AD_OAAP – OAAP Application Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

See documentation in ctcLink Reference Center.

https://ctclinkreferencecenter.ctclink.us/m/79544/l/1379930-9-2-oaap-application-report

Student Schedule Batch Printing

Audience: Colleges

This BI Report creates a batch report for student schedules. Students are selected when prompted either by an Advisor ID or by a Student Group. This report is a modified version of STDNT_SCHED.

BI Report

Report Name: BCS_STDNTSCH – Stdnt Schedule Batch Printing

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Academic Plan Inventory

Audience: Colleges

The following queries and Business Intelligence (BI) Publisher report have been developed and are available to assist colleges with managing and maintaining their academic plan inventory. The academic plan inventory is a comprehensive listing of all active certificate and degree plans offered at each college. This ready availability of plan listings is important in program planning and development.

Queries

QCS_AC_PLAN_INVENTORY – Plan Inventory

QCS_AC_PLAN_INVENTORY_DTL – Plan Inventory Detail

BI Report

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

- Report Name: BCS_PLN_INV – Plan Inventory Report

  This is the main criteria used by the query to pull in data for the report:

  - The last admit term is either blank or equal to or greater than the current term, indicating that the plan is currently offered
  - Degree is not blank or indicate High School

Report criteria

- Report is sorted by CIP Code and then Plan

Student Financials Receivables

Audience: Colleges

Queries and BI Report to provide data for student financials receivables.

Query

QCS_SF_ACCOUNTING_ID_TOTAL_AS_OF_DT – ID Totals as of Date

Sums the Amount from SF Accounting Line by ID Type, Common Id, Business unit through a point in time using Journal Date to identify point in time. Limited to 101% accounts that are 7 digits in length. 6 digit accounts are excluded.

BI Report

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

- Report Name: BCS_SF_RECV – ID Totals as of Date

  This is the main criteria used by the query to pull in data for the report:

  - Same as query above

  Report criteria

  - Account data is shown as a pivot table with the common id and description in the left column and the account and descriptions along the top of the grid. Account and common id totals are at the right and bottom of the grid.

Workforce CLNA Report

Audience: Colleges

Queries and BI Report to provide CLNA related information.

This BI report is intended to support the Perkins Comprehensive Local Needs Assessment (CLNA) by providing data about Workforce enrollments that can supplement the Perkins Protected Dashboard. Enrollment and completion counts are provided by program and year. These counts provide yearly information on program enrollment and completion trends, by gender.

Note: This report includes a broader sample of students whereas the Perkins Dashboard focuses on the Perkins Cohort. Information about the criteria for the Perkins cohort can be found in the Perkins Data Dictionary.

BI Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- Report Name: BCS_SR_CLNA - CLNA (Perkins) Enrll & Cmplete

Query

QCS_SR_PERKINS_CLNA_ENROLLED - Workforce Enrollments

Aggregated counts by Sex and Plan Code of students enrolled in Workforce programs. Information is provided about non-traditional* enrollments for each workforce program. This report also includes students who are non-award seeking and attending for the purpose of job upgrade. Note: Non-Award Seeking students are not included in the Perkins Cohort.

QCS_SR_PERKINS_CLNA_NONAWARD - Workforce Enrollments—Non-Award Seeking

Aggregated counts by Sex and Plan Code of Workforce students not enrolled in a degree or certificate program. Intended for colleges to use for outreach to students to recruit them to enroll in a credential or degree pathway. Information is provided about non-traditional* enrollments for each non-award seeking workforce program.

QCS_SR_PERKINS_CLNA_COMPLETION - Workforce Completions

Aggregated counts by Sex and Plan Code of students awarded a Prof/Tech credential. Colleges can use this report to analyze completions by program as well as the gender breakdown per program.

*Perkins defines non-traditional enrollments as when a student is enrolled in a program that leads to an occupation "for which individuals from one gender comprise less than 25 percent of the individuals employed in each occupation or field of work."

Shared Courses

Audience: Colleges

A method of coding equivalent classes in ctcLink to allow students from multiple institutions to be taught by one instructor. Students will enroll in the shared course at their institution, although another institution may employ the instructor.

FTEs are generated at the college the student is enrolled at, regardless if it is a Teaching College or an Enrolling College.

- Shared courses must use the same Class Section value, referred to as Shared Section ID. The Shared Section ID is used to identify shared courses across institutions, in addition to the Course attributes that designate Course Sharing.
- A shared class section must be assigned a Shared Course (SSHR) Attribute indicating Instructed or Enrolled.
- Shared class sections must have the same applicable Program (SSHP) attribute.

Refer to the SBCTC Student and Course Coding Manual to see which attributes should be used.

The QRG can be located at: https://ctclinkreferencecenter.ctclink.us/m/79558/l/1796048-shared-courses-in-ctclink

Queries:

- QCS_CM_SHARED_COURSES_CLASSES - CURRICULUM MGMT query folder
  - Public shared class information that doesn't require an Institution prompt (optional).
  - Includes Instruction Mode and Last Date to Enroll.
  - Counts are included for Waitlist, Enrollment, and Grades Posted by the Institution and by the Shared Section ID for Totals. This allows for monitoring and management by Administrators of the shared courses across institutions.
- QCS_SR_SHARED_COURSES_ENROLLED - STUDENT RECORDS query folder
  - Secure to the Institution where the student is enrolled.

- o Includes the student's Units Enrolled, Grading Basis, Grade, and Grade Points for the shared course.

Campus Solutions - Enrollment Management

Program Headcount and FTE Queries

Audience: Colleges

The following queries have been developed and are available to assist Campus Solutions staff with monitoring specific program enrollments and FTES such as Worker Retraining or Apprenticeship.

The number of records returned by the query represent the student headcount.

The headcount and FTES returned by the queries represent the data that will be added to the SBCTC Data Warehouse at the end of each term.

For more information related to program specific coding, please refer to the SBCTC Coding Manual.

Details about the query can be found in metaLink when performing a search by query name in the Free Text Search box.

Program	Query
Apprenticeship Students	QCS_SR_SAPR_HC_FTE
Apprenticeship FTES (W91)	QCS_SR_APR_WAIVER_FTE
Ability to Benefit	QCS_SR_SATB_HC_FTE
Basic Food Employment and Training (BFET)	QCS_SR_SBFT_HC_FTE
IBEST	QCS_SR_SBST_HC_FTE
Childcare	QCS_SR_SCLD_HC_FTE
Early Achievers Grant	QCS_SR_SEAG_HC_FTE
Hospital Employee Education and Training (HEET)	QCS_SR_SHEE_HC_FTE
Contract High School	QCS_SR_SHS_HC_FTE
International Contract	QCS_SR_SINC_HC_FTE
International Students	QCS_SR_SINT_HC_FTE
Mathematic Engineering Science Achievement (MESA)	QCS_SR_SMSA_HC_FTE
Running Start	QCS_SR_RS_HC_FTE
WorkFirst	QCS_SR_SWRF_HC_FTE
Worker Retraining	QCS_SR_SWRT_HC_FTE
Matriculated Baccalaureate	QCS_SR_MATRICULATEDBA_HC_FTE
BedA Basic Skills	QCS_SR_BASICSKILLS_HC_FTE
Department of Corrections	QCS_SR_DOC_FTES
College in the High School	QCS_SR_CIHS_HC_FTE
Aerospace 1000	QCS_SR_SARO_HC_FTE
Career Launch	QCS_SR_SCAR_HC_FTE

Aerospace Apprenticeship   QCS_SR_SAPA_HC_FTE

Tribal Stewards   QCS_SR_STRB_HC_FTE

BI Reports

Report Name: BCS_FTE_SUM
Description: FTE Summary Tmplt by Stdnt Grp.

- ctcLink Term Headcount & FTE Summary Report w/ Student Groups. The first two sections of this report show total FTEs by funding source and headcount by funding source for each term that was included in the prompt. These sections are followed by headcount and FTE totals by student group by term.
- The prompts for this report are:
    - Institution
    - Start Term Range
    - End Term Range

Report Name: BCS_FTE_YEAR
Description: Annual FTE Report- Student Grp.

- ctcLink Annual FTE & Headcount Summary Report by Student Group. First section shows annual FTE totals with a subsection that breaks these down by term. Second section shows count of distinct headcount by funding source. These sections are followed by Veteran, Running Start, and Student Group sections each containing headcounts and annual FTE sums by funding source.
- The prompts for this report are:
    - Institution
    - Academic Year

These reports must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

One annual FTE is the equivalent of a student enrolled for 45 credits in a year. One quarterly FTE is the equivalent of a student enrolled for 15 credits in a quarter. The sum of all quarters is divided by 3 to compute annual FTE.

Early Achievers, Work First, and Worker Retraining Program Data Quality Reporting

Audience: Colleges

By using this query and prompting for each quarter in the academic year, you can review the list of students who have an active SEAG, SWRF, or SWRT attribute. The query will show you the students and their relationships to the active program stack, attribute coding, and enrollment.

QCS_CC_SBCTC_ATTR_GROUP

Field Definitions by Institution, Student ID, Attribute and Attribute Value, Term, Program Stack Career, Program Stack Career Nbr, Attribute Stack Career, Attribute Stack Career Nbr

NOTE: Unique combination of Academic Career and Student Career Number = Program Stack.

- Status – Active, Discontinued, etc.: Indicates the program stack status as of the prompted term

- Last Active Term – Term Code: When student does not have an active program stack, this will display the last active term in that specific program stack. The student will show in the query up through that term but will not pull in terms after the Last Active Term.
- Act Prog Flag – Y/N flag: Is the specific program stack Active in the prompted term?
- Term Act Flag – Y/N flag: Is Student Term Active in the specific program stack?
- Term Enrl Flag – Y/N flag: Is Student Enrolled in Term in the specific program stack?
- Act Group Flag – Y/N flag: Is Student Active in the Student Group that matches the Student Attribute code (i.e., SEAG, SWRF, or SWRT)?
- Match Attr Effdt – Y/N flag: Is the Attribute on the last effective dated row for the specific program stack and within the quarters begin and end dates?
- Match Attr Career – Y/N flag: Does the Term Active/Enrolled program stack Career match the Attribute program stack Career?
- Match Attr Career Nbr – Y/N flag: Does the Term Active/Enrolled program stack Career Nbr match the Attribute program stack Career Nbr?
- Data Warehouse FTE Note – Text field that will display on each program stack that will not be counted due to the mismatch of the above flags

To be counted: All flags must be Yes.

