

# ctcLink Project Update

## Financial Management Advisory Committee

April 24, 2014

Barbara Martin, ctcLink Project Director

Joann Wiszmann, Interim Director Accounting Services



# What is ctcLink?

- New technology foundation providing 21<sup>st</sup> century services anytime, anywhere for students, faculty and staff
- Replaces a cumbersome 30+ year old administrative system (student/academic, finance and HR/payroll)
- A patchwork of state-provided and locally developed processes that are uneven, sometimes incompatible, and increasingly labor intensive to maintain

# Change is Needed

- **Limitations of the Current Applications**
  - Difficult to Change Data Collection to Evolving Needs.
  - Very Limited Self-Service.
  - Lacks Modern Business Intelligence Capabilities.
  - Enhancement Requests for Modernization Unsupportable
- **Impact on Colleges**
  - Cannot respond to the evolving needs of students or government reporting.
  - Staff time that could be spent on improving the student experience is spent on maintaining data.
  - Loss of revenue because colleges cannot compete effectively.

# Thorough Planning & Deliberate Action

- Strategic Technology Plan
- Go Forward Study
- HP3000 Migration to UNIX
- Project Guiding Principles
- System Decision to Proceed

# Benefits for Students

- Single admission applications process
- A single electronic record with one student ID
- Ability to pay for all fees and services on-line
- Improved access to financial aid services
- Ability to access information on-line, self-service
- One-stop shopping for degree audit, registration, waitlists, etc.

# Improved College Operations

- Eliminate time consuming redundant processes
- Colleges can manage and share data
- Improved access to data and metrics to support decision making
- Employee self-service
- Automated business processes and approval queues

# Building a Successful Project

## Project Planning Around Best Practices

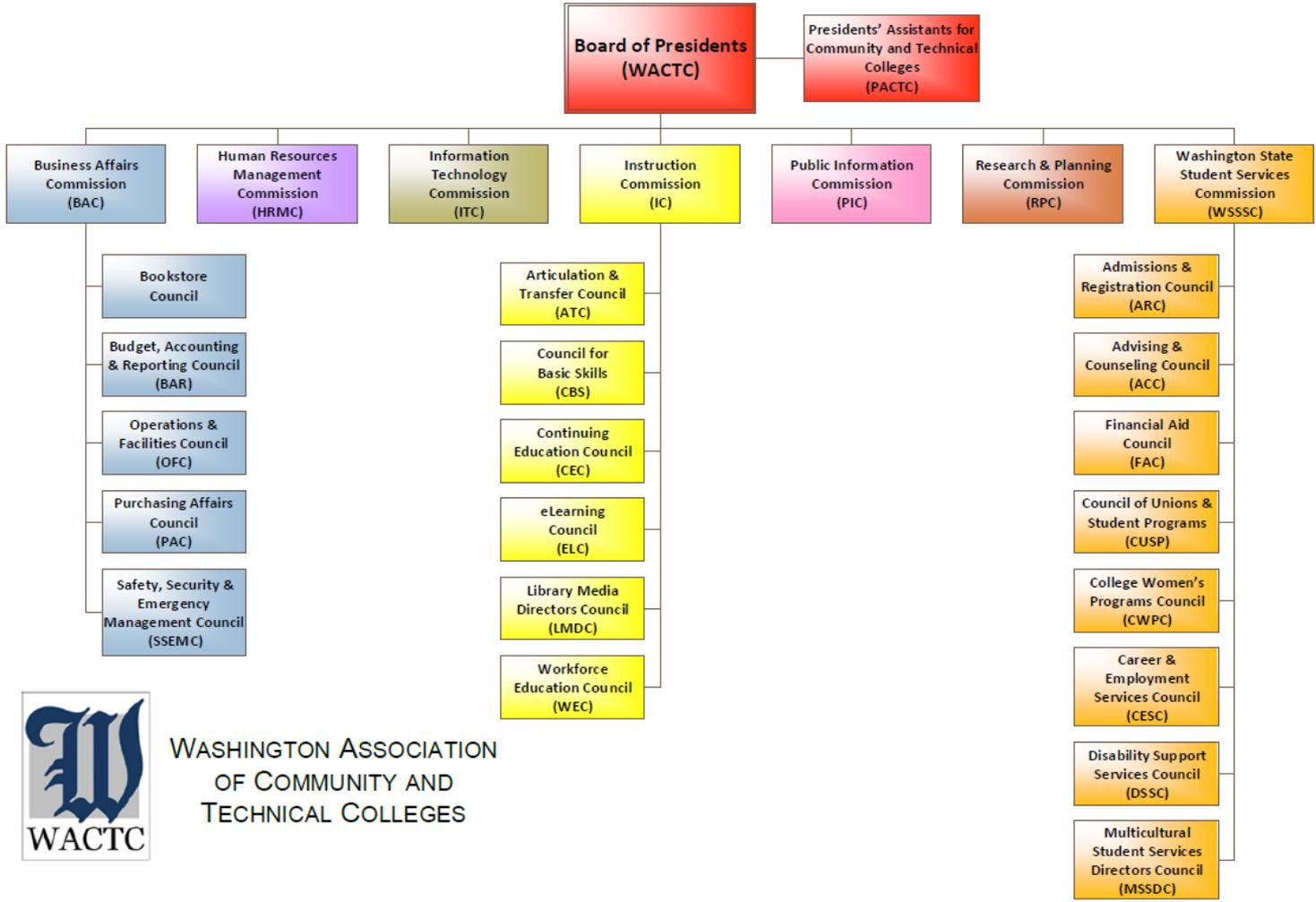
- Readiness Assessment
- Communications
- Training
- Organizational Change Management
- Governance
- Risk Management
- Implementation Approach
- Project Organizational Structure and Resource Requirements
- Cost Estimates
- Research Other College Projects

