



STEERING COMMITTEE MEETING MINUTES

Nov. 17, 2020, WebEx Only

Meeting Participants

Voting Members

- Reagan Bellamy, Wenatchee
- Kurt Buttleman, Seattle
- Rodger Harrison, Bellevue
- Ed Jaramillo, Skagit Valley
- Tim Wrye, Chair, Highline
- Chad Stiteler, Bellingham Tech
- Grant Rodeheaver, SBCTC
- John Boesenberg, SBCTC
- Carli Schiffner, SBCTC

Non-Voting Members

- Christy Campbell, SBCTC
- Paul Giebel, Moran Technology Consulting
- Rich Tomsinski, OCIO Representative
- Brian Lee, Clover Park Tech PM
- Clay Krauss, Tacoma PM

Non-Voting Commission Reps

- Sachi Horback, IC
- Carly Haddon, RPC
- Ruby Hayden, WSSSC

Guests & Staff

- Dani Bundy, ctcLink Customer Support Director
- Janelle Runyon, ctcLink Project Communications Manager
- Reuth Kim, ctcLink Quality Assurance, Risk & Issue Management PM
- Susan Maxwell, ctcLink College Advisor PM
- Shelley McDermott, OCIO Expert PM
- Tara Keen, ctcLink Assistant Project Director
- Sandy Main, Application Services Director
- Kenn Nied, Interim Deputy Chief Information Officer

Welcome

Tim Wrye welcomed the committee and Christy Campbell reviewed the agenda.

The committee welcomed new non-voting member, Carly Haddon, who represents the Research and Planning Commission (RPC).

Approval of Minutes

The Oct. 20, 2020 draft minutes were approved as submitted.

Okta Identity Management Software (Multi-Factor Authentication - MFA)

Implementation timeline, impact, engagement with project

Kenn Nied said the Okta Advisory Group (OAG) is on second round of technical development planning discussions. A few additional things emerged that will need to be incorporated into the requirements.

Outside of technical matters, the communications and training aspects need to be incorporated. Kenn had forgotten to include Customer Support (Dani Bundy) in the OAG to start working on how the communication will go out to the college system.

It is doubtful Okta will go live before DG4. It's dependent on technical side of the house and very dependent upon the Project per Burgundy Managed Services. Communications to the system about the new way passwords are going to be changed will be a daunting task which needs to be executed well so the Help Desk isn't flooded with calls when it's activated.

Tim asked whether Okta implementation – while it is changing the log-in process – will it also change the activation process for new users or will that remain the same.

Kenn said it will change Activate Your Account (AYA), because the security question aspect will change. That needs to be developed out in the discussion plan. Kenn doesn't see how you can actually implant a security question to an account that hasn't been created yet in Okta. For example, will there be an email that goes out and says to finish up the credential? Or will it be just in time – When they first log in, will they be asked to finish their security questions and ask them phone numbers and the other various ways that they can change their password.

Tim said he is also doubtful about Okta going live for DG4, but as we're starting to build those things out

in general, they would be directed to the same place. That is, the initial ctcLink account activation might stay the same and they might just get passed off to a second step to do the MFA.

Kenn said that the MFA will not be implemented on day one. Once it gets fully vetted out and we're not having issues, then we can perhaps bring in some staff first, and then start rolling out the MFA process to finalize it. Then eventually get all staff and students on it. We don't want to overburden everybody out of the gate for the MFA.

Tim said that from a DG4 perspective, as they are getting ready within the next few weeks to start their next cycle of user acceptance testing, it really concerns him that we're looking at adding any type of change of scope for DG4 and adding risks to that implementation. So, although it would be great to deploy Okta, he wants to make sure it's not a constraint on those colleges going live.

Kenn said the decision does not lie with him; it lies with the ctcLink Project team and Support team – and per Burgundy - to make sure there is not added risk. He definitely thinks it will go live after DG4.

Tim asked if there's anyone from the colleges in the conversation or if it's all happening internally, but thinks there should be some representation from the colleges in that conversation. He agrees with Christy at this point that as we're trying to finalize some of the end-user training, especially around students and getting them activated in the system, it would be best to not change how that looks in the short-term. Hopefully, we can make sure that folks have some direct input into that conversation and timing.

Key Bank/CyberSource Transition

Sandy Main said SBCTC is working with the State Treasurer's office to figure out the best timing and when we can get the colleges lined up. They have a couple of internal meetings scheduled to look through the list of colleges, because we're currently dealing with colleges that are in production. We need to be able to give our feedback to the Treasurer's office about where we see obstacles with implementing certain colleges at certain times (i.e. those in DG4 and DG5 coming up and those that will be on Legacy for a while).