NOTE: Any flag that is a No should be identifiable by the field definitions above.

For more information related to program specific coding, please refer to the [SBCTC Coding Manual](#).

FTE Exception Queries

Audience: Colleges

A new field was added to the CTC_STDNT_FTE table and the CEMLI process in production on September 16, 2022. The following queries help identify the reasons classes are not earning FTE so corrections can be made prior to the snapshot, if applicable. Also provides transparency as to the reason some FTE are not reportable, such as Waivers, Registration after Census Date, etc. The queries are listed in the order they are handled in processing.

For a full description of the FTE calculation, please see the [ctcLink Student FTE Calculation Overview](#). This overview covers the data needed to calculate FTE, the calculation, and the FTE exceptions.

QCS_SR_FTES_EXCEPT_ CNED

- CNED_CREDIT_BEARING – The class is run in the CNED career and carries credits.
- CNED_CAT_NBR_100_499 - The class is offered in the CNED career and the Catalog Number is between 100 and 499.
- CNED_GRD_BASIS_NON - The class is offered in the CNED career and the Grading Basis = NON (non-graded component of graded class). This Grading Basis is not applicable in CNED.
- CNED_GRD_BASIS_GRD - The class is offered in the CNED career and the Grading Basis = GRD (graded class). This Grading Basis is not applicable in CNED.

QCS_SR_FTES_EXCEPT_NON_MIS_WVR

Displays where an enrollment selected in the FTE CEMLI process has been awarded a non-reportable MIS waiver code. The FTE CEMLI sets all FTE values to 0.00 and sets the FTE Exception as NON_MIS_WVR_### and the ### will list the specific waiver code being selected.

QCS_SR_FTES_EXCEPT_REPEATS

Displays student enrollment data where Repeat Code has been manually assigned to set to RFTE or RLMT which sets the FTE to 0 for an enrollment over the allowable limit.

QCS_SR_FTES_EXCEPT_CENSUS_ENRL

Displays where an enrollment selected in the FTE CEMLI process has Enroll Add Date after the Class Census date or is Missing the Class Census Date. The FTE CEMLI sets all FTE values to 0.00 and sets the FTE Exception as either MISSING_CENSUS_DATE or ENRL_AFTER_CENSUS

QCS_SR_FTES_EXCEPT_CONTACT_HRS

Displays where an enrollment selected in the FTE CEMLI process has no Units Maximum and no Course Contact Hours assigned to the class. The FTE CEMLI sets all FTE values to 0.00 and sets the FTE Exception as MISSING_CONTACT_HOURS.

QCS_SR_FTES_EXCEPT_CIP_CODE

Displays where an enrollment selected in the FTE CEMLI process has no CIP Code assigned at the Course Catalog. The FTE CEMLI sets all FTE values to 0.00 and sets the FTE Exception as MISSING_CIP_CODE.

QCS_SR_FTES_EXCEPT_SFND_ATTR

Displays where an enrollment selected in the FTE CEMLI process has no SFND Attribute assigned to the class. The FTE CEMLI sets all FTE values to 0.00 and sets the FTE Exception as MISSING_SFND_ATTR.

QCS_SR_FTES_EXCEPT_PLAN_STACK

Displays where an enrollment selected in the FTE CEMLI process has no program active or completed status as of term end date and term active program plan stack to match the enrollment. The FTE CEMLI sets FTE to 0.00 and the FTE Exception as MISSING_PLAN_STACK.

QCS_SR_FTES_EXCEPT_OTH_ENR_NON

Displays where an enrollment selected in the FTE CEMLI process has an Enroll Class Type but a NON Grading Basis assigned and the Units Taken and Course Contact Hours are zero and Catalog Units Max is greater than 0. The FTE CEMLI sets the FTE Exception as OTHER_ENROLL_NON.

QCS_SR_FTES_EXCEPT_OTH_UNITS_0

Displays where an enrollment selected in the FTE CEMLI process has all units set to zero. The FTE CEMLI sets the FTE Exception as OTHER_ENROLL_UNITS_0.

QCS_SR_FTES_EXCEPT_OTHER

Displays where an enrollment selected in the FTE CEMLI process has zero FTE but no predetermined reason why. The FTE CEMLI sets the FTE Exception as OTHER_EXCEPTION.

QCS_SR_FTES_EXCEPT_RS_SPLT_UNT

Displays Running Start (RS) enrollment records where the units billed under the RS contact plus the units billed to the student do not equal the units enrolled. This is caused by data entry errors. Due to this mismatch, FTES cannot be calculated accurately.

Other supporting queries related to FTE Exceptions:

QCS_SR_FTES_EXCEPT_FTE_TOTALS

Displays where an enrollment selected in the FTE CEMLI process has no FTE to verify that there is an Exception for each instance.

QCS_SR_FTES_EXCEPT_W_FTE_GT_0

Displays where an enrollment selected in the FTE CEMLI process has FTE but has an exception assigned. This should not happen.

QCS_SR_FTES_SBST_MAX_ATTR_VAL

Displays where a class selected in the FTE process finds a class with more than one SBST attribute value in the CRSE_ATTRIBUTE table. The FTE CEMLI will select the maximum value in these situations.

QCS_SR_FTES_SXTF_MIN_ATTR_VAL

Selects where a class selected in the CTC_STDNT_FTE table has more than one SXTF attribute value in the CRSE_ATTRIBUTE table. The FTE CEMLI will select the minimum value in these situations.

QCS_SR_FTES_SFND_MIN_ATTR_VAL

Displays where an enrollment selected in the FTE process finds a class that has more than one SFND attribute value in the CRSE_ATTRIBUTE table. The FTE CEMLI will select the minimum value in these situations.

Basic Skills Grading Basis

Audience: Colleges

Basic Skills courses and classes are considered Ungraded per the State Board Policy Chapter 5.30.15.

Query

Two queries are available in ctcLink to identify basic skills courses and their associated Grading Basis to assist in data cleanup.

- QCS_CM_BASICSKILLS_GRADEBASIS
    - Provides a list of all active Basic Skills (CIP 32*) Courses in the catalog with their associated Grading Basis. All Basic Skills courses should be associated to the BGB Grading Basis.
- QCS_CM_BSK_SCHED_GRADEBASIS
    - Provides a list of all active and currently scheduled Basic Skills (CIP 32*) Classes with their associated Grading Basis. All Basic Skills classes should be associated to the BGB Grading Basis.

Basic Education for Adults (BEdA)

Audience: Colleges

Anyone who is 16 years of age or older and not enrolled in secondary school, and who either has needs below the level of high school completion or is limited-English-proficiencies eligible to participate in Basic Education for Adults (BEdA) activities.

Query

Repeat Course Checking

Students cannot be reported for a course in which they have already earned credit except when such a repeat is necessary to satisfy a requirement for improving academic or skill progress (grades). In no circumstance will a student be reported more than three times for the same course – this is defined as two repeats in addition to the original enrollment.

- QCS_SR_BEDA_REPEAT_COURSES
    - The use of the BEdA Grading Basis (BGB) will exclude basic skills courses from ctcLink Repeat Class Checking. A query has been developed to assist with identifying students who have registered for a class they have already taken twice previously.
- QCS_SR_BASICSKILLS_HC_FTE
    - BEdA Basic Skills Headcount and FTE

BI Report

Report Name: BCS_SR_BEDAT – BEdA Transcript Report

This BI Report creates a transcript of BEdA classes for one student and includes all terms that are less than or equal to the term identified in the prompt.

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Academic Credit for Prior Learning (ACPL)

Audience: Colleges

Students can earn various different types of Academic Credit for Prior Learning (ACPL) before enrolling at a Washington community or technical college, including credit for course challenges, credit by testing (CLEP, etc.), extra-institutional learning (ACE, NCLEX-RN, Military MOS, etc.), and prior experiential learning (portfolio review, etc.). The Washington Student Achievement Council (WSAC) requests that four terms of ACPL data be reported for the prior academic year with a leading summer term (e.g., Academic Year 2020 = Summer 2019, Fall 2019, Winter 2020, and Spring 2020), and WSAC requests this data in the fall following the prior academic year.

BI Report

Report Name: BCS_SR_ACPL – WSAC ACPL

This BI Report is modeled after the ACPL data collection form that WSAC sends out every fall requesting data from colleges for the prior academic year. There are sections in the report containing data for the four individual terms in the prompted academic year (with a leading summer term), and there are sections in the report containing summary data for that academic year. Please note that counts in the report may not exactly match what was reported to WSAC because additional ACPL data may have been loaded into ctcLink since ACPL data were compiled and reported to WSAC.

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Aggregate Student Accommodations

Audience: Colleges

Enrolled students can request accommodations for a variety of diagnoses. These diagnoses are coded in ctcLink under the following overarching categories: Deaf/Hearing, Mobility, Speech/Language, Learning Disability, Blind/Visual, Chronic/Acute Health, Neurological/Nervous System, and Psychological/Emotional. Within each overarching category are a variety of subcategories of diagnoses, and students can request accommodations for more than one diagnosis at a time. This report was developed so that colleges will have both duplicated and unduplicated counts of their enrolled students who requested accommodations under the various diagnosis codes in a given academic year with a leading summer term (e.g., Academic Year 2020 = Summer 2019, Fall 2019, Winter 2020, and Spring 2020), in a given term in that academic year, and in a given fund source (i.e., state, contract, or self-support).

BI Report

Report Name: BCS_SR_ACCOM – Aggregate Stdnt Accommodations

This BI Report is modeled after the aggregate Students with Disabilities by Category report that is available in the data warehouse by academic year, term, and funding source. There are sections in the report containing data for the four individual terms in the prompted academic year (with a leading summer term), and there are sections in the report containing summary data for that academic year. Please note that this report represents counts of students as of the date that this report is generated in ctcLink; therefore, these counts may not necessarily match the counts in the Students with Disabilities by Category report in the data warehouse (which is snapshotted at the end of the term) because diagnosis codes are not effective dated in ctcLink. Also, students are only able to be reported in up to two diagnosis categories in the data warehouse, whereas in ctcLink, students can be reported in more than two. For example, in the duplicated sections of the

BI report, a student who requested accommodations for the categories Deaf/Hearing, Mobility, and Speech/Language would be counted in all three of those categories.

