CLARK COLLEGE CTCLINK GO-LIVE LESSONS LEARNED

Go-Live Date: October 28, 2019

The following document is a compilation by ctcLink PMO of notes from a Lessons Learned discussion with Clark College's ctcLink leadership/team on Dec. 16, 2019 and additional lessons learned notes from Susan Maxwell, project manager at Clark College.

Finance

General Statements

- 95% of Finance issues were Student Financials
- All issues were human error, not a problem with the PeopleSoft product

Top Recommendations from Clark

- Stop financial transactions / close books a week or more before go-live so there are no outstanding items at cutover. (No cashiering, financial aid, etc., anything that pushes into Finance (web transaction server). Have no refunds pending).
- At go-live, close business offices for entire week of go-live and don't be open for students. Allows all back office and student services to stabilize the system. Clark only closed 2 days and it was not enough. Clean up ALL account issues before you open for business.
- Workflow and travel was not set up correctly at Clark. Set up workflow in advance (e.g., travel, leave, expense approvals). Clark spent good amount of time on this, but still wasn't enough. Start earlier. More time needs to be spent configuring these and much earlier in the process.
- Only the open charges were pushed to GL from Jan 1 on. Recommend no push for future colleges. Bring over Open charges regardless. Have colleges do that work with an upload. Clark posted and then unposted.

Clark Business Office - Issues/Gaps/Suggestions

1. Need a checklist from SBCTC for what activities need to take place in Finance before go-live.
2. Need a post Go-Live checklist: Consistent setup / What do colleges need to do / What do colleges need to do at Go-Live and need to setup (e.g. create new combo codes for grants, new project ID's, buildings need project ID)
    a. Consolidate checklists in one location (Some modules had checklists, some didn't?)
3. A standard crosswalk for all colleges would be helpful (not allowing colleges to have unique values).
4. A crosswalk value change (from 011 to 421) was made by project to correct mistakes for SBCTC agency conversion. The changes were inadvertently applied to Clark as well. Caused significant issues.
    a. Project Team needs to understand requirements or requested change prior to making updates to crosswalk.

5. Cross walk reviews and Gold: How can these be locked once we review and approve so that no changes happen?
6. Sabra suggested would be helpful if ctcLink/ERP Support staff were involved in conversion (seeing data before converted). More collaboration between ERP and project activities.
7. Note: Class Crosswalks were same issue. Once blessed, make sure we don't change it somehow.
8. Need better process for tracking changes. Susan said some things would get fixed, some wouldn't. Many didn't make it all way around, and/or there would be changes throughout that process. If way to lock it in once accurate and approved (also specific to Item Types).
   - Review -> Report -> Correct -> Verify

Employee/Manager Self-Service

1. Big thing is workflow and travel. Not set up correctly. Tanya spent a ton of time on that to get it working correctly. Advice: spend more time on this and start sooner! Clark didn't focus on it until right before go-live.
2. Awareness/Understanding. Some employees said jobs/tasks were taken away. Make sure to work with people well in advance to understand the changes coming, who will do what in Employee Self-Service, Manager Self-Service. (Travel, expenses, etc.)
3. Make sure we work with and explain to supervisors. Focused training regarding employee and manager self-service. Clark folks didn't understand all the things they'd need to do.
4. Susan said need to work at executive level regarding who makes final approvals on certain things. "As a manager, these are the things you will approve in Manager Self-Service" (because they won't be delegating those online approvals).
5. Awareness/Understanding for managers regarding that level of change to business processes (who will be performing which "tasks" in the online self-service module).
   - Involve Executive Leadership in communications about manager self-service and business processes).

Grants

1. Conversion of grants didn't work well. Project staff couldn't find the project IDs that were submitted. (Tara noted a change already in place)
2. Grants were submitted, but didn't get included in the final conversion. They could not find the project ID's Clark submitted so they used generic codes.

Combo Codes

Combo Code issue due to the crosswalk value change as well (011 to 421). Had to redo. Consistency and understanding what is needed is important.

