# ctcLink

# WORKING GROUP MEETING MINUTES

## February 1, 2023

### Meeting Recording:

https://sbctc.webex.com/webappng/sites/sbctc/recording/7414334a8488103baeec00505681604d/playback

### Co-Chairs: Chantel Black & Tara Keen

### Meeting Participants

**College Voting Members**

☐ Chantel Black, Co-Chair & Spokane Community College/CS, Absent

☒ Beth Farley, Edmonds/CS, Security, PM

☒ Charlene Rios, Big Bend/FIN

☒ Donald Denney, Skagit Valley/Accessibility

☒ Jill Hammitt, Highline/Data & Reporting, CS, SF

☒ Kathy Disney, Tacoma/CS

☐ Samantha Orth, Lower Columbia/HCM, Payroll

☒ Pat Daniels, Highline/IT, Security, PM

☒ Rachelle Russell, Skagit Valley/ CS, Financial Aid

**SBCTC Voting Members**

☒ Tara Keen, Co-Chair

☒ Carmen McKenzie, Data Services

☒ Teri Sexton, Business Operations,

☒ Dani Bundy, ctcLink Customer Support

☒ Ray Gartner, Application Services

☒ Will Durden, Education Services, Absent

**Ex-Officio/Advisory**

☒ Kyrsten Catlin, CS Core, Absent

☒ Ana Ybarra, Financial Aid

☐ Brandon Reed, Student Financials, Absent

☒ Shon Dicks-Schlesinger, Finance

☒ Brian Lanier, HCM, Absent

☒ Roger Curry, Customer Support, Absent

☒ Shelia Sloan, Security

☒ Ivy Brent, Data & Reporting

☒ Tami Whitney, QA (Testing)

☒ Christopher Soran, App Svcs/Ops, Absent

☒ Reuth Kim, PMO CS & Facilitator

☒ Christyanna Dawson, PMO FIN

☐ Sanjiv Bhagat, PMO HCM, Absent

☐ Bhuvana Samraj, Technical PM, Absent

☒ Sherry Nelson, IT Comms

# Welcome, Roll Call (00:00 – 00:04 mins)

Welcome and roll call.

# Meeting Minutes for January 18th (00:04 – 00:05 mins) – **approved by consensus**

# SBCTC Updates (00:05 – 00:17 mins)

- **Customer Support:** Dani reported the following updates:
  - **CS Core**-
    - Assisting with SMS Data Validation for Legacy Data Access Project
    - Meeting with ARC ctcLink priority workgroup
    - Transcript date fix passed testing in PQA- next step is for testing to review results and then App Services to schedule migration to production
    - Name type display on CS pages QRG is complete
  - **Financial Aid**-
    - Working with PMO to get items calendared out to move into production for Satisfactory Academic Progress (SAP) configuration
    - Working with colleges for Aid Year Rollover (AYR) activities through 2/22/2023
    - Currently testing PeopleSoft Release Patchset's (PRP's) to deliver mid February
  - **Finance**-
    - Finance team hosted FSCM College Production Support Webex
    - General Ledger combo edit rule updates
    - Working with SF to test 2$^{nd}$ Journal Set Automation
    - Accounts Payable Enhancement- Restrict Bank Access to BU in AP
  - **Human Capital Management (HCM)**-
    - SOGI implementation- currently working with Data Services on field mapping
    - Implementation of timesheet update for multiple jobs with same descriptions
    - Payroll Streamline Process and PSHUP file edits being deployed
    - PayRun ID configuration for 2023
  - **Student Financials**-
    - Testing out a new sequencing set up for the SF to FIN GL job processing
    - Running Start enhancement- Spring deadline messages sent out to colleges who have not implemented (7 colleges)
    - Working with PMO to start TouchNet meetings
  - **Training**-
    - Provided 8 different cyclical/workshop type trainings; partnering with all functional teams and professional development
    - Working with subgroup on diagramming tool replacement for LucidChart
    - Meeting with the functional teams to discuss and plan for necessary updates and trainings
    - Met with colleges on tickets
  - **General Support Activities**-
    - All pillars responding to tickets
    - Working with Application Services on technical solutions and trouble-shooting
    - Holding Webex meetings for special topics to get resolution on issues
    - CS, HCM, FIN and PMO continue to investigate, test and build project plan for Oracles delivered preferred name ability in HCM modules
    - Ongoing training content being created for new trainings to be offered throughout 2023
    - Updating QRGs based on user feedback filed in tickets or functional analyst collaborative efforts

- **Environments**:  Ray reported no scheduled downtime in the near future.  Primary recent activity has been the upgrade for People Tools 8.59. It is installed in the lower environments to perform analysis and retrofit work, which is progressing as expected. Ray confirmed PSHUP went to production Thursday, Jan. 26, 2023. HCM 23A tax update is scheduled for production evening of 2/2/2023. Have 2 Financial Aid PRP's that are in the works, they need to be in before the 8.59 code freeze. PCD environment refresh scheduled for 2/6/2023 which is normal monthly refresh. Also working on draft of yearly production release calendar. Would like to review the draft with WG at 2/15 meeting.