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Headcount by Fund Source, Ethnicity, Sex, and Enrollment Status

Audience: Colleges

This report was inspired by the QARS SR1101 report. It provides student headcount for the prompted term. The report includes unduplicated headcounts and duplicated headcounts for fund source, ethnicity, sex, and enrollment status.

BI Report

Report Name: BCS_HCFNDETH – SR1101 Hdcnt by Fnd Src & Ethn

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

FTE by Funding Source and Class Intent

Audience: Colleges

This report was inspired by the QARS SR3101 report. It provides FTES count by funding source and class intent for the prompted term. The report includes a pie chart for each funding source and then a group of pie charts funding sources for each class intent.

Note that Class intent Academic, Workforce and Personal Enrichment is determined by the SINT class attribute value. Workforce includes class attribute values Workforce and Workforce Supplemental. Class Intent Basic Skills is determined by CIP Code 32%. Class Intent Development is determined by CIP Code 33%.

Note that Class Type includes the following: Upper Division are course catalog numbers between 300 and 499. Lower Division are course catalog numbers between 100 and 299.

BI Report

Report Name: BCS_FTECLSIN – FTE by Fund Src & Class Intent

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

State Support Funded FTE and Headcount Pivot Grids

Audience: Colleges

These reports are pivot grids which compare the registration day count for one term with the same term from previous years based on data available in ctcLink. There are running total and individual day total reports for State Support Funded FTE and Headcount.

Pivot Grid

Report Name: PGCS_SR_STD_FTE_BY_DAY – FTE Total by Registration Day

Report Name: PGCS_SR_STD_FTE_SUMMARY – FTE Sum Undup Run Total

> Student FTE Summary with running total for FTE State Supported Funding. Only days with enrollment activity are included. Days with no enrollment activity are shown with no FTE.

Report Name: PGCS_SR_STD_FTE_SUMMARY2 – FTE Sum Run ALL Days

> Student FTE Summary with running total for FTE State Supported Funding. If a day has no registration activity, that day will be populated with prior day's total. This pivot grid takes a while to populate as the day counts are being re-summed in the background every time the grid is run.

Report Name: PGCS_SR_STD_HEADCNT_BY_DAY – Headcount Total by Reg Day

Report Name: PGCS_SR_STD_HEADCNT_SUMMARY – Unduplicated Headcount Summary

To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Enrollment/Admittance Rate Pivot Grid

Audience: Colleges

This report is a pivot grid which compares the number of enrolled students with the number of admitted students to derive a yield rate percentage.

Pivot Grid

Report Name: PGCS_AD_ENRL_VS_APP_RT – Apply/Admit/Enroll by STRM

To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Enrollment Verification

Audience: Colleges

This report is a modified version of the delivered Enrollment Verification Report. If a student withdraws from courses but is still shown as enrolled the UNITS will be set to "0.00" and the Status will be set to "No Units"

BI Report

Report Name: BCS_ENRLVRFY – Stdnt Enrollment Verification

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Veterans 85/15 Percent Enrollment Report Query

Audience: Colleges

This query was developed to aid schools in filling out the VA 85/15 report. Contains Emplid, program/plan/subplan, units for progress, FTE calculation, and five numbered columns which correspond to the five criteria listed at benefits.va.gov for determining supported vs non-supported.

Each of these columns contains a link to a drilldown query with additional supporting information. There is also a "Supported?" column which shows whether the student should be considered Supported, Not Supported, or Possibly Supported (based on the data in numbered columns 1-5) and an "Explanation" column which explains the reasoning for this determination.

Query may need to be ran in Schedule Query depending on the prompt values used. In order for the drilldown links to work, please use HTM output format (not TXT).

Query

Query Name: QCS_SR_VA_85_15_REPORT – VA 85/15 Report Query

National Association of College and University Business Officers (NACUBO) Accounting for and Reporting Financial Aid as a Discount

Audience: Colleges

As of FY25 NACUBO no longer endorses the Alternative estimating method when calculating the Discounts and Allowances for the Financial Statements. With the implementation of ctcLink, there is now the ability to categorize every item type and calculate the actual discount instead of an estimate.

The BI report lists students (by term), aid awarded, and aid applied to determine the actual discount to tuition and fees. The "Discount" is defined as "amounts awarded to students that reduce their out-of-pocket costs for tuition and fees and/or auxiliary services costs." Waivers are taken into consideration and formulas for applying aid are used to calculate two discount columns – Aid Allocated to Tuition and Fees (Discount) and Aid Allocated to Aux (Discount).

The Query is for audit support purposes and is all the detailed data that comprises the BI report. This supplies a look at the data in deeper detail.

BI Report

Report Name: BCS_NACUBO – NACUBO Dscnts and Allwncs Rpt

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Query

Query Name: QCS_SF_NACUBO_DIS_ALLW_DTL – NACUBO Dscnts and Allwncs Dtl

Finance

Year End Close and SMARTER Queries

Audience: Colleges

There is an overview of all the summary level reports in a query called: QCS_GL_SMARTER_REPORT which will identify which of the summary level queries you will want to run and get more details on the issues highlighted in the overview. This report should be run in Query Schedule.

The set of summary level reports, each with an accompanying drill down to detail report. This feature is only available when the query is run to HTML. The detail report will open in a new window, so it is important to have pop-up blocker turned off. These reports have been developed and are available to assist Finance staff with monitoring specific accounting rules and correcting during year end close processes.

Details on the reporting are on the SBCTC's Accounting website under ctcLink Accounting, SMARTER Query Instructions.

These queries are located in the query folder called SMARTER. The list of included queries can be found in Query Viewer or Query Manager when searching by folder through either the Basic or the Advanced Search. The list can also be found in metaLink when performing a search by folder.

Sub System to Journal Reconciliation Queries

Audiences: Colleges

These queries provide the balances by Business Unit, Fiscal Year, Period or Journal Date, and Account from the sub-systems (accounting line level) that feed the Journal (limited to periods 1-12) to allow comparisons between them. Adjustment periods are not included.

These queries will show balances for all Accounts by Sub -System and Journal.

 QFS_GL_SUB_SYS_RECON – Prompted by Accounting Period

 QFS_GL_SUB_SYS_RECON_DAILY – Prompted by Journal Date

These queries will show only Accounts that do not balance between the sub system and the Journal:

 QFS_GL_SUB_SYS_RECON_DIFF – Prompted by Accounting Period

 QFS_GL_SUB_SYS_RECON_DAILYDIFF – Prompted by Journal Date

They both drill into the details of Journal ID and also drill into the detail from sub-system tables and include 1-2 key fields depending on sub system (there are Key field mapping descriptions in the query output). The drill feature is only available when the query is run to HTML. The drill reports will open in a new window, so it is important to have pop-up blocker turned off. Due to the number of tables and complexity of reporting this data, we recommend the queries be run from Schedule Query instead of Query Viewer.

More information and details on Sub System Source Tables and Key Field mapping can be found in metaLink when performing a search by query name in the Free Text Search box.

Additionally, in the Finance pillar but related to SF Accounting Line from CS and FS:

QFS_GL_SF_JRNL_VERIFY_ACCOUNT

QFS_GL_SF_JRNL_VERIFY_ACCT_101

QFS_GL_SF_JRNL_VERIFY_BY_CF

These queries show the Amounts by Account (or various chart fields) from CS SF Accounting Line, FS SF Accounting Line, all other Sources that are in the Journal accounts and the total of those accounts in the Ledger.

Budget Reports

Audience: Colleges and State Board

The following reports use the Commitment Control ledgers or the General Ledger or a combination of both. Please be sure to review the notes about the reports so you know which ledgers are being used.

There are two sets of reports. One is for operational budget and the other is for grant budgets. Budget, expenses, encumbrance and pre-encumbrance amounts are displayed. Available budget is calculated and displayed.

BI Reports

These reports can be at Reporting Tools > BI Publisher > Query Report Viewer.

- BFS_KK_B2AOP – Budget to Actual for Operational Departments. Uses commitment control ledgers.
- BFS_KK_B2AGN – Budget to Actual for Grant Departments (this report is at the project and activity id level). Budget comes from Project related tables; other data comes from commitment control ledgers.
- BFS_KK_GRANT - KK Grant w/Contract Bud & Exp (this report is very similar to BFS_KK_B2AGN but goes to another level of detail by including the project, activity id and contract breakdown). Budget comes from Project related tables; other data comes from commitment control ledgers.

These reports must be run at Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_KK_BOOPR – KK Budget Overview for Operational Departments. Uses commitment control ledgers.
- BFS_KK_BOGNT - KK Budget Overview for Project/Grant Departments. Uses commitment control ledgers
- BFS_GL_BEROP - GL Budget, Expense and Revenue for Operational Departments. Budget, Encumbrance and Pre-Encumbrance data comes from Commitment Control ledgers. Expense and Revenue data comes from General Ledger journal tables. See companion query QFS_GL_BUD_EXP_REV_OPR below.
- BFS_GL_BERGN - Project Budget, GL Expense and GL Revenue for Grant/Project Departments. Budget data comes from PROJ_RESOURCE table. Expense and Revenue

data comes from General Ledger journal tables. Encumbrance and Pre-Encumbrance come from Commitment Control ledgers. See companion query QFS_GL_BUD_EXP_REV_PRJ below.

Financial Status Report pulls data from the General Ledger Journal tables. Data includes revenue and expenses displayed by fund by department in a BI Report.

- BFS_GL_FINST

Pivot Grid Reports

These reports can be run from Reporting Tools > Pivot Grid> [Pivot Grid Viewer](#).

- PGFS_KK_BUD2ACT_GNT_PG – Budget to Actual for Grant Departments
- PGFS_KK_BUD2ACT_OPR – Budget to Actuals for Operational Departments
- PGFS_KK_BUDGET_OVERVIEW – Commitment Control detail for Operational Departments
- PGFS_KK_BUDGET_OVERIVEW_GNT – Commitment Control detail for Grant Departments

Queries

- QFS_KK_BUDGET_OVERVIEW_OPR – Summary for Operational Departments. Uses commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_OPR_DTL – Transaction Detail for Operational Departments Uses commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_GNT – Summary for Grant Departments. Budget comes from Project related tables, other data comes from commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_GNT_DTL – Transaction Detail for Grant Departments. Budget comes from Project related tables, other data comes from commitment control ledgers.
- QFS_GL_BUD_EXP_REV_OPR – This is a companion query to BFS_GL_BEROP BI Report. It combines data from Commitment Control and General Ledger to provide department summary level budget, expense and revenue dollar amounts. Drill down detailed data is available for both expenses and revenue by clicking on the blue hyperlinks in the query results.
- QFS_GL_BUD_EXP_REV_PRJ – This is a companion query to BFS_GL_BERGN BI Report. It combines data from PROJ_RESOURCE, Commitment Control and General Ledger to provide department summary level budget, expense, and revenue dollar amounts. Drill down detailed data is available for both expenses and revenue by clicking on the blue hyperlinks in the query results. This query will take a few minutes to run so please run it from [Schedule Query](#) and set the format to XLS so that the drill down hyperlinks will be available.