SBCTC is also working out the permissions and roles and responsibilities within the agency and how that looks now that SBCTC has a presence within the CyberSource environment, and how the new college accounts are going to be set up.

They are meeting weekly with the Treasurer's office and will share the deployment schedule as soon as they get it. The drop-dead date is mid-May 2021, so we don't have a lot of time with all the other activities going on.

Tim asked what's been holding up that conversation, whether technical or contractual. With DG4 on the cusp of go-live, they were hoping to make their CyberSource cutover to KeyBank along with our DG4 go live and not have to set up ctcLink with their Bank of America accounts, and then make another change later.

Sandy said there were some hiccoughs and miscommunication at SBCTC which have been ironed out and now they're moving forward and have a focused game plan. Her goal this week is to get those meetings finished up or started, so they can get a plan for the Steering Committee to see, probably the first week of December. She said they normally meet with KeyBank CyberSource and the Treasury office once a week, but because of the holidays, they cancelled.

TouchNet Update

Sandy Main said gave an update on in-person, point-of-sale credit card processing. This is only for PeopleSoft ctcLink colleges, because it is about the integration with PeopleSoft Campus Solutions. They are still in negotiations with the vendor, TouchNet, and working with contracts officer, Abraham Rocha, to get all of the technical questions and timelines figured out to get the contract lined up.

The biggest concern is jeopardizing DG4, so we need to have expectation-setting conversations with the vendor and the colleges and meet with project staff, production staff and others to get together kind of iron everything out.

Christy said the Project side has been touching base with the college PMs about this, because we want to make sure they're aware maybe what their Finance or Student Financials folks are working on that they may not be in the loop; and it takes away from some of the implementation work when they're doing these other activities.

Sandy said it's the same at SBCTC, so they are getting the right people into the room at the same time internally to kind of get ourselves set and understanding what this is and how it's going to impact the colleges. And then we can start engaging more users.

Tim asked to clarify that it's going to be a college-by-college implementation as it becomes available. Sandy said that is correct. the easiest way to think of it is we have the online web card transactions that students can use right now. This is more of in person point of sale and so it's, it's implementing that piece of it. There are conversations about what we could use TouchNet for in the future, but for now, the focus is getting the point-of-sale set up and letting colleges understand what that's going to mean to them. There will be a financial cost to the colleges to buy, support and maintain the devices, so it's important to get that information out to the colleges, so they understand what this implementation would look like on the campus.

ctcLink Support Organization Update

Customer Support Update

Staffing, Workload/Activities

Dani reported they have hired eight positions to ramp up for DG4 and are waiting for the last one to onboard December 1. They are getting ready to actively recruit for senior functional analysts to give the organization some technical depth. They are down one position in HCM to fill from a vacancy .

Currently, the Customer Support team is working on tickets and holding Webex sessions with colleges. The biggest workload right now is the image updates, as the Project and Technical teams and others are going through the compares from the previous image and looking at testing and scripts.

Application Support

Sandy said the Application Support team, a partner of the Customer Support team, filled three engineer positions a few weeks ago which will be a major help to our Support side. They're on staff and learning our environments, getting up to speed and cross-training.

These are hard positions to fill, but we were lucky to find three individuals, each with over 10 to 15 years' experience working in PeopleSoft and development.

Production Support Update

Dani said Production Support Updates are published in alignment with the ctcLink Working Group, so will be ready tomorrow and invited the committee to the view the [Production Update \(SBCTC ctcLink Support\), Nov. 18, 2020](#) online

ctcLink Accessibility Update

Level Access testing, Improvements

Sandy reminded the committee that [Status and information on ctcLink Accessibility](#) updates are posted as often as possible.

The mitigation report comes out quarterly, but we are actively working on dealing with items identified as important to address over the next few months. We continue to review Level Access findings and address those as time permits.

We've already started working on reaching out to Oracle with some service requests to get those items addressed, because they're pretty serious; blocking user access to very important pages, like, absence requests.

Level Access will conduct accessibility review of the new online admissions application (OAA) and we're hoping that within the next week or so they will do the OAA accessibility evaluation.

We have shifted the way we do things at SBCTC; we now are concentrating on the updates that are coming out in the PeopleSoft image releases. Every pillar is getting an update by the end of December and we're finding Oracle is actually really trying to make some improvements to their pages. They're adding the ARIA tags and forming the tables correctly, addressing all those accessibility issues. We are evaluating those changes and advertising in our image update documents which accessibility improvements Oracle has made. These will be posted to the website as soon as the documents are finished and updated; Finance maybe within the next week or two and then HCM and CS will come out shortly after. She can see that Oracle is trying and is seeing more and more improvements and updates all the time, so is really excited about. It's getting better, but it's not all there.

