



Shoreline Subject Matter Expert (SME) & College ctcLink Project Team

Resource Definitions

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Introduction

This document outlines general roles, duties and/or knowledge areas expected for each type of subject matter expert (SME), as well as the college project team roles.

The three SME sections are organized by PeopleSoft pillar (Finance, Campus Solutions and Human Capital Management) and outline the typical job roles, expertise and responsibilities of designated SMEs.

The last section outlines college ctLink project team roles.

Finance Pillar Lead

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| <p>Satoko Prigmore Jennifer Fenske</p> | <p>Person(s) knowledgeable and responsible for the Campus Solution processes with decision-making authority. Oversees college tasks associated with Campus Solutions configuration, conversion activity, validation, testing, training, change management, etc.</p> |
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Finance SMEs

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| <p>College Grant Manager</p> <p>Jennifer Fenske Lisa Malik Ann Martin Cummins Satoko Prigmore</p> | <p>Person who monitors each grant, including grant spending, grant budgets and initiates grant invoices. Manages timing of grant invoicing to meet grant contract requirements.</p> |
| <p>College Grant (Billing) Specialist</p> <p>Jennifer Fenske Ann Martin-Cummins (OBIS)</p> | <p>Person who performs the actual billing of a grant. In PeopleSoft this person would be expected to understand not just the Grants module, but also the Billing module to fulfill grant invoicing requirements.</p> |
| <p>College Travel Expense Specialist</p> <p>Ulrike Lopez</p> | <p>Person who processes Travel Authorizations, manages compliance to OFM travel regulations. As well as:</p> <ul style="list-style-type: none"> • Processes requests for Cash Advances for travel. • Processes Expense Reports for travel reimbursements. • Ensures staff who received Cash Advances have provided supporting Expense Reports to substantiate expenditures in the timeframe dictated by college policy. |
| <p>College Accounting Manager</p> <p>Jennifer Fenske Satoko Prigmore</p> | <p>Person who manages the Monthly and Yearly closing processes. Approves the reconciled (ledger & sub-ledger) accounting reports such as Trial Balance and Financial Statements.</p> <p>Oversees the Finance office's appropriate use of proper chart strings (chartfields) that comply with OFM and SBCTC policy and regulations.</p> <p>Responsible for AFRS accuracy and SMART adjustments.</p> |
| <p>College Finance Office Manager</p> <p>Jennifer Fenske</p> | <p>Person who oversees the cash management and investments at a college. Responsible for staff that perform banking reconciliation. Verifies income statements, accuracy of Financial Statements relative to investments and cash.</p> |

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| <p>College Budget Manager</p> <p>Ann Martin-Cummins Satoko Prigmore</p> | <p>Person who oversees budget development, compiles all budget planning data to establish baseline budget for the upcoming fiscal year and prepares budget for approval. Ensures approved budget data is input into the system for monitoring. Responds to requests for on-demand budget status reports. Defines budgeting levels and sets budget control methods. Manages budget checking errors.</p> |
| <p>College Billing Specialist</p> <p>Rachelle Eskridge Shobha Malawarair</p> | <p>Person who is responsible for creating and processing invoices. Reviews all invoices are properly coded and complete prior to month end close. Responsible for resolving any errors in billing, including correcting or cancelling invoices as needed. May be called upon to perform reconciliation duties as assigned. Once on PeopleSoft will be responsible for identification of budget checking issues incurred when generating invoices.</p> |
| <p>College Accounts Receivable (AR) Specialist</p> <p>Rachelle Eskridge Shobha Malawarair</p> | <p>Person who is responsible for processing and managing payments received, maintains customer accounts for non-payments and late payments. Generates aging analysis. Processes any adjustments related to collections. Reviews all invoices and payments are properly coded and complete prior to month end close. May be called upon to perform reconciliation duties as assigned.</p> <p>Once in PeopleSoft will be responsible for generating Customer Statements and Dunning Letters.</p> |
| <p>College Accounts Payable (AP) Manager</p> <p>Ulrike Lopez</p> | <p>Person who is responsible for processing and managing payments made and invoices received. They maintain Supplier accounts, including management of discounts forfeited or made. Responsible for Supplier Aging Reports and proper Purchase Order matching. Reviews all invoices and payments are properly coded and complete prior to month end close. May be called upon to perform reconciliation duties as assigned. Oversees PCard payments.</p> |
| <p>College Purchasing Manager</p> <p>Raisa Minchuk</p> | <p>Person who is responsible for creating requisitions, contracts, Requests for Proposals (RFPs) and Requests for Quotes (RFQs). Manages creation and closure and proper matching of Purchasing transactions in Accounts Payable. Inputs request to update/maintain Supplier data. Generate purchasing reports as needed to ensure proper reconciliation or meet on-demand requests for status. May be called upon to perform reconciliation duties as assigned, including Year-End and Biennium close processing.</p> |
| <p>College PCard (Purchasing Card) Manager</p> <p>Raisa Minchuk</p> | <p>Person who performs PCard reconciliation. Responsible for establishing and enforcing PCard use policy. Maintaining Purchasing Card Service Provider (e.g. JP Morgan) relationship.</p> <p>Once in PeopleSoft, will be responsible for:</p> <ul style="list-style-type: none"> • Managing PCard User Security • Adding & Cancelling PCards • Template maintenance for exchanging statement data from bank. |
| <p>College Physical Inventory Specialist</p> | <p>Person who is responsible for tracking the physical assets of the college.</p> |
| <p>College Asset Manager IT: Tracy Bjerkeset, Ellen Gottas Non-IT: Raisa Minchuk</p> | <p>Person who is responsible for recording, depreciating and reporting of physical assets.</p> |

