

Standard Information	
Approved by:	CNC ITS Leadership
Approval Date:	April, 2024
Administrator Responsible	David Lampron, CIO
Date of Next Review:	February, 2025

CNC Colleague Support Standard

Statement about this Standard

Ellucian Colleague is a critical College resource used by multiple departments to manage many of the college's core processes (student registrations, human resources and financial management). The data generated and stored within Colleague is key institutional data used for both operational and key strategic decision making. Colleague support is provided by OA Solutions, a third-party company. Some administrative support duties fall to members of IT Services and/or to power-users within the various departments.

Purpose / Rationale

The purpose of this document is to define the standard approach for supporting CNC's Colleague needs.

Scope / Limits

This standard shall apply to all employees within CNC while executing business functions, activities, or services for or on behalf of CNC or its customers. Policies, Standards, and Procedures may be expanded, or exceptions may be made as needed.

Definitions

- **Data Steward** – individuals within CNC's functional areas (HR, Registrar, Finance) who are responsible for the data they define, produce and use.
- **Enterprise Resource Planning (ERP) tool** – refers to a multi-module software platform that the college uses to manage day-to-day business activities such as student admissions/records, finance/accounting, human resource appointments/records, procurement approvals, and other core business processes.
- **Governance** – the decision-making process related to changes and additions to the Colleague system.

Background

- Colleague (an Ellucian Product) is the main Enterprise Resource Planning (ERP) tool in use at CNC.
- Colleague is a mission critical application for CNC underpinning and enabling numerous core processes such as student registrations, records and transcripts, financial aid, counseling, employee appointments and employment records, financial transactions and reporting, as well as procurement.
- Colleague is the key entry point and repository for the 'record of truth' of CNC's most important data, namely student and employee records.
- Colleague is a critical system for CNC. Disruption and/or downtime in the system can have detrimental impacts on CNC's operations.
- Ambiguity of roles and responsibilities associated with use, maintenance and support of Colleague can not only cause issues with conducting college operations but incurs various risks including privacy and cybersecurity breaches.
- CNC participates in a consortium, the Colleague Steering Committee (CSC), sharing licensing, application hosting and service support with 10 (ten) other BC colleges and small Universities.
- BCNET provides the support for licensing management, and community cloud application hosting.
- OA Solutions is the current service provider for all Colleague technical support.

Principles

- CNC recognizes the critical importance of Colleague, and its underlying data to the colleges' overall operations.
- Clear roles and responsibilities, processes and accountabilities are required for Colleague to adequately function.
- Ensuring adequate management, maintenance and curatorship of Colleague is a shared responsibility.
- Decisions related to priorities for potential additions of new Colleague functionality need to be made as a quorum of functional owners.
- Use, oversight, and maintenance of Colleague is multifaceted and complex. A matrixed model is required to fully encapsulate the approach.

Roles & Responsibilities

- The following framework generally underpins how roles and responsibilities are determined in the following areas:

Colleague Component	Functional Use	Responsibility	CNC Functional Owner
Enrollment, SIS, Financial Aid, Counselling	student registrations, records, and transcripts	data stewardship, application maintenance & enhancement testing & approvals	Office of the Registrar
Human Resources	employee appointments/records	data stewardship, application maintenance & enhancement testing & approvals	Human Resources
Financial Management	financial transactions and reporting, including payroll	data stewardship, application maintenance & enhancement testing & approvals	Finance
Procurement	Purchase Orders, Blanket orders	data stewardship, application maintenance & enhancement testing & approvals	Procurement
Colleague 'Core': Self-Service, Informer, security settings	Modules/functions that have shared uses	data stewardship, application maintenance & enhancement testing & approvals	Registrar, Finance, HR, OA Solutions
Colleague, Self-Service, Informer	Modules/functions that have shared uses	access management	Registrar, Finance, HR, IT Services

¹ Office of the Registrar acts as the intermediary for Student Services (financial aid, counselling, etc)

Application Support	End-user support	End-user support of overall Colleague application	OA Solutions
Server and Infrastructure	Operating System patching, maintenance, backups, data centre	OS Maintenance, testing, Infrastructure level cybersecurity	BCNET
Ellucian Licensing	Licensing for the consortia, contract with service provider (OA), contract with Ellucian	License conformance, vendor management	BCNET
Cost Management	Approval of invoices	Liaising with BCNET & OA on continuous improvement of services; review and approval of invoices from BCNET & OA; adding/removing users to the OA support portal	IT Services

Standard Support Requests

- OA Solutions is the current service provider for all Colleague technical support.
- If a CNC business unit (HR, Finance, Registrar) encounters a non-critical support requirement (e.g. an issue that can wait for several business days), a designated representative of that unit should be placing a support request directly through OA's service request portal: <https://support.oasolutions.ca/index.php>
- Designated representatives can be found in **Appendix D – Roles with Authority to OA Log Helpdesk Tickets & Authority to Approve Maintenance and Changes**
- CNC IT Services can add/remove user access to OA's service request portal. CNC stakeholders can request an add/remove through [CNC ITS Self-Service Portal](#).
- OA's Triaged Response Times for Low/Medium/high priorities can be found in the appendix section of this document (**Appendix A - OA Priority Classifications & Service Levels**).