Item Types

1. Item Types were not set up correctly. ctcLink/ERP Support has been helping great. Not identifying issue until try to do something, then find out not set up correctly.
2. This is Sabra's biggest concern for future DGs.

3. Need queries available to verify information.
4. **Spend more time on Item Types!** (Sabra spent a ton of time, but there are still issues).
    - Clark suggests coming up with a way/process for ctcLink ERP Support to work with project on common things they are seeing.
    - Make sure you understand how Item Types are configured and what it means.

Other

1. Assets were not converted for Clark (or converted incorrectly?). Known issue; being addressed by project staff.
2. Student could pay but only with checks, from 10/17 when web transaction server was taken down.
3. **Testing** was done in UAT but not everything went to production (a Gold issue per SBCTC).
4. **1098T Issue** – Because of the way student finance data was converted students enrolled in winter 2019 have incorrect amounts. This is still being researched.
5. **Payment swapping** is new and something Clark is still learning about. Quick Reference Guide (QRG)

- Nightly Cashier Closing was wrong (instructions out of order?)

Queries

1. Budget Status KK – Not pulling correct data. Taking positives and turning them negative.
2. Any pulling from Treasury module; not bringing in treasury data
3. Queries – would like to have query migration list. They are there now so will be helpful for the next DGs.
4. Now have a query to see how many have activated their account
5. Sandbox for query developers before go live. The data dictionaries were blank. We were talking about opening up SVX for that, Tara told Susan.
6. Queries aren't one to one matches (query to role) ZD SF query but had email address, so had to have HR query role.

Security

Security/Roles – From Clark College

1. Continuing Education / more roles needed to serve the students than what we originally though were needed – plan stack, cashiering.
2. Security Roles / Descriptions / What does role actually do…SACR, Process Groups, PPL, Route Controls, Query Security, Need much more information about this.
3. Security Role changes, permissions. Especially when they are not communicated to the college and are just discovered.
4. Security Roles / Descriptions / what does role actually do…100% consistent naming would help – we have submitted a few tickets. A plain English version of what each role is for (like HCM has) would be really helpful.
5. Needed to do UAT with our actual roles so that all that was set ahead of time, and also SACR, etc.
6. Some ZS roles do not display all we need, but SC gives too much access

7. QGRs would be more helpful if they contained tips and tricks, best practices, WHY/impacts of doing (or not doing) something, and also what roles are needed to do a business process in a QRG. The why/impacts is especially important related to effective dating.
8. A separate document about effective dating and the impacts would be helpful.
9. Staff are confused about where we should be doing work, what the data is: UAT, SVL, production
10. 3C's – apparently need PSQ training so you can use BI publisher. We did not know that and needed to have someone take time to do this training that could have been done ahead of time. Still have little understanding of running 3C's, need a workshop for deeper dive.
11. Pillar leads need to be good communicators and folks need to know who their leads are.
12. Data validation, very short time frames (later cycle data validation/cleanup)
13. Would be helpful to have a document that explains what the default roles are in each pillar based on roles and what is auto assigned by SBCTC, and what it's based on.
14. Student workers / dynamic roles / user profile issues at go-live.
15. Access – Security access. Navigation bar. More detail on that. – **Tara mentioned adding what security roles are tied to each QRG.**
16. Milestones didn't have file mapping on the ZZ
17. U grade aren't requiring last date of attendance. Haven't submitted that ticket yet (*this was on 12/16/19*).