Campus Solutions Pillar Lead

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| Chris Melton | Person knowledgeable and responsible for the Campus Solution processes and has decision-making authority. This person would oversee the college tasks associated with Campus Solutions configuration, conversion activity, validation, testing, training, change management, etc. |
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Campus Solutions SMEs

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| College Instruction Bayta Maring | Person knowledgeable and responsible for any/all academic structure foundation processes and has decision-making authority. This person would oversee the configurations of academic groups, organizations, locations, facilities, subjects, plan codes, etc. |
| College Curriculum Jenifer Aydelotte | Person(s) knowledgeable and responsible for any/all of the college course catalog and class scheduling processes and has decision-making authority. This person would oversee the course catalog maintenance, enrollment requirements, course equivalencies, works with Student Financials on course/class fees, works with Credential Evaluator, etc. |
| College Enrollment Chris Melton Kim Streitz Mary Cheung Stephanie Baker Zaira Valencia Holly Burton Janel Middleton | Person(s) knowledgeable and responsible for any/all of the college enrollment processes and has decision-making authority. This person would oversee the enrollment appointments, enrollment calendar, enrollment, waitlists, enrollment requirements, works with Student Financials for due dates, drop for non-payment, refunding, waivers, etc. |
| College Assessment Dannica Totten Derek Levy | Person knowledgeable and responsible for any/all for placement testing processes and has decision-making authority. This person would oversee the placement test and the loading of test scores to the student record. |
| College Student Records Chris Melton Kim Streitz Mary Cheung Janel Middleton | Person knowledgeable and responsible for the student records processes and has decision-making authority This person would oversee grading, student groups, service indicators (unusual actions), academic standing, honors and awards, transcripts, etc. |
| College Financial Aid Margie Pederson Tigist Stangohr Ming Yin Zoe Swanson George Savanah | Person(s) knowledgeable and responsible for any/all financial aid processes and has decision-making authority. This person would also oversee Student Financials processes that impacts FA processes, such as Refunds and changes in payments. In addition, there would be oversight with Student Records/Enrollment processes that impacts FA Term, R2T4, Census Date, etc. |
| College Student Financials Jennifer Fenske Rachelle Eskridge | Person(s) knowledgeable and responsible for any/all of Student Financials processes and has decision-making authority. This person oversees the variety of charges to student accounts including, tuition and mandatory fees, course/class fees, miscellaneous fees (parking, library, childcare, insurance, etc.), billing, 1098-T, collections, online payments, other payments, general ledger accounting |

