Debunking the Myths about Colleague®

Creating the Experience Your Campus Deserves

Kristy Elliott, Director of Product Management, Ellucian

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Agenda

1. Why modernize?
2. What does “modern Colleague” look like?
3. Misconceptions
4. How to get modern

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Why Modernize?

Get Current and Take Advantage of What you Already Own

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Delight your students, faculty, and staff with software you already own!

On the go

Without training

Automating more than ever

Your fastest, simplest and most cost-effective path to modernization

BUILT FOR TOMORROW. READY TODAY.

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Customer Feedback

"GMC was surprised to learn Ellucian offered the direct deposit capability at no additional cost. The setup consisted of establishing the direct deposit file parameters with our bank and changing a few Finance Self-Service features. Our vendors and students have embraced electronic payments. Our office loves the cost savings (printing, check stock, postage, etc.) and having fewer checks to sign."

—Donna Bradley
Assistant Controller
Georgia Military College

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Customer Feedback

"Colleague Student Planning makes building my academic plan 100x easier and faster!"

—Student at Lee University

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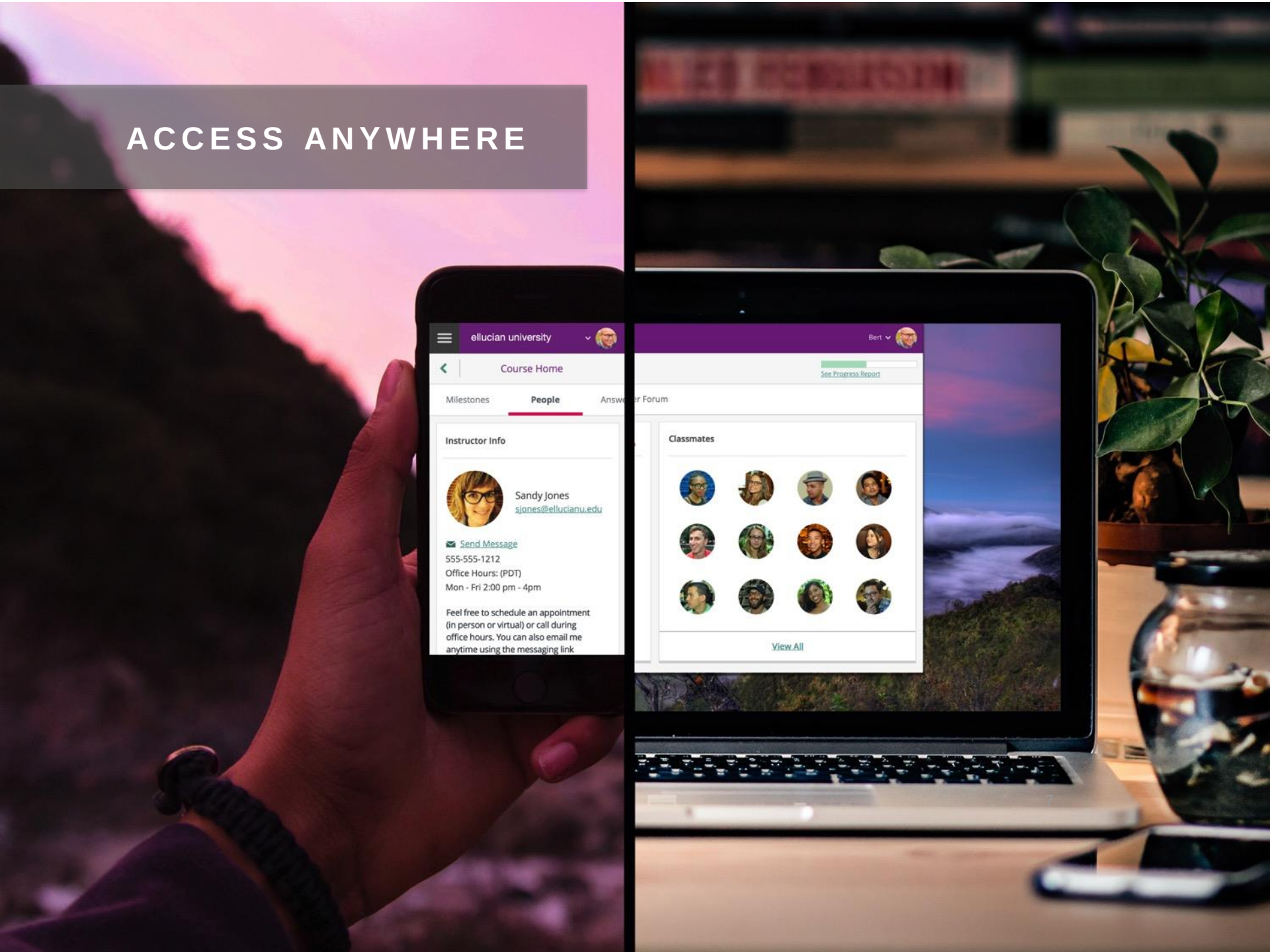
ACCESS ANYWHERE



Some of What's Available with the Colleague Transformation

Administrative Applications

- Colleague Core
- Colleague Student
- Colleague HR
- Colleague Finance
- Colleague AR/CR
- Colleague Financial Aid

Self-Service Solutions

- Registration
- Student Finance
- Graduation Application
- Proxy
- Student Planning
- Class Roster
- Financial Aid
- **Faculty Grading**
- Faculty Waiver of Requisites
- Faculty Granting of Petitions or Section Consent
- **Guest Search for Curriculum**
- **Transcript Request**
- **Enrollment Verification**
- **Projects Accounting**
- **Budget Self-Service**
- **W-2/1095-C Forms**
- **1098-T/1098-E**
- **Time Entry**
- User Profile
- Banking Information/Direct Deposit
- Emergency Information
- View/Update Address
- View/Update Phone
- View/Update E-Mail
- **Google Analytics**
- **Resource File Editor to Manage Resource Files Across Releases**
- **Site Access Research Capabilities**

What does “Being Modern” look like?