Campus Solutions & Financial Aid

Instruction, course/class builders

1. Need a list of all in the catalog that a college needs to touch (canvas shell, lecture lab split out, class association, "schedule class meetings" - didn't know that "easy button" so had to manually "uncombo" them all.)
    a. Clark ended up going back to work on course catalog multiple times as we continued to find out about work that needed to be done, e.g. Class associations, lecture lab hours, LMS canvas
2. Suggested a Business Process Guide (BPG) (like FinAid has) for Credentials and Enrollment Services side. All processes and best practices around effective dating. QRGs are great, but seem incomplete. No tips or tricks on effective dates and biz process types. Need to take them into a deeper path (like FinAid)
3. Cancelling a class does not cancel final exam (have to cancel separately).
4. For Course Catalog work sessions – Hand out / Checklist would be very helpful that explains the course setup in PeopleSoft (course and class). Would be helpful if each field was explained in this document – what do the options DO, what is the impact, where does the data go / what is it used for – basically information about the whole picture.
5. Which components needs canvas shell? First Clark had this checked on none, then added to all and that created issues. Business process change to collect this information that Clark was not aware of.
6. Schedule Builds needs to be connected to enrollment and CS Leads, and Continuing Education
7. Pre-requisites not releasing when class is taken – issue at Clark
8. Hold is not lifting – issue at Clark
9. Waitlist error on student side / real time / process run? May have been a swap or drop class issue.
10. Had some credentials come over twice (instead of once)
11. Datalink – didn't get everything back that put in?

12. Admissions apps that applied through legacy and processed, but then when converted over, didn't know where to find them. Weren't active applications. Converted applicants, but where do you find them? Ended up using Search Match.
    a. Tara said these should have converted. She will work with Ray re application data and where it is loading.
13. Same issues with Program Plan Stack and Logging Graduation (?). Didn't ask the question re things not converting over. For example, students that had applied in legacy didn't show up applied in PS. About 700 for Clark. And, that had to have an active Program Plan Stack for each program/cert they are applying for. If had 3 but only one active plan.
14. Many selective admissions students (Nursing, etc.) converted to PRQ plan codes. Identified it early and advised to effective-date plan to winter, but then found they had already applied for graduation.
    - Think this could have been remedied by more complete information, business process from beginning to end.

Office of Instruction – Additional Items

1. Have largest transitory population, also not our own "pillar" or module. There is a lag in impact on FWL or faculty's interaction with the system.
2. Suggesting timing the end-user training to when certain groups will start using the system. Depends on go-live date and where that falls within a quarter.
3. Class Builder needs to be joined at hip with CS and Enrollment lead. Such as Canvas shell creation. Because they have a lab and class, need 2 Canvas shells.
4. If have 3 labs to a single lecture, the lab needs to be the enrolled component. We don't think of the Canvas component. If have 3 different lab instructors, how link to same Canvas shell.
    a. Tara suggested these types of things get baked in to UAT materials (tips, tricks).
5. Didn't know lecture lab hours had to be split.
6. Cancelled class does not cancel final exam. (Cancel separately)
7. For Course Catalog work sessions – Hand out / Checklist would be very helpful that explains the course setup in PeopleSoft (course and class)
8. Need ramifications of what each field means? Class builders need to know what each field is pulling from and the effects. Definition and relational aspect of each field? (So, same as the check/uncheck directions above).

3Cs

1. Suggested adding 3Cs to Production Workshop series. Had training, overview, canvas shells, but need a workshop for deeper dive.
2. Clark not using 3Cs yet because haven't had opportunity to set them up yet. Some templates are there, but pieces missing in order to run 3Cs.
3. Clark told that SBCTC authorizes who gets access. ERP needing time to work it out. People had to go through PS Query training to get the role to do it. Would have liked to know this beforehand. For Clark that would add…maybe 2 to query managers. Enrollment, Advising – From Clark College

1. At/after go-live, have foresight that this will impact your services to students. Be realistic of the customer service component. It will add extra time due to new processes/software. Extra time to advising, enrollment – any student interactions
2. Staff no longer know that when they submit A, that B will happen in X amount of time. Can't give good timeline to students. (particularly impacts advisors)
    a. Student Services foresight to understand student impact and how long it is expected to take. For example, 24 hours, now takes 48 hours

