ctcLink

WORKING GROUP MEETING MINUTES

April 3, 2024

Meeting Recording:

https://sbctc.webex.com/webappng/sites/sbctc/recording/9f8d727dd409103cafd356d25d94f958/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, Seattle District/FIN
☒ Donald Denney, Skagit Valley/Accessibility
☒ Jill Hammitt, Highline/Data & Reporting, CS, SF
☒ Kathy Disney, Tacoma/CS
☐ Samantha Orth, Lower Columbia/HCM, Payroll, Absent
☒ Pat Daniels, Highline/IT, Security, PM
☐ Rachelle Russell, Skagit Valley/ CS, Financial Aid, Absent, Donald has vote

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, Kyrsten has vote

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, Absent
☒ Shelia Sloan, Security
☒ Ivy Brent, Data & Reporting
☒ Tami Whitney, QA (Testing)
☒ Christopher Soran, App Svcs/Ops
☒ Amy MacNeill, PMO Coord. & WG Facilitator
☒ Christyanna Dawson, PMO FIN
☒ Bhuvana Samraj, Technical PM
☒ Sherry Nelson, IT Comms

Welcome, Roll Call (00:00 – 00:03 min)

Welcome and roll call.

Meeting Minutes for March 20, 2024 (00:03 – 00:04 min)– approved by consensus with correction of date

SBCTC Updates (00:04– 00:17 min)

- **Customer Support**: Dani had no updates from last meeting as things are still moving along as expected:

- **Application Services:**

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

    - PeopleTools 8.59.21 PTS Thursday, February 29, 2024 – In Progress:
      - SIT Status:
        - FIN 99%
        - HCM 97%
        - CS 99%
    - PeopleTools 8.59.21 PQA scheduled for Tuesday, April 9, 2024
    - FA PRPs 2.1 -2.5 FAFSA Simplification – Planned Oracle Release will be mid-late April. Planned Production Release Tuesday, June 6.
    - Ray shared ctcLink Annual Release Calendar. Please review for approval on April 17.
    - PCD Environment Refresh completed for Monday, April 1, 2024
    - TRD Environment Refresh scheduled for Friday, April 5, 2024
    - PeopleTools 8.59.21 PRD scheduled for Saturday, April 27, 2024

  - **Security –** Shelia Sloan presented the following:
    - SASI Project –Met with Advisory Team and covered the solution design document for Masking Data and Shell roles for Third Party Access. Working on User Access Request with Approval Workflow Next.
    - New MFA role went into production last night to remove security questions and email from MFA options for users that are identified by the local colleges.
    - HCM Security lead working with HCM team to support Onboarding project (HR onboarding not security). UAT coming soon
    - PeopleTools Project Support
    - Testing changes to AYA User account for Name searches. Reset Changes on Hold until after ER request discussed.
    - Masking in Finance in development

  - **Accessibility -** Christopher Soran reported the following (please refer to slide deck for visuals):
    - Finance - Express Bill Entry Template page.

      - The screen reader user cannot access any of the checkboxes on the Charge Details tab of the Configure Bill Line Grid Area. On the other tabs in the Configure Bill Line Grid Area, the checkboxes are accessed by the screen reader but the labels are not read by the screen reader so the user does not know what to check.
      - Oracle is developed a fix that was planned to be delivered in Finance Image 47 but got pushed to image 48.
      - We will be implementing this fix in October 2024.
    - Calendar Widget
      - Previously you were unable to use the arrow keys to change the calendar and month dropdowns on the calendar prompt. That was fixed when we went to PeopleTools 8.59.14 last year.

- HCM Time Pages
  - Focus goes to banner region after user interacts with calendar widget or previous button or next button. Focus should remain on the control that is selected.
  - We opened an SR for this issue.
  - Provisional fix was given by Oracle which is currently in testing phase.

Application Services slide deck is below along with Release Calendar:

Application Services Update - Working Gro

ctcLink Release Calendar 2024 DRAFT

Enhancement Requests – (00:17 – 00:45 min)

Formal ER's –
Teri Sexton and Brian Lanier, SBCTC, presented the following:
ER 219 - Automation of adjustments to vacation sick time donations for Shared Leave – Approved by Consensus –
Maria Rivas and Jessica Berry, Bellevue College, presented the following:
ER 262 - Faculty Contract Content Visibility- Approved by consensus
Kathy Disney, Tacoma Community College, presented the following:
ER 269 - Security account reset capabilities - Approved by Consensus with the dependency that a Business Process be established and brought back to WG before implementing in production.

FYI/Mandated ER's –
Teri Sexton, SBCTC, presented the following 4 FYI's:
ER 270 - (FYI) New Project Types needed in Project Costing
ER 271 - (FYI) Add missing Fund 573 for AM Funds
ER 272 -(FYI) Updated Rules
ER 273 - (FYI) 2 New Accounts needed for Salaries & Wages

ER Pause Period Update – Pat, Beth and Dani (00:45 – 00:52 min)

Pat reported started April 1st and ending June 1st.