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| | information, waivers, payment plan, third party payments, works with finance for chart of accounts, etc. |
| College Head Cashier Rachelle Eskridge Jennifer Fenske | Person(s) knowledgeable and responsible for any/all Cashiers Office processes and has decision-making authority. This person oversees the opening and closing cashier sessions, accepting student and sponsor payments, refunds, waivers, etc. |
| College Continuing Education Leah Pearce Kelly Blackard | Person(s) knowledgeable and responsible for any/all aspects of delivering Continuing Education processes and has decision-making authority. This person would oversee Continuing Education processes, such as student entry, enrollment, class building, payments, etc. |
| College Basic Education for Adults (BEaA) Brigitte Kidd & her team | Person(s) knowledgeable of all aspects of BEaA processes and has decision-making authority. This person would oversee processes such as admissions, enrollment, class building, waivers, works with Student Financials, etc. |
| College Department of Corrections N/A | Person(s) knowledgeable Dept. of Corrections processes and has decision-making authority. This person would oversee processes such as admissions, enrollment, class building, etc. |
| College Running Start Maria Tungol Steve Seki Chris Melton Kim Streitz | Person(s) knowledgeable of all aspects of the college Running Start processes and has decision-making authority. This person would oversee admissions, enrollment, student coding, waivers, reporting, etc. |
| College Student Services Audrey Reuter Tiffany Meier John Tankersley Lucy Casale Chris Melton Kim Streitz Mary Cheung | Student Services department leads knowledgeable and responsible for their departments decisions and processes and have decision-making authority related to the use of communications, checklists, milestones, upload documents, student groups, service indicators, etc. |
| College Advising Lucy Casale Audrey Reuter Advising staff Kim Streitz | Person knowledgeable and responsible for Advising processes and has decision-making authority. This person would oversee the use of Advisor Center, Early Alert, milestone, and works with Records on Academic Standing. |
| College Admissions Chris Melton Kim Streitz Mary Cheung Stephanie Baker Zaira Valencia Holly Burton | Person knowledgeable and responsible for the Admission processes and has decision-making authority. This person would oversee the admissions processing, residency, works with Student Financials for admissions fees, etc. |

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| College International Program IE Staff | Person knowledgeable and responsible for the International Student processes and has decision-making authority. This person would oversee the admissions, student citizenship/Visa, SEVIS reporting, etc. |
| College Credential Evaluator Mary Cheung Pamela Kocaturk Cecily Sherritt Kim Streitz Chris Melton | Person(s) knowledgeable and responsible for transfer rules, articulation rules, graduation evaluation, degree honors, and for building and maintaining Academic Advisement Reports (AAR, aka degree audit reports). |
| College Institutional Researcher Bayta Maring Lisa Malek | Person who can assist their college SME's with legacy information for configuration decisions and conversion files. This person can also assist with validation activities. |

Human Capital Management Pillar Lead

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| Veronica Zura | Person(s) knowledgeable and responsible for the Campus Solution/Human Capital Management processes with decision-making authority. Oversees college tasks associated with Campus Solutions configuration, conversion activity, validation, testing, training, change management, etc. |
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Human Capital Management SMEs

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| College HR Manager Veronica Zura | Person who oversees the HR staff, defines the hiring process/procedures, including defining position descriptions. Ensures the college Human Resources practices align with college policy, the negotiated Collective Bargaining Agreements and state and federal laws. |
| College HR Specialist Sarah Dunkinson Rochelle Roldan David Isaac | Person who enters job data for new hires, changes and terminations. Performs recruiting tasks. Maintain seniority and longevity data in the system. Maintain layoff lists and step increments. Handle I-9 forms and bio/data changes for employees. Processes FMLA and Shared Leave requests and communicates to the Leave Administrator to support special leave types. Once on PeopleSoft, may be responsible for assignment of Time and Labor work groups, Benefit Program, Payroll and Absence groups. |
| College Time Administrator Delene Bryant Brandi Okano | Person who is responsible for maintaining Time and Labor, such as work schedules, holiday schedules. Also responsible for managing time approvals of division/department managers and ensuring time entry for employees to submit time through a system. |
| College Payroll Manager Delene Bryant Brandi Okano | Person who coordinates the payroll team in the performance of payroll operations, including the day-to-day activities for payroll processing. Responsible for reviewing regulatory changes in payroll processing and ensures that system complies with state and federal laws. Perform reconciliation and sign-off before completion of pay distribution. Coordinate data exchanges between DRS, HCA and college, including working with SBCTC to address payroll processing errors or issues. |

