COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

ctcLink

COLLEGE ROLES, DEPARTMENTAL DEPENDENCIES & ALIGNMENT

A MODEL FOR CTCLINK TRANSITION AND SUSTAINABILITY

Table of Contents

Introduction

ctcLink brings with it a new way of doing business and serving students. As each college moves through the implementation process, building a permanent team of local ctcLink experts and having a local governance structure in place will go a long way to ensure ongoing success with ctcLink — from implementation, to go-live and well beyond.

This document is intended to assist colleges in understanding the level and type of support needed once the ctcLink system is in place. Many of the roles will look familiar as they directly align with those recommended for the implementation phase. The goal is to provide guidance for colleges to better understand which ctcLink roles and responsibilities are permanent and recommended to be in place at each college to ensure ongoing success in using ctcLink to its fullest to serve students and help faculty and staff realize all the benefits of the ctcLink system.

- The first section provides an overview of lead roles, including expectations of skill levels and recommendations for both the type of employee and their ideal location within the organization.
- The second section outlines a local governance structure (Change Control Board) and opportunities to align roles.

Please note: It is up to each college to determine how to fill these roles. It could be a combination of new roles/positions, a shift in existing roles, sharing and/or changing specific duties among existing staff to align with ctcLink business processes, and implementation team members continuing their new role post go-live. Each college will determine how to best support the new ctcLink system.

Functional Analysts/Business Analysts (per pillar)

The college ctcLink Functional Analysts are responsible for being an authority in their area of specialization (PeopleSoft pillar) — Campus Solutions (CS), Human Capital Management (HCM), Finance (FIN) — and can analyze and deconstruct complex requirements of the system for optimal function.

The Functional Analyst:

- Troubleshoots system issues at the college level, working with ERP Support and disseminating information to college staff
- Will serve as a liaison between different pillar functional analysts in relation to the integration of the system
- Monitors performance, discovers variances and proposes necessary actions to mitigate potential risks
- Prepares technical manuals, system documents and other technical resources at the local college level
- Coordinates with the Security Lead and Training Lead to facilitate system updates, as well as onboarding new employees

This role is necessary early in the deployment schedule, throughout the duration of the implementation, and is key to your success after Go-Live. The Functional Analyst role is required through all phases of the implementation to build trust and relationships with the pillar subject matter experts (SMEs). It is critical the Functional Analysts are part of the implementation to be able to participate in configuration and training sessions.

This is an ongoing, long-term role, as the need for the Functional Analysts will always exist within the pillars of PeopleSoft.

Organizational placement recommendation

- Varies by pillar (HCM, CS and/or FIN)

Skills needed and/or developed through Implementation Activities

- Thorough knowledge of the area of specialization (pillar)
- Analytical and investigatory skills and strong working knowledge of other pillars due to the interconnectedness of related tables
- Ability to make decisions based on long-term effects for the project
- Outstanding communication skills with the ability to communicate ERP security-related concepts to both a highly technical audience and to business-oriented leaders
- Working knowledge of data and process modeling
- Familiarity with SQL and reporting
- Strong communication, verbal and interpersonal skills
- Excellent organizational and presentation skills

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Accounting course(s) for finance pillar
- Core Microsoft, Excel, SQL
- Analytical and research skills courses
- Courses for business process documentation

Optional Training

- Oracle University training https://education.oracle.com/home

Reporting Lead

The college ctcLink Reporting Lead is the responsible point-of-contact for SBCTC Data Services on reporting-related topics (e.g. training and maintenance). ctcLink Reporting Lead responsibilities include:

- Authorizes which college staff are designated Query Developers
- Enforces the query development life cycle and prioritizes SBCTC report/query development requests
- Serves as a member of the Query Governance group

This is an ongoing, long-term position as the need for new reports and queries will always exist. This role is necessary early in the deployment schedule, through the duration of the implementation, and post Go-Live.