Teri asked about an item that she believed was in flight which she is presenting again at cCCG next week. Her concern about timing for one of her items that has May timeline/urgency based on Pause Period. Dani clarified ER is not In Flight, but up for review and going to be going through the process.

PMO Update – Christyanna and Tara (00:52– 01:03 min)
- SASI
  - **In Progress:**
    - Finalized Business Process Steps
    - Reviewed Solution Design for Work Packages – Narrowed down to 12 Work Packages
    - Draft Solution Design Documents on Information Guide
  - **Up Next:**
    - Prep for Solution Design Sign-Off
    - Commence Development

- **Resources:**
  - Shelia Sloan at Ssloan@sbctc.edu or Tara Keen Tkeen@sbctc.edu
  - Guide Link: *SASI* Project Information Guide
- **TouchNet** - the product that was chosen as solution for ER 41 to address PCI compliance
  - TouchNet Vendor Discussions
    - PMO & TouchNet Closing in On Schedule for Proof-of-Concept Test
    - Thank you to all of those that responded to the email was sent out to the BAC/BAR listserv. Colleges are still able to submit a response.
    - State Treasurer's Office – Processor Requirements & Feasibility Study
      - PMO/Business Operations and TouchNet Representative meet with the Treasurer's office on Friday to review expectations
    - Test Environment Built – Awaiting TouchNet Data Gathering/Configuration
    - **Next Up:** POC Testing
      - **POC Schedule Breakdown by Feature**
      - Student Account Center
        - Data Gathering Phase
        - Test Installation / Configuration Phase
        - Training Phase
        - User Acceptance Testing (Test Environment)
      - Payment Client
        - Data Gathering
        - Test Configuration
        - Training Phase
        - User Acceptance Testing
      - Point of Sales (POS) Client "*card readers*"
        - Data Gathering
        - Test Configuration
        - Training
        - PoC Testing (Internal + College Engagement)
      - Credit Card
        - Test Configuration
        - PoC Testing (Internal + College Engagement)
      - ACH (eChecks)
        - Test ACH Configuration
        - PoC Testing (Internal + College Engagement)
      - Payment Plan (Single College Opt-In)
        - Data Gathering
        - Configuration Phase
        - PoC Testing (Internal + College Engagement)
  - Resources:
    - Christyanna Dawson at cdawson@sbctc.edu or Brandon Reed breed@sbctc.edu
    - Guide Link: TouchNet Project Information Guide
- **LACES** (WABERS REPLACEMENT)
  - **In Progress:**
    - Finalize Requirement Discovery
    - Inform User Group (colleges) of LACES fields
    - Review configuration value options with colleges
    - Internal Testing began 03/18/24
    - College Testing begins 04/01/24
  - **Up Next:**
    - College Engagement Period begins 05/06/24
    - New Go Live Date 07/01/24

- **Resources:**
  - Scott Toscano at Stoscano@sbctc.edu or Tara Keen Tkeen@sbctc.edu
- **Other Projects** Preparing to map AFRS Values to FDM Model using Oracle EDM Tool in collaboration with Oracle Consulting.
  - **OneWa** - Preparing to map AFRS Values to FDM Model using Oracle EDM Tool in collaboration with Oracle Consulting.
    - Requirement Gathering – Materially Complete
    - Testing Strategy – Test Plan Drafted
    - Configuration/Development - In Progress
  - **Common Business Processes** – Core Team Working Internally To: Define Vision Statement & Outcomes, Draft Engagement Plan, Build Project Schedule and Start Stakeholder Analysis and RACI.
  - Planning & Budgeting Cloud Solutions (PBCS) - 3 schools (LW Tech, Shoreline, & Yakima) have volunteered to Go Live in January 2025.

Please see slide deck presented below:

PMO Project Update
04_03_24.pptx

Mindful Minute – (01:03 – 01:09 min)

Rachelle Russell, FA rep from Skagit Valley is stepping down as she no longer can fulfill WG duties based on other work commitments. There were two options discussed:

1. Select from prior nominations (received about 18 months ago)
2. Ask colleges to submit new nominations to select from

After the group discussed options, there was a vote, and they were all for Option 2. No one voted for Option 1.

We will follow a similar process as before sending out a communication asking for nominations.

Also, after group discussion, it was determined that we will be meeting April 17.

Action Item Review/New Business/Closing

Action Items:

- **Vote on ctcLink Annual Release Calendar Ray provided today at the 4/17 meeting**
- Draft/ Revise the nomination form process and generate that communication
- Discuss ER Pause Period and timeline at 4/17 meeting

Future Meetings: April 17, 2024 and future meetings will be discussed at this time

Future Business: None