Finance IPEDS Reports

Audience: Colleges

There are nVision reports by Fiscal Year beginning in FY2020 that provide the IPEDS Financial Reports Part A – Part C1.   These reports are secure to specific users at the local Finance College office.   Data downloads to an Excel spreadsheet that mirrors the Finance IPEDS report for that reporting section. The rows expand and collapse to show Chart field details to the Account, Fund, and Class, while the column expands to include the Operating Unit.

Detailed instructions for running the nVision reports can be found on the SBCTC's Accounting and Business Services webpage under the "Accounting" section.

Lori Carambot, System Accounting and Reporting Manager, is the contact person and administrator of these reports.

The report names example for IPEDS Part A Fiscal Year 2021: A_FY21

Reports are run from Reporting Tools > nVision > Define Report Request

Finance Financial Statement Reports

Audience: Colleges

There are nVision reports by Fiscal Year beginning in FY2020 that provide Financial Statements reports for Statement of Net Position and Statement of Revenue and Expense Changes in Net Position.   These reports are secure to specific users in the local Finance College office.   Data downloads to an Excel spreadsheet. The rows expand and collapse to show Chart field details to the Account and Fund, while the column expands to show data by Accounting Period. These reports are then used to complete the financial statement workbook supplied by the State Board for use in completing auditable GASB compliant financial statements.

Details on the reporting running these reports are on the SBCTC's Accounting website under ctcLink the Accounting section, while information specific to financial statements is under the Financial Statement section.

Lori Carambot, System Accounting and Reporting Manager, is the contact person and administrator of these reports.

The report names incorporate Fiscal Year; examples for 2021:

>   NETPOS21
>   SRECNP21

Reports are run from Reporting Tools > nVision > Define Report Request

Finance Purchase Order Queries and Reports

Audience: Colleges

Queries and reports for purchase order and requisition information.

Queries

- QFS_PO_PO_LINE_DETAIL - Purchase Order Line Detail
  - Purchase Order Line Detail. Includes encumbrance data along with PO header and PO line distrib info.
- QFS_PO_PO_VCHR_INV_PAY_DETAIL - PO, Voucher, Invoice and Pymnt
  - This query brings together PO, Voucher, Invoice and Payment data. Acts as a payment cross reference for the purchase orders. Created to be used with BI Report BFS_PO_PYMNT.
- QFS_PO_REQ_WIP_NO_PO - Requisition in Process - No PO
  - This query returns process status information for Requisitions that are not in a "Complete" or "Canceled" status. Prompts for BU (required), Accounting Date From (optional), and Accounting Date To (optional).
- QFS_PO_REQ_NOT_SOURCED_TO_PO - Apprvd Reqs not sourced to PO
  - This query is to be used by a Purchasing Assistant or other Purchasing Office staff member to identify Requisitions that have been fully Approved and have not been sourced to a Purchase Order in any way (i.e. neither partially nor fully sourced). Prompted by Business Unit and Between Approval Date range

BI Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_PO_PYMNT - PO and Voucher Payment Report
  - Purchase Order and payment data combined in BI report. One PO per page with corresponding payment data. Includes Voucher, invoice, amounts paid and remaining balance. Use query QFS_PO_PO_VCHR_INV_PAY_DETAIL as a cross reference for the payments.

Finance VPA Reconciliation Queries and Report

Audience: Colleges

Queries and reports for Vendor Payment Advance (VPA) reconciliation.

BI Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_VPA_RECN - VPA Reconciliation
  - This report is only for fiscal year reconciliation. It does not currently support accounting period reconciliation.
  - There is a drilldown query that is accessed by clicking on the amount that is shown in the grid that associates to the account and the fund. This will open an excel spreadsheet that contains the detail that has been summed together.

If the spreadsheet doesn't appear you will need to log in again to ctcLink FSCM and then click on the link a second time.

- o There are 3 sections to the report.
  - ▪ Section 1 – Payroll Reimbursement Journal Entry
    - • Source = Pay, Accounts = 5xxxxxx, 4020020 and 4020120 (if applicable), Fund = State Funds (001, 057, 060, 08A, 24J, 489).
  - ▪ Section 2 - Non-Payroll Reimbursement Journal Entry
    - • Source = All except PAY and CNV, Accounts = 5xxxxxx, 4020020 and 4020120 (if applicable), Fund = State Funds (001, 057, 060, 08A, 24J, 489).
  - ▪ Section 3 - Reverse Revenue for Payroll and Non-Payroll
    - • Includes data for the following when available
      - o ACCOUNT = 4100010 and FUND = '001
      - o ACCOUNT = 4200010 and FUND = 057
      - o ACCOUNT = 4200020 and FUND = 060
      - o ACCOUNT = 4100020 and FUND = 08A
      - o ACCOUNT = 4100070 and FUND = 24J
      - o ACCOUNT = 4100060 and FUND = 489

Finance Building and Innovation Fee Report

Audience: Colleges

Report for Building and Innovation Fee remittance. Run after month end close. Tuition transactions from SF are only recorded in accounting periods 1-12 unless a college records a manual entry for Building or Innovation.

BI Report

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

- • BFS_GL_BLDIN - *Building and Innovation Fee*

  This is the main criteria used by the query to pull in data for the report:

  - • The data comes from the GL ledger table
  - • Ledger = LOCAL
  - • Fund code = 060, 561 or 841
  - • App Idx = Z61 or Z60
  - • Accounts = 5120010 or 5120020 or (between 1000070 and 1000199)
  - • Accounting Period = 0 to 998 but not including 133
  - • Fiscal Year not less than 2020

  Report criteria

  - • If the account is 5120010 and the fund is 841 the report as Non-Op Building Fee Remittance
  - • If the account is 5120020 and the fund is 841 then report as Non-Op Innov Fee Remittance
  - • If the account is 1000070-1000199 and the fund is either 060 or 561 and App Idx is either Z60 or Z61 the report as Cash

- If the account is 101150 and the fund is either Z60 or Z61 then report as Summary Cash

Report data

- Page 1 shows Year-to-Date submissions and collections of Building Fee
- Page 2 shows the YTD submissions and collections of Innovation Fee
- Non-Op Building Remittance Fee shows YTD payments and Cash shows YTD collections

Finance Asset Management Fixed Asset Report

Audience: Colleges

The following report uses the Asset Management submodule. This report provides Capital Asset starting balances, disposals, changes, annual accumulated depreciation, and ending asset and depreciation values for a fiscal year. This report is like the CR2128 report that colleges used to use from Directline, which was used to reconcile the Asset Management system data to the General Ledger. Colleges could use this report to reconcile their General Ledger balances at year-end, for backup documents to support data on their financial statements, or to provide auditors with capital asset listings.

This report contains multiple tabs. Some tabs are Summary information for the Unit as a whole, summary information by Fund type – Governmental and Proprietary, and detailed asset listings for equipment, buildings, land, improvements, and library resources.

BI Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_FIXASSET – Fixed Asset Report
    - This report is only for fiscal year reconciliation. It does not support accounting period reconciliation.

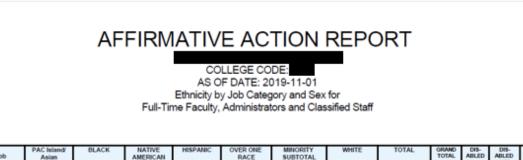# Human Capital Management

Affirmative Action Reporting

Audience: Colleges

This is an affirmative action report available in ctcLink Production through BI Publisher. The report is based on the legacy report CR6312 which reports ethnicity by male or female by job category.

The ctcLink BI Publisher report does the same but also includes the sex category of not specifically male or female. An additional difference is the ctcLink report is as of November 1st to better align with IPEDS reporting. The report will produce one page of results for a specific institution and another page with ctcLink system members combined results.

The report is called BHC_HR_EEO and must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Run Date: 2020-08-05

AFFIRMATIVE ACTION REPORT

COLLEGE CODE:

AS OF DATE: 2019-11-01

Ethnicity by Job Category and Sex for

Full-Time Faculty, Administrators and Classified Staff

Job Category	PAC Island/ Asian			BLACK			NATIVE AMERICAN			HISPANIC			OVER ONE RACE			MINORITY SUBTOTAL			WHITE			TOTAL			GRAND TOTAL	DIS-ABLED	DIS-ABLED VET	OVER 40
	M	F	X	M	F	X	M	F	X	M	F	X	M	F	X	M	F	X	M	F	X	M	F	X				
Executive/Admin/Managerial	0	1	0	2	3	0	0	0	0	1	3	0	0	3	0	3	10	0	7	14	0	10	24	0	34	0	0	31
Faculty	5	6	0	3	7	0	1	0	0	6	5	0	6	4	0	21	22	0	44	66	0	65	88	0	153	8	2	125
No EEO-6 Reporting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	2	0	2	0	0	2
Professional Nonfaculty	2	10	0	2	7	0	1	2	0	1	1	0	1	4	0	7	24	0	23	36	0	30	60	0	90	5	0	54
Secretarial/Clerical	0	6	0	3	4	0	0	1	0	2	2	0	0	4	0	5	17	0	4	28	0	9	45	0	54	3	1	35
Service Maintenance Workers	5	2	0	4	3	0	0	0	0	1	2	0	1	1	0	11	8	0	13	10	0	24	18	0	42	5	0	32
Skilled Crafts	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	0	8	0	0	9	0	0	9	0	0	9
Technical/Paraprofessional	2	4	0	2	6	0	0	1	0	1	2	0	1	3	0	6	16	0	8	31	0	14	47	0	61	3	0	33
Total by College	14	29	0	17	30	0	2	4	0	12	15	0	9	19	0	54	97	0	107	187	0	161	284	0	445	24	3	321
Percentage of Total	3%	7%	0%	4%	7%	0%	0%	1%	0%	3%	3%	0%	2%	4%	0%	12%	22%	0%	24%	42%	0%	36%	64%	0%	100%	5%	1%	72%

Queries

- QHC_HR_AFFIRM_ACTION_EEO - Affirmative Action w/cur date
  - This query differs from the report in that it will only produce results for a specific institution and the "As of Date" is based on the current date.