Organizational placement recommendation

- Recommended to be in an information technology (IT) or institutional research (IR) position

Skills needed and/or developed through Implementation Activities

- Must have working knowledge of PS Query and SQL, but does not necessarily have to be a query developer
- Working knowledge of other reporting tools used in ctcLink such as Oracle Business Intelligence (BI) Publisher
- Strong communication skills as the liaison between college SMEs and query developers
- An understanding of the college's non-PeopleSoft reporting strategy and structures, such as a local ODS, data warehouse, MS Reporting Services, Tableau or other BI tools used by the college. Such knowledge will assist in determination of redundant reporting

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Core Microsoft, Excel, SQL
- Analytical and research skills courses

Optional Training

- Oracle University training https://education.oracle.com/home

Security Lead

The college ctcLink Security Lead is the primary point-of-contact for SBCTC's Security team. This role is responsible to:

- Complete user security requests by assigning users to predefined roles once approved by the college-defined authority, including onboarding, offboarding and position changes
- Provide oversight and documentation for audits
- Troubleshoot security issues that arise and support user questions
- Reset security answers for students and staff, unless there is designated staff in the Help Desk for this task
- Serve a critical functional role in system updates, bundle, and PeopleTools updates

This role is necessary early in the deployment schedule, throughout the duration of the implementation, and post Go-Live.

The Security Lead will be involved with system integration testing (SIT) and user acceptance testing (UAT) and will receive training from SBCTC during those processes. This role is necessary after the college goes live to handle permission changes for staff and to help with auditing PeopleSoft Security.

Organizational placement recommendation

Recommended to be in the IT or IT security department due to familiarity with permissions and security controls. It is also beneficial to have a neutral party when dealing with PeopleSoft audits.

Skills needed and/or developed through Implementation Activities

- Understanding of PeopleSoft security principles (page- and data-level permissions)
- Familiarity with User Profiles, Roles, and Permission Lists
- Exposure to security controls, information technology, and compliance

- Outstanding communication skills with the ability to communicate ERP security-related concepts to both a highly technical audience and to business-oriented audience
- Intermediate experience level with MS-Excel
- Functional staff and college-designated security approvers will need an understanding of PeopleSoft security

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Core Microsoft, Excel, SQL
- Analytical and research skills courses
- Courses on best practice auditing procedures

Optional Training

- Oracle University training https://education.oracle.com/home

Test Lead(s)

The college ctcLink Test Lead is responsible for being SBCTC's primary point-of-contact for all test-related issues during any given testing phase(s). This position plays a critical role in participating in system, bundle, image, and PeopleTools updates. The Test Lead will:

- Identify test locations and coordinate with the appropriate resources to ensure testers have all the tools needed for testing
- Identify college testers based on the business processes under review and ensure that security has been set up for each of the testers in the required environment(s)
- Ensure any and all issues found during testing phases be logged in a timely manner; triage issues found by testers, address testers' questions and ensure testers keep their commitments and stay on task
- Work closely with the QA team to assist testers with any issues they may encounter during the testing process
- Participate in testing phase(s) entrance and exit criteria reviews, as well as frequent web-based meetings to discuss escalated issues and address issues that cannot be resolved at the local level

This role is necessary early in the deployment schedule, throughout the duration of the implementation, and post Go-Live. This is an ongoing position, as the need to coordinate testing of upgrades (bundles, images, etc.) will always exist.

Organizational placement recommendation

- Recommended to be in IT department

Skills needed and/or developed through Implementation Activities

- Basic understanding of testing processes
- Outstanding communication skills with the ability to communicate ERP security-related concepts to both a highly technical audience and to business-oriented leaders
- Willing to learn new tools and processes

- Be highly organized, adaptable and have a good sense of humor
- Self-motivated, willing to ask questions and able to ensure college staff complete the work needed to support testing

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Core Microsoft, Excel, SQL
- Analytical and research skills courses

Optional Training

- Oracle University training https://education.oracle.com/home

Training Lead

The college ctcLink Training Lead is responsible for coordination and logistics of training activities at the college. This role will:

- Act as liaison between the ctcLink SBCTC Training Team and the college campus
- Ensure trainers are scheduled for each session on campus and the appropriate personnel participate in all deployment group-training activities
- Plan and manage local logistics including, but not limited to, securing training labs, IT support, as well as produce and disseminate training materials
- Convey and distribute training information to college staff, making sure the campus stays up-to-date with training efforts led by both SBCTC and at the local level

This role is necessary early in the deployment schedule, through the duration of the implementation, and post Go-Live. This is a long-term position, as the need to coordinate with the ERP Support team regarding training will be ongoing to keep staff up-to-date with any system updates and future training opportunities.

