![ctcLink logo]

WORKING GROUP MEETING MINUTES

April 19, 2023

Meeting Recording:

https://sbctc.webex.com/recordingservice/sites/sbctc/recording/c49fc86ec101103bbc5600505681b736/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, Absent, Tara voting
☒ 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, Kyrsten voting

Ex-Officio/Advisory
☒ Kyrsten Catlin, CS Core
☒ Ana Ybarra, Financial Aid
☒ Brandon Reed, Student Financials
☒ Shon Dicks-Schlesinger, Finance
☒ Brian Lanier, HCM
☒ Roger Curry, Customer Support
☒ 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
☐ Bhuvana Samraj, Technical PM, Absent
☒ Sherry Nelson, IT Comms

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

Welcome and roll call.

Meeting Minutes for April 5, 2023 (00:04 – 00:05 mins) – approved by consensus

SBCTC Updates (00:05 – 00:25 mins)

- **Customer Support:** Dani reported the following:

  - **General Support Activities-**
    - All pillars actively testing PeopleTools 8.59
    - 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

  - **PeopleTools 8.59 Documentation-**
    - New Quick Reference Guides (QRGs) in [ctcLink PeopleSoft Fundamentals](#) section
      - Navigating PeopleSoft - Using the Home Page
      - Navigating PeopleSoft - Using the NavBar
      - Navigating PeopleSoft - Adding and Editing Favorites
      - Navigating PeopleSoft - Notifications Panel
    - Image Overview Document (IOVD)
      - [PeopleTools 8.59 Update Overview](#)
      - [PeopleTools 8.59 Accessibility Update Overview](#)
    - Q & A dates
      - [PeopleTools 8.59 Q & A Session 1](#)
        Thursday, April 27, 2023 2:00 pm | 1 hour | (UTC-07:00) Pacific Time (US & Canada) [Join Session 1](#)
      - [PeopleTools 8.59 Q & A Session 2](#)
        Friday, April 28, 2023 10:00 am | 1 hour | (UTC-07:00) Pacific Time (US & Canada)[Join Session 2](#)

  - **Fraudulent Applications/Accounts-**
    - Met with a sub-group put together by College Collaboration Group to discuss issue. It was decided that some work needed to be done internally (SBCTC) in order to provide guidance and communicate responsibilities to the colleges. SBCTC is addressing in the following ways:
      - Memo going out to Presidents and listservs week of April 24th
      - Official Institutional Practices and Reporting Responsibilities Guide
      - *NEW Website, Reporting Forms and Quick Reference Guide
    - Additional Reporting Requirements for ANY Monetary Loss
      - [State Auditor's Office](#)
      - SBCTC Business Operations Reporting Form
      - [Department of Education Office of Inspector General](#)

  - **Enhancement Request Status-**

    [Enhancement Request Status Page](#)

[ctcLink Enhancement Request Webpage](#)

- Deployed
  - ER 177 – Required Absence Reason for LWOP Leave Type
  - ER 188 – (FYI) Global change to Payment Terms
- Canceled
  - ER 187 – (FYI) Global Change to GL Journal Source
    - Going to be combined with ticket 157584
  - ER 199 – Disable PO Price Edit Warning
    - Local configuration, not global

Customer Support slide deck is below:

Customer Support
updates 04192023.pp

- **Application Services:**

  - **Environments/Activities** -Ray reported the following:

    - PeopleTools Upgrade to 8.59- **Saturday, April 29.** This impacts all pillars therefore downtime is 7:00AM – 8:00PM. Canvas will be available but users need to access directly as the ctcLink portal will not be an option. Communication for this downtime was sent out on the ctcLink Alerts listserv last Monday.

    - *Partial Code Freeze is 3/14 to 4/29*. This does not impact query migrations or sequel code, just code changes.

    - Work activity related to 8.59 upgrade:

      - PDV migration completed 3/14
      - PTS migration completed 3/22
      - PQA migration in-progress to be completed 4/19

    - PCD Refresh from PROD including 8.59 upgrade- Monday, May 1st. PCD will be down most of the day.

    - PeopleTools 8.59 SIT went from 3/28 through 4/13. Below are the results from morning of 4/18:

      - CS- 99% Passed (fix in place for issue and will be re-tested)
      - FIN 100% Passed
      - HCM 98% Passed (fix in place for issue and will be re-tested)

Biggest challenge thus far with 8.59 upgrade is related to Search bar functionality. It has been added to the top of the page; however, is not functioning as advertised and returns either unclear results or invalid URL navigation. Search bar can be configured as Standard Search or Suggestion Search. With Standard, results returned are somewhat of a random order and there appear to be duplicates in some cases. Also, users may see results but they don't have the navigation security. With Suggestion, it should display a list of the users most frequently accessed pages. This search seems to work most of the time but in some cases when trying to navigate to one of the result pages, users get invalid URL. Bottomline, neither of the options are acceptable therefore a ticket has been opened with Oracle. While waiting for the response, the technical team is working to troubleshoot to come up with a better solution. At this point, the recommended workaround is to configure

the Standard Search to display zero results, which mirrors 8.57 functionality. When you click Search bar and hit the magnifying glass or enter key, it will display 8.57 results.