3. Grading basis was set up incorrectly. U grades were calculating into GPA. SBCTC had to fix.
4. U grades are not requiring a last date of attendance – but they need to.
5. Had a waitlist error. When info in shopping cart, said waitlist error. They did submit a ticket. Jennifer thinks maybe swap or drop class, they were getting that error.
6. Issues with students who applied in legacy. They do not have an active application in PeopleSoft. They are also not in suspense. They are converted applications. This also impacts the data in the dashboard. Need better information about how to find these applicants and how to process.
7. Did not anticipate what data would not come over into PS – such as graduation application information
8. When students apply for graduation for multiple degrees / certificate we need to have an active plan stack for all. Many programs are set up with stackable certificates, or certificates you can earn along the way. Colleges never had the ability to have multiple EPC's – so students have not had to declare these certificates.
9. After Go-Live we were not sure if we could just add the multiple planstacks and if there would be any unintended consequences. Would have been helpful to have a workshop on this so college could be prepared.
10. Clark will encourage student s to use AAR to track their progress and use this for enrolling in classes.

Waivers

1. Waivers were set up for "pay all" but should have been term specific. This ends up paying previous terms. All of these needed to be fixed.

Tuition Groups

1. High/Low still not resolved (someone commented "need fancy equation from Brock)."
2. International Insurance was not set up (per SM)

Online Admissions Application (OAA)

1. Collected $25 fee but did not push to SF Accounting Link or GL.
2. Clark has to run a daily process (per SM)

Financial Aid

1. Financial Aid has a Business Process Guide (BPG). It is the most useful, and then QRG, and then Configuration Guides in Canvas. *Note, Fin Aid is the only area that has a full business process guide.*
2. BPG needs to be updated for FA to CS 9.2. Would be helpful to have Tips and Tricks in this document.
3. Dual Processing – has been a hard fought victory. Lack of information in one place for entire process; get in bits and pieces. Proactive in a few areas, Dual processing guide does not include SAP and PeopleSoft has SAP but no Dual Processing,
4. **Need a dual processing guide.**
5. Overall, provide better guidance, better manual for dual processing
6. Guides in both Legacy and PeopleSoft (hybrid manage, and security)
7. EPC to Plan codes crosswalks, students were not loading in, map everything for an undeclared code. Students are not loading in…CS crosswalks many EPCs (because of old EPCs) to one

plancode. For dual processing to work Fin aid need to crosswalk the plancode back top only one EPC. Clark had to set up additional EPCs in SMS for new plan codes, such as undeclared.

8. FAM award code crosswalks were not correct, not fully understood.
9. DM1002 screen. FAPSE that did not disburse in legacy.
10. Award codes in legacy (FAM) shifting to misc. code 1 and 2. Clark uses sub codes for messages and help to calculate enrollment level. This information does not crosswalk to codes, so manual cleanup necessary.
11. Dual processing is not as simple as “doing it in both places”. Also need to learn about where to find student information that needs to be used by fin aid, and need the security to see this information.
12. Need to know what to do when student names do not match between FAM and PS.
13. Disburse / Funds awarded in FAM produces checks retroactively
14. Disbursements dual processing run check calculation by term. Run Check calculation per term.
15. Negative disbursements, to post reductions manually uploading legacy EXP and Accounts in PeopleSoft
16. Guides in both Legacy and PeopleSoft (hybrid manage, and security) would be helpful
17. SAP status had to be reviewed and modified
18. Run check calc individually (per term). Need to do that in ctcLink. In Legacy, used to do it in batch. Have to do one batch for summer, then second batch for fall, then in winter, will do 3 times over…so again, changing our process.
19. Did not understand how to post reductions.
20. Didn’t disburse until a month into system. Need to plan for that.
21. Help colleges understand how they post their reductions.
22. Help people identify what screens they will be using for dual processing too. See above. Identify what comes from where (how do you hybrid-manage fin aid). Getting security set up is huge too. Some don’t have access to screens they need.
23. Tara mentioned a query where you can put in a portion of a navigational reference and it will tell you all the roles that lead to that navigational reference. Can put in a portion and it will say here are all pages.
24. **Tara offered a QRG**
25. KW1030R Interface, which tells name. Name differences between PS and FAM. ISIR = needs to be the same or it rejects. But, won’t load into PS because it isn’t matching. May need a mini WebEx to understand this, Tara said. They said they’d talked to Stephanie about it.
26. Homework Process – Realized didn’t understand it during BPFGs. Suggested need to go over biz processes again.
27. **Overall, better guidance on homework and cross-reference with other affected pillars.**
28. Testing – Some confusion re what data was used. There wasn’t always staging in advance for the testing.
29. Testing was done in UAT but not everything went to production (a Gold issue per SBCTC).