Organizational placement recommendation

- Recommended to be part of the campus eLearning team, which allows the Training Lead to work within the Canvas system to leverage its delivery capacity for teaching.

Skills needed and/or developed through Implementation Activities

- Subject matter expert in Finance, Student Services or Human Resources (experience in areas of the value chain that are relevant to their area of expertise) in the college business processes
- Outstanding communication skills, with the ability to communicate ERP security-related concepts to both a highly technical audience and to business-oriented leaders
- Strong working knowledge and understanding of previous system(s)
- Experience in facilitating training and/or strong customer service skills in subject area
- Strong communication, verbal, interpersonal or organizational skills
- Ability to commit to learning teaching and facilitating skills
- Willingness to learn complex technical and functional concepts

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Core Microsoft, Excel
- Analytical and research skills courses
- Customer service and training skills courses

Optional Training

- Oracle University training - https://education.oracle.com/home

Governance Structure (Change Control Board)

A local Change Control Board (CCB) should consist of (at a minimum) SMEs, functional/business analysts and the local project management office.

College staff propose change(s) to local PeopleSoft configuration or business processes for review and consideration by the CCB, which makes decisions regarding whether or not the college implements the proposed change(s).

A CCB provides a systematic approach to managing all changes made to PeopleSoft at the local level. Its primary role is to:

- Ensure changes are necessary and that all changes are documented
- Minimize PeopleSoft service disruption
- Prioritize work and requests for efficient use of College and shared State Board resources
- Review each request to determine if there are any associated risks
- Evaluate timeline and scope
- Determine an execution plan for approved changes, working with the requestor(s) to validate the accuracy of the delivered solution

Responsible, Accountable, Consulted, Informed

For any organization and its associated business processes, there should be in place responsible (R), accountable (A), consulted (C), and informed (I) parties.

It is important to ensure responsible staff report directly to the accountable party for specific business process. For example, if credentialing staff currently report to someone not accountable for upholding accreditation standards, this is an opportunity for realignment.

With the implementation of PeopleSoft, colleges have an opportunity to better align responsible parties with accountable parties. The RACI Model (below) can help a campus understand who, what and where these departmental dependencies and alignments need to occur.

RACI Model and Alignment

R – RESPONSIBLE *"The Doer"*

The "doer" is the individual(s) who actually completes the task. The "doer" is responsible for action/implementation. Responsibility may be shared, but the "A" individual determines the degree of responsibility.

A – ACCOUNTABLE "The Buck Stops Here"

The accountable person is the individual who is ultimately answerable for the activity or decision. This includes "yes" or "no" authority and veto power. **Only one "A" can be assigned to an action.**

C - CONSULT "In the Loop"

Those in this role (typically SMEs) are consulted prior to a final decision or action. This is a predetermined need for two-way communication. Input from the designated position is required.

I – INFORM "Keep others in the Picture"

These individuals need to be informed *after a decision is made or action taken.* They may be required to take action as a result of the outcome. It is a one-way communication.

Departmental Dependencies and Opportunities for Alignment

In PeopleSoft, different areas have significant dependencies on one another and should be reviewed for appropriate alignment with accountable parties.

Within the Common Process Workshops (CPW), lessons learned from the FirstLink Colleges and during college business process reviews with change action planning, it became increasingly clear there is a need for alignment among the departments and staff at the colleges.

Here are just a few examples of alignment opportunities:

Faculty Workload (FWL) Management

- Strong dependency between Instruction (Curriculum Managers & Class Builders), Human Resources and Payroll
- Clear understanding of Part-Time and Full-Time Faculty pay calculation and contract rules/policies for the institution (typically found in the collective bargaining agreement and college HR policy)
- A User Profile provides an employee with access to pages in the system to be able to perform the essential functions of their job. The User Profile is dependent upon the Effective Date of the Job Data record in HCM. This will also provide access to the Faculty Center in Campus Solutions
- Calculation of faculty pay occurs in the Campus Solution Pillar and depends upon proper Course Catalog configuration, accurate Class Schedule build and correctly input Job Data records. Job Data contains the Effective Date (Job Start Date), Department, Location (Campus), Pay Group, Earnings Code, and Combo Code (Budget Code) and must align to the begin/end dates of all instructional and non-instructional assignments. All aforementioned Job Data elements (except the Pay Group) are displayed on faculty the contract and administrative assistants and Deans/Admins reviewing and approving the contracts are expected to verify the accuracy prior to approval
- A Payline Extract is run in FWL every pay period, which will feed to a PSHUP file for Payroll Processing in HCM. The payroll office will manage any outstanding negative Pay Lines (retractions of funds previously paid) and coordination between payroll and administrative assistants when correcting contract overpayments is critical
- Faculty Workload provides Absence Management with an FTE calculation that in some cases can affect the amount of PRL or CSL that a Part Time Faculty member receives. If there is an issue with the amount that is being entitled to a Part Time Faculty member, the Faculty Workload admin may need to be informed and consulted