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| <p>College Payroll Specialist Delene Bryant Brandi Okano</p> | <p>Person who performs the day-to-day activities, handling garnishments, inputting and verifying deductions, processing of manual checks, check cancellations, retro pay, overpayments. Manage direct deposit information, W4, W2 validation.</p> |
| <p>College Faculty Contract Specialist Veronica Zura Sarah Dunkinson</p> | <p>Person who provides the definition of the contract calculation logic for Faculty Pay, per the Collective Bargaining Agreement. Also reviews generated Faculty Contracts for accuracy and approval prior to employee signature. Oversees the general adherence to Faculty Pay processing logic from those responsible for data entry leading to generation of Faculty Contracts.</p> |
| <p>College Faculty Pay Specialist Delene Bryant</p> | <p>Person who is responsible for handling payroll processing of Faculty, including addressing any retro-pay or overpayments. Communicates with Faculty or Division Administrators and their assistants to resolve outstand pay issues.</p> |
| <p>College Benefit Coordinator Brandi Okano</p> | <p>Person who manages benefit data entry in HCA and processes any benefit changes during annual enrollment periods. Verifies benefit deductions passed from payroll. Monitors Adjunct/Part-Time Faculty and Hourly employees for benefit eligibility. Once in PeopleSoft will be expected to understand Job Data screens to read benefit relevant information and payroll to validate accuracy of deduction information. This person will be expected to have strong data analytics skills.</p> |
| <p>College Leave Administrator Sarah Dunkinson Veronica Zura</p> | <p>Person who is responsible for maintaining leave rules based on HR manager’s interpretation of the Collective Bargaining Agreements and other contract leave types. Process leave forms and communicate with employees who have issues with leave. Maintain Share Leave balances, donations and redistributions to return unused leave. Processes approved FMLA leave usages. Run Leave Accrual processes. Once on PeopleSoft the Leave (Absence) Administrator will be responsible for leave data validation, leave adjustments. This person will be expected to have strong data analytics skills.</p> |
| <p>Director of Talent Acquisition Sarah Dunkinson Rochelle Roldan David Isaac Veronica Zura</p> | <p>Person leads all sourcing strategies. Oversees all stages of candidate experience (including application, interviews and communication). Forecasts hiring needs based on entity growth plans. Measures key recruitment metrics, like source of hire and time-to-hire. This person builds talent pipelines for current and future job openings. Manages external partnerships job boards and HR software vendors. Implements online and offline employer branding activities. Prepares and reviews annual recruitment budgets. Ensures that the college recruitment practices align with college policy, the negotiated Collective Bargaining Agreements and state and federal laws.</p> |
| <p>Talent Acquisition Manager Sarah Dunkinson Rochelle Roldan David Isaac</p> | <p>Person who determines current staffing needs and produces resource forecasts. This person leads employment branding initiatives, and develops talent acquisition strategies and hiring plans. This person is actively involved in planning and conducting recruitment and selection processes (interviews, screening calls etc.) Ensures that the college recruitment practices align with college policy, the negotiated Collective Bargaining Agreements and state and federal laws.</p> |
| <p>College Recruiter</p> | <p>Person assists in the design and implementation of the overall recruiting strategy. Develops and updates job descriptions and job specifications.</p> |

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| <p>Sarah Dunkinson Rochelle Roldan David Isaac</p> | <p>Prepares recruitment materials and posts jobs to appropriate job board/newspapers/colleges etc. Sources and recruits candidates through the use of applicant tracking solutions, social media, etc. Screens potential job candidate resumes and job applications. Active in scheduling and conducting candidate interviews. Ensures that the college recruitment practices align with college policy, the negotiated Collective Bargaining Agreements and state and federal laws.</p> |
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College ctclink Project Team Roles

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| <p>Executive Sponsor</p> <p>Cheryl Roberts</p> | <p>The ctclink Executive Sponsor is typically in an active senior management role and responsible for supporting from the top to assist in influencing stakeholders. They are responsible for identifying the business needs, potential problems or opportunities. The Executive Sponsor ensures the project remains on course and that benefits are realized. They support the Project Manager with any issues outside the control of the PM and serve as a project champion. This role is necessary early on in the deployment schedule, throughout the duration of the implementation, and for a period of time post go-live.</p> |
| <p>Project Manager</p> <p>Joe Chiappa</p> | <p>The ctclink Project Manager leads the design and implementation of the ctclink Enterprise Resource Project (ERP) at the college. ctclink is sponsored by the State Board for Community and Technical Colleges (SBCTC). The Project Manager is responsible for coordinating College staff participation in the design of the ERP and the timely and efficient implementation of the ERP at the College.</p> <p>The Project Manager provides periodic reports to the senior executives of the College. The Project Manager works with College staff to ensure that the College’s business processes are consistent with the ERP and that the ERP’s processes and reports fulfill the College’s business objectives. The Project Manager is the primary liaison for the College with the SBCTC ctclink project team.</p> <p>Since the ERP is anticipated to require substantial changes in working relationships and work methods, the Project Manager will need to be well-versed and experienced in change management techniques, including facilitating work teams and coaching executives and supervisors in their roles as sponsors of change. This role is necessary early on in the deployment schedule, throughout the duration of the implementation, and for a period of time post go-live.</p> |
| <p>Organizational Change Management (OCM) Lead</p> <p>Joe Chiappa</p> | <p>Each college needs to designate an Organizational Change Management (OCM) Lead to facilitate local OCM activities on their campus. This person should be a member of the college’s project team. The ctclink SBCTC OCM Lead will work closely with the college’s OCM Lead to help develop an OCM plan, assist as issues arise and maintain accountability for OCM related activities.</p> <p>The college OCM Lead will develop and execute a local OCM strategy and plan following the OCM approach described in the ctclink OCM Approach, as well as assist the college stakeholders through the PeopleSoft transition. OCM Lead engages with sponsors to ensure senior leadership support is crucial for project success. This can be facilitated through a steering change management leadership team, committee and or working one-on-one with senior leaders to ensure alignment and support for respective areas of change management planning and execution. This role is necessary early on in the deployment schedule, throughout the duration of</p> |