COVID-19 Vaccination Reporting

Audience: Colleges

There is a combination of delivered, custom and Data Services views used in this reporting set. We offer this data via Data Services Views for efficient college query development, queries and pivot grid reports. Immunization/Vaccination data is considered highly sensitive data requiring special handling (Category 4 data). ZD_DS_QRY_HRCORE_VACC_HI_SENS is the Role which allows access to query Vaccine data within Campus Solutions.

Codes and Descriptions

The codes and descriptions have been configured the same in both Campus Solutions and HCM.

- CEXMD - Exemption - Medical
- CEXPH - Exemption – Philosophical (this option is not available to employees)
- CEXRL - Exemption – Religious
- CJJ1 - Johnson & Johnson / Janssen
- CMO1 - Moderna - 1st dose
- CMO2 - Moderna - 2nd dose
- COT1 - Other COVID-19 Vaccine
- CPB1 - Pfizer-BioNTech - 1st dose
- CPB2 - Pfizer-BioNTech - 2nd dose

Fully Vaccinated Flag

The SBCTC Data Services ctcLink Reporting team have created custom queries and views including a derived fully vaccinated flag. This flag represents the completion of the required vaccination series. It does not factor in nor evaluate the time between shots or since the last shot.

A value of "Yes" represents:

- The Student or Staff have received 1 Johnson & Johnson/Janssen vaccine
  or
- The Student or Staff have received both Moderna vaccines
  or
- The Student or Staff have received both Pfizer-BioNTech vaccines
  or
- The Student or Staff have received one Pfizer-BioNTech and one Moderna vaccine
  or
- The Student or Staff have received 1 Other COVID-19 Vaccine

Data Services Custom Views (available to query developers)

- VHC_IMMUN_VAX_V – Company is associated with Job record. Uses maximum Received Date for each Immunization/Vaccine Type. Contains a fully vaccinated flag and Verified by HR flag.

- VHC_IMM_VAX_DTL – Company is associated with Job record. All rows returned.

- VHC_IMM_VAX_HR – All active employees as of the current date by Company. Contains Short Work Break Flag, Responded flag, Fully Vaccinated flag and Verified by HR flag.

- VHC_IMM_VX_HRSU – All active employees as of the current date by Company. Contains Short Work Break Flag, Responded flag, Fully Vaccinated flag and Verified by HR flag. Includes Supervisor.

- VHC_IMM_VAX_AGG – Count active employees in Company by the various flags: Short Work Break, Responded, Fully Vaccinated and Verified by HR. - Not Highly Sensitive

> Immunization Status is used by HR Admins to indicate the employee vaccine data has been verified. **Immunization Status = Complete Records Received indicates Verified by HR.**
>
> SBCTC advises colleges to not keep copies of vaccination documents. There is not and will not be functionality in ctcLink (or Legacy) to retain this documentation.

Data Services Queries

- QHC_HR_COVID_FULLY_VAX_YN_FLAG - For HR Admin. Uses maximum Received Date for each Immunization/Vaccine Type. Contains Company, Employee ID, Name, Preferred Email Address, Fully Vaccinated flag and HR Verified Flag.
- QHC_HR_COVID_VAX_DETAILS – For HR Admin. All rows returned.
- QHC_HR_COVID_VAX_ACTIVE_EMPL – For HR Admin. Active Employees by Company with Short Work Break, Responded, Fully Vaccinated flag and HR Verified Flag. Contains Company, Employee ID, Name, Preferred Email Address.
- QHC_HR_COVID_VAX_ACT_EMPL_SUPR– For HR Admin. Active Employees by Company with Short Work Break, Responded, Fully Vaccinated flag and HR Verified Flag. Contains Company, Employee ID, Name, Preferred Email Address, List of Immunizations and Supervisor name.
- QHC_HR_COVID_VAX_EE_COUNT – Active Employee Counts in Company by Short Work Break, Responded, Fully Vaccinated and HR Verified Flags– Not Highly Sensitive

- QHC_HR_COVID_SU_FULLVAX_YN_FLG – Secure by Supervisor version
- QHC_HR_COVID_SUP_VAX_DETAILS – Secure by Supervisor version
- QHC_HR_COVID_SUP_ACTIVE_EE – Secure by Supervisor version

Data Services Pivot Grid

PGHC_HR_COVID_VAX_EE_CNT- Employee Vaccination Count

To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Prompt on Company and then click the "Search" button to populate the pivot grid with data.

Click on the All+ hyperlink to open the grid section. Click on the total "Eligible to Enroll" value to view the grid detail.

The chart opens as a bar chart but can be changed to a pie or horizontal bar chart. Data can be filtered using the options found on the left side of the pivot grid page.

Data Services BI Publisher Report

BHC_HR_IMMUN - Employee Vaccination Count

This report contains aggregate data for vaccination reporting including exemptions. Data is in 2 sections. The first section contains employee counts and percentages. The second section has division level counts and percentages. Note that the division section will include duplicate counts for those employees who work under more than one department.

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

Payroll CR-7000 Series Reporting

Audience: Colleges

This is a collection of BI Publisher Reports that provide summarized information regarding the expense distribution of Payroll as of the most recent pay end date. Reports run to Word output.

These reports can be run at Reporting Tools > BI Publisher > Query Report Viewer.

Default to RTF (Word) is the output type for this reporting but can be modified at run time.

BHC_PY_7010C – College Totals by Fund

BHC_PY_7010S – System Totals by Fund

					Community Colleges System Report CR7010					Report Definition ID: BHC_PY_7010S	
Report Run Date:	8/6/2020				Expense Distribution						
Pay Schedule:	07A 2020				Payroll Summary Report						
Pay End Date:	7/15/2020										

System Check Date: 7/23/2020

Fund Code	Title	State Fund	System Gross Payroll	System OASI	System Retirement	System Med Aid	System Health	System HERP	System FSA	System PFML	System Unempl Comp	System Total
001	STATE GENERAL	Y	$4,281,614.68	$316,170.41	$437,107.84	$31,232.85	$1,976,635.99	$2,649.17	$279.46	$7,216.35	$3,103.84	$7,056,915.36
057	ST BLDG CONTR ACCT	Y	$375.00	$28.26	$48.22	$1.73	$101.03	$0.00	$0.00	$0.55	$0.00	$556.17
060	CC CAP PROJECT ACCT	Y	$25,483.59	$1,885.06	$2,536.48	$193.96	$11,003.54	$6.81	$0.00	$66.17	$0.00	$41,178.62
08A	ED LEGACY TRUST ACCT 08A	Y	$104,772.28	$7,608.81	$11,139.14	$684.37	$43,567.22	$58.76	$11.35	$197.68	$7.08	$168,246.69
101	STATE GENERAL FUND	Y	$2,200.50	$163.95	$130.45	$16.47	$1,311.69	$2.86	$0.00	$1.20	$0.00	$3,830.15
24J	WORKFORCE INVESTMENT ACCT	Y	$10,438.71	$783.34	$726.71	$78.43	$3,519.31	$9.75	$1.25	$16.41	$0.24	$15,574.15
561	CTC INNOVATION 561	Y	$217,616.60	$15,459.51	$19,567.52	$652.52	$45,384.00	$205.23	$13.75	$816.03	$0.00	$299,715.16
145	GRANTS&CONTRACTS	N	$916,395.15	$66,291.90	$94,115.37	$10,360.80	$579,571.84	$489.39	$60.76	$1,513.80	$182.11	$1,669,210.19
146	LOCAL CONTRACTS	N	$336,519.80	$24,634.05	$32,030.39	$2,338.24	$168,867.38	$260.38	$32.08	$528.91	$222.14	$565,403.89
148	DEDICATED LOCAL	N	$354,749.07	$24,938.55	$28,905.29	$3,064.79	$151,284.05	$175.97	$24.10	$543.44	$428.32	$564,133.18
149	OPERATING FEES ACCT	N	$2,478,309.23	$181,908.54	$236,765.63	$16,408.64	$1,389,993.70	$1,733.26	$154.57	$3,689.16	$80.26	$4,309,173.42
444	CENTRAL IT SERVICES	N	$80,529.10	$5,943.58	$7,669.51	$329.18	$23,033.60	$86.76	$11.37	$322.14	$0.00	$117,925.24
448	PRINTING FUND	N	$10,180.74	$753.84	$1,117.62	$100.95	$4,889.77	$1.84	$1.25	$14.91	$4.78	$17,065.70
460	MOTOR POOL	N	$559.58	$40.51	$71.96	$4.45	$292.80	$0.00	$0.00	$0.82	$0.00	$970.12
522	ASSOCIATED STUDENTS	N	$98,254.67	$6,409.37	$7,342.01	$1,131.46	$41,428.37	$25.13	$1.64	$149.22	$33.49	$154,778.21
524	BOOKSTORE	N	$41,294.74	$2,957.57	$4,573.57	$445.58	$23,189.76	$5.83	$0.94	$60.71	$49.38	$72,594.52
528	PARKING	N	$33,151.58	$2,467.04	$3,127.39	$368.63	$12,374.41	$0.00	$0.00	$48.71	$17.28	$51,555.04
569	FOOD SERVICE	N	$7,711.23	$563.00	$969.03	$102.95	$7,446.90	$1.03	$0.00	$11.32	$16.47	$16,821.93
570	OTHER AUXILIARY ENTE	N	$136,482.92	$10,060.95	$13,744.60	$826.02	$54,832.00	$81.78	$7.17	$408.51	$57.03	$216,520.90
573	HOUSING & FOOD	N	$2,070.79	$151.38	$227.05	$20.79	$1,220.00	$0.96	$0.31	$3.05	$0.00	$3,701.99
790	COMM COLL CLEARING	N	$0.00	$0.00	$0.00	$0.00	$976.00	$0.00	$0.00	$0.00	$0.00	$976.00
840	AGENCY	N	$26,045.33	$1,924.09	$2,560.18	$193.02	$13,176.00	$24.30	$1.25	$39.83	$27.27	$43,991.27
850	WORK STUDY	N	$16,084.59	$155.27	$235.63	$218.37	$1,151.64	$0.00	$0.00	$43.56	$1.25	$17,890.31
860	FINANCIAL AID FUND	N	$8,287.25	$0.00	$0.00	$126.44	$0.00	$0.00	$0.00	$33.02	$0.00	$8,446.71

Page 1 of 1

Payroll Register Report

Audience: Colleges

A BI Report for the OFM regulatory report required to certify each payroll.