# Readiness Assessment

- Purpose: Evaluate the level of preparedness for each college and the overall college system to carry out and ERP implementation.
- Readiness Assessment Addressed:
  - Technical Readiness
  - Functional Readiness
  - Project Readiness
  - Cultural Readiness
  - Resource and Effort Awareness



# Leverage System Governance

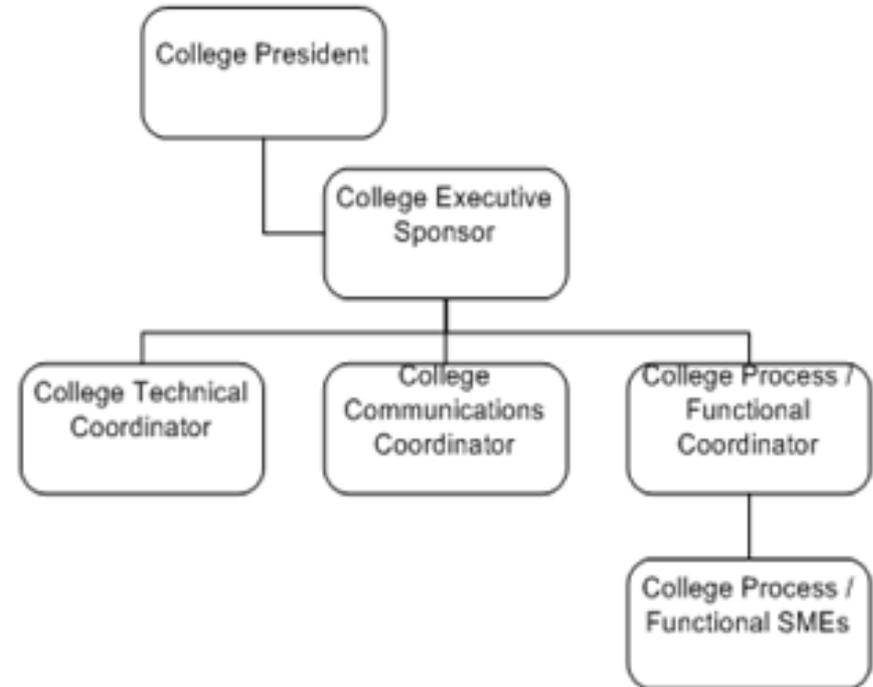


WASHINGTON ASSOCIATION  
OF COMMUNITY AND  
TECHNICAL COLLEGES



# College Teams

- President
- Executive
- Coordinators
  - Technical
  - Communications
  - SME Coordinator
- Subject Matter Experts (SME's)



# Steering Committee

- 2 Presidents
- Commission Representatives
  - Instruction
  - Student Services
  - Business Affairs
  - Human Resources
  - Information Technology
  - Public Information
  - Researchers
  - Financial Aid Council
- SBCTC Divisions – Education, Finance, Information Technology, Human Resources