- **Accessibility** -Christopher reported the following:
  - **Enter Time-**
    - On the Enter Time page, when switching between Elapsed time and Punch time jobs, the focus lands on the back button instead of staying where it should. Oracle agrees this is an issue and is working on a development solution.
  - **PeopleTools 8.59-**
    - In "My Preferences" you can add Screen Reader Mode to the Actions menu.
    - You can enable screen reader mode for one session or have it persist.
    - Increased Color contrast of file attachment drop area border.
    - Changes on Component Search Pages and Prompt Lookup Search Pages
    - When Search button is pressed and no matching values return, the text "no matching resulting were found" was not read by assistive technology and now it is.
    - Prior to Tools 8.59, the grid header button did not announce that it was a sort button. This issue is corrected in 8.59.
    - Prior to Tools 8.59, if user selected the ESC button on the keyboard it will close the grid action menu but doing so refreshed the page and the user was taken back to the top of the page. In Tools 8.59 ESC button closes the popup menu and the focus remains on the same action menu grid icon.
    - Prior to Tools 8.59, in Query Manager or Viewer page screen readers never read the criteria "begins with" even when user tabbed back. This issue is fixed in Tools 8.59. Criteria "begins with" is read along with the search field value.
- **Security**: Shelia reported the following:
  - **CS Pillar**
    - Advising Notes – Secure by Institution Released to PROD and the New Local Security Role grant roles in all pillars are in PROD as well.
    - 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
    - Item Type Security Testing
  - **FS Pillar**
    - Masking is ready to develop for First Round.
    - PeopleTools Testing
  - **HCM Pillar**
    - 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 - (00:25 – 01:26 min)
Formal ERs

- ER-9 HR Core Add Additional Fields to Self Service Compensation History -approved by consensus – Melody Matthew's presentation is below:

HCM ER 009 -
Additional comp info

- ER-150 ctcLink Transmission File to DRS Inaccurately Reports Retro Pay Increases - approved by consensus
- ER-181 Preferred Name Implementation - approved by consensus – Brian Lanier's presentation is below:

Preferred Names
Release Process for Co

- ER-190 Customization of ACH Payment Advice-*Revised* - approved by consensus
- ER-200 PO Auto Sourcing – Business Unit Required Default - approved by consensus
- ER-111 Student Facing Class Search - approved by consensus – Rebecca Clayton's presentation is below:

WG Enhancement
Request #111 - ARR [

FYI/Mandated Items

Accounting and Business Services:

- ER-198 Finance Activate New Accounts
- ER-201 Asset Profile Updates

FA-SAP:

- ER-194C (3 of 19) SAP MAXT with Developmental Credits over 45
- ER-194O (15 Of 19) SAP Repeat Query for Variable Credits
- ER- 194P (16 of 19) SAP Query after Graduation

FA-Mass Packaging:

- ER- 195A (1 of 5) Prorate WCG Award Based on FA Load-Mass Packaging

Requirements Traceability Matrix (01:26 – 01:28 mins)

April 19, 2023 – *De-Scope Items*: ALL Approved by Consensus

- TF29 - Trust Funds (General)
- TF32 - Trust Funds (General)
- TF35 - Trust Funds (General)
- TF36 - Trust Funds (General)
- TF41 - Trust Funds (General)
- TF42 - Trust Funds (General)
- TF47 - Trust Funds (General)

Mindful Minute (01:28 – 01:33mins)

- Beth and Pat shared that they discussed the *RTM* survey they created made up of items from all pillars deemed as *Requirement Clarifications Needed* to College Collaboration Group last Wednesday, April 12. These surveys were sent out to the members late Monday, April 17, to give a once-over and provide feedback rather than bring 1, 2 or 3 at a time to Working Group, for efficiency purposes. This gives the colleges an opportunity to highlight any items that jump out to them as needing more conversation before being moved forward to a future De-Scope vote. They are not asked to provide those thoughts at the time of survey submission, just identify those that jump out at them. The survey is broken into couple week segments so colleges can gather SMEs to have the conversations or move through them in the way that is most conducive for sufficient feedback. Colleges have until the end of July to get through entire list. Those highlighted items will then be brought to the State Board to engage with the colleges to get more needed information in order to make a better-informed decision on whether an Enhancement Request is needed to keep it moving or whether it can be moved to De-Scope vote at a future Working Group meeting.

Action Item Review/New Business/Closing (01:33– 1:34 mins)

Action Items:

- Amy will check links in agenda and email to verify they can be opened by those outside SBCTC.
- Brian/HCM Support Team will create a QRG for Searching by Preferred Name OR Legal Name.
- Brian will reach out to set up a meeting with Samantha Orth at LCC regarding business processes related to ER181 questions.

Future Meetings: May 3, May 17

Future Business (none)