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25.20.30	Certification Requirements
	RCW 41.06.270 specifies two conditions an agency must meet before paying an employee. The agency head (or authorized designee) must certify that the payroll meets these conditions using the following language: "I hereby certify that to the best of my knowledge amounts listed in this payroll are true and correct charges and that employees holding a position covered by Chapter 41.06 RCW or other applicable employment contract, have been employed in accordance with the rules, regulations, and orders issued thereunder."

Report BHC_PY_1320 must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Earned Hours Based Benefit Eligibility Queries

Audience: College HR and SBCTC HR Staff

The following queries can be run to identify employees who have a specific number of earned hours and are therefore eligible for certain benefits.

QHC_HR_THRSH_CIVILSERVICE_1050
- Report for Civil Service Exemption.
    - Civil Service Exempt - WAC 357-04-045
- Any employee who has worked 1050 hours or less in a rolling 12-month period is exempt from civil service.
    - The user will prompt on institution.
        - Selection criteria:
            - Employee class is not equal to STU.
            - The earnings end date is between the calculated service date and the current date.
    - The earnings for this time period will be added together.
        - If the amount is 900 hours or greater they will be included in this report.
        - The 900-hour amount is used as the starting point for inclusion in the report so that the user will know when employees are getting close to the 1050 hours.
- The drilldown includes all the detailed data used to determine that the employee has at least 900 hours of earnings and is eligible for the Civil Service Exemption.

QHC_HR_THRSH_MEDICAL_480
- Report for Medical Benefit Eligibility.
    - Medical Benefit Edibility - WAC 182-12-114
- Any employee with 480 plus hours in a rolling 6-month period.
    - The user will prompt on institution and the earnings end date that they want to use to start the 6-month period.
        - Selection criteria:
            - The employee is part time.
            - The employee class is not equal to STU.
            - The earnings end dates included are between the earnings end date prompt and that same earnings end date minus 6 months.
            - Include all hours with HRY earn code.
    - Hours are summed and any employee with 480 hours or more in the 6-month period will be included in the query results.
- The drilldown includes all the detailed data used to determine that the employee has at least 480 hours of earnings in a rolling 6-month period and is eligible for Medical Benefits.

QHC_HR_THRSH_RETIREMENT_70
- Report for Retirement Eligibility.
    - The user will prompt on institution.
        - Selection criteria:

- The employee must have worked 70 hours or more for at least 5 months in a year for 2 years.
  - The drilldown includes all the detailed data used to determine that the employee has at least 70 hours of earnings for 5 months a year during a 2-year period.

QHC_HR_THRSH_UNIONELIG_350
- Report for Union Eligibility.
  - Union - WAC 357-04-045
- Employee is in union code WP or WF and works 350 or more hours in 12 months is eligible to join the union.
  - The user will prompt on institution.
    - Selection criteria:
      - The month of the employee's original hire date must match the month of the current date or the original hire date is within the last 12 months
      - The earnings end date is within the last 12 months.
  - All hours are summed and anyone with hours equal to or greater than 300 will be included so that the employee will be included in the report as they are getting close to 350 hours.
- The drilldown includes all the detailed data used to determine that the employee has at least 300 hours of earnings for the last 12 months.

Payroll by Department

Audience: College HR and SBCTC HR Staff

This is an HCM query providing payroll by department information for every employee paid through a specific department. This query uses highly sensitive record HR_ACCOUNTING_LINE so those without access to the highly sensitive garnishment role will not be able to view this data.

- QHC_PY_PAYROLL_BY_DEPT

Data Privacy Acknowledgement

Audience: Colleges and SBCTC

This is an HCM query that provides a list of active employees and their data privacy acknowledgement status. Includes the Employee email, Supervisor Name and Email.

- QHC_HR_EE_DATA_PRIV_EMAIL_SUPR

Jobcode Aggregate Employee Count

Audience: Colleges and SBCTC

This is an HCM query that provides an aggregate count of active employees by their jobcode.

- QHC_HR_JOBCODE_EMPL_COUNT - Active Empl Count by Jobcode

Audience: Colleges and SBCTC

This is a BI Publisher Reports that provide an aggerated count of jobcode by company for all institutions except technical which includes 250, 260, 270, 280, and 290.

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

Report name: BHC_HR_JCCCNT - Active JOBCODE Count by Company

Time and Effort Employee Certification Report

Audience: Colleges

This is a BI Publisher Report by Employee and pay end date range that provides a breakdown of earnings for Time and Effort reporting for Grants from the HR Accounting Line data. There are three categories in the report,

(1) Grant Earnings where Project ID is populated and Earn Codes are not STP, MLC, or NTH.
(2) Non-Grant Earnings where Project ID is not populated and Earn Codes are not STP, MLC, or NTH.
(3) Salary Sources where Earn Codes are STP, MLC, or NTH.

The percentage of earnings is calculated based on the totals and the categories above.

This report can be run at Reporting Tools > BI Publisher > Query Report Viewer.

Report name: BHC_CO_00002 – Faculty Staff Time Effort Rpt.

SBCTC Grant Office: https://www.sbctc.edu/colleges-staff/grants/manage-grant

TIAA – Over 6% Payroll Benefits Transfers

Audience: Colleges

These queries have been developed to both identify retirement contribution charges greater than 6% of gross pay in state fund chart strings and create the journal lines to move the charges out of state funds and into local funds.

- QHC_PY_GROSS_TIAA_BENE_OVER_6 – this query pulls detailed information on employees that have non-DRS retirement contributions greater than 6% of their gross pay in a state fund, by pay end date

- QHC_PY_STATE_TIAA_JRNL_OVER_6 – this query generates and displays the journal lines that would be needed to move the transactions out of state fund chart strings and into local fund chart strings by pay end date

- QHC_PY_STATE_TIAA_JRNL_6_TMPLT – this query puts the journal lines needed to move transactions out of state funds chart strings and into local fund chart strings into a format that can be used by the journal upload process

Running the queries alone will not redistribute the funds. The journal lines created must be uploaded into the General Ledger for the transfers to take effect.

Notes:

- Due to the high volume of data, queries should be run in Scheduled mode

- The queries can be run for multiple pay periods, but our recommendation is that you run them for single pay periods or at most, for a single month (two pay periods)

- The data output should be marked as XLS to prevent the dropping of leading zeros, which would cause upload issues

- The output from QHC_PY_GROSS_TIAA_BENE_OVER_6 could be attached to your journal upload as backup

The existing CEMLI (TIAA-CREF Over 6 Pct Report) previously designed to identify employees with benefits greater than 6 percent charged to state funds will be retired and replaced with this process.

There is a QRG published to assist with this process - https://ctclinkreferencecenter.ctclink.us/m/79727/l/1897849-9-2-tiaa-over-6-pct-payroll-benefits-transfer

For any questions or concerns, please submit a support ticket with Accounting and Business Services.

Security

Query Security Reporting

Audience: College Security Administrators

XX = CS - Campus FS - Finance HC - Human Resources	QUERY NAME	DESCRIPTION
	QXX_DS_QUERY_RECORD_RPT	This query is intended to be used to troubleshoot query access issues. This query prompts for the Query Name and will identify each record in the query and flag whether or not is in the new query tree and roles. The expectation is that all records return 1=Yes. There is also a column that shows Additional Record Security to help identify SACR security related records in the CS pillar requiring additional User Student Administration Security assignments.
	QXX_DS_QUERY_RECORD_USER_RPT	This query is intended to be used to troubleshoot query access issues by Users. This query prompts for the Query Name and Username and will identify each record in the query and flag whether the User has access to each record and which Role(s) provides access.
	QXX_DS_QUERY_RECORD_USER_MULT	This query is a version of QXX_DS_QUERY_USER_RPT but can be used for up to 6 queries, and a checkbox can show all records with access, or just Inaccessible records for the use. The query identifies each record for the prompted query, the Role(s) needed, and whether the user prompted has access.
	QXX_DS_QUERY_TREE_REC_USER_RPT	Displays the query trees developed for distribution by college security and the records associated with each Role/Permission list that may be assigned. User must also have the ZD_DS_QUERY_VIEWER role assigned. Includes UserID.
	QXX_DS_QUERY_TREE_RECORD_RPT	Displays the query trees developed for distribution by college security and the records associated with each Role/Permission list.
	QXX_DS_QUERY_ACCESS_BY_USER	Displays the queries that a user has access to.

	QXX_DS_QUERY_ACCESS_BY_ROLE	Displays the queries that a specific role has access to on a standalone basis.
	QXX_DS_QUERY_USED_BY_BIP	Displays the Connected Query or Query related to a BI Report Definition
	QXX_DS_MAP_NAV_TO_RECORD_FIELD	Navigation related to a Record/Field – can either prompt by Navigation or Record

User Security Reporting

Audience: College Security Administrators

XX = CS - Campus FS - Finance HC - Human Resources	QUERY NAME	DESCRIPTION
All Pillars	QXX_SEC_USER_ROLES_BY_UNIT	Provides a list of Users with Job Company, JobCode Department, including Supervisor, with access by Role and Business Unit. Include options to select Only Active Employees and/or select only Locked Accounts.
CS Pillar Only	QCS_SEC_USER_ROLES_BY_UNT_SACR	Same as QCS_SEC_USER_ROLES_BY_UNIT but also has a Y/N Flag for SACR Institution.
CS Pillar Only	QCS_SEC_USER_ROLES_UNIT_SA_OPR	Same as QCS_SEC_USER_ROLES_BY_UNT_SACR but also has the user OPRCLASS.
All Pillars	QXX_SEC_COMPARE_USER_ROLES	Allows for a College security administrator to review roles assigned between two active employees at their institution.
CS & HC Pillars Only	QXX_SEC_JOB_USEREMAIL_NOT_CAMP	Identifies employees (including faculty) that do not have a CAMP email type.
CS & HC Pillars Only	QXX_SEC_OPR_DESC_NE_DISP_NAME	Identifies employees that have a mismatch between PERSONAL_DATA Name Display and the PSOPRDEFN User Profile Name. This can be minor differences, upper/lowercase or can be due to Name Change.
HC & FS Pillars	QXX_SEC_OPR_ROLES_NO_JOB	Identifies users with a Primary Permission List that do not have a matching company Job record as of the query run date for the user.

