



CRITICAL MIGRATION PROCESS

SBCTC DATA SERVICES REPORTING TEAM

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Critical Migration Process

What is a critical migration?

A critical migration is a query migration request that occurs outside of the normal query migration timeframe.

When does migration qualify as critical?

A migration may qualify as critical when:

- The query is required for a time-sensitive ctcLink business process (e.g., awarding Financial Aid, processing payroll, financial reconciliation).
- The business process cannot proceed without the data generated from the query.

Critical Migration Approval Path

Institution Query Developer >> Institution Reporting Lead >> Data Services ctcLink Associate Director (or ctcLink Reporting Team Lead if the Associate Director is unavailable).

Critical Migration Request Process

Step 1 – Institution Developer & Reporting Lead

- Institution query developer contacts the Institution Reporting Lead.
- Together, they assess whether the situation qualifies for a critical migration.

Step 2 – Reporting Lead & Data Services

- Institution Reporting Lead contacts the Data Services ctcLink Associate Director by phone, email or Teams Chat.
- If the Associate Director is unavailable, contact ctcLink Reporting Team Lead.

Step 3 – Approval Decision

The Associate Director (or Reporting Team Lead) and the Institution Reporting Lead determine if a critical migration is needed.

If Yes – Critical Migration Approved

1. Institution Reporting Lead creates a ticket requesting a critical migration. Tickets must include:

- Reason for the critical migration
- Description of the required change/fix for modified queries or the description and purpose of new query
- Completed query migration form
- 2. SBCTC Reporting Team actions:
 - Create and submit a Change Service Request (CSR)
 - CSR Status: *Critical*
 - Assigned to: *Manage Service queue*
 - Notify the Associate Director via email with the CSR number
- 3. Associate Director actions:
 - Email Manage Services requesting a critical migration (including CSR number)
 - Notify Manage Services via Webex Chat with the CSR number
 - Await Manage Services confirmation when migration is complete
- 4. Associate Director (or Reporting Team Lead) notifies the Institution Reporting Lead when migration is complete.

If No – Critical Migration Denied

- The Institution Reporting Lead may submit the migration request via the normal migration process.

Limitation on Critical Migration Requests

- An approved critical migration request is a one-time migration to production.
- If the issue is not resolved, the institution must use the normal migration process to:
 - Make corrections
 - Test changes
 - Submit a standard migration request

Terminology

	Term	Explanation
1	Migration	Combination of manual and automated steps that physically copies the query updates from the PCD environment to the production environment. Some of the steps are performed by the SBCTC Data Services Reporting Team and some steps are performed by contracted Manage Services.
2	Definition	General PeopleSoft reference to fields, records, pages, components, menus, PeopleCode and SQL which are used to build and modify PeopleSoft applications.
3	Migration Path	The ctcLink environments that are included in the manual and automated steps that make up the migration process.
4	Managed Services	This is the SBCTC ctcLink service provider Burgundy that is referred to as Managed Serviced (MS)
5	Associate Director	Manages the ctcLink Reporting Team.
6	Reporting Team Lead	Technical Lead for the ctcLink Reporting Team.



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