ctcLink

WORKING GROUP MEETING MINUTES

April 5, 2023

Meeting Recording:

https://sbctc.webex.com/recordingservice/sites/sbctc/recording/64e848f7b601103bbf8b0050568198a4/playback

Co-Chairs: Chantel Black & Tara Keen

Meeting Participants

College Voting Members

☒ Chantel Black, Co-Chair & Spokane Community College/CS,
☒ 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, Absent, Roger voting
☒ Ray Gartner, Application Services
☐ Will Durden, Education Services, Absent, Carmen voting

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, Absent
☒ Ivy Brent, Data & Reporting
☒ Tami Whitney, QA (Testing)
☒ Christopher Soran, App Svcs/Ops, Absent
☐ Reuth Kim, PMO CS & Facilitator, Absent
☒ 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 March 15, 2023 (00:04 – 00:05 mins) – approved by consensus

SBCTC Updates (00:05 – 00:17 mins)

- **Customer Support and NEW Enhancement Request Process**: Dani reported the following updates:
  - **CS Core**-
    - PeopleTools 8.59 testing
    - CampusCE project descoped items testing and Search/Match testing
    - Production Workshop planning for AARs and Enrollment Requirements
    - Legacy Transcripts testing for the new tool
    - ER 180 – Letter Codes deployed
  - **Financial Aid**-
    - Working with PMO to review Solution Design Document for Satisfactory Academic Progress (SAP) configuration
    - Working on requirements gathering and timeline for Mass Packaging updates
    - ER 137 – Use of FA Keyword field for IPEDS, currently in development with Data Services
  - **Finance**-
    - The Finance team hosted a FSCM College Production Support Webex
    - Functional Analyst are working on editing Regression Test Scripts and reviewing Image 47 Oracle notes to prepare for the October system update
    - Functional Analyst are working on PeopleTools 8.59.13 testing
  - **Human Capital Management (HCM)**-
    - Processed 1771 W2C Forms and paychecks for a college
    - LTC testing and configuration
    - ER 181, - Preferred Name in HCM - UAT is scheduled for 4/6/ and implementation is scheduled for 4/13, Will be presented to WG on 4/19/2023
    - ER 171 – Required Absence Reason for LWOP Leave type will be deployed 4/1/2023
  - **Student Financials**-
    - Running Start – All colleges completed!!
      - ER 135, is now complete
    - Additional meeting coming for Alternative Loans global process
    - ER 159 – Item Type Security, testing is open and progressing in PCD
    - SF team is working with Business Operations on State Audit
  - **Training**-
    - Provided 15 different cyclical/workshop type trainings, partnering with all functional teams and professional development
    - Prepping training content for upgrade to PeopleTools 8.59
    - Continue to work on trainings; scheduling, preparing, delivering and post–training follow ups
  - **General Support Activities**-
    - All pillars responding to tickets
    - Working with Application Services and Data Services Enhancement Request analysis and development efforts
    - Holding Webex meetings for special topics to get resolution on issues
    - 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
    - Working with Application Services and Data Services Enhancement Request analysis and development efforts

- **Enhancement Request Status-**
  - [New Enhancement Request Status Page](#)
  - [New ctcLink Enhancement Request Webpage](#)

  - NEW Enhancement Requests:
    - ER 185 – (FYI) Combo Edit Rules Update
    - ER 186 –(FYI) Global Change to Asset Profiles
    - ER 187 – (FYI) Global Change to GL Journal Source
    - ER 188– (FYI) Global Change to Payment Terms
    - ER 189 – Stale Dating Checks
    - ER 190 – Customization of ACH Payment Advice
    - ER 191 – Set Supplier Location Procure to Pay at Higher Level
    - ER 192 – Add Supplier Email Address to PO Forms
    - ER 193 – Second Journal Set
  - Deployed Enhancement Requests:
    - ER 180– College Specific Letter Code Values
    - ER 135 – RS Billing Unit Update to Self Service Tuition Calculation

Dani's slide deck is below:

Customer Support
updates 04052023.pp

- **Environments and Production Release Calendar** -Ray reported the following:

  - PCD Refresh from PROD was completed April 3.

  - PeopleTools Upgrade to 8.59- **Saturday, April 29.** Anticipating a number of hours. *Partial Code Freeze is 3/14 to 4/29*. This does not impact query migrations or sequel code, just code changes.

  - PeopleTools 8.59 SIT results as of 4/5 morning report:

    - CS- 56% Passed
    - FIN 84% Passes
    - HCM 64% Passed

- **Accessibility**: Christopher reported the following-

  - **OAAP-**

    - The IOVD of the accessibility fixes that went to production on March 11 is posted on the ctcLink Accessibility page.

  - **PeopleTools 8.59.21-**

    - Reviewing accessibility fixes and we will be publishing an accessibility IOVD at a later date.

- **Security**: Shelia reported the following:

  - **CS Pillar**

    - Advising Notes – Secure by Institution UAT in Progress, PROD release April 13th.
    - New Local Security Role grant roles will be delivered at the same time as the new

Advising Notes Roles.
- Beginning development on new Report Definition roles by Institution.
- Masking is ready to develop for Second Round but is on hold until some of the other priorities are farther along
- PeopleTools Testing
- Segregation Of Duties Query is in Production!
- CampusCE Testing
- Item Type Security Testing

- FS Pillar

  - New Local Security Role grant roles move to Prod April 13th.
  - Masking is ready to develop for First Round.
  - PeopleTools Testing
  - Several upcoming role changes coming, they will be announced over listserv.

- HCM Pillar

  - New Local Security Role grant roles to Production April 13th
  - Masking is ready to develop for First Round.
  - PeopleTools Testing
  - Automated offboarding (all pillars) - waiting on development resource.

Application Services slide deck is below:

Application Services
Update - Working Gro

Enhancement Requests - (00:17 – 01:06 min)
Formal ER's

- ER 189 – Stale Dating Checks - approved

- ER 190 – Customization of ACH Payment Advice – *tabled-revising ER for WG vote via email*
- ER 191 – Set Supplier Location Procure to Pay at Higher Level – approved-recording vote as it stands, 9 for, 3 against, 1 abstained
- ER 192 – Add Supplier email Address to PO Forms – approved as amended *Placement of Supplier email under Supplier information
- ER 193 – Second Journal Set - approved

FYI Items

- ER 185 – (FYI) Combo Edit Rules Update -
- ER 186 – (FYI) Global Change to Asset Profiles –
- ER 187 – (FYI) Global Change to GL Journal Source - *edit made to Description during meeting-*Remove* was changed to *Inactivate* GL Journal Source "ADJ" and add GL Journal Source "AC".
- ER 188 – (FYI) Global Changes to Payment Terms

Requirements Traceability Matrix (01:06 – 01:12 mins)

April 5, 2023 – *De-Scope Items*:

- [TF1 - Trust Funds (General)](#) – approved
- [TF2 - Trust Funds (General)](#) – approved
- [TF4 - Trust Funds (General)](#) – approved
- [TF9 - Trust Funds (General)](#) – approved
- [TF15 - Trust Funds (General)](#) – approved
- [TF16 - Trust Funds (General)](#) – approved
- [TF21 - Trust Funds (General)](#) – approved

Mindful Minute (01:12 – 01:13mins)

No reports

Action Item Review/New Business/Closing (01:13 – 1:14 mins)

Action Items:

- Tara/Amy will work with Shon after ER190 revision to send out to WG for a vote via email

Future Meetings: April 19, May 3

Future Business (none)