Payroll (Processing & Post-Processing)

- Strong dependency between Human Resources, Benefits, Absence Management, Time & Labor, Finance and Payroll
- Payroll Processing is dependent on the accuracy and timing of data entered/maintained across different modules within ctcLink. Payroll processes this data based on a defined payroll schedule. Dependent modules should adhere to the determined cutoff days/times to ensure accurate processing of payroll for the pay period
- Post -payroll processing consists of activities handled locally as well as centrally by staff at the State Board

- Timely communication between each college/district and its central payroll office is needed to facilitate post-payroll processing activities such as:
    - GL Interface transferring of Expenses & Liabilities pertaining to payroll (e.g. Salary Expense, Employee Liabilities, Employer Expenses/Deductions)
    - Accounts Payable extraction (processing and creating the Accounts Payable vouchers used to remit payment for payroll deductions)
    - Third-party interfaces (e.g. OFM, MetLife, Health Care Authority)

Managing Work Study

- Strong dependency between Financial Aid, Finance, and Payroll, means it is critical that payroll staff and financial aid staff have a close working relationship
- Work-study reconciliation is dependent on set-up tables that hold pay period dates for Campus Solution term dates, Payroll dates from HCM and dates from FIN
- The set-up tables also house Job Codes from HCM and a crosswalk with financial aid item types to earning codes (time reporting codes)
- Financial Aid is dependent on resources from other pillars to make sure all the set-up is correct and it is reconciled in the financial aid awarding pages to match what the student was paid from payroll. This information is reported on the Fiscal Operations Report and Application to Participate (FISAP), required annually by financial aid offices

Financial Aid (FA) Authorize/Disburse/Reconciliation

- Strong dependency and alignment between Financial Aid, Student Financials, and Finance
- It is critical to make sure that there is clear and consistent communication between these three areas. They will be heavily dependent on each area for preforming items such as; disbursements, processing refunds and reconciliation
- Refunds: Each day Financial Aid (FA) will issue a disbursement file available to Student Financials (SF) that will be posted as a group post. The timing is crucial due to refunds. Refunds cannot be processed for FA students until the group post has been processed. FA offices will need to communicate with Student Financials daily when they have run their batch disbursements, so the group post can be processed and FA refunds can be processed
- Withdrawals: The way funds from FA can be withdrawn from Student Financials from Legacy is different. FA in PeopleSoft has the capability to now reverse the FA funds themselves without any SF intervention. It is key that both areas (FA and SF) are aware when this occurs to ensure funds are withdrawn from SF appropriately. This will be a key working relationship between FA and SF
- Reconciliation: There are numerous ways FA reconciles its funds with SF. SF then has to reconcile the FA funds with the general ledger (GL). All parties will need to have knowledge of customer accounts in SF to help in this process. There is no student data passed on to the GL, so it is imperative FA, SF and FIN work in tandem for reconciliation
- SF is now in control of sending the bio/demo information to Bank Mobile (if the college participates using this method for refunds to students). This is a change from Legacy. SF, FA, and Records/Enrollment will need to work together to make sure name and address information is correct, so students receive refunds in a timely manner
- Parent Plus loans are another area where FA and SF need to work together (e.g. when a check is to be cut for a parent and not the student)