All Pillars	**QXX_SEC_USER_ LOGIN_HIST_UNIT**	Displays active employees by Unit, Employee and their login history to that specific pillar. Contains email address like %.EDU in HCM and FIN but not in the CS version because it can be updated directly and not match the HR official data that is stored in HCM.
All Pillars	**QXX_SEC_USER_NO_LOG_IN_BY_UNIT**	Displays active employees by Unit that have not logged into that specific pillar. Contains email address like %.EDU in HCM and FIN but not in the CS version because it can be updated directly and not match the HR official data that is stored in HCM.
HC & FS Pillars	**QXX_SEC_OPRCLASS_NOT_ASSIGNED**	Displays users that do not have an OprClass (Primary Permission list) assigned that matches their active Job Business Unit GL/Company or are missing OPRCLASS or missing EMPLID from PSOPRDEFN profile.
All Pillars	**QXX_SEC_USER_ROLES_NOT_LOCAL**	Roles assigned to active users by Unit that are not in the Local Role Grant authority.
All Pillars	**QXX_SEC_ROLE_EDIT_BY_OPR**	Security changes by operator from the AUDIT_ROLEUSER table (does not store dynamic role assignments or roles assigned prior to implementation of auditing or converted/script assigned roles) performed by an Operator for users. Query lookup is secure, and the results return LSA OPRID data that matches the query viewer user institution/company access. Will display user at other institution if updated by LSA at your institution.
All Pillars	**QXX_SEC_USER_ROLE_HISTORY**	Security changes performed by User from the AUDIT_ROLEUSER table (does not store dynamic role assignments or roles assigned prior to implementation of auditing or converted/script assigned roles). Query lookup is secure, and the results return user data that matches the query viewer user institution/company access. Will display LSA at other institution if User updated by them.
HC & CS Pillars	**QXX_SEC_ROLE_GRANT_DEFN_PILLAR**	Provides a matrix style report to assist in identifying roles that sync between HCM and FIN, CS and Portal and in CS synced to Portal. If ZZ Local Security Admin role has role grant access, this is also shown in the matrix by rolename.

CS Security Reporting

Audience: College Security Administrators

CS Pillar Only	QUERY NAME	DESCRIPTION
	QCS_SEC_USER_ROLES_STUDENT	Identifies students that have ever had enrollment at the Institution and their associated Roles. Includes Portal Roles as well. Locked Account flags for both Pillar and Portal have been added.
	QCS_SEC_STUDENT_DYN_ROLE_MISS	Identifies students Term Active in the prompted term or greater that do not have the ZZ SS Student role and other required CS roles or the Portal Role counterparts as well.
	QCS_SEC_STU_EMPL_SS_ROLE_MISS	Displays current/future students that have active Jobs based on run date and do not have the ZZ SS Student role. Shows Portal ZZ SS Student role if assigned.
	QCS_SEC_USER_STDNT_ LOGIN_HIST	Displays by student, term and institution with the ZZ SS Student and are Enrolled in the prompted term and their login history.
	QCS_SEC_USER_STDT_LOGIN_STATUS	Displays by term and institution all enrolled students with the ZZ SS Student and their last login data.
	QCS_SEC_USER_STDNT_NO_LOG_IN	Displays students that have the ZZ SS Student and are Enrolled in the prompted term (or greater) and have not logged in logging the date in the Last Log In Date Time in the PSOPRDEFN table or PSACCESSLOG table.
	QCS_SEC_SF_SS_INST_SET_MISSING	Displays Students where the Institution Set or the Institution Set Override does not match the prompted enrolled Institution. This is located at: Nav Bar > Navigator > Set Up SACR > Security > Student Financials > User ID > Student Institution Set
	QCS_SEC_SF_SS_INSTITUTION_SET	Displays the Institution Set, Institution Set Override, CS User Defaults, Last Log in date/time and the CTC%CC portal role which should trigger the Institution Set Override to be calcuated for Students.

		This is located at: Nav Bar > Navigator > Set Up SACR > Security > Student Financials > User ID > Student Institution Set
	QCS_SEC_INSTR_ADV_BY_COLLEGE	Provides a list of faculty and advisors configured on the Instructor/Advisor table and if Advisor/Faculty self-service roles. Also lists any user that has the self-service role and are NOT on the Instructor/Advisor table. Includes flags for roles assigned in the Portal as well.
	QCS_SEC_INSTR_ADV_NO_JOB	Provides a list of faculty and advisors configured on the Instructor/Advisor table, displays Advisor/Faculty self-service roles, if assigned, who do not have Jobs at the prompted institution. Displays Classes Scheduled where Term End Date is not less than the Current Date. Displays the max Effective Date from HR, if applicable. Includes flags for roles assigned in the Portal as well.
	QCS_SEC_OPR_ROLES_SACR_NO_JOB	Identifies users with SACR at the Parent Level and there is no matching Job record as of the query run date for the user. Source tables used to create a Parent Institution value: SetID: PS_SEC_SETID_OPR Academic Org PS_SCRTY_TBL_ACAD Advising Note PS_SAA_NOTE_ACCESS Business Unit PS_SEC_UNITSF_OPR Institution Set PS_SEC_ISET_OPR Company PS_SEC_COMPANY_OPR
BI Publisher Report to Excel	BCS_SEC_SACR	Used by Colleges for Off Boarding an employee to capture the SACR assigned for a user. Includes SACR, SF Security, Advising Note Category Security, User Operator Defaults, lists Job Information (if applicable), and all Roles Assigned to User in CS. Must be run from Reporting Tools > BI Publisher > Query Report Scheduler
	QCS_SEC_SACR_CORE_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Institution, Career, Program, Campus, Institution Set, Business Unit, SetID, Transcript Type, Transcript Rpt, Advisement Rpt, Adm Rec Center, Adm Appl Center, Adm Actions, Program Actions, Tests, Enrollment Access ID, Graduation Status,

		Academic Org, Effdt, Node From and Node To
		
		Source tables used to create a Parent Institution value used for Institution prompt:
		      SetID: PS_SEC_SETID_OPR
		      Academic Org PS_SCRTY_TBL_ACAD
		      Advising Note PS_SAA_NOTE_ACCESS
		      Business Unit PS_SEC_UNITSF_OPR
		      Institution Set PS_SEC_ISET_OPR
		      Company PS_SEC_COMPANY_OPR

	QCS_SEC_SACR_STDNT_GRP_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Student Group prompted and Student Groups by Indicator, Inquiry and Update Indicators.
	QCS_SEC_SACR_MILESTONE_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Milestone prompted and Milestones by Indicator, Inquiry and Update Indicators.
	QCS_SEC_SACR_3C_SCRTY_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: 3C Group prompted and 3C Groups by Indicator, Inquiry, Update, Delete Indicators.
	QCS_SEC_SACR_SRVC_IND_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Service Indicator prompted and Service Indicator by Indicator, Placement and Release Indicators.
	QCS_SEC_SACR_ADV_NOTE_COMPARE	Compare two users Advising Notes access or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. Access is identified as User or Role.

		Roles are listed if that is the access type.
	QCS_SEC_SACR_SF_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. Student Financials Security in this query are: Business Unit SF, Cashier Office, Company, Credit Card, Item, Institution Set, Set ID, Origin
	QCS_SEC_SACR_MILESTONE_COMPARE	Compare two users or enter same user in both prompts to review a single user data for Milestone security.
	QCS_SEC_SACR_ITEMTYPE_OPR_COMP	Compare two users or enter same user in both prompts to review a single user data for Item Type security.
	QCS_SEC_OPR_DEF_TBL_CS_VALUES	Displays a user's operator default values they have saved. Prompted by institution which maps to the user's HR Company history.
	QCS_SEC_OPR_COMM_SPDKEY_VALUES	Displays a user's operator default values for Comm SpeedKeys. Prompted by institution which maps to the user's HR Company history.
	QCS_SEC_ACADPROG_NO_PORTALROLE	Needs to be run from Schedule Query. Returns any student with ZZ SS Student role and in ACAD_PROG record for an Institution and does not have a corresponding CTC_%_CC Portal Role in either Portal or CS Pillars for that Institution.
	QCS_SEC_MASKING_BY_OPRID	Displays a user's Security SSN Mask settings.
	QCS_SEC_SEGREGATION_OF_DUTIES	Segregation of duties is the concept of having more than one person required to complete a task. It is an administrative control to prevent fraud, theft misuse of information, or other security compromises. For example, the person responsible for disbursing aid should not be able to refund the aid. Typically, whoever enters the transaction should not be the one approving it. When onboarding a new hire, it is critical to consider any segregation of duties issues while assigning roles. It is also critical to review Segregation of duties issues twice a year for audit purposes as well.

| | | The SACR institution must correspond to the prompted Unit for operator to be selected in query results.

Includes drilldown to role details when run to HTML.

Assisting query: **QCS_SEC_SOD_NAVIGATION_ROLES** |
| --- | --- | --- |

Finance Security Reporting

Audience: College Security Administrators

FS Pillar Only	QUERY NAME	DESCRIPTION
BI Publisher Report to Excel	**BFS_SEC_OPDF**	Used by Colleges for Off Boarding an employee to capture the Finance Operator defaults & other module-based security assigned to a user in the business unit. Includes Operator Default Product Preferences data for products we use, Data sources from the OPR_DEF_TBL - AM, AP, AR, BI, CA, FS, GL, OM, OB, OBT, OLE, PM, RTM, VND.

Data is also included for assignments to Process Groups, Paycycles, Department Manager, P-Card Proxies, Buyer, Requestor, Treasury Payments, Vendors, Commitment Control rules, and Grants.

Report also displays the prompted employee's Job Information, HR Status, operator profile settings, jobcode description), and all Roles Assigned to User in FS.