30. Frustration around UAT. It was task-based, but not biz process. Could complete the tasks, but no reference to entire process around that specific task. Need end to end picture.

OSECE – From Clark College ECD

1. Continuing education and activate students. What used to take two minutes now takes 20 minutes.
2. OSECE does not activate a student’s plan stack – need to do that manually, which Clark did not know

3. Converted Continuing Ed students need to activate their ctcLink account. They can't just use OSECE
4. Knowledge about system and processes not clear or shared.
5. Need to be in PeopleSoft to quick admit, quick enroll – need security roles to be able to do this
6. Continuing Education staff need to understand PeopleSoft and the new business process – include Continuing Education staff to all discussions about CS processes and practices.
7. OSECE is not a "separate system". You really need to know how to do all the course/class/enrollment functions in PS.
8. Need to be very involved in faculty workload (FWL). At Clark CE staff were not very involved in this process, but now they are. CE faculty pay is different than regular FWL at Clark, so it need different setup.
9. Need to have contact hours on the course. Not needed for FWL so Clark was told not to do it. However, then the FTES were not counting and have had to go back to each course and class and add in contact hours for term (so a 4 hour 1X class is 4/10 or .4 contact hours per week)
10. Clark is having problems tracking the money, SF payments, from OSECE. Would not recommend using this until this is addressed, as we can't verify where the money is going.
11. OSECE – Credit Card Payment (Prior quarters) Priority 5 and kicks it backwards
12. Collect in cyber source but not pay account, not consistent

Additional CE notes from 12-16-19 meeting

1. Continuing Education needs to understand PeopleSoft. And business process
2. If implementing OSECE, understand up front that OSECE/CE students must have a ctcLink account before registering in OSECE. (OSECE is not a standalone application).
3. Make sure Continuing Education is putting people into CampusCE.
4. Make sure CE staff are at the table for Implementation activities. They need to know ctcLink/PeopleSoft. Thinking they won't touch PS/ctcLink is a misnomer.
    a. Add Continuing Education to the table to for all CS processes and practices
5. Project (PMO) assist with this and with what "tables" CE staff should be at.
6. Worked independently before, but now spending lots of time with FIN. FWL, etc. Now work closely with other departments.
7. Added an entirely different job they didn't have (dealing with FWL).
8. Still trying to figure out how contact hours did/didn't work for Clark.
9. OSECE usability is awful for end users.
10. Finding payments aren't getting posted
11. Credit Card Payment (Prior quarters) Priority 5 and kicks it backwards. Overwriting payments. This is a priority issue as it goes backwards. This becomes a manual fix. Collect fees in cyber source but not posting to the student account/pay account. Not consistent in OSECE, random and Clark can't find a pattern.
12. Registering for classes but not showing up as registered.
13. Didn't allow any student payments.
14. They registered students … went to Legacy. Shut down transactions … If you don't shut it down, it's a moving target.
15. Concerned there isn't a way to ensure there is no fallout. Identify and clean up before closing business.

