

# ctcLink

## STEERING COMMITTEE MEETING MINUTES

Feb. 23, 2021, WebEx Only

### Meeting Participants

#### Voting Members

- Reagan Bellamy, Wenatchee
- Kurt Buttleman, Seattle
- Rodger Harrison, Bellevue
- Carolyn Tucker for Ed Jaramillo, Skagit Valley
- Tim Wrye, Chair, Highline
- Chad Stiteler, Bellingham Tech
- Grant Rodeheaver, SBCTC
- John Boesenber, 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

- Peter Lortz, IC
- Carly Haddon, RPC
- Ruby Hayden, WSSSC

#### Staff & Guests

- 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
- Christyanna Dawson, ctcLink Finance PM
- Sandy Main, SBCTC Application Services Director
- Kenn Nied, Interim Deputy Chief Information Officer

### Welcome

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

### Approval of Minutes

The Feb. 9, 2021 draft minutes were approved as submitted.

### DG4-B – Day-After-Go-Live Update

Christy said overall it was the smoothest go-live to date with minimal follow-up items.

Daniel Cordas, Seattle PM, said people are busy activating accts, participating in go-live activities. They had a number of student enrollments that dropped out and are adding those back in. Their Cybersource credit card was set up yesterday. Concerns around the timelines to first payroll and a few issues in finance and general ledger.

Kurt Buttleman said they are having regular meetings with leadership and SMEs. they are feeling pretty good about where they are at.

Dani Bundy said the DG4 college SMEs and teams are actively participating on support Webexes and asking questions. In the HR area, the colleges seem to have made their own plan. The only concern with that is that we have structured these activities to be sequential to get to a certain outcome, like payroll. The support team is sitting on the Webex and getting a few questions, but it's a concern.

The cross-pillar activities with student financials and finance are critical, but it seemed like some of the SMEs didn't know what their own local processes are and were asking the Support team. Dani has conferred with Daniel on this.

### DG4-A – Post Go-Live Update

Tim said the go-live adrenaline has worn off. With the President's Day holiday, the go-live timeline was a struggle for the payroll staff. They stayed late, worked hard and got it done, but there are

lessons-learned. The biggest pain points lately are the Student Financials and tuition calc for winter quarter enrollments. We've been sitting on transactions for longer than hoped. We are still waiting on the Cybersource payment gateway. It's not SBCTC or Highline; it's the vendor.

Reagan said payroll was difficult, but the support Webexes were awesome. We are so thankful for the Customer Support team and couldn't have gotten through without them. This week is way less stressful than last week.

Dani agreed that payroll was difficult, but all the colleges were phenomenal. There are times when things go wrong and they've been online with colleges until 9 or 10 p.m. or sometimes one o'clock in the morning. They have transitioned DG4-A to the ticketing system. Questions from DG4-A are substantive questions and demonstrate a deeper understanding of the product and that they took the training. As of today, we have 142 tickets from DG4-A; 71 tickets closed, 24 pending customer review, 47 open.

In addition, we have tickets from DG2 and DG3 colleges, so that is not the extent of all tickets.

## **Planning & Budgeting Cloud Service (PBCS) Go-Live Update**

Christyanna Dawson gave an initial report of Feb. 12 post go-live experience. They had some difficulties with the vendor and that was slowing down the progress that we really wanted to have this deployed earlier due to colleges' planning time period.

All nine colleges decided to go ahead and work in parallel with their current system and then with to start to really get feel like they have a better understanding of. So, they feel comfortable with the data they're seeing. With the next budget cycle, they will feel confident and ready to go.

We didn't deploy with reports and those reports have now been vetted out and we are hoping to showcase those next week to the colleges so that they can have them as a resource.

Olympic College is doing weekly workshops to make sure that they are on the right track and that they're really working as a team to make sure that things are working for them. She thought that was really great that colleges worked make sure that they feel comfortable with the system and doing workshops within their college to make sure that that's working as needed.

Timelines for this current deployment will look a little different, because we want to make sure colleges have enough runway to feel comfortable. She will be sending that out to the project managers as soon as we have a good firm grasp on what that looks like. She envisions it testing for them again in an October or November timeframe, so they feel comfortable and ready to use that product January first for their budget cycles.

Clay Krauss said Tacoma CC found the tool cumbersome. Christyanna said she plans to meet with the colleges to see how they might improve their experience. PBCS interfaces with ctcLink via reports run from ctcLink Peoplesoft which are edited and then re-uploaded into ctcLink.

Ruby asked if the vendor has an ETA for items in the VPAT. [Oracle Planning and Budgeting Cloud Service \(PBCS\) Application Management VPAT](#). Grant said Oracle indicates some items are marked as "not accessible" and yet they are also marked as "not tested." Grant said he will connect with Oracle to learn more. Tim said a partial pass on a VPAT is not necessarily a failure. It's only the start of the conversation.