Must be run from Reporting Tools > BI Publisher > Query Report Scheduler |
	QFS_SEC_OPR_DEF_TBL_FS_OPRCLS	Displays the OPRCLASS by the Business Unit for Users in OPR_DEF_TBL_FS.
	QFS_SEC_OPR_DEF_TBL_VNDR_COMP	Compare two users or enter same user in both prompts to review a single user data. Displays Supplier Entry Status, Entry Role Name, Approve Role Name, Supplier Active Status, Authority to View, Supplier Audit.
	QFS_SEC_OPR_DEF_TBL_PO_COMPARE	Compare two users or enter same user in both prompts to review a single user data. Displays Purchase Order Approval, Role Name, Requisition Approval, Role Name.

	QFS_SEC_OPR_EXP_APPRVR	Operator default data for Expense Approver assignments.
	QFS_SEC_OPR_DEF_RPT_USER_BU	Display the record name of any operator defaults by prompted Business Unit that are assigned to a prompted user.
	QFS_SEC_USER_EMAIL_RTE_CNTRL	Query by User id to find email address and roles with route controls. Joins to HR Active employee row to return data where HR Business Unit maps to the FS GL Business Unit.
	QFS_SEC_FS_DELEGATION_REVIEW	Query to display the end users that have granted delegation and to whom and their status with the company that matches their Primary Permission list.
	QFS_SEC_SEGREGATION_OF_DUTIES	Segregation of duties is the concept of having more than one person required to complete a task. It is an administrative control to prevent fraud, theft misuse of information, or other security compromises. For example, the person responsible for adding a vendor, should not be able to approve the vendor. You don't want someone entering a vendor, and vouchering against that vendor, and running a paycycle for example. Typically, whoever enters the transaction should not be the one approving it. When onboarding a new hire, it is critical to consider any segregation of duties issues while assigning roles. It is also critical to review Segregation of duties issues twice a year for audit purposes as well. The primary permission list must correspond to the prompted Unit for operator to be selected in query results. Includes drilldown to role details when run to HTML.
	QFS_SEC_PM_OPR_DEF_BY_UNIT	This query will help Local Security Admins to quickly look through a listing of all college users for inconsistencies in procurement User Preferences settings – specifically targeting whether users are set as the default requester and default buyer when new transactions (reqs and PO's) are entered.

HCM Security Reporting

Audience: College Security Administrators

CS Pillar Only	QUERY NAME	DESCRIPTION
	QHC_SEC_HR_STATUS_SYSTEM_LEVEL	For College security administrators, a query they can run to see users that they are going to terminate to ensure they are not employed at other colleges. This reporting shows Employee ID, Name, and System Status (considers all Jobs and Companies) grouping Active and Inactive companies by the Employee current system status. Is secure by college if there is an association with employee or student at some time. Displays List of Roles minimum required for users in HCM and Portal; Assigned Roles in Pillar and Portal by User at associated Company; Mismatch or Errors in Assigned Roles. Includes drilldown to CS Roles for User, FIN Roles for User and HCM Max Inactive/Active and Pay dates by User/Company when run in HTML. Added Prompted Company status to include notation for Future Dates: Values are: Active Future Date, Active, Inactive Future Date, and Inactive May need to be run from Schedule Query.
	QHC_SEC_PORTAL_RESET_QUESTION	Displays users by Company that have access to reset the Portal security question for end users. Role in Portal is: CTC_SEC_ANSWER_RESET
	QHC_SEC_PORTAL_ROLES_UNIT	Displays Portal Roles by User by Company by Job history association.
	QHC_SEC_PORTAL_ROLES_UNIT_TILE	Displays Company from HR and corresponding Unit Portal Tile from both roles 'CTC_%_DISTR' or 'CTC_%_CC' if assigned, else will be blank
	QHC_SEC_PORTAL_ROLE_MISSING	Displays Company from HR and corresponding Unit Portal Tile from both roles 'CTC_%_DISTR' or 'CTC_%_CC' if CTC_%_DISTR is not assigned to the HR User. Sorted so Active HR Status are shown first in query results. Updated to include also the ZZ_OKTA_MFA role if

		Missing.
	QHC_SEC_JOB_USEREMAIL_NOT_EDU	Identifies any user id that does not have a .edu email address on the user profile. Please use this query as part of Security audits and update personal email addresses on the user profile. Personal email addresses should be cleaned up (removed) and updated to be the campus email address as it can cause issues with notifications, and other functionality such as TAM/Careers.
	QHC_SEC_DATA_PRIVACY_USAGE_VW	All active employees by Company that have been presented the data privacy acknowledgement and their response status. Optional prompt for EMPLID.
	QHC_SEC_SEGREGATION_OF_DUTIES	Segregation of duties is the concept of having more than one person required to complete a task. It is an administrative control to prevent fraud, theft misuse of information, or other security compromises. For example, the person responsible for disbursing aid should not be able to refund the aid. Typically, whoever enters the transaction should not be the one approving it. When onboarding a new hire, it is critical to consider any segregation of duties issues while assigning roles. It is also critical to review Segregation of duties issues twice a year for audit purposes as well. The SACR institution must correspond to the prompted Unit for operator to be selected in query results. Includes drilldown to role details when run to HTML.

Navigation and Role Reporting

Audience: College Security Administrators

XX = CS - Campus FS - Finance HC - Human Resources	QUERY NAME	DESCRIPTION
	QXX_SEC_ROLE_NAVIGATION_ACCESS	Displays user friendly menu navigation by Role and Page Access

	QXX_SEC_PSROLECANGRANT_LOCAL	Displays all security roles that can be applied by local security admins
	QXX_SEC_LSA_EMAIL_CONTACTS	Displays the Name and Email for users with the ZZ Local Security Admin role intended to be used by LSA's to contact each other.
	QCS_SEC_SOD_NAVIGATION_ROLES	Displays the Navigation of the roles coded for Segregation of Duties in CS.

SBCTC Security Reporting

Audience: SBCTC Security Administrators

XX = CS - Campus FS - Finance HC - Human Resources	QUERY NAME	DESCRIPTION
All Pillars	QXX_SEC_OPR_ROLES_NO_JOB_SBCTC	Displays users that have Roles assigned in the Pillar and but no record in JOB or historical EARNINGS_BAL record. In Fin & HCM, must also have a Primary Permission List assigned and in CS, must also Parent Institution value. Source tables used to create a Parent Institution value: SetID: PS_SEC_SETID_OPR Academic Org PS_SCRTY_TBL_ACAD Advising Note PS_SAA_NOTE_ACCESS Business Unit PS_SEC_UNITSF_OPR Institution Set PS_SEC_ISET_OPR Company PS_SEC_COMPANY_OPR

Additional Reporting Resources

- [ctcLink Reference Center](#)
- [ctcLink Reference Center for Query and Reporting](#)
- [metaLink](#)

Running a Query in Schedule Query

1. In Query Viewer, under the Search Results, click on the **Schedule** link.
2. The Scheduled Query page will appear, prompting you to either create a new or find an existing Run Control ID.
3. **Run Control ID**s are tied to a user ID and are visible only to the creator. Instead of entering the same values each time a query is scheduled; a Run Control can be saved with these settings. The next time the query is scheduled, the Run Control ID is selected and the system completes the settings with the previously defined parameters.
   a. To run an existing Run Control ID, click the Find an Existing Value tab. Type in the name of the Run Control ID you wish to retrieve. Click Search. Click on the Run Control ID you want to run.
   b. To create a new Run Control ID, click on Add a New Value tab. Type a Run Control ID, using alpha numeric characters with no spaces. Underscore should be used for spacing. Click **Add**.
4. If there are prompt(s) associated with the query (i.e. Institution or Business Unit), a pop-up screen will appear asking you to populate the prompt(s). Not all queries will have prompt(s).
5. The Process Scheduler Request screen will appear. Select additional choices on how the Scheduled Query will run.
   a. Server Name should remain blank.
   b. Recurrence should be left blank.
6. From the Process List, use the dropdowns to make the below choices.
   a. **Type** = Web.
   b. **Format** = TXT or XLS will result in an Excel output file.
   Click **OK**.
7. Click on the "Process Monitor" hyperlink.
8. Click on the "Refresh" button periodically until the "Run Status" says **Success**.
9. Click on the "Details" link.
10. Click on the "View Log/Trace" link to retrieve the Scheduled Query results.
11. Click on the output file and it will download or ask you what you want to do with the file.

Running a BI Publisher Report in Query Report Viewer

Reporting Tools > BI Publisher > Query Report Viewer. Enter the name of the report and click the Search button. Click on the "View Report" hyper link found to the left of the report name in the Report Definition grid. Enter the desired prompt values and then click the OK button.

Running a BI Publisher Report in Query Report Scheduler

Reporting Tools > BI Publisher > Query Report Scheduler.

1. If this is the first time running the report the click on "Add a New Value" tab. Enter a unique name that identifies this report to you so it will be easy to recognize the next time the report is run.
   a. This only has to be done once. Next time the report needs to be run it can be found by going to Query Report Scheduler and clicking on the Search button. Report name and prompt values from last time the report was run have been saved and can be used again or prompt values can be changed.
2. Data Source Type is "Connected Query".
3. Enter the name of the report.
4. Enter the desired prompt values.
5. Click "Run".
6. Click "OK".
7. Click on the "Process Monitor" hyperlink.
8. Click on the "Refresh" button periodically until the "Run Status" says Success.
9. Click on the "Report Manager" hyperlink.
10. Click on the "Administration" tab.
11. Your report is in the Report List grid. Click on the Report ID hyperlink to open your report.

Running a Pivot Grid Report in Pivot Grid Viewer

1. Enter the name of the pivot grid into the "Pivot Grid Name" field.
2. Click "Search",
3. Click on the blue hyperlink to select the pivot grid.
4. The prompts are located on the left side of the page.
5. Click on the magnifying glass on the appropriate prompt to find the data you are looking for.
6. Click the "Search" button.
7. There may be a "More Options" hyper link. If so, click on this to get more prompt options.

Running an nVision Report from Define Report Request

1. Enter or look up your Business Unit.
2. Click "Search",
3. Reports that you have access to run will be displayed. Click on the blue hyperlink to select.
4. Click the "Run Report" button.
5. Click "OK".
6. Click on the "Process Monitor" hyperlink.
7. Click on the "Refresh" button periodically until the "Run Status" says Success.
8. Click on the "Report Manager" hyperlink.
9. Your report is in the Report List. Click on the Report ID hyperlink.
10. Click the **File Name** to download the file to Excel.

Return to Table of Contents