Human Capital Management

Faculty Workload

1. FWL is only module that 100% is in every pillar! Make that clear to everyone.
2. Communicate to college that processing for faculty workload and pay will take additional time. (An old half-hour job took two days). Need to have information in on time to be processed.
3. Pillar/module leads need to be good communicators and people need to know who their leads are; who they are supporting (touches all 3 pillars).
4. Do not make employee record changes (job record) once contract is approved
5. Lots of data defaulted at conversion and needed to be cleaned up.
6. Primary full time job (=0) and add a moonlight job. Helpful to put in a default moonlight job for all faculty, even if not using now. That way it is set up correctly for last minute changes.
7. Job class code controls what you see and department is what you need.
8. Include HR in FWL training
9. ECE can create new combo codes for different budgets needed.
10. Helpful to take current FQL process and make it look like PS. That way you have an easy review process.
11. Work with your HR team on definitions for job class.
12. FWL creates the need for new business processes around HR, FWL, payroll and course/class coding.
13. FWL pushes FTES to HCM, which is what is used for benefits and leave. Need to look at FTE info also when verifying, not just are they getting paid correctly.
14. Tara suggested a follow-up workshop on how to set up easier ways to set up job codes.
15. Work with HR; didn't work with HR early enough.
16. They were focused only on paying people correctly. That was good, but several people got overpaid because weren't looking at FTEs.
17. Warn people that hand-drawn checks don't sync back. Check written in payroll didn't record

Payroll

1. FMLA – Setup incorrectly accounts. Health Care – Wrong accounts
2. Unemployment surcharge not set up / BPFG needs to be included in this work/document
3. Parallel for both SF and Payroll end to end testing. Needed to see the payroll process when it hits the GL.
4. First Payroll – Any faculty that had multiple jobs, overpaid part-time job (got full pay – not just what was due for that time period) not FWL (20). Result for Clark was overpayment and faculty making payments back to the college over time (as per contract).
5. Job data issues
6. Short time period between Go-Live and when payroll needs to run is very challenging. Absence, submit time, approvals, FWL are all new, in addition to the actual payroll process, and cleanup from conversion.
7. What payments were pushed from SF to GL at Go-live, recommend no push for future colleges. Bring over Open charges regardless. Have colleges do that work.

Time and Labor / Absence / Human Resources

1. Dates are critical to converting correctly
2. Understanding what is HR and what is Payroll. Who is responsible and accountable for each part of the process? Need to understand all the parts of the process.
3. HR back office need an understanding of cross over between Manager and HR responsibilities
4. Employee Self Service Training Labs were very helpful, especially to help with payroll.

5. TAM training session in Canvas is optional and needs to be separate training, since not all colleges are using. This was not clear to staff that they did not need this training.
6. Canvas courses came out very late for Clark. So we had limited time and were not able to synthesize what we learned.
7. Manager Self Service Training Labs would be helpful to have close to Go-Live.
8. Benefits went well, however some QRGs are not correct
9. UAT for Absence Management was not testing process, so much as checking that the testing scripts could run.
10. Production formulas for AM were not updated for accrual immediately.
11. Did not get to test calculations, or see what formulas are being used. This would have been helpful for data validation.
12. Manager Self Service and HR Work Approvals has been a steep learning curve. Better once we created a lot of end user documentation. Especially understanding who gets notified and at what email.
13. Continued issues with links that managers get not working. After 24 hours the link no longer works.
14. Clark received lots of tickets and questions related to the Smoker information in self-service. Smoker on the left is the field name. Unfortunately the values are "smoker" to mean "yes I am a smoker" and then left blank to mean "no I am not a smoker". Can we change the label, or add a label for the no value?
15. Post Support team to address questions/ WebEx Support is crucial
16. Search Match – is not always working, employee instance…Student or returning employee, Bio Demo at another college
17. Manual checks (hand drawn checks) does not flow to FWL Don't cut a check – need to push from FWL.
18. Really would have benefited from end to end testing and understanding the entire employee lifecycle.

Human Resources Office

1. Employee Self Service Training Labs
2. Manager Self Service Training Labs
3. Back office understanding of cross over between Manager and HR responsibilities
4. Benefits went well
5. Confusing environments and what needs to be looked at where
6. UAT issues but was not checking but testing scripts
7. Production formulas for AM were not updated for accrual immediately.
8. Data Validation
9. Security Roles / Descriptions / What does role actually do…
10. Manager Self Service and HR Work Approvals
11. Post Support team to address questions
12. Local IT / Troubleshooting list / Cache / Personal Data / Smoker&Smoker and correct
    a. Change label opportunity
13. WebEx Support
14. WPTE came across as WCTE / WAVE 1 Old Configuration
15. Search Match – is not always working, employee instance…Student or returning employee, Bio Demo at another college (When do a search match and looking for employee, it doesn't come up in search match but if you look in the **employee instance** and it was there. More than likely, it was a student or past employee or past employee somewhere else).
16. Manual checks does not flow to FWL