Item Types

- Strong dependency between Finance (FIN), Student Financials (SF) and Financial Aid (FA)
- Globally maintained by SF ERP support and Item types are set up as cross-modular elements
- Item types contain many different components. Two major areas are GL (Finance) and FA
- SF Supervisor (each college may have a different title for this role) must work with the Finance GL person (Director or GL Accountant, for example) to validate the GL information is accurate. SF transactions (based on item type set-up) are communicated to Finance and, if the GL is not accurate, Finance reporting will be inaccurate. Finance Director and/or SF Supervisor must sign off on all requested item types new or updates
- SF Supervisor must also work closely with Financial Aid. FA item types must be set up in Student Financials before they can be created and used on the FA side (such as to award and disburse). FA Director must sign off on all requested item types (new or updates that pertain to Financial Aid)
- FA Item type set-up is a parent-to-child relationship and is dependent upon SF item type set-up. FA item types cannot exist without an SF item type created first. There are two sides to set up for item types. FA needs to be involved in both. They need to work with SF staff to determine the item type number (global numbering convention established by SBCTC), the appropriate charge priority (what the item type can pay), the payment priority (what order the item type pays) and whether it is refundable or not
- SF will also work with FIN to establish the appropriate chart fields for the GL. After the item type is set up on the SF side it can then be set up on the FA side. There are multiple different set-up pages in FA for item types. Currently, SBCTC ERP staff are responsible for the set-up on the SF side, but the college staff have to submit a form signed off by SF and FA. Once the item type is created on the SF side, FA staff can do the set-up on their side. FA set-up is not controlled by SBCTC. Once again, the working relationship between FA, SF, and FIN is imperative to make sure the item type is set up correctly so there will not be any discrepancies between the three areas when FA disburses funds to students

Advising - Academic Advisement Reports (AARs)

- Strong dependency between Advising, Curriculum/Program Committee, Course/Class Builders, Credentials Evaluation, and Financial Aid
- Ensure that staff responsible for configuring the AARs collaborate with the department/staff that governs curriculum/programs, the department/staff that maintain the PeopleSoft Course Catalog, Credentials Evaluators, and with Financial Aid. This will ensure that any additions to plans, courses, and/or classes are incorporated into the AARs for the students to use
- Incorporating Financial Aid into the collaboration process will help keep them in the loop about new plans, courses, and/or classes, so they can get the funding requirements in order

Communications-Processing

- Responsible for assigning student communications and running the process to send communications to students
- Responsible for confirming and validating the query/queries pull the correct population of students prior to sending
- Manage any issues after the communication has been sent (i.e. invalid student emails, processing errors) and coordinate with the required parties to resolve

- If using Message Center and the letter allows for replies, this role would need to coordinate with the person managing replies to let them know when communication has been sent to start managing student-threaded conversation

Communications-Building

- Works with ERP to set up a Letter Template, which needs to include any images, PeopleSoft merged fields and hyperlinks
- Gathers logos and images from the college marketing/communications department and adheres to any established campus design standards for letters or messages (appropriate colors, sizes and resolution, etc.)
- Works with Data Services or has skills to build queries required to assign and send communications
- Manages the communications-build process timeline to gather requirements and ensure testing and completion prior to communication send date

Benefits

- Strong dependency with Human Resources and Payroll
- Staff must be mindful of Payroll cutoff times and perform all entry in a timely fashion, as Benefit deductions result in Payroll from enrollment screens in Benefits
- Termination processing is particularly sensitive with Human Resources, but can be completed for Benefits either manually or through an automatic process that runs twice monthly. Terminations need to be communicated to Benefits
- Prepay processing is shared with Payroll, so Prepay should be monitored by both Benefits and Payroll personnel
- DRS Processing is dependent upon Payroll confirm, so any questions or corrections to DRS information typically must be communicated to Payroll to account for next payroll period, if applicable

Time and Labor, Absence Management, Faculty Workload

- Strong dependency with Human Resources and Payroll
- Absence Management content flows through Time and Labor to reach Payroll for North America
- Termination processing that begins in Human Resources must be communicated to Time and Labor and Absence Management so timesheet entries are correct, vacation payouts can be processed, and enrollment status can be updated
- Sick leave buyout in January and Compensatory time buyout in June should be communicated to Payroll
- Overpayments as a result of unaddressed Time and Labor/Absence exceptions must be communicated to Payroll for processing. In some cases. Leave Without Pay in Absence will also need to be addressed with Payroll, depending on business process
- Faculty Workload provides Absence Management with an FTE calculation that in some cases can affect the amount of PRL or CSL that a Part-Time Faculty member receives. If there is an issue with the amount that is being entitled to a Part-Time Faculty member, the Faculty Workload administrator may need to be informed and consulted