## **CampusCE Integration: Go-Live Approval – ACTION**

Susan Maxwell went over the timeline. Looking at tentative date of March 9 for Phase 1 integration. and April 16 for Phase 2. CampusCE includes accessibility testing as part of its product development and quality assurance processes.” Their [CampusCE Continuing Education Management System VPAT](#) has been posted to the SBCTC Accessibility web page.

Susan reviewed the issues and concerns reported and their status toward resolution as well as college readiness recommendations.

#### **Motion passed:**

Campus CE Phase 1 integration will be available for college use as of March 9, 2021 at the discretion of each college in DG2, DG3 and DG4.

Approve Phase II of CampusCE integration date of April 16, 2021 for DG2, DG3 and DG4 colleges, with remaining colleges’ integration available at ctcLink go-live with the following conditions:

- UAT is completed on time and any fixes made or scheduled
- DG2, DG3 and DG4 colleges approve March 9 go-live date

### **ctcLink Program Status**

See [ctcLink Project Status Report \(Jan. 18-29, 2021\)](#) for details.

Overall, we are on track, but with COVID restrictions, it’s still a struggle.

### **Deployment Group Status**

#### **DG5**

Christy reported that the project is finishing up DG5 configuration based upon the homework turned in. DG5 is now preparing for cycle 2 data validation. This one of the biggest activities the DG5 SMEs will be doing. it has been quite intense for those that have gone before. We’re very excited to be focusing more on the DG5 group and moving them forward and looking an October timeline.

It’s not an easy task to come up with the dates. We need more than just payroll dates; we also need to consider term start dates, last student drop dates, priority registration for the next term, and other factors across eight colleges.

We are meeting with DG5 tomorrow to talk about deployment dates, to help them understand the time that the conversion will take, and the options for the go-live dates. We will bring dates to the Steering Committee meeting to review and approve.

#### **DG6**

DG6 has finalized their Global Design Adoption and PeopleSoft Fundamentals training. They had BPFG sessions for Campus Solutions Core in January, and they now will be reengaging with the project team in March to continue with those Business Process Fit Gap sessions. The ramp-up for DG6 is really just starting, so we’ll be working with those colleges to start looking and making sure that their engagement, attendance and understanding are going as expected.

### **Program Risks and Issues**

See [ctcLink Project Status Report \(Jan. 18-29, 2021\)](#) for details.

#### **Top risks**

- **DG5 Security:** Security activities are scheduled to begin in March 2021. Colleges need key college security administrators to participate and focus on learning and adoption of PS Security. College PMs need to be engaged in this process, provide oversight and all security deliverables per the timeline. Prior deployment group security lessons learned:
  - Security work begins seven (7) months prior to go-live, providing the longest time frame for college security administrators to engage in this work.
  - Additional security resources have been added to provide Canvas Security training content.
  - The ctclink project team will provide a basic walkthrough of Google sheets to college security administrators before they dive in to the Google workbooks.
- **DG5: Data Conversion & Validation College Staff Resources:** For DG5, Cycle 2 college data validation activities begin in early March 2021. We are concerned about the college staff resources having the time and knowledge to complete this project activity within the timeline. Work with DG5 College PMs on mitigation.
- **First DG4-A Payroll may be impacted by system takedown for DG4-B Go-Live:** First-ever DG4-A payroll run may be impacted by system takedown dates for DG4-B implementation. The DG4-A payroll run coincides with the timing of shut down for the DG4-B Go Live weekend. Solution: HCM Customer Support will be hosting two different Webexes for the first couple of payrolls after go-live.

#### .Top issues

- **ctclink Project team members and college staff resources working remotely are impacted by inclement weather based upon geography:** Some states were hit with severe weather leading to power outages, no internet access and inability to travel to a back-up location with power and internet. As we go live with DG4-B, ctclink Project team members are communicating their concerns and limitations regarding their availability and connectivity to their managers.
- **DG4-B Student Financials Conversion Show Stoppers for Go-Live:** Mitigation solution was demonstrated with DG4-A data and will be applied to DG4-B data the week of Feb. 8 for their review and acceptance. Mitigation solution was presented to DG4-B colleges with a review environment applied in PRF, mitigation approved by Seattle.
- **Customer Support Resource Plan:** Support has hired 13 out of 14 team members. The 14<sup>th</sup> job position will be posted in March.

## Budget

Christy reported we're currently under budget by about \$760,000 against the \$145 million budget. Previously we were running \$2 to \$5 million under budget, so that's the closest number tied to budget that we've seen, so this is coming more in line with where we expected to be based upon this time.

## Moran/QA & OCIO

See [ctclink Project Status Report \(Jan. 18-29, 2021\)](#) for details.