Get Current and Take Advantage

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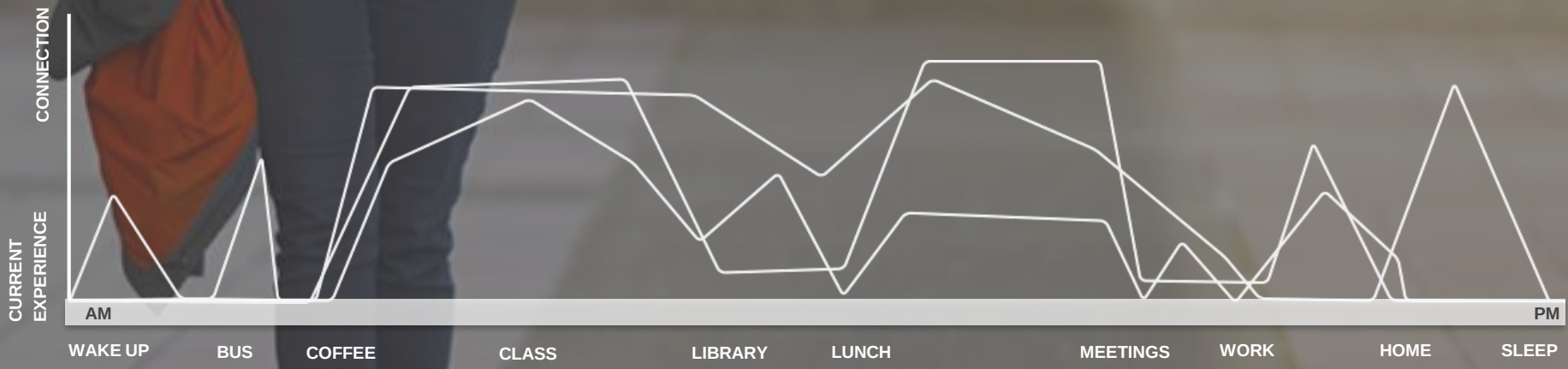
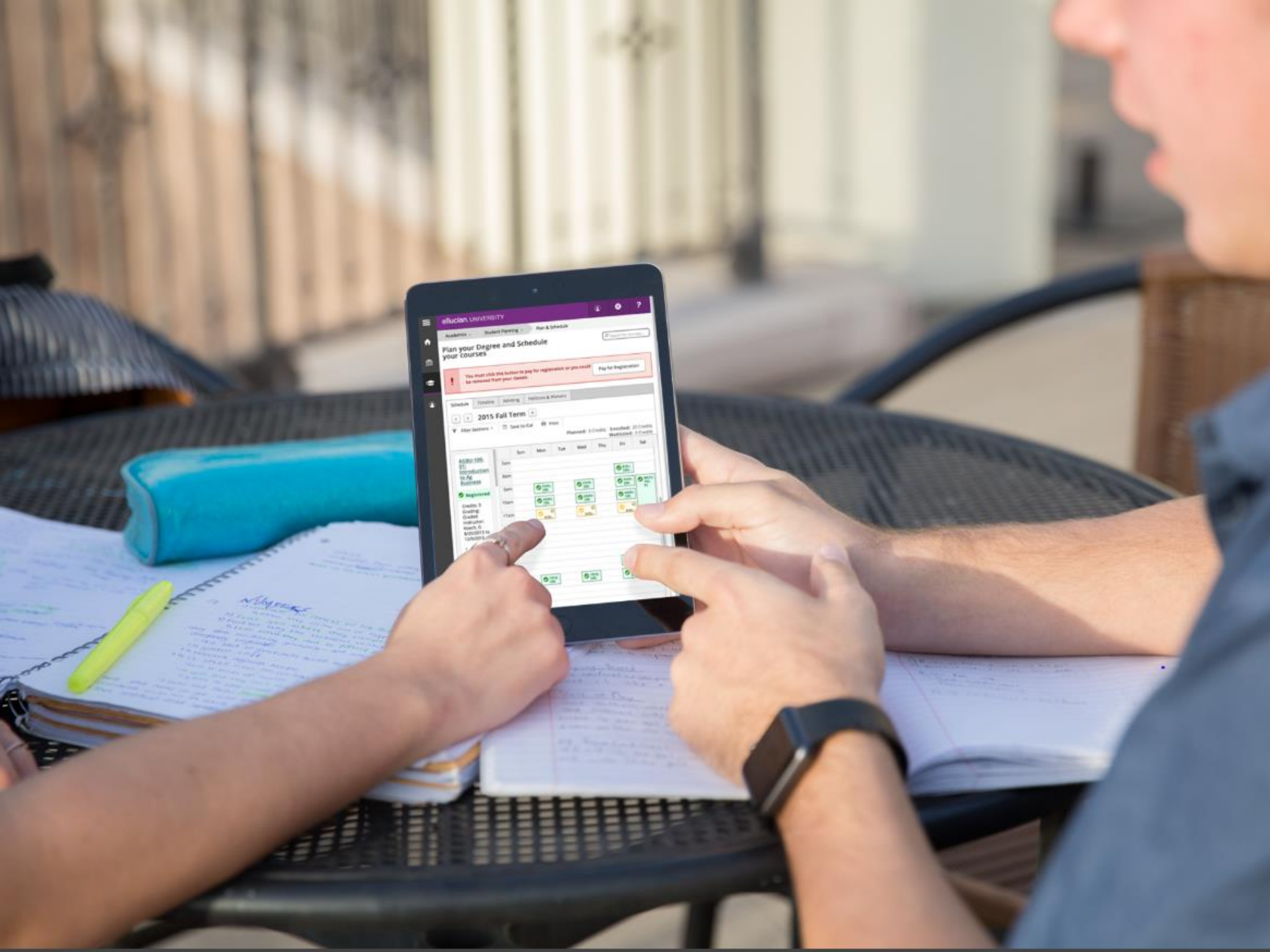
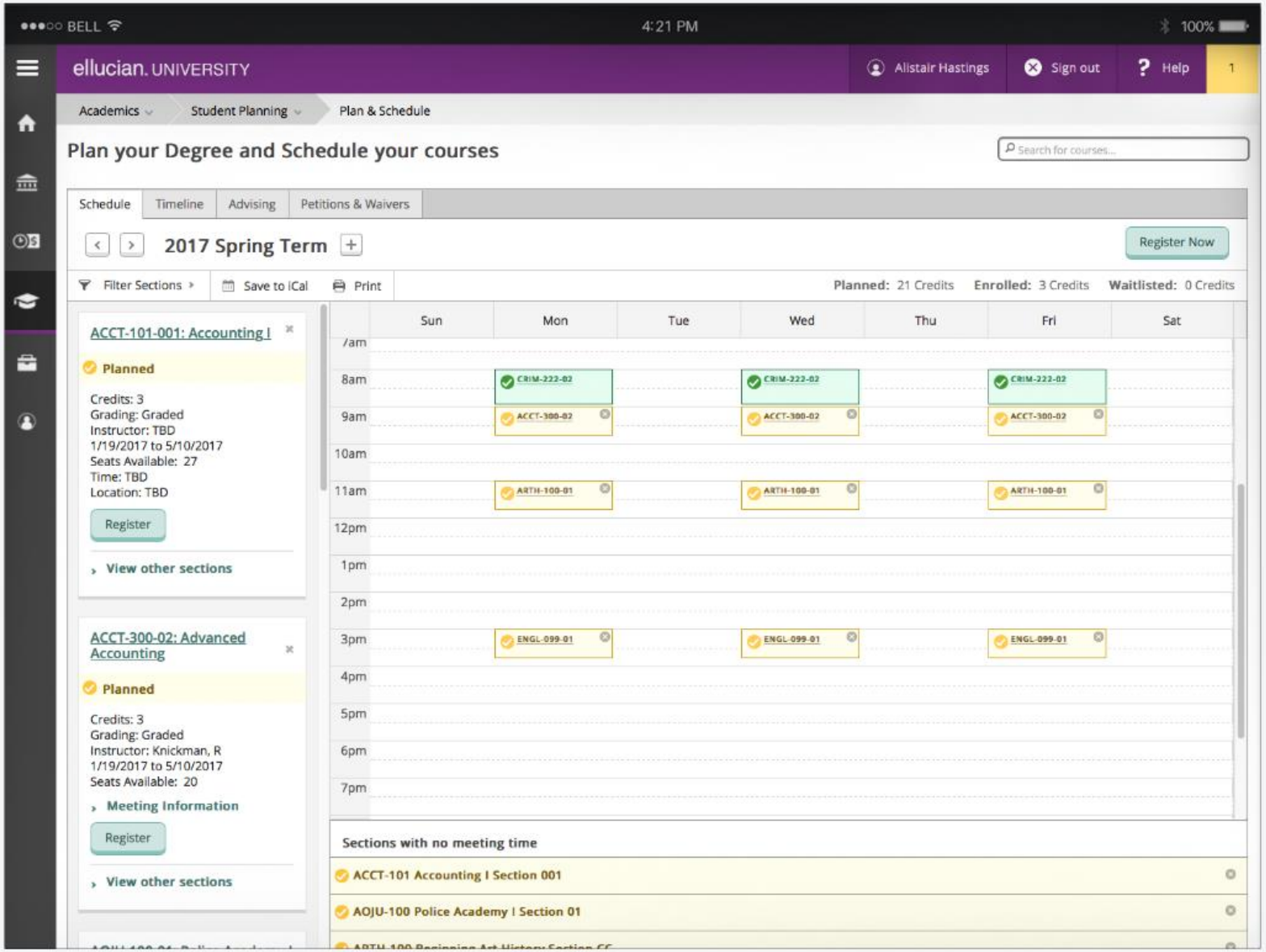
A JOURNEY WITH COLLEAGUE TODAY




Plan your Degree and Schedule your courses
2015 Fall Term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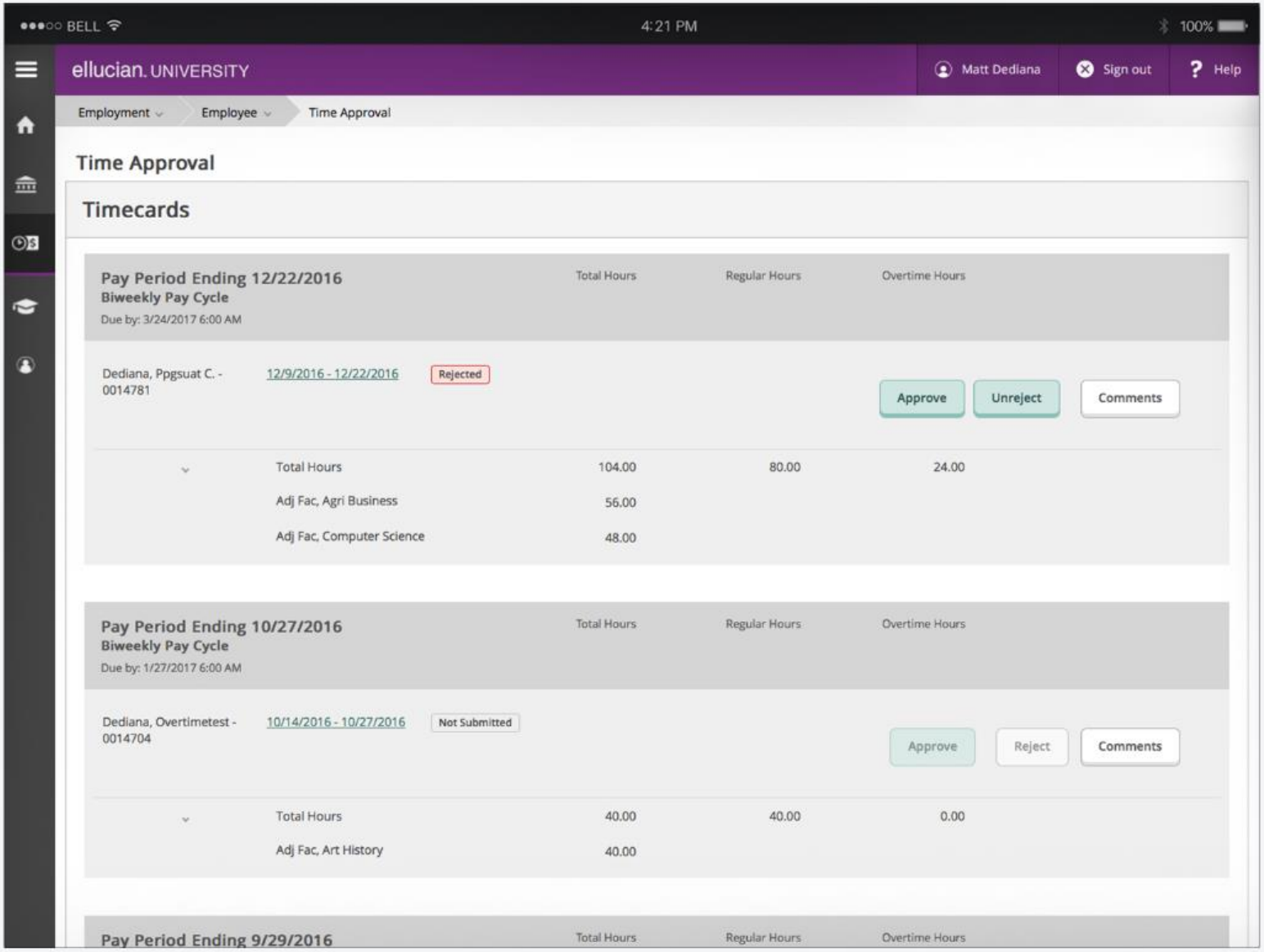
Academics
Student Planning
Plan & Schedule
Plan your Degree and Schedule your courses
Search for courses...
Schedule
Timeline
Advising
Petitions & Waivers
2017 Spring Term
Register Now
Filter Sections
Save to iCal
Print
Planned: 21 Credits
Enrolled: 3 Credits
Waitlisted: 0 Credits
ACCT-101-001: Accounting I
Planned
Credits: 3
Grading: Graded
Instructor: TBD
1/19/2017 to 5/10/2017
Seats Available: 27
Time: TBD
Location: TBD
Register
View other sections
ACCT-300-02: Advanced Accounting
Planned
Credits: 3
Grading: Graded
Instructor: Knickman, R
1/19/2017 to 5/10/2017
Seats Available: 20
Meeting Information
Register
View other sections
Sun
Mon
Tue
Wed
Thu
Fri
Sat
7am
8am
9am
10am
11am
12pm
1pm
2pm
3pm
4pm
5pm
6pm
7pm
CRIM-222-02
ACCT-300-02
ARTH-100-01
ENGL-099-01
Sections with no meeting time
ACCT-101 Accounting I Section 001
AOJU-100 Police Academy I Section 01