Tim asked Sandy whether the team has been involved in any conversation with the broader Peoplesoft-user community through HEUG ([Higher Education Users Group](#)) membership to leverage the hundreds of schools that use the software to coordinate a broader effort toward accessibility for PeopleSoft.

Sandy said they have not, but it is a timing issue. For now, by necessity, they are trying to be more reactive. Things will eventually get to the point they can start reaching out now that they have staff on board. Most of one engineer's time will be focused on accessibility and a lot of the new hires have accessibility experience. Nothing's as fast as we want it to be, but the future plan is to get a group effort behind some of the change in the requests to Oracle.

Brian from Clover Park asked if the primary work plan for these engineers is based on the accessibility audit from April or do they have a parallel workstream of accessibility service requests coming from the colleges at the same time.

Sandy said it's a combination of both. They get service desk tickets, emails, letters from stakeholder groups (e.g. Disability Student Support Services Council). The first priority are the high severity issues found by Level Access (absence request and finance self-service with travel and expense requests). We are focused on areas with the largest return, but we document and prioritize every request, based on the largest impact to the most users.

ctcLink Program Status

See the [ctcLink Project Status Report \(Oct. 26 - Nov. 6, 2020\)](#) for details.

Remediation & Replacement Solutions

CampusCE

Christy said that when she met with the Continuing Education Council (CEC) executive committee a couple of weeks ago, they had good feedback regarding the business processes. ctcLink Project has had a key project resource out sick for the past month and are now trying to mitigate that staffing challenge and get back on track. A prime concern is having enough time to test the integrations. If we are able to use our previous integration it would be a much more streamlined approach for CampusCE to implement at other colleges.

We could be able to do some testing as part of the later part of Sprint 2 for DG4 in December and early January. If not then, we are looking for a window during the month of January that we need integration complete. We need to be able to test in the project with CampusCE before we want to put it in front of the colleges with DG4 to be able to deploy. As soon as it's ready, we will reach out to the three colleges already on CampusCE. They want to take advantage of the integration as soon as possible, because they have been doing double-entry.

Online Admissions Application

Christy said the online admissions application (OAA) is in system integration testing. We had some early challenges and the timeline needed to shift, but we're on track now and feeling pretty good about it. The vendor, Kastech, has delivered the majority of the test scripts and are delivering training documentation by the end of the week.

We need to "ctcLink-ify" any test scripts and training documents the vendor delivers, so they are in a useful format and appropriate level of detail for the colleges. The team is developing test scripts and training material during December as SIT is still going on. College user acceptance testing will be January 11-22 with deployment for DG2 and DG3 colleges at the end of January 2021.

Budget Planning Tool

PeopleSoft Budget Cloud Solution is currently on track. The overall process is being managed by Christyanna Dawson, PeopleSoft Finance ctcLink Project lead, and she's doing a really great job with her team working with vendor, Mythics. Test scripts and training materials are started to be developed. This will be a train-the-trainer approach is scheduled for early December. We're currently system Integration. Testing and the vendor is doing the build and doing unit testing. The pre-UAT Kick off and training for the colleges will be in January. This product is on a completely different timeline than the implementation for the deployment groups, because we cannot deploy the PBCS unless there's actual production data in PeopleSoft to integrate with the tool.

Budget

Christy reviewed the budget report as of October 31, 2020. Regarding the apparent overage of

\$993,676: Gate 5 budget is based on last approved technology budget - June 2020. The Gate 5 through Gate 7 budget has since been amended to reflect the current forecast for FY21-FY22 which compensates for the overage of (\$993,676). The overage is covered by the \$4.2 million underspent in previous years.

Program Risks and Issues

See the [ctcLink Project Status Report \(Oct. 26 - Nov. 6, 2020\)](#) for details.

Themes in several of the risks and issues centered around organizational change management (OCM) practices and employee overload/burnout. Christy said some have expressed expectations that, by this time, everything in ctcLink implementations should be perfect. With new and different colleges plus SBCTC, with each having very different expectations about how the project will be, how the activities will be, and how some colleges have resources and leadership advantages, it will not be a perfect or equal experience.

She discussed the importance of communication, organizational change management and helping college employees understand it is a year-plus long implementation and it's not going to be smooth for every different group based upon their unique organization, the project, their local project manager, their college leadership's support; all these are factors that contribute to how easy or difficult the implementation is.

Tim suggested the Project team try to help PMs plan for where on the project they can give people breaks to help college SMEs reduce burnout. At Highline, a couple of folks were proactive in late spring and early summer and planned when they could take time off. Those people got their break and are energized and they're getting their stuff done, but other people didn't and are now find themselves unable to take a break.