Critical Support Requests

- In rare circumstances, CNC may need immediate attention to a matter.
- These issues are listed in the OA Triaged response times as Critical or Very High. (**Appendix B - OA Triaged Response Metrics**)
- A designated representative from a CNC business unit that unit should be placing a support request through OA's service request portal:
<https://support.oasolutions.ca/index.php>

Maintenance, Testing & Change Approvals

- OA has regular application maintenance windows. Those maintenance windows can be found in the appendix below (**Appendix C - OA Maintenance Schedule**) or through OA's service request portal:
<https://support.oasolutions.ca/softwareupdates/schedule/index.php>
- OA will send out communications to CNC informing of the maintenance windows and which Colleague components will be affected.
- In the case of upgraded modules, it will be CNC's functional owner's responsibility to conduct user acceptance testing.
- See **Appendix D - Roles with Authority to OA Log Helpdesk Tickets & Authority to Approve Maintenance and Changes**
- OA will be seeking approval to move new upgrades from the test environment to production.
- OA will send out an email to CNC's Colleague Mailing list seeking approvals to move upgrades to production.
- It is the CNC functional owner's (see Appendix D) responsibility to provide OA with approval to move specific modules to production.


Governance

There are two tiers of Colleague governance:

1. **Colleague [Consortia] Steering Committee** – in partnership with BCNET, oversees decisions that are germane across the consortia (i.e. service agreements with OA or Ellucian)
2. **CNC Colleague Steering** – Oversees coordination, alignment, prioritization, and makes recommendations to Executive Committee regarding CNC's use and evolution of the Colleague ecosystem. Projects and work orders pertaining to changes and/or enhancements to Colleague should be discussed and approved at the Colleague Steering prior to approval with OA.


Colleague Cost Management

- OA submits invoices to CNC IT Services monthly.
- BCNET submits regular invoices (annually, quarterly) to IT Services.

- Regular service review meetings are conducted between OA and CNC monthly. CNC ITS attends these meetings; Representatives from at least two CNC functional owners should participate on this .

Legislative and Collective Agreement References

[CNC & FANC 2014-2019 Collective Agreement](#)

 [CNC & CUPE 2022-25 Collective Agreement](#)

Other related policies, documents and websites

[Acceptable Use of CNC Information Technology](#)

[Identity and Access Management](#)

[Information Cybersecurity](#)

[Information Technology Asset Procurement and Vendor Management](#)

Standard Amendment Log

Amendment Number:	Date:
0	December 12, 2023
1	February, 2024
2	April, 2024
3	

Appendix A - OA Priority Classifications & Service Levels



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EXHIBIT B – Priority Classification and Service Levels

EXAMPLES OF PRIORITY CLASSIFICATION AND SERVICE LEVELS
Priority 1 – Critical
<ul style="list-style-type: none"> ■ Supported Production system is down; ■ System anomalies that prevent Client from accessing supported Applications; ■ Inability to reach login site of supported Applications; ■ Institution is unable to complete a critical business function. Critical business functions are defined to be: <ul style="list-style-type: none"> ○ Registering Students ○ Cash Disbursements, (specifically completing payroll, paying accounts payable); the method of payment/disbursement is not material (could be cheques or EFT). <p>Note: If there is 'a way' to complete these processes, then the ticket will not be considered Critical (could still be 'Very High'). For example, if one user is unable to print cheques, but another user can, then it would not be Critical.</p>
Priority 2 – Very High
<ul style="list-style-type: none"> ■ Application not functioning normally for critical business processing; ■ New trouble report that needs immediate attention and is affecting major component(s) of supported Applications; ■ Institution is unable to complete a critical business function using normal business processes. Critical business functions are defined to be: <ul style="list-style-type: none"> ○ Registering Students ○ Cash Disbursements, specifically (completing payroll, paying accounts payable); the method of payment/disbursement is not material (could be cheques or EFT). ■ This status should be used for tickets that initially were requested as Critical; however a temporary alternative process has been provided/used to avert the emergency.
Priority 3 – High
<ul style="list-style-type: none"> ■ A user is unable to complete a time sensitive business process. This could include: <ul style="list-style-type: none"> ○ Ability to log into the system; ○ Ability to access a screen; ○ Bug; ○ Training related issue. <p>Note: If a user is unable to complete a task but the deadline for completing the task is unspecified or far in the future (more than two weeks), then it would not be a 'High' status.</p>
Priority 4 – Medium

- General support requests not affecting broad range of users or supported Applications;
- Known trouble report that has been previously reported;
- Users are unable to complete a non-time-sensitive business process.
- This includes processes that have a deadline that is more than two weeks in the future. It is possible for a normal status ticket to be escalated to 'high' as it approaches its deadline.