Later that day…

1:00 P.M.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Time Approval
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Timecards
Pay Period Ending 12/22/2016
Biweekly Pay Cycle
Due by: 3/24/2017 6:00 AM
Total Hours
Regular Hours
Overtime Hours
Dediana, Ppgsuat C. - 0014781
12/9/2016 - 12/22/2016
Rejected
Approve
Unreject
Comments
Total Hours 104.00 80.00 24.00
Adj Fac, Agri Business 56.00
Adj Fac, Computer Science 48.00
Pay Period Ending 10/27/2016
Biweekly Pay Cycle
Due by: 1/27/2017 6:00 AM
Total Hours
Regular Hours
Overtime Hours
Dediana, Overtimetest - 0014704
10/14/2016 - 10/27/2016
Not Submitted
Approve
Reject
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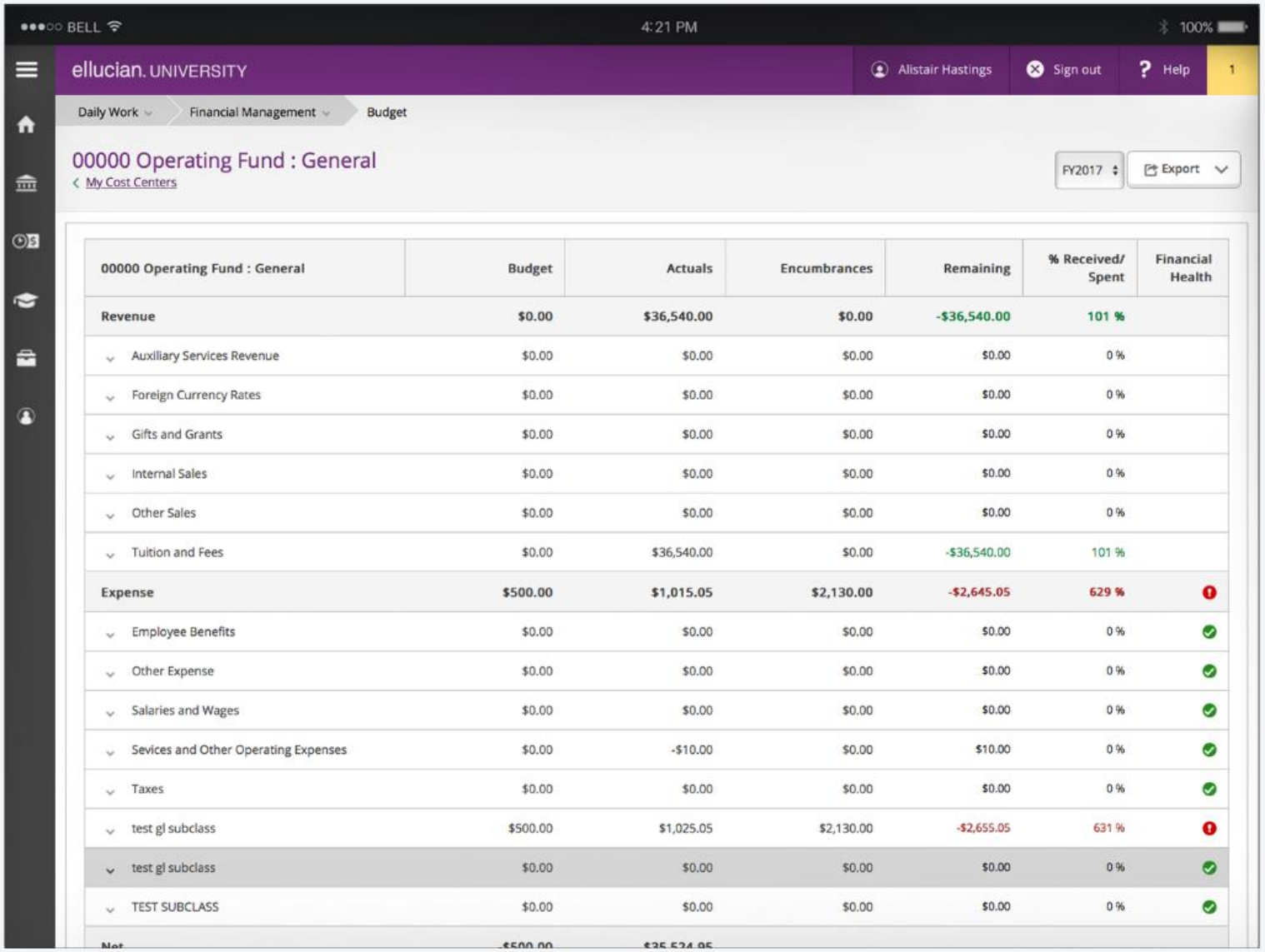
Total Hours 40.00 40.00 0.00
Adj Fac, Art History 40.00
Pay Period Ending 9/29/2016
Total Hours
Regular Hours
Overtime Hours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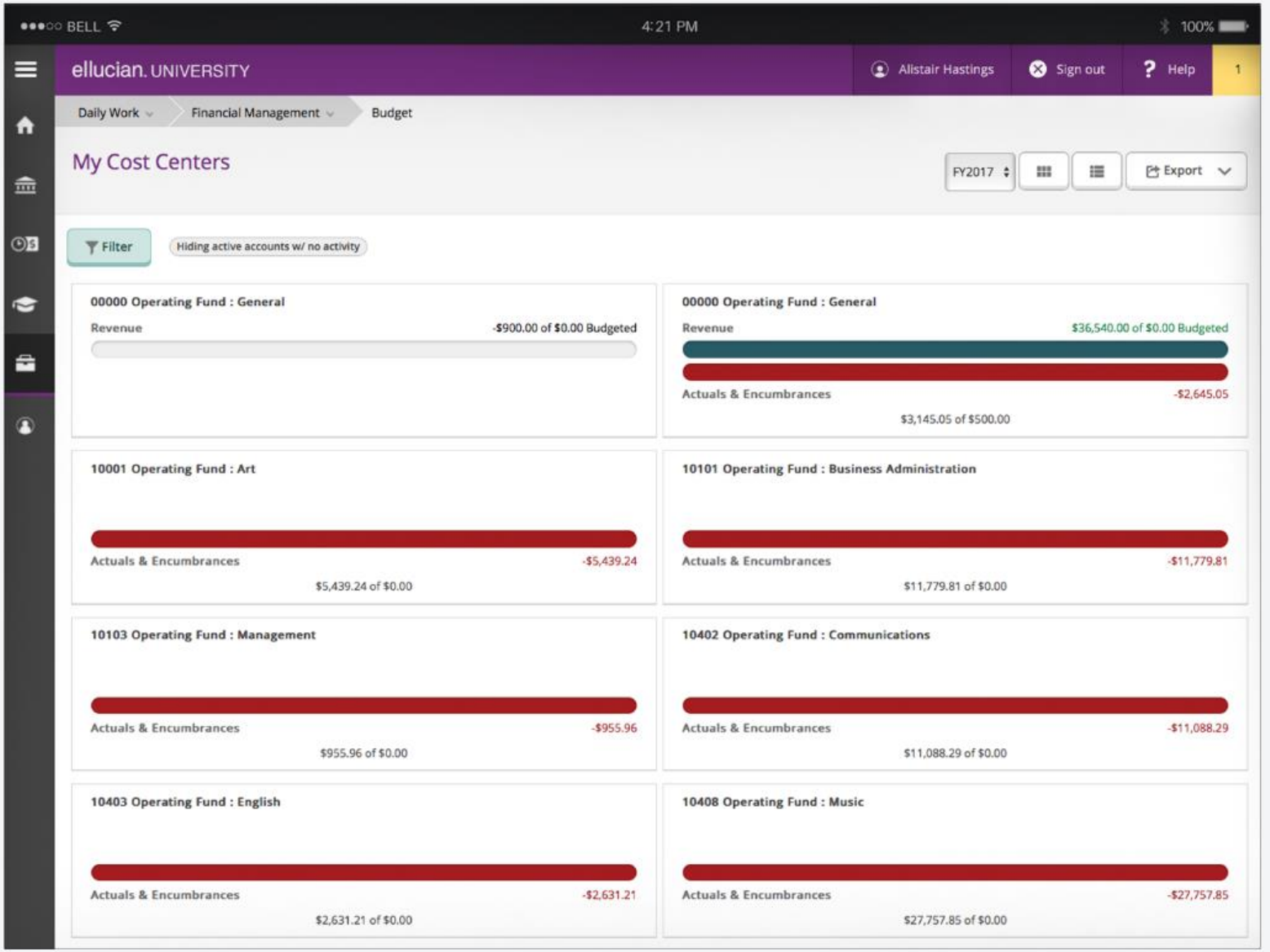
Help
1
Daily Work
Financial Management
Budget
00000 Operating Fund : General
My Cost Centers
FY2017
Export
00000 Operating Fund : General | Budget | Actuals | Encumbrances | Remaining | % Received/ Spent | Financial Health
Revenue | $0.00 | $36,540.00 | $0.00 | -$36,540.00 | 101 %
Auxiliary Services Revenue | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Foreign Currency Rates | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Gifts and Grants | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Internal Sales | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Other Sales | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Tuition and Fees | $0.00 | $36,540.00 | $0.00 | -$36,540.00 | 101 %
Expense | $500.00 | $1,015.05 | $2,130.00 | -$2,645.05 | 629 %
Employee Benefits | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Other Expense | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Salaries and Wages | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
Sevices and Other Operating Expenses | $0.00 | -$10.00 | $0.00 | $10.00 | 0 %
Taxes | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
test gl subclass | $500.00 | $1,025.05 | $2,130.00 | -$2,655.05 | 631 %
test gl subclass | $0.00 | $0.00 | $0.00 | $0.00 | 0 %
TEST SUBCLASS | $0.00 | $0.00 | $0.00 | $0.00 | 0 %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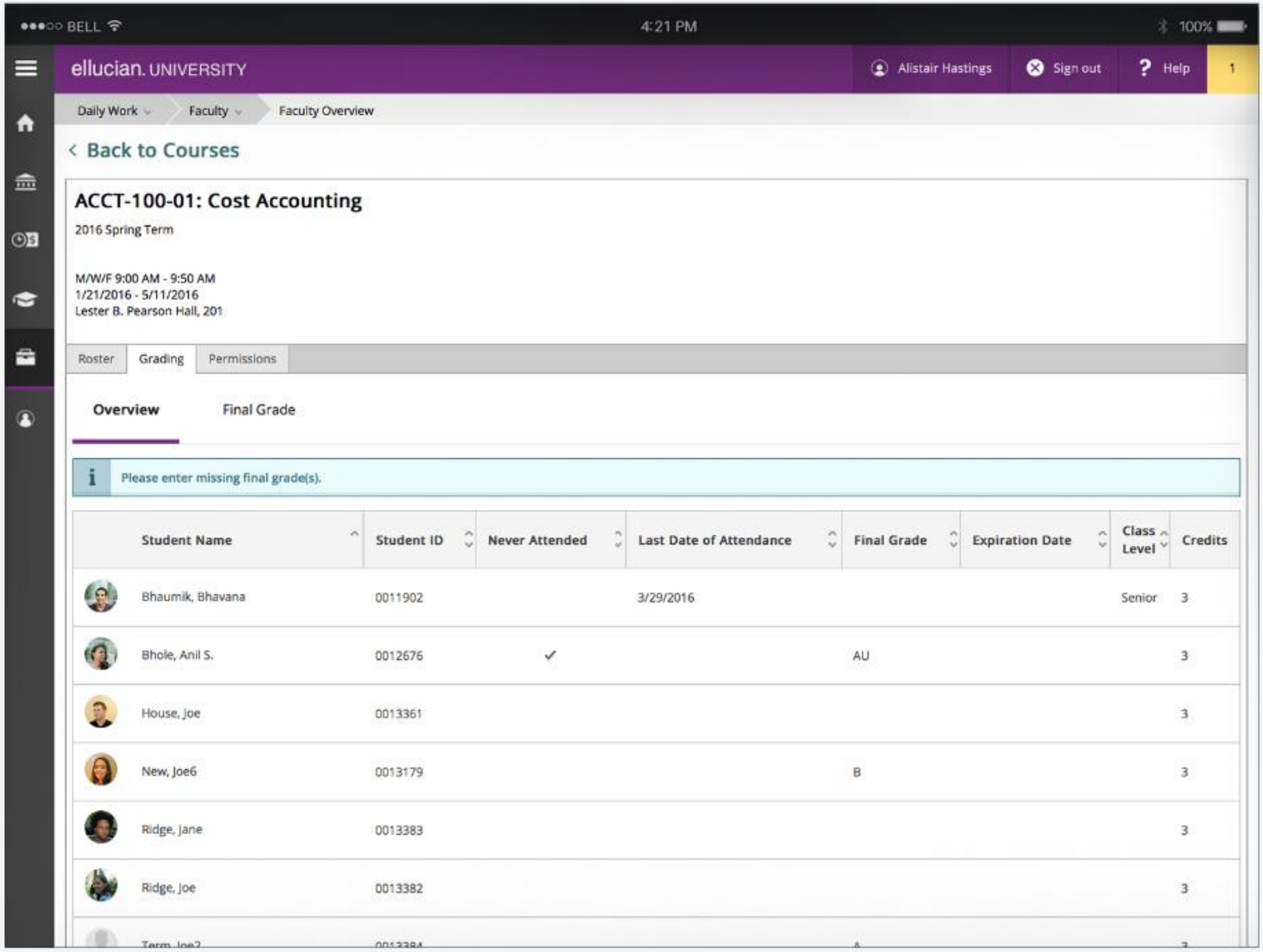
Help
1
Daily Work
Financial Management
Budget
My Cost Centers
FY2017
Export
Filter
Hiding active accounts w/ no activity
00000 Operating Fund : General
Revenue
-$900.00 of $0.00 Budgeted
00000 Operating Fund : General
Revenue
$36,540.00 of $0.00 Budgeted
Actuals & Encumbrances
-$2,645.05
$3,145.05 of $500.00
10001 Operating Fund : Art
Actuals & Encumbrances
-$5,439.24
$5,439.24 of $0.00
10101 Operating Fund : Business Administration
Actuals & Encumbrances
-$11,779.81
$11,779.81 of $0.00
10103 Operating Fund : Management
Actuals & Encumbrances
-$955.96
$955.96 of $0.00
10402 Operating Fund : Communications
Actuals & Encumbrances
-$11,088.29
$11,088.29 of $0.00
10403 Operating Fund : English
Actuals & Encumbrances
-$2,631.21
$2,631.21 of $0.00
10408 Operating Fund : Music
Actuals & Encumbrances
-$27,757.85
$27,757.85 of $0.00