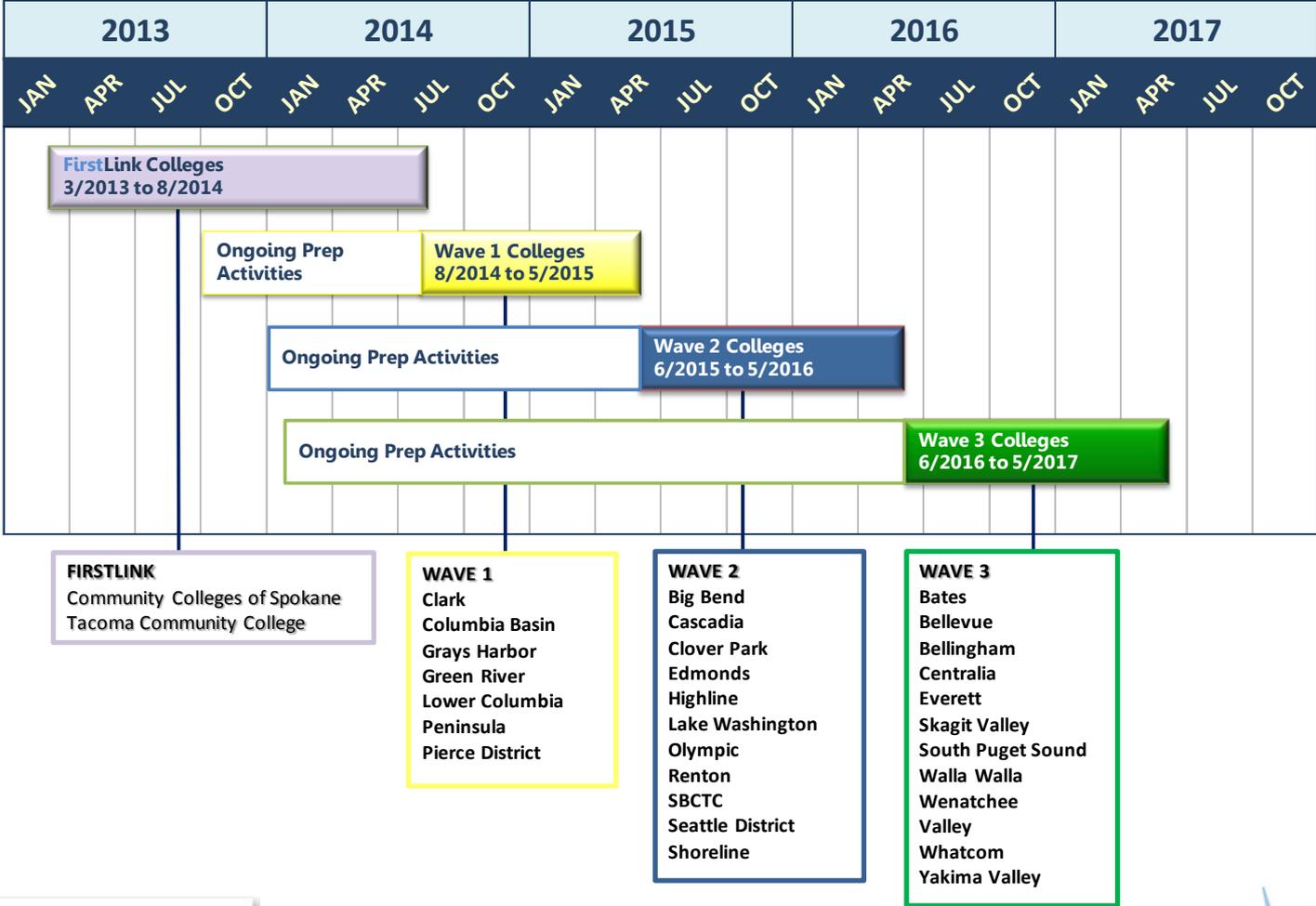


# Building a Successful Project

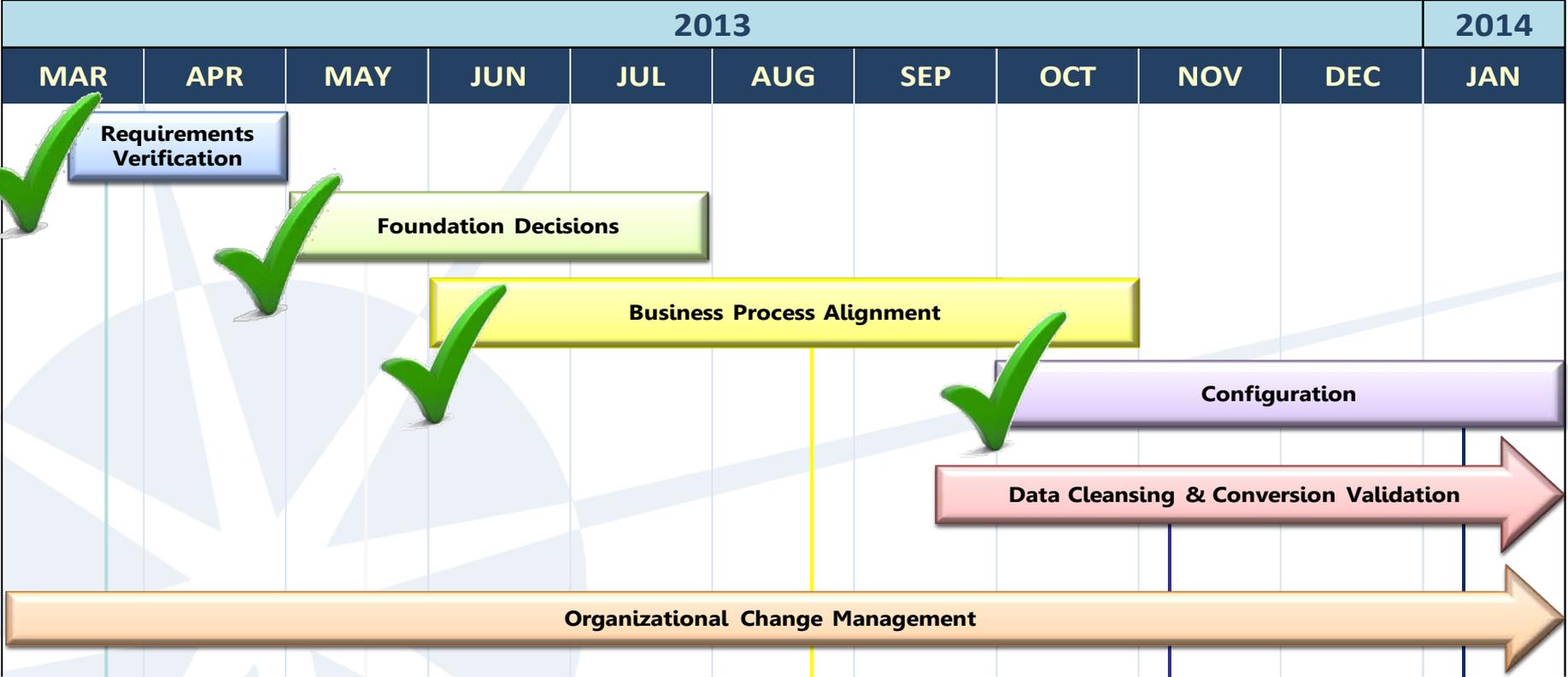
- Complete the RFP.
  - College Involvement
  - Functional and Technical Requirements
  - Leverage Information / Marketplace
- Thorough selection evaluation and demonstrations.
- Select a vendor and negotiate contract.
- Finalize implementation plan with vendor.
- Work with treasury office to finance COPs.
- Begin the Implementation Phase.



# Implementation Timeline



# Implementation Steps



- Validate requirements
- Clarification webinars with SMEs as needed

- Security Strategy – Complete
- Portal Strategy – Complete
- Conversion Strategy – Complete
- Reporting Strategy – Complete
- GL Account Structure – Complete
- Academic Structure – Complete
- Bio / Demo Structure – Complete
- Training Strategy – Complete

- Business Process Diagrams
- Security Definition
- Business Processes
- Technical Development
- Training Plan

Global data cleanup, mapping, conversion, validation

- System build based on BPA findings
- Reporting Plan



# Current / Future Activities

- CEMLI Functional & Technical Design Documents
- Testing – 4 phases
  - Refine and correct defects
- User Training
- Communications
- OCM

# Questions?