Priority 5 – Low/None

Requests assigned Low or None are either awaiting a final Priority classification (New tickets for example) or may be used for other purposes.

Appendix B - OA Triaged Response Metrics



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EXHIBIT C – TRIAGED RESPONSE METRICS

Priority Level	Description	Service Response Time	Notification Schedule
1	Critical – A problem or issue impacting a significant group of customers or any mission-critical IT function.	60 Minutes	Hourly updates after submission via email or phone until resolution.

Priority Level	Description	Service Response Time	Notification Schedule
2	Very High – Non-critical but significant issue degrading the performance and reliability of supported services; however, the services are still operational. Support issues that could escalate to Critical if not addressed quickly.	120 Minutes	Daily updates after submission via email or phone until resolution. Additional Resources assigned after 1 day. If not resolved after two (2) days, escalate to Ellucian.
3	High – Routine support requests or incidences that impact a single user or non-critical issues.	One (1) business day	Deadline as per client.
4	Medium – A minor service issue or general inquiry.	Two (2) Business Days	Deadline as per client.

Help Desk Service Request Status Codes

Ticket Status	Description	Actions
New	Ticket is new and either not yet assigned or not yet been acknowledged by the assigned analyst.	Tickets created by customers are assigned the New status (unassigned) to indicate the ticket needs assignment. Assigned New tickets have to be acknowledged by the assigned analyst before any information can be recorded for that ticket.
Open	Ticket is currently active, and analysts are working towards resolution	Analysts will work on open tickets until they have been resolved or closed at the request of the client. When tickets are received via email to “Support” or directly to an “Analyst”, any other clients cc’d on the email will be added to the ticket as “Other clients to be notified”. There is a maximum of 4 other clients that can be added.

Ticket Status	Description	Actions
Waiting on Customer	Analyst has provided a resolution or options and is awaiting information from client.	When a ticket has a status of "Waiting on Customer" for more than 30 days (calculated from the date the ticket was made Waiting on Client) the status will be changed to "Resolved". The ticket initiator and others cc'd on the original request will be advised of the status change.
Resolved	A resolution has been presented to the user, or	No further work will be done on these tickets.

Appendix C - OA Maintenance Schedule



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EXHIBIT D – SU SCHEDULE

2023 / 24 Schedule

2023

Quarter 1

April 3, 2023
May 1, 2023
May 26, 2023
May 31, 2023
June 3, 2023
June 4, 2023

Clone Patchtest & Install Updates
Update Reports Published
Testing Completed
Production Installation Authorization Due
Production Installation
Test Clone

Quarter 2

July 3, 2023
August 7, 2023
September 22, 2023
September 27, 2023
September 30, 2023
October 1, 2023

Clone Patchtest & Install Updates
Update Reports Published
Testing Completed
Production Installation Authorization Due
Production Installation
Test Clone

Quarter 3

October 2, 2023
November 6, 2023
December 1, 2023
December 6, 2023
December 9, 2023
December 10, 2023

Clone Patchtest & Install Updates
Update Reports Published
Testing Completed
Production Installation Authorization Due
Production Installation
Test Clone

Quarter 4

January 2, 2024
February 5, 2024
March 1, 2024
March 6, 2024
March 9, 2024
March 10, 2024

Clone Patchtest & Install Updates
Update Reports Published
Testing Completed
Production Installation Authorization Due
Production Installation
Test Clone

Appendix D – Roles with Authority to OA Log Helpdesk Tickets & Authority to Approve Maintenance and Changes

Title	Department	Authority to Approve Maintenance & Changes
Supervisor IT Helpdesk	IT Services	
IT Helpdesk	IT Services	
Developer	IT Services	
Chief Information Officer	IT Services	
Developer	IT Services	
Manager, Information Architecture	IT Services	
Director, Budgets and Analysis	Financial Services	Yes
Director, Finance	Financial Services	Yes
Financial Analyst	Financial Services	Yes
Advisor, Benefits & Abilities Mgmt.	Human Resources	
Advisor - Payroll	Human Resources	
Associate Registrar	Office of the Registrar	Yes
Associate Registrar	Office of the Registrar	Yes
Business Systems & Project Lead	Office of the Registrar	
Business Systems Support	Office of the Registrar	
Registrar	Office of the Registrar	Yes
Director, Institutional Research	Institutional Research	
Analyst, IT	Institutional Research	
Procurement Analyst	Procurement	
VP Finance and Corporate Services	Finance and Corporate Services	
Manger, Student Services	<i>Student Services</i>	