Later that afternoon…
4:10 P.M.

LIT 101
THEMES
CONFLICTS
SYMBOLS
STORY ARC
T.S. ELIOT
THE WASTELAND
DOSTMODERNISM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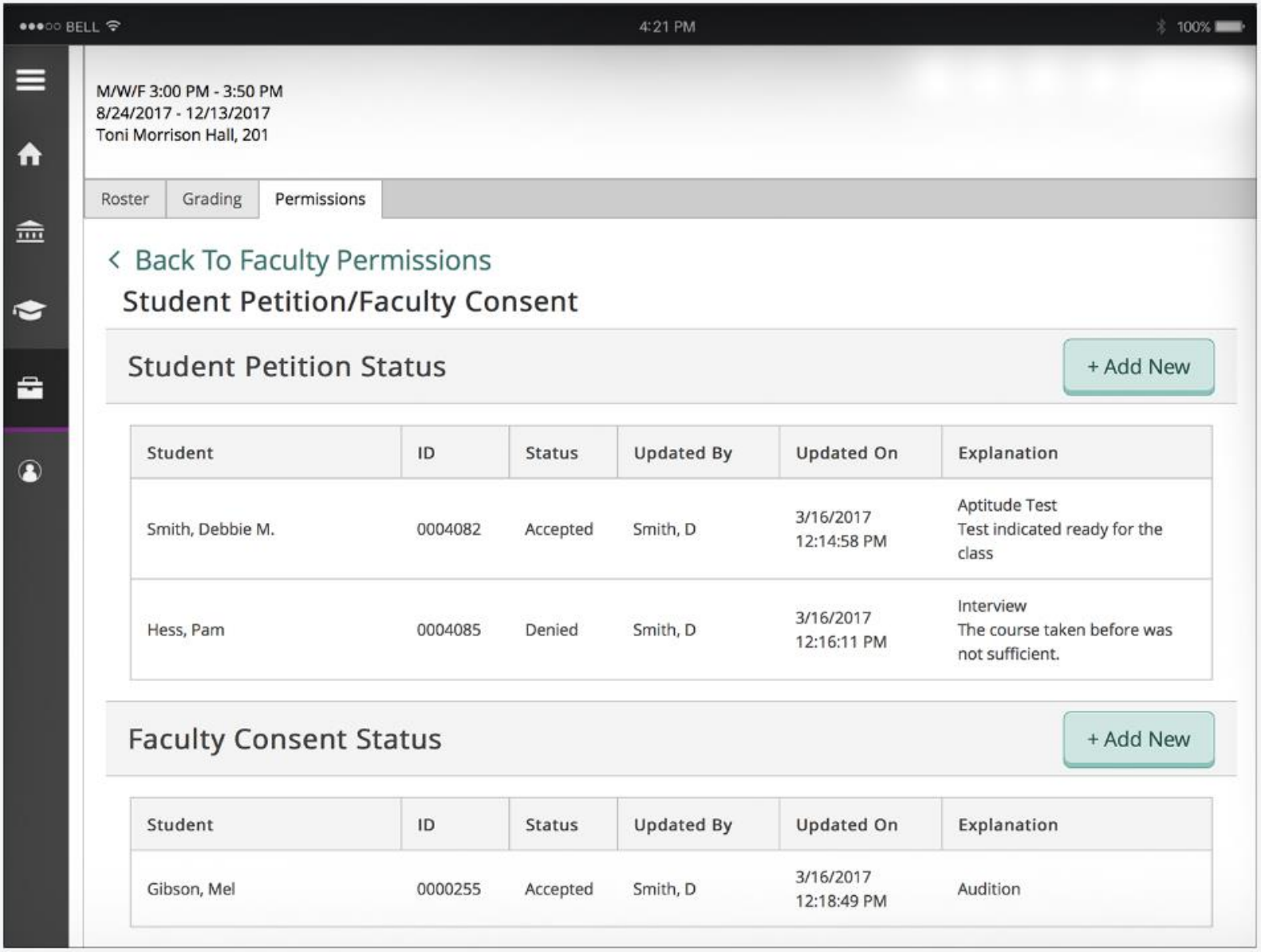
1
Daily Work
Faculty
Faculty Overview
Back to Courses
ACCT-100-01: Cost Accounting
2016 Spring Term
M/W/F 9:00 AM - 9:50 AM
1/21/2016 - 5/11/2016
Lester B. Pearson Hall, 201
Roster
Grading
Permissions
Overview
Final Grade
Please enter missing final grade(s).
Student Name
Student ID
Never Attended
Last Date of Attendance
Final Grade
Expiration Date
Class Level
Credits
Bhaumik, Bhavana 0011902 3/29/2016 Senior 3
Bhole, Anil S. 0012676 ✓ AU 3
House, Joe 0013361 3
New, Joe6 0013179 B 3
Ridge, Jane 0013383 3
Ridge, Joe 0013382 3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8/24/2017 - 12/13/2017
Toni Morrison Hall, 201
Roster
Grading
Permissions
Back To Faculty Permissions
Student Petition/Faculty Consent
Student Petition Status
+ Add New
Student
ID
Status
Updated By
Updated On
Explanation
Smith, Debbie M.
0004082
Accepted
Smith, D
3/16/2017 12:14:58 PM
Aptitude Test Test indicated ready for the class
Hess, Pam
0004085
Denied
Smith, D
3/16/2017 12:16:11 PM
Interview The course taken before was not sufficient.
Faculty Consent Status
+ Add New
Student
ID
Status
Updated By
Updated On
Explanation
Gibson, Mel
0000255
Accepted
Smith, D
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Audition

Recap

Dispelling the Misconceptions

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Dispelling Misconceptions

1. Why should we upgrade? We don't know what's new in Colleague baseline.

- Over 62 code workarounds added to Colleague baseline
  - 100% of the Colleague Financial Aid workarounds
- Over 615 CRs addressed
  - Twelve Registration Billing CRs
  - Ability to display Student Account Summary and Lifetime Eligibility Pell amounts in Colleague Self-Service Financial Aid (parameter settings)
  - Weighted average overtime calculation
  - Graduation application

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Registration Billing Updates

These releases gave you the ability to:

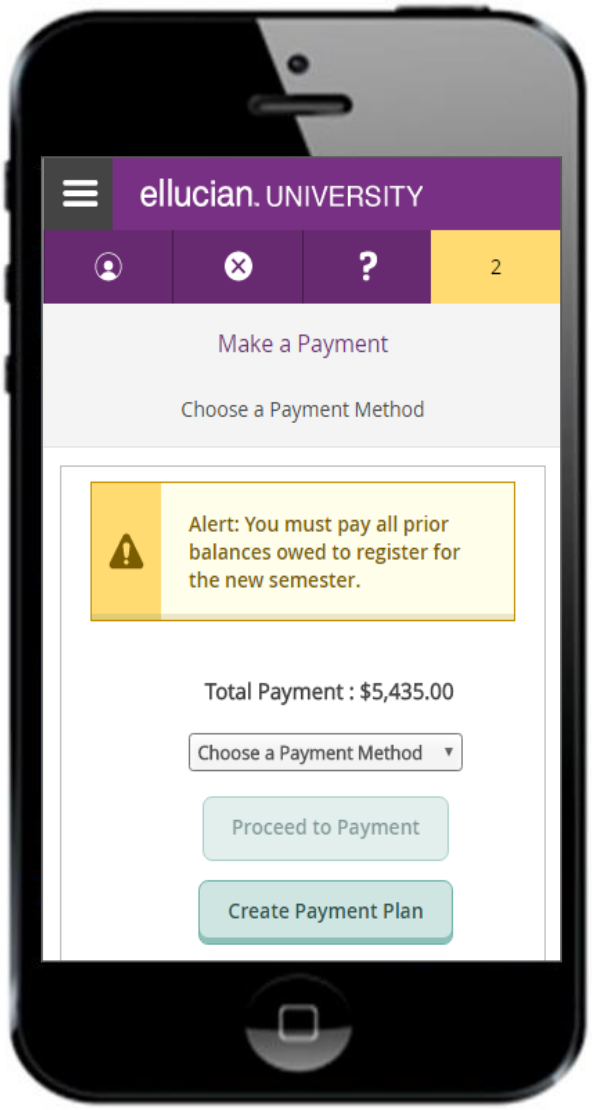
- Run BILL in report only mode
- Create New Static Rate Billing Tables (STRT)
- Avoid Registration Billing batches (ARDE)
- Remove custom code workarounds

SU016334-1805*52 –
Colleague Registration Billing 1

- Released September 28, 2016

SU016863-1805*17 –
Colleague Registration Billing 2

- Released December 8, 2016



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Colleague Student Baseline

Ability to delete GRADUATES records

- Batch Delete GRADUATES Records (BDGR)

Fix Student's Term Pointers (FSTR) updated

- Removed the need for the colon prompt (Article 000004117)

Batch Update Completion Date (BUCD) created

- Allow the Completion Date to be updated in batch (Article 000004238)

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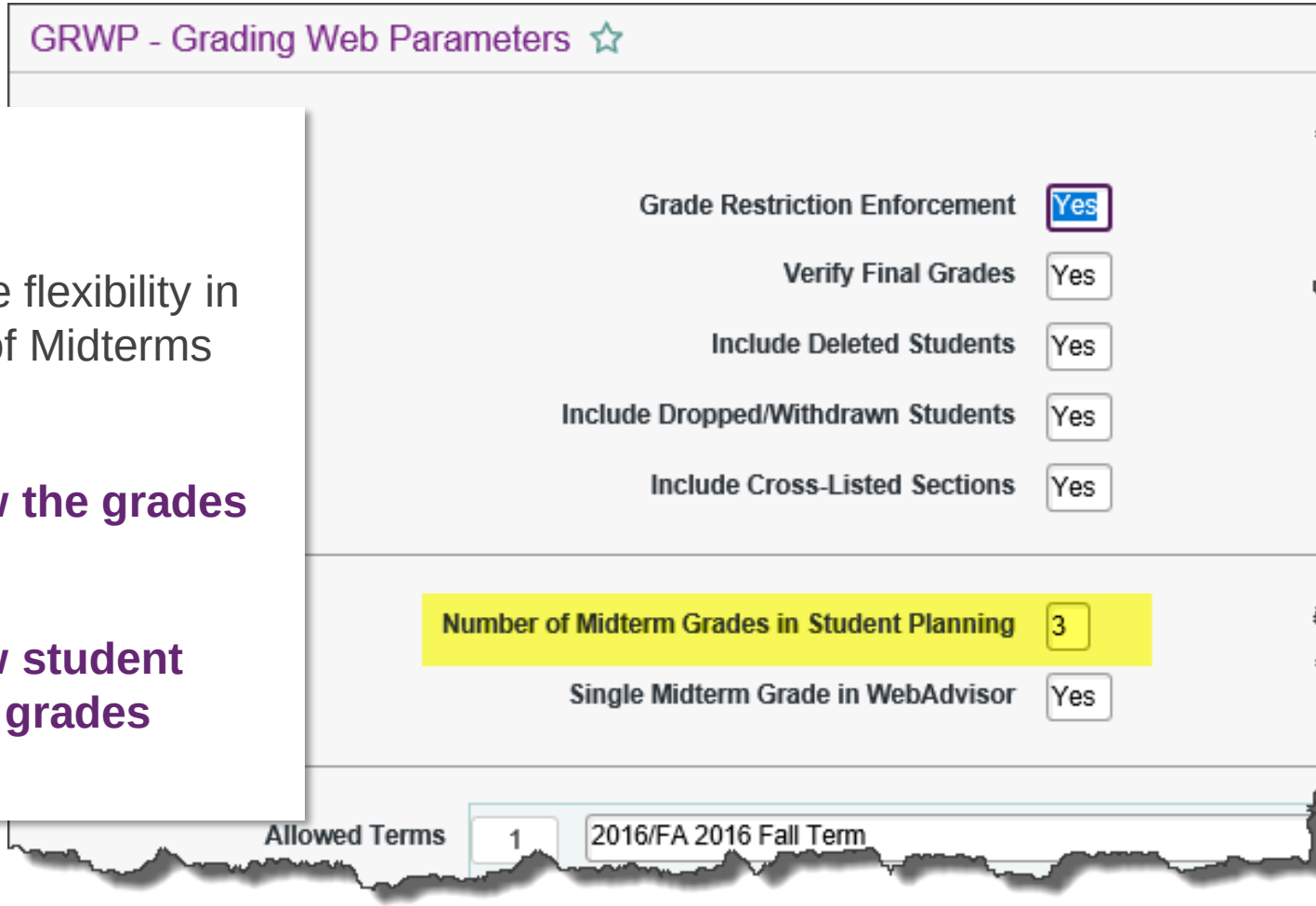
View Midterm Grades

Faculty Grading Midterm added

- Allowed more flexibility in the number of Midterms displayed

Students can view the grades in self-service

Advisors can view student midterm and final grades



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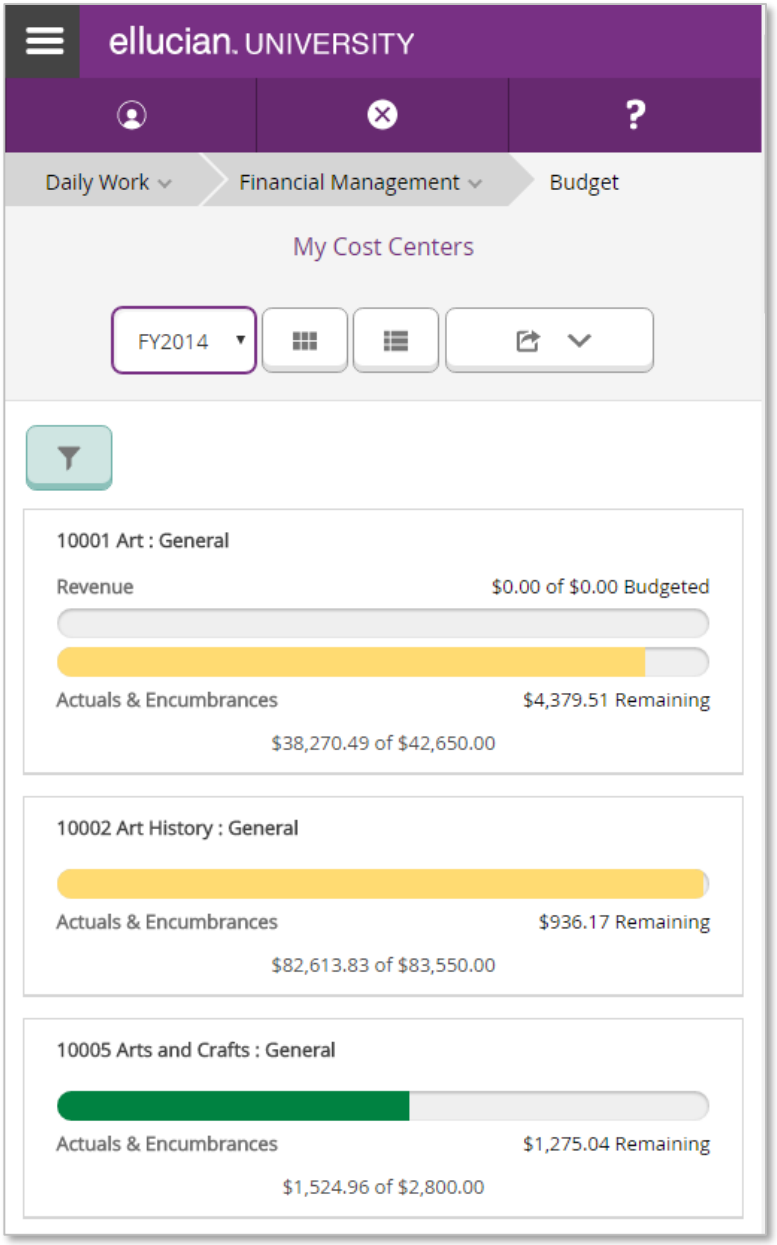
Budget Officer Self-Service

Have you checked the financial health of your cost center lately?