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| | <p>the implementation, and post go-live. This role is also be needed after the college goes-live in order help facilitate change through additional projects that integrate with ctclink business processes and additional implementations.</p> |
| <p>Communications Lead Martha Lynn</p> <p>Communications Team Adam Staffa Lori Maxwell Amy Stapleton Susie Schroeder</p> | <p>Each college needs to designate a communications lead or coordinator to facilitate local ctclink communications activities on their campus.</p> <p>This person should be a member of the college’s project team and/or communications office and work closely with the college’s project manager. The Communications Lead will work closely with the college PM, Executive Sponsor, and stakeholders to assist as requested/needed in developing the college’ local communications plan and provide guidance in executing the plan. This role is necessary early on in the deployment schedule, throughout the duration of the implementation, and for a period of time post go-live.</p> |
| <p>Reporting Lead</p> <p>Bayta Maring</p> | <p>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:</p> <ul style="list-style-type: none"> • 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 <p>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, throughout the duration of the implementation, and is key to your success after Go-Live.</p> |
| <p>Security Lead</p> <p>Bonnie Madison</p> | <p>The college ctclink Security Lead is the primary point-of-contact for SBCTC’s Security team. This role is responsible to:</p> <ul style="list-style-type: none"> • 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 <p>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 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.</p> |
| <p>Functional Analysts, Business Analysts (per pillar)</p> <p>TBD</p> | <p>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.</p> |

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| | <p>The Functional Analyst:</p> <ul style="list-style-type: none"> • 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 <p>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.</p> <p>This is an ongoing, long-term role, as the need for the Functional Analysts will always exist within the pillars of PeopleSoft.</p> |
| <p>Pillar Lead(s)</p> <p>See Above</p> | <p>Person(s) knowledgeable and responsible for the individual pillar processes and has decision-making authority. This person would oversee the college tasks associated with the pillar configuration, conversion activity, validation, testing, training, and change management. This role is necessary early on in the deployment schedule, throughout the duration of the implementation, and for a period of time post go-live.</p> |
| <p>Subject Matter Experts</p> <p>See Above</p> | <p>Functional experts who will respond to requests for input from ctcLink functional team members (Project Leads, Functional Analysts, etc.) and keeps the College Pillar Lead informed. They respond to requests for input from ctcLink technical team members (Testing / Prototype Lead, Data Conversion Lead, etc.). They participate in key ERP project activities on an as-needed basis. These include, but are not limited to common process workshops, design sessions, data conversion, testing, security configuration, training etc.</p> |
| <p>Test Lead</p> <p>ctcLink Business Analyst (TBD)</p> | <p>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:</p> <ul style="list-style-type: none"> • 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 |