Moran/QA

Paul Giebel said Moran thinks the project is in a very good position. This is a very complex project, so when you think about "lessons learned," remember that every deployment group is different. So, as Christy described earlier, what may work for one deployment group may not work for another. As you add more colleges, it adds a level of complexity to this entire project. Moran is heartened by the additional staff on the back-end support side and hopes the support team will continue to grow for future deployment groups.

ctcLink Communications – Update

Executive-level change communications, student communications, other

Janelle reported that Shanda Haluapo, Clark College former ctcLink executive sponsor joined the ctcLink Communications team in October.

One of her first tasks was to meet with DG4, DG5 and DG6 executive sponsors to get ideas how the Project can better support executive sponsors in their critical campus role. From those meetings, she is developing change communication messages, focusing more on the people side of things – staff recognition, what's coming up next, reiterating the importance of the ctcLink Project from a leadership level – that executive sponsors can localize for key milestones in the project. So far, we've provided D6G kick-off and DG4 welcome to UAT, and will be developing a full toolkit.

When Shanda met with DG4 executive sponsors, they identified a possible gap in student, so we developed a student communications sample plan, and will add that to the toolkit. Since DG4-A is about 10 weeks out from go-live, we sent an early draft of the awareness section so they could start using it right away. A lot of colleges already have great communications, student awareness, and go-live week plans in place, but for others, this will give some newer different ideas to add to their plan.

Communications with Commissions/Councils

Janelle said we are in the beginning stages of a plan for consistent communications with the commissions, especially focused on how to get ahead of some of the hyperbole or miscommunication.

Tim said the issues are often based in fact, but people react to partial or old information, so we have an active plan to engage with the Student Services Commission and Financial Aid Council on Dec. 3 and with ARC on Jan. 19. Ruby is facilitating some information-gathering with them.

At this point, Tim thinks it's going to have some Project involvement, but mostly it's Production Support. A lot of this is on Customer Support, Dani and her crew because the issues are coming from live

colleges. Not that the rest of us aren't concerned, but it's really things that people have learned or have experienced once they're in live production. So we are trying to close the feedback loop and use this experience to inform what further conversations can or should look like. And to inform this larger conversation we keep having in the background of the Steering Committee and other places about what ongoing governance of ctcLink will look like after the implementation project closes.

There are conversations in WACTC-Tech, cELC, with Grant and SBCTC IT, and with the Strategic Technology Advisory Committee and scattered conversations happening in various commissions that, collectively, we need to get on the same page if we're going to be effective in the long run. There is not a lot of solidity to it yet, but some movement and some intent that we just need to make sure we stay on top of and make happen effectively going down the road.

Janelle said we've had some internal brainstorming on this and this really needs to tie in with ctcLink Customer Support, because a lot of the things that come up at the council meetings are about production/live colleges. We're going to work on some more ideas with this, who should be involved. and then we'll share more.

Tim got an email earlier today from Sachi, Instruction Commission rep, that there was a question from that commission about basic education grading. Dani said this is something Customer Support is actively working on and is calling it the "ungraded grading basis." She worked in financial aid at the time when a decision was made to pool all of those classes under one area, so the teams are working on it. Tim suggested that it would be good to just push the information back out to the system if it is actively on the support work list to make sure people know where to find the information. Dani said she would add to the updated list.

ctcLink Project-Related Commission/Council Topics

Ruby said she had sent a list of items that had come up during a recent Advising and Registration Council (ARC) meeting and wondered if there were any responses to that or whether she did not get it on time. Tim said, unfortunately, that list was dropped into a conversation thread about planning for the upcoming WSSSC and FAC meeting, but was not directed to the Steering Committee agenda.

The conversation last week was about pushing through this FAC conversation, figuring out what is working or not and then following on to do a similar follow up with ARC.

If something in the list is identified as high priority, we could offer quicker response. Ruby said the issue with the 1098 forms was high priority, but everything else could wait and we could approach it the same way. Dani said that Customer Support is looking at it and will get a response back.

Carly said the Research and Planning Commission (RPC) is interested in understanding the feedback loop to provide information to this group or others. She is feeling like she needs to take information back to those groups and making sure it's disseminated, because it's been piecemeal into this group. She hopes to bridge the gap communications. And make sure that the Research and Planning Commission leadership is aware of the proper channels, so people don't get bombarded from the side or separately.

Agenda Items for Future Meetings & Meeting Closure

- Dec. 1 - cELC and WACTC-Tech 11/19 meeting overview
- Dec. 29 meeting cancelled
- Jan. 12, 2021 - DG4-A go-live readiness, need quorum
- Jan. 26, 2021 - DG4-B go-live readiness, need quorum