- Easy to use interface
- Monitor and control budget dollars in real time
- Cost center information is at your fingertips
- Summary to source documents
- Mobile and tablet ready
- Was released in 2.12



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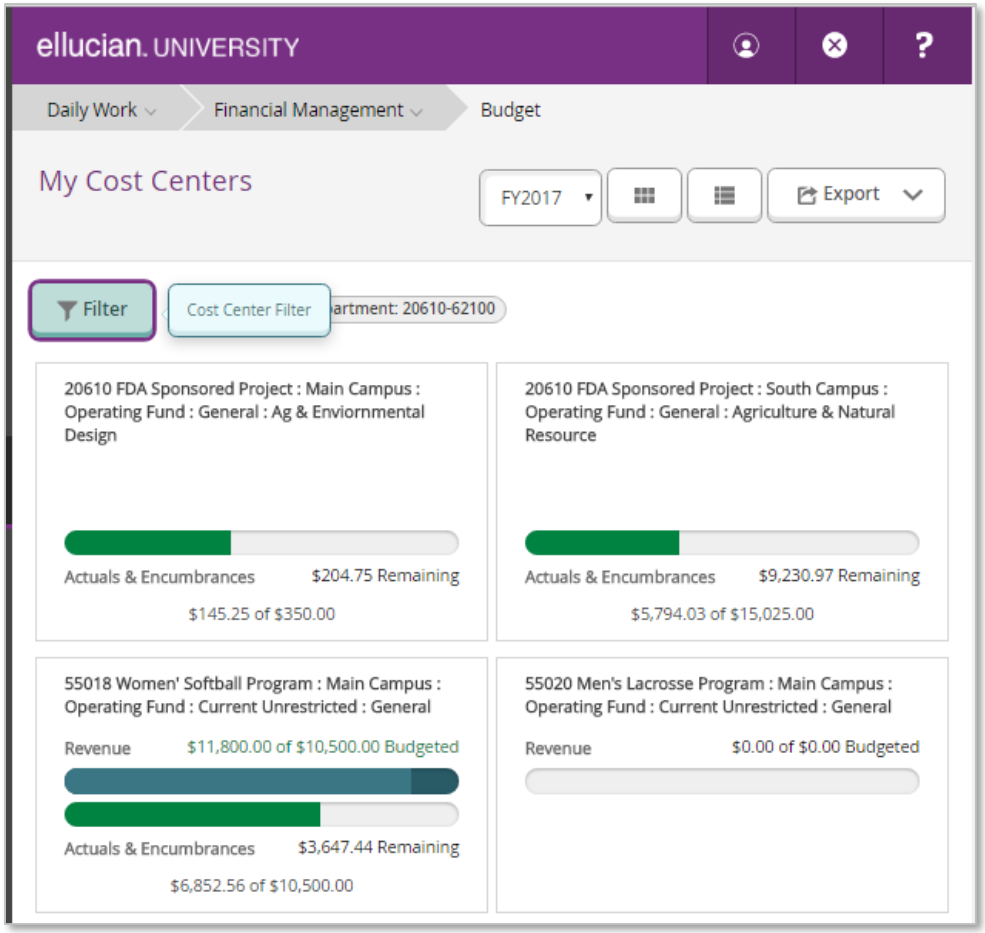
Budget Officer Self-Service

Self-Service 2.15

- Ability to save filter criteria
- Ability to see at a glance filter criteria applied
- Apply filter to Cost Center Detail
- Default Bar Graph or List View based on last used
- Revenue added to Bar Graph, List, & Cost Center Detail



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Payroll Infrastructure Enhancements

SU016562-1805*37 Delivered June, 2016

- Weighted Average Overtime calculation (CR 12763.89)
- Batch Supervisor Assignment (CR 44690.33)
- Payroll Register from CALC to .csv (eLive suggestion)
- Field to store last 4 of payroll account unencrypted (IDEA 45777)
- Numerous bug fixes, most related to cloud readiness

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Client Feedback

“With the new batch supervisor process (BSAP) I can set my supervisors up within minutes and in a group, as to where it took me days to do it individually! Editing is also much more of a breeze! Thank you so much for speeding up my productivity and ensuring quality in my work!”

Missy Flack
Student Employment Coordinator & Payroll Assistant
Luther College

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Dispelling misconceptions (Cont'd)

2. Can we really de-customize? How have configuration and extensibility been built into baseline Colleague?

- Overtime Calculation
- Resource File Editor and Upgrade Merge
- Display messages to users
- Add Hyperlinks to Self-Service Navigation
- View or allow edit of Self-service address, e-mail and phone designations

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Configuration over Customization

API 1.13.1/Self-Service 2.13.1 Delivered September, 2016

- Enhanced ability to configure calculations of overtime
  - Overtime calculation definitions

- Comments and notifications with submissions, approvals, and rejections
- Ability to migrate employees from Web Time Entry to Time Entry Self-Service individually or in groups
- Support for biweekly, hourly, summary, non-exempt
- Time entry and approval for the Student persona

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Client Feedback

“Although we do not have complex customization to the overtime subroutine, any time we can eliminate customization we are happy! The new set up will allow us to remove this one from our list.”

Linda Miller
Business Affairs Systems Analyst
North Central College

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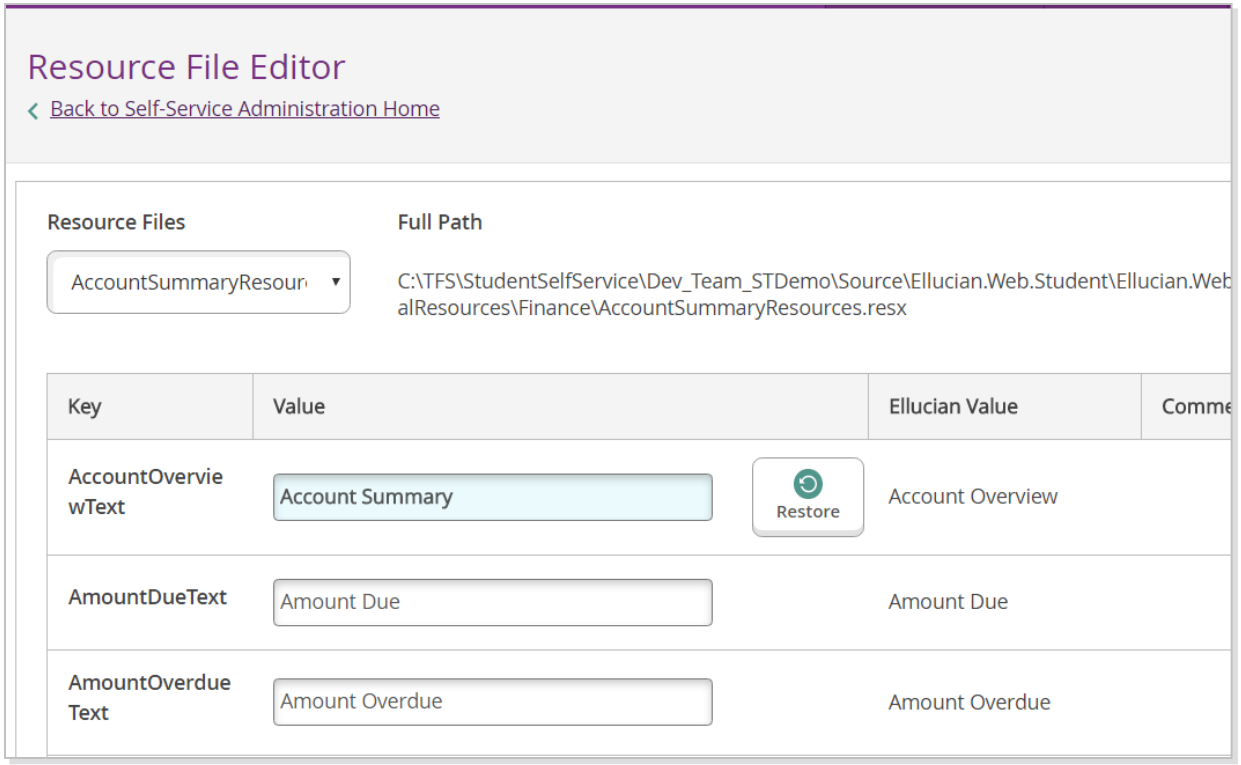
Configuration over Customization

Resource file editor and upgrade merge! (2.15)

- Editor provided in Site Administration
- Text values are merged and retained at upgrade
- Source control no longer needed



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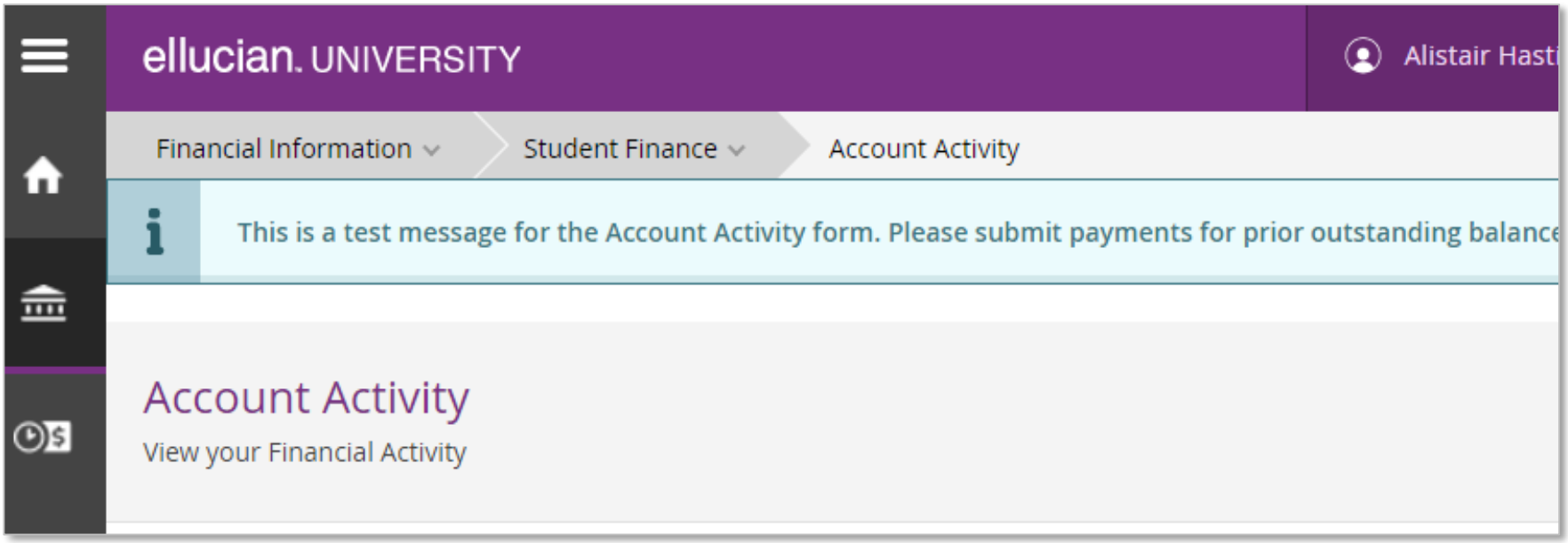
Configuration over Customization