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| | <p>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</p> <p>This role is necessary early in the deployment schedule, throughout the duration of the implementation, and is key to your success after Go-Live. This is an ongoing position, as the need to coordinate testing of upgrades (bundles, images, etc.) will always exist.</p> |
| <p>Testing Team</p> <p>Pillar Leads and staff in core functional areas (HR/Payroll, Business Services, Instruction, Financial Aid, Enrollments Services, Advising/ Counseling)</p> | <p>The college testing team will be responsible for performing User Acceptance Testing (UAT), which entails practicing testing scenarios within their area of functionality in a testing environment and report/log all issues encountered on both the process side and the system functionality. The testing team will coordinate with other departments within their agency to support end-to-end testing during the UAT process.</p> <p>This team will identify data scenarios and error conditions that will be executed during UAT. They will enter the testing progress and issues in Oracle Test Manager (OTM) and retest issues once they are resolved. This team will participate in testing training that outlines responsibilities, procedures and assists with troubleshooting issues. They will also attend stand up meetings, as needed, with the SBCTC training team. This role is necessary early on in the deployment schedule, throughout the duration of the implementation of the project.</p> |
| <p>Training Lead</p> <p>Amy Rovner</p> | <p>The college ctcLink Training Lead is responsible for coordination and logistics of training activities at the college. This role will:</p> <ul style="list-style-type: none"> • 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 <p>Plan and manage local logistics including, but not limited to, securing training labs, IT support, and produce, disseminate training materials</p> <p>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</p> <p>This role is necessary early in the deployment schedule, throughout the duration of the implementation, and is key to your success after 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.</p> |
| <p>Training Facilitator(s)</p> <p>TBA</p> | <p>College Facilitators with subject matter expertise on each campus will be essential in the success of PeopleSoft training activities. College Facilitators will assist the SBCTC Training Team with analysis and validation of online Canvas training courses. College Facilitators will collaborate with the SBCTC Trainers during the ILT workshops to ensure the knowledge transfer is effective and participants are getting the maximum benefit. The SBCTC Training Team will work with the College Training Lead to identify and select College Facilitators for training.</p> <p>In order for the College Facilitators to have the greatest potential for success, they should be a subject matter expert in their respective areas of Finance, Student Services or Human Resources.</p> |

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| | <p>Because there are several courses for each subject area; over 60 courses in total, their expertise in the legacy systems (FMS, SMS, FAM, PPMS) will dictate which of these courses - called modules - they will be qualified to teach.</p> |
| <p>Change Agent Network/Change Champions Cheryl Roberts Joe Chiappa Bill Saraceno Mary Bruggeman Marisa Herrera Phillip King Martha Lynn Ann Garnsey-Harter Gavin Smith Chris Melton Satoko Prigmore Jennifer Fenske Veronica Zura Samira Pardanani ctcLink Business Analyst</p> | <p>The ctcLink Change Agent Network consists of multiple roles that will collaborate with the project team to prepare the organization for upcoming changes. The Change Agent Network is to assist in ensuring all readiness activities are completed in timely manner in prep for ctcLink program Go-Live. They will participate in ctcLink program change and communications activities and sign off on role mapping. They direct project specialists' team and partner with leaders to prepare staff and manage execution of business readiness activities, as well as disperse important information to staff.</p> <p>The Change Agent Network would assist project team and utilize process expertise by participating in design workshops to support the mapping of current state processes and data clean-up. In addition, the network will assist in testing the system to validate it works as designed, meets business needs, deliver training, provide frontline support during implementation and post Go-Live. This team will ultimately provide feedback regarding readiness and training effectiveness.</p> |
| <p>Help Desk Team Gavin Smith</p> | <p>Provide first tier of support at Go-Live and after. Will participate in training regarding how to handle certain questions and troubleshoot issues that are within their area of control at their college and how / where to escalate more complex issues that only the ERP Support team can handle. The Help Desk Team will log all issues as tickets so that the number of help tickets generated the urgency of the request, the category of problem, and the number of help requests resolved could generate important statistics. This will assist the implementation team to determine whether they are keeping up with the problem queue, whether certain types of problems seem to be trending unfavorably, whether certain user groups seem to be generating more help tickets than others are, and what priority to place on each reported problem. This is an ongoing, long-term position, as the need for a help-desk team will be needed indefinitely at the local level. It is recommended that this role be an IT position.</p> |
| <p>Technology/Data Team Gary Kalbfleisch, Gavin Smith Ric Doike-Foreman, Linda Mickelberry</p> | |
| <p>Governance Structure (Change Control Board) Local ctcLink Working Group (consisting of members of the ctcLink Leadership Team, as well as SMEs) will initially serve as CCB.</p> | <p>A local Change Control Board (CCB) should consist of (at a minimum) SMEs, functional/business analysts and the local project management office.</p> <p>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).</p> <p>A CCB provides a systematic approach to managing all changes made to PeopleSoft at the local level. Its primary role is to:</p> <ul style="list-style-type: none"> • 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 SBCTC resources • Review each request to determine if there are any associated risks |

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| | <ul style="list-style-type: none">• Evaluate timeline and scope• Determine an execution plan for approved changes, working with the requestor(s) to validate the accuracy of the delivered solution |
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Washington State Board for Community and Technical Colleges