- **Accessibility:** Christopher reported they are currently working through the OAAP accessibility bug; 3rd party vendor reviewed the online admissions portal and provided the findings to Kastech to implement those changes. Making good progress collaborating with Kastech on the many fixes needed. Also, there have been some accessibility bugs in financial aid PRP. Also some accessibility issues in People Tools 8.59. Accessibility issues also found in HCX 22.4 which need to get submitted for review to HighPoint. State Board Accessibility forums is where you can find all the updates along with slide decks from the monthly meetings.

- **Security:** Shelia reported they are hard at work supporting SOGI in HCM and in CS Core they have unit tested the Advisor Note access. Securing Advisor Note access by institution. Next, securing report category access by institution, which is exciting news coming.  Also supporting the People Tools upgrade along with supporting the colleges as they implement multi-factor and mass loads. If colleges are doing mass loads (roles for many users), security is loading for them. Team is prepping docs and timeline for the next rounds of masking, which may be presented to WG in near future. Security is also supporting the Preferred Name initiative as well.

## Enhancement Requests - Updates on Pending/Approved-Not Yet Deployed (00:18 – 01:07  mins)

- Amy and Tara shared the updates for those Enhancement Requests listed in the following QRG- Reference Center Link -Enhancement-Request-Status. The intent of this presentation is to provide you the information that you can then react to and communicate back to us identifying any item you deem to be lower in the queue than it should be or have clarifying questions. Each pillar is represented and available to give further details on the status.
- As of 2/1 meeting there are 38 in Pending status and 14 (slide showed 13 but was corrected once math was checked) in Approved-Not Yet Deployed across all pillars. Updates per pillar/module will be given at each WG along with Amy updating the QRG to correspond with presentation. This is to ensure all college staff can view the information being disseminated bi-weekly.

## No New ERs

## Requirements Traceability Matrix (01:07 – 01:17 mins)

February 1, 2023 – approved for descope

- HR37 - Human Resources (Compensation) "Approve/Block Appointments" - [Slated for Possible De-Scope]

## WG Charter Wording Update for Voting by Ex-Officio Members (01:17 – 01:21 mins)

- As reported in last meeting, STAC gave their perspective on proxy voting. We have now put language in the charter which documents "If a voting member is unable to attend a meeting, they may review the meeting materials and cast their vote by proxy. Proxy voters may be <u>any</u> attending Working Group member, either voting or advisory, trusted by the voting member to represent their interest in the meeting. Proxy voting rights may not be given to anyone outside the Voting or Ex-Officio/Advisory members of the Working Group."
- Amended charter approved by consensus and will be sent to STAC for final approval.

## SAP Special Session Update (01:21 – 01:24 mins)

- Had last 4 of the special sessions on January 24.
- Updated the SAP Information Guide to reflect items we believe we have received clarity on or requirement clarification.
- Now working on doing the groundwork for completing commitments, which were online materials for local configuration and programming logic along with drafting the solution design documentation. This will help colleges see in word and picture form what we believe we agreed to in terms of solution design approach. Then also work with CS Core team on two of the items on the list to facilitate conversations between the financial community and the enrollment services community on things like grade scheme and the impact on attempted credits and GPA.
- Team has commitment to provide some information back out to reflect what is had in terms of agreement on solution design from financial community so development work can begin.

## Mindful Minute (01:24 – 01:26 mins)

- William Durden works with the Council for Basic Skills (which is under the Instruction Commission). They have a committee that is looking at the ER process this year and the long list of items they have to see what is top 1, 2 or 3 and what it would look like to go through the process. Will is serving as a resource and giving guidance, such as, sharing links of ER documentation and the basics to help them through the process.

## Action Item Review/New Business/Closing (01:26 –01:28 mins)

### Action Items

WG Charter proxy voting amendment was approved by STAC. Charter edited and posted to website (completed) ctcLink Working Group Charter (revised Feb. 6, 2023)

*Future Meetings:*

- February 15, March 1, March 15

*Future Business (none)*