Several “Ideas” requested the ability to display messages to users

- Miscellaneous text can be configured on every Self-Service page
- Pulls data from Miscellaneous Text (MTXT) form in Colleague UI
- Can be used to target important informational messages to a set of users



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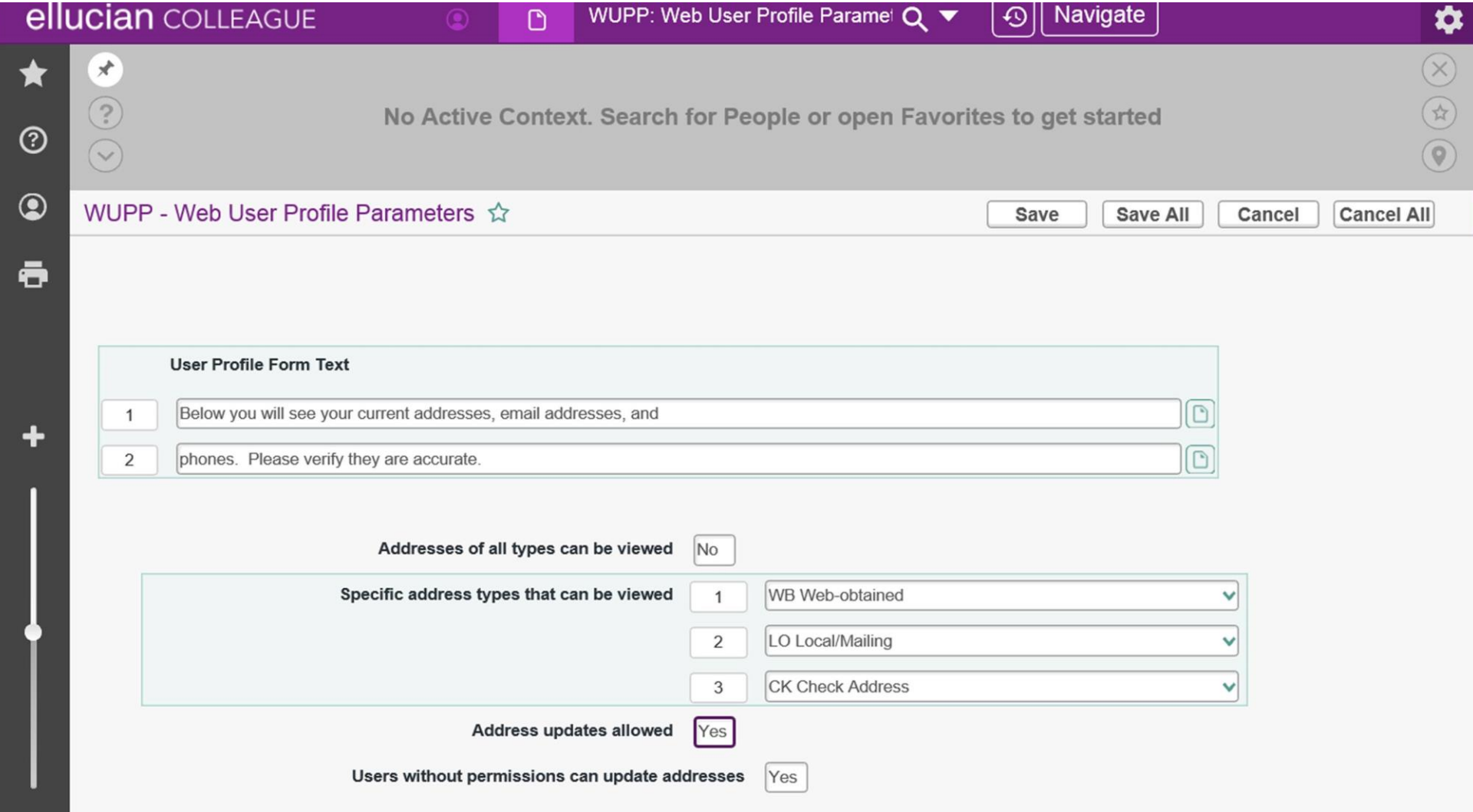
View/Edit Contact Info - WUPP

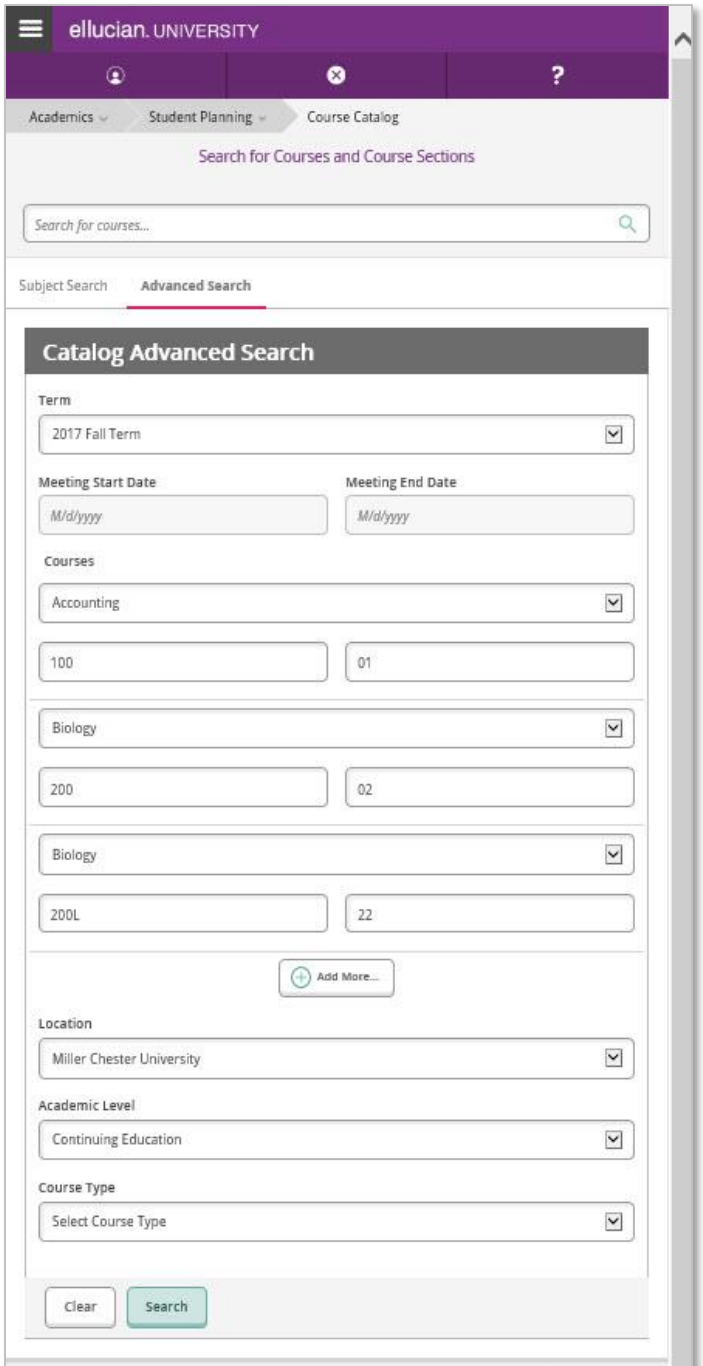
View or allow edit of Self-service address, e-mail and phone information



Dispelling misconceptions

3. Colleague Self Service is ready—Use it now or in tandem with Web Advisor

- Begin the migration now
- Use both at the same time while you transition
  - Put links to WebAdvisor in Colleague Self-Service during the transition
- Student Planning Search is accessible for guest users!
  - Configure which fields are shown



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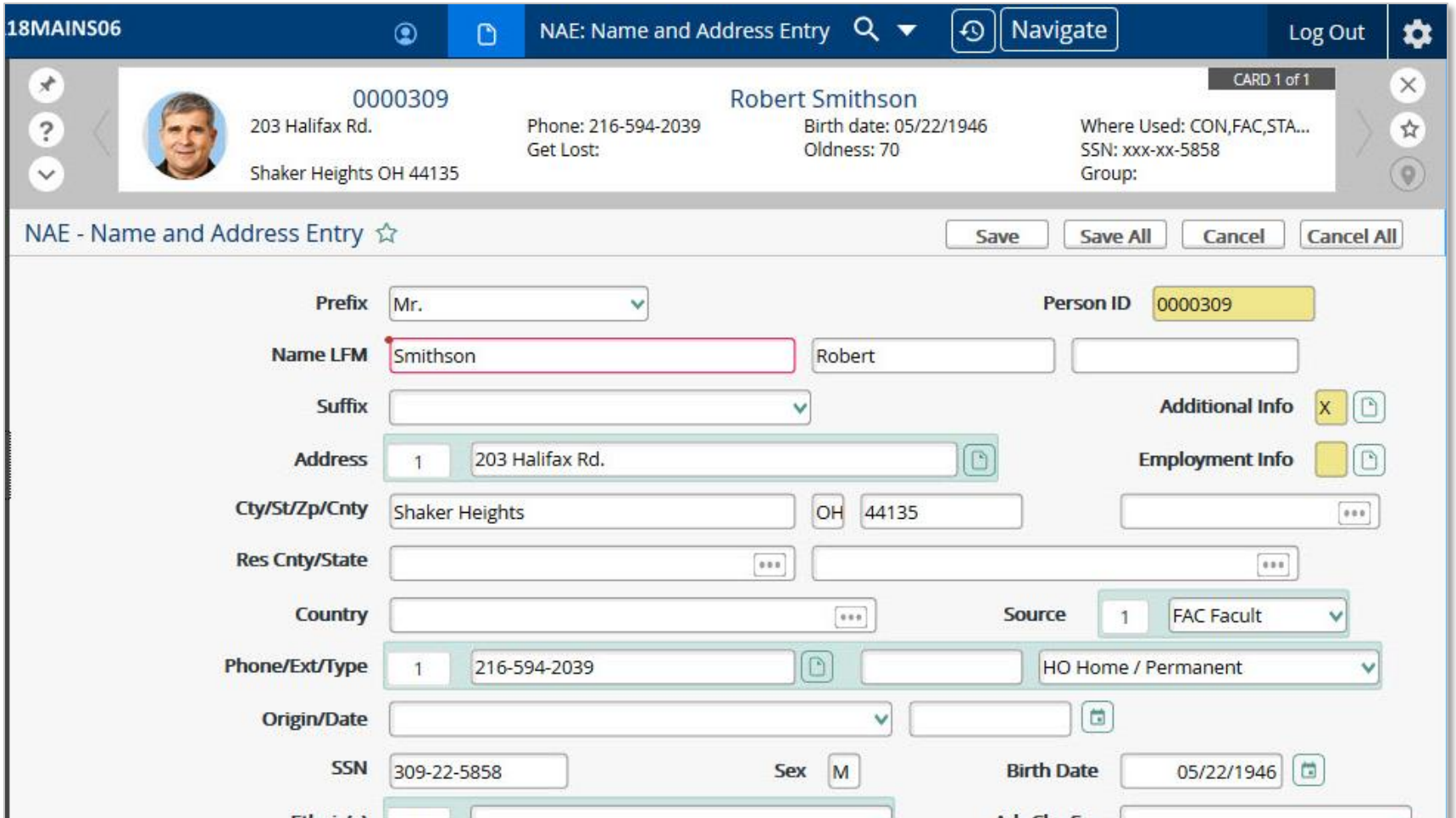
“We LOVE the new grade functionality and guest access to the course catalog. It is much easier to work with than WebAdvisor”