### Moran

Paul said from an overall standpoint and QA perspective, they continue to be high on the progress and the project. It would be easy to say, "Geez, we're halfway home. The replacement solutions have good plans in place, so we can bring this home pretty easily." But there's still a whole bunch of work to do! There's no resting on your laurels by the project team or from anyone involved.

Paul has been on other projects where, if you had a security model defined, as was done on this project, people would look and say, "Okay, we're done." But the issues and risks Reuth shared highlighted how this project acts; and that is, "What's the what's the best way to work with each deployment group?"

As we've gone along there are differences between DG2 and DG3 and then from DG3 to DG4. And there will be differences as we get into DG5 and DG6 and the Project team continues to take that under consideration and that leads him to believe we'll continue to be successful as we go forward this deployment group. Overall, we're very heartened, but this is not going to be easy to bring it home.

As you get towards the end of the project, your skilled team members potentially have other options. We want to make sure there are plans in place to keep people on the team to deliver this through the homestretch. And we want to make sure the support organization continues to be positioned to support additional colleges that are coming on. The workload shifts a little bit and you'll see in some of our latest recommendations, we continue to look at the support organization and provide suggestions.

Christy thanked Paul saying he raises a great point. Within this next year we have 17 colleges to deploy. And if anyone thinks that we're at a sweet spot or that this is going to be easy, because we've accomplished so much, this is really the time for the leaders to pay attention to make sure DG5 and DG6 colleges are aligned with the resources to be able to partner for this project.

## **ctcLink Support Organization Update**

### **Customer Support Update**

Dani reported they are actively resolving tickets. For all colleges, just since Monday we have closed 136 tickets.

### **OAAP Update**

Sandy Main reported that about 5,000 new accounts have been created in the new online admissions application portal (OAAP) as of noon today, which is amazing. Since going live on February 2, about 3,600 submitted applications have gone through.

A software release or application upgrade is going out to Thursday evening and includes 61 of the outstanding accessibility issues. So, it will wrap up the eight outstanding issues for applicants, so those will be resolved; as well as 37 in the college district admin section, and 16 of the central admin and other fixes and improvements,

Level Access will conduct a third-party regression test once all the accessibility issues are resolved to confirm that we are compliant. There has been concern about a third-party that is part of OAAP and they will follow up with those individuals. The team has not been able to pinpoint the issues.

### **Cybersource/Key Bank Update**

Sandy reported they have started the relationship between Key Bank and Cybersource and all that good stuff for about 17 colleges. The rest are going to be in the next phase. As of now, three of the colleges are keeping merchant IDs, and we're actively trying to get them connected. Highline is one of the first, so she hopes that by the end of the day, their live site will be up in a way that we can start setting up their Cybersource connections in PeopleSoft. Had a major hiccup this week as in the

amount of support need doubled over what we were led to believe at the beginning. We're quickly adjusting to see how we're going to support this product.

## Okta Update

Kenn Nied gave an update on the multi-factor authentication Okta Integration Gateway (OIG) implementation. The gateway is stood up in a non-production environment and the Okta instance has been delivered and configured, so they can start testing. The page has been delivered, but is not 100% installed yet. In March, they will work with Okta and SBCTC to build a new landing page which will include a checkbox for accessibility to be passed during the login process.

Okta will review the configuration of our preview instance of Okta to make sure we're following best practice. After the DG4 go-live activities settle down in March, we'll be starting to look over the whole plan that's going to then start bringing in more of Sandy's team with the developers to start working on the next step. They have preliminary dates in the summer (July, August) which will go to the ctcLink Working Group for their review to see if the dates will work for everybody and then Steering Committee for a vote. Kenn thinks they will have the work done before the August timeframe.

So far, the independent accessibility testing found only two issues. First, the security image had no tags in it. Folks could tab through it, but there were no good tags saying which tab they were on. That feature has been turned on. Second, an account creation email linked to a video with no captioning. We've gone through and edited all the emails that go out, branded them with ctcLink.

Kenn also announced that Michael Elsberry, Director of Managed Services at The Burgundy Group, will be taking on the Okta PM role and will be the liaison between all the groups.

Ruby asked about the VPAT for Okta. Tim said Ward Neff, co-chair of the Committee for Accessible Technology Oversight (CATO), is working with Kenn and team to do specific accessibility testing with Okta and the platform environment. He said Ward has been very vigilant in participating and making sure the integration gateway is going to be compliant for the authentication pieces.

## Production Support Update

The most recent production update handout is available online and was updated last week for the ctcLink Working Group. [Production Update \(SBCTC ctcLink Support\), Jan. 20, 2021](#)

## ctcLink Accessibility Update

Grant said there are no additional changes beyond the OAAP report above. The latest reports can be found at the [ctcLink Accessibility](#) page.

## Agenda Items for Future Meetings & Meeting Closure

- March 9, 2021 – DG4-B go-live report, PBCS check-in, CampusCE go-live, DG5 deployment dates