17. Training Materials need to be updated. Some of questions, answers weren't in modules themselves.
18. FWL – Warn people that hand-drawn checks don't sync back. Check written in payroll didn't record that data in FWL.
19. Clark chose not to use TAM, but there was overlap of TAM in some training; TAM training session is optional and needs to be separate training
20. Suggest more time before go live for training and more advanced training!
21. Get Business Processes down. Did that work in advance, but once got into the system, it changed. Need to see the system to figure out how it worked.
22. Also, with UAT, we went from UAT to SVL to Live! Confusing to staff.
23. Have scripts for UAT for how it flows through. Not the same people. Not seeing complete full circle of training. Felt disconnected.
24. Had assumption that Absence Management would work on go live. Had to manually accrue 300 people. Was a lot of work! Ask the questions, how will this affect leave accrual, etc. Have right people in the room.
25. New classified employees were set up to accrue vacation 6 months out. Was supposed to be corrected. All teams have been helpful, just didn't have capacity to address everything.
26. Don't go live 2 or 3 days before payroll. Need time to validate the data first before that. Needed time to validate, work out kinks.
27. Accessibility continues to be a topic at Clark. Supervisors that use assisted technology are having difficulties. Will the upgrade in March help with this?
28. IT/Help Desk had a list of things to check when things weren't working. Sometimes easy fix, like browser issue.
29. How the "Smoker" status displays is confusing. Be proactive with employees regarding what they are going to see in self-service ("Smoker" field/label is there for everyone. If nothing/blank next to it, means you are NOT a smoker. If a Smoker, it says "Smoker" again at right instead of being an empty field.

Wrap-up Session

Notes from Clark College (Susan and Steering Team)

1. Having open WebEx's week 2 was helpful.
2. Clark shutdown systems about a week prior to go live so books could be closed, and all transactions processed.
3. Need a document that tells colleges what needs to happens when go live week1
4. Accessibility fixes / PeopleTools Upgrade to 8.57 – when will this happen? Code Freeze DG3 may impact changes that can happen before SG3 goes Live.
5. Accessibility – time and time sheets and approving as a supervisor are challenging for staff using screen readers. Homework is not fully understood. Would be helpful if they went over the actual homework in the BPFG sessions. Clark did not have access to PeopleSoft during these sessions so it was kind of theoretical. Need much better information about where we need to collaborate with other departments on homework.
6. UAT – need to first do staging of data before everyone comes to test. Otherwise you have lots of wasted staff time. This means the college should come up with courses / classes / students who can be used for testing. Need to understand the UAT process from end to end.
7. UAT was very task based, but not really process based. Did not test end to end so there was no understanding of flow and handoffs.