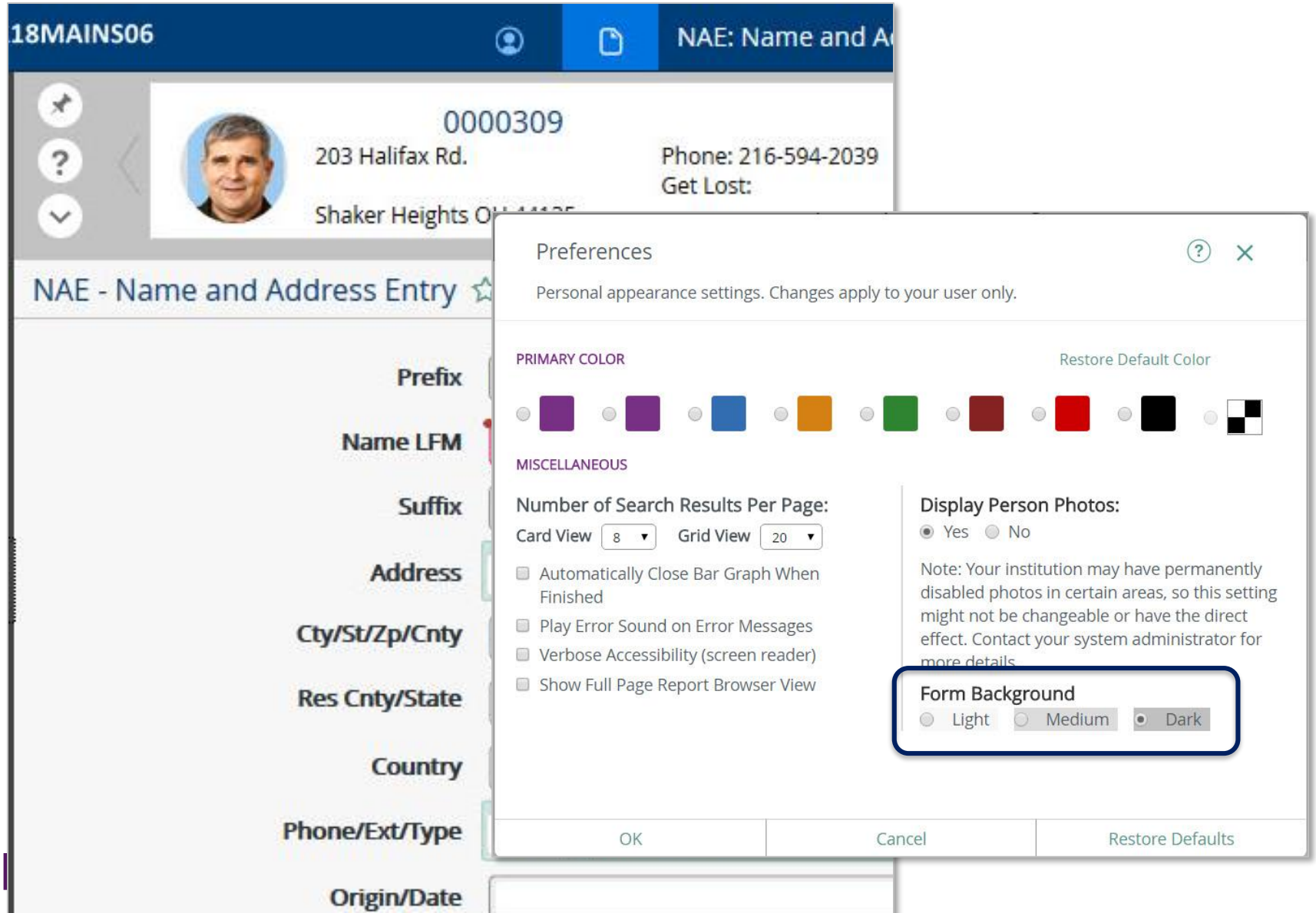
Elizabeth Nieckoski
Information Technologist, Registrar’s Office
Keen State College

Dispelling misconceptions (Cont'd)

4. UI 5.x was designed to allow for all fields and forms to stay in the same place. No significant retraining is required.



UI 5.3 – Coming in Early May



How to Get Modern

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Product Calendar Dashboard with Real-Time Access

Available via the Ellucian Support Center under Dashboards

Only shows what you own

Ability to view online and to export for sharing

NEW!

Product Line	Release: Release Name	Target GA Date ↓	Date Released	Status	Summary
Product Name: Accounts Receivable **(13 records)**					
Banner	BA AR 9.3.2	12/22/2016	12/22/2016	Complete	9x defect fixes and up
Colleague	016864	12/14/2016	12/14/2016	Complete	AR Collections Management
Colleague	017031	12/12/2016	12/12/2016	Complete	AR Update to Support Colleague Cloud
Colleague	016863	12/8/2016	12/8/2016	Complete	Registration Billing 2
Banner	BA AR 9.3.1	12/7/2016	12/7/2016	Complete	2016 Regulatory updates for 10
Banner	BA AR 8.5.2.1	11/14/2016	11/14/2016	Complete	2016 1098T update for institutio
Banner	BA AR 8.5.2	11/7/2016	11/7/2016	Complete	2016 Regulatory 1098T Updates
Colleague	016334	9/28/2016	9/28/2016	Complete	Registration Billing 1

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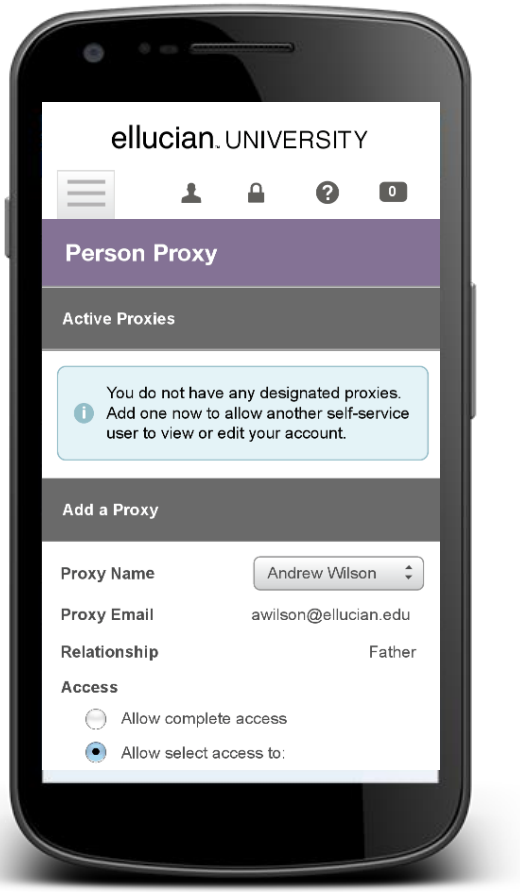
Colleague Modernization – Getting Started



Steps to modernize:

1. Get current on Colleague UI (5.2+ release) and Colleague Self-Service
2. Review the Product Calendar Dashboard
3. Leverage one new feature
   a) Start by solving a key business problem with out of box Colleague functionality
   b) Simply reduce technical overhead
4. Prepare your custom code inventory and line it up with new baseline functionality including Colleague Extensibility tools

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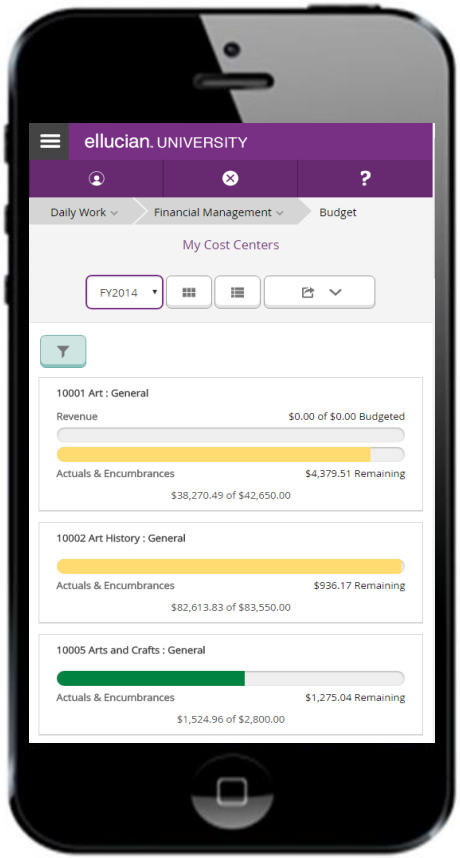
Colleague Modernization – Getting Started



Reduce Overhead

- Ex. Resource File Editor

Solve a Business Problem

- Ex. Implement Self-Service Budget Officer to eliminate custom reporting

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Resources to Help

Educate your campus

Webinars, videos, documentation, eCommunities Group Daily Digest, attend your Regional User Group meeting

Ask your Ellucian CSM, Inside Sales Rep, or Account Executive for help

We can help you streamline business processes and leverage out of box functionality

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What we covered

1. Why modernize?
2. What does “modern Colleague” look like?
3. Misconceptions
4. How to get modern

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Q&A

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Want more information?

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