8. QRGs are not very helpful for the end user (faculty, department secretaries) as they are more SME process oriented and they leave people lost and confused – especially since some areas do not have an order to them. Clark created many documents for end users.
9. People really want to be in the systems and see the system so they can understand it a little before they go live.
10. Training - Most staff will not take the time for online training. You need to schedule time for them to come hear the information in person. Most useful once they have a system to access.
    a. Held Grading Workshops when grading started. Held workshops for Students too.
11. UAT – better documentation as we tested would have helped. Hard to start all over with a test, but you can't really just pick up where you left off in the middle of a process that did not work. The first steps in the process get lost of testing.
12. It would be helpful if data-x reports could be developed t help validate data.
13. Need a list of what is global, what is local, what is local but SBCTC does it.
14. Too many acronyms for people when we go live. People don't know what it all means.
15. Queries that are available in SVL for validation and testing need to be available in production day 1. Project staff create queries to help with conversion and validation but then they are not available.
16. Need to see the formulas for any information which is calculated. Colleges need to be able to see to understand and validate. Would be helpful if SBCTC documentation used consistent naming throughout all documentation. Becomes especially confusing for end users who have not been involved. Good example is the use of FSCM, FM, FIN interchangeably.
17. Along with consistent naming is consistent grouping. What do you group in a module, and keep that consistent across all work.
18. Colleges should do their Change Action Plans as a part of the BPFG workshops. Build in time to do the work while people are in the room. Have a note-taker in each session (your business analyst) to add information to the Plan as you go through the session.
19. Colleges, plan for Faculty specific training, Employee Self Service Training, and Student Self Service training along with open labs.
20. Make sure we work with and explain to supervisors. Focused training regarding employee and manager self-service. Clark folks didn't understand all the things they'd need to do. Need to work at executive level regarding who makes final approvals on certain things. "As a manager, these are the things you will approve in Manager Self-Service" rather than assistants doing those online approvals.
21. A query may be in one area, say Curriculum Management, but also require people to have access to student records. There is no documentation – just trial and error, or contact SBCTC.
22. Awareness/Understanding. Some employees said jobs/tasks were taken away. Make sure to work with people well in advance to understand the changes coming, who will do what in Employee Self-Service, Manager Self-Service. (Travel, expenses, etc.)

Additional Wrap-Up Notes from 12-16-19 meeting

1. Need a timeline for colleges. Who does what first? Time it out who will need to do what. Maybe even some people would be off a certain day or two, then work weekend instead.
2. CE = need to understand what roles they will need. Need to plan-stack a student, CE staff need the roles they need to serve students.
3. Security – Need a template to say definition of each role will give you access to what? Otherwise, don't know what/if any access is missing.

4. Susan/Tara said HCM (Tara) provided a “plain English” version of Security roles/definitions. Didn’t do it yet in every area. Need to do that.
5. Benefit to having roles in testing and training – more large workshops with workbooks. Q&A before workbooks turned in. Tara been working on revising QRGs. If you use this you need setup SACR, etc. This will…in the end…be in the Reference Center (Tara said).
6. DG3 “just in time” still. DG4, 5 and 6 will benefit.
7. Will Clark see Security Role changes due to LLs and DG3? Tara said yes based on what learned today. Such as view-only roles. Some work to be done.
8. Need clear understanding of who owns security at SBCTC. Susan said Johnathan confirmed he was point person for Security.
    a. Tara working with the team to create all supporting documentation, descriptions, etc. Project is still owning that piece.
9. New roles should be set up in a non-prod enviro and tested first.
10. Accessibility – Still issues. Want it to remain a top priority.
    a. Christy said significant fixes in new release. We have to look at timing of when to implement those. And, need to get college involvement in UAT. We have not completed testing for HighPoint, OSECE and OAA/new OAA.
        i. Tara working with Sandy’s team to analyze the tools upgrade, timing, etc.
11. Onboarding feature for adjuncts that didn’t make it to production yet? Tara said working on it, but it needs to be tested by ctcLink/ERP support.
12. Request from Clark to have adjunct faculty get in the system early. Pre-dating a job record so they can get into the system (without getting their payroll activated). Sounds like they need to do what Spokane is doing. How to solve for the problem. Partially addresses bullet above.
13. QRGs – Don’t feel like this is where we should be sending end users. (QRGs for faculty…end user ones listed with back-office ones. End-user QRGs could be grouped together?
14. Portal sync issue for students not getting the “student homepage” role
15. We need to know how things work. For example, formulas being used. For calculating things. Susan said we are asked for this information, but we don’t know what it’s for.
16. Would like updated query dependency sheet. (Query roles you need if you have this ctcLink role) And a list of what queries are associated with which roles? What does this role do and what does it give you access to?
17. Better organization of Training/QRGs in Reference Center. End users stuff needs to be broken out. (Expenses is an example of volume of very specific QRGs mixed in with end-user QRGs).
18. FAQs for Security folks to troubleshoot. Common troubleshooting. For example: “If you get this unauthorized error, it could be…