



Debunking the Myths about Colleague[®]

Creating the Experience Your Campus Deserves

Kristy Elliott, Director of Product Management, Ellucian

Agenda

1 Why modernize?

2 What does “modern Colleague” look like?

3 Misconceptions

4 How to get modern



Why Modernize?

Get Current and Take Advantage of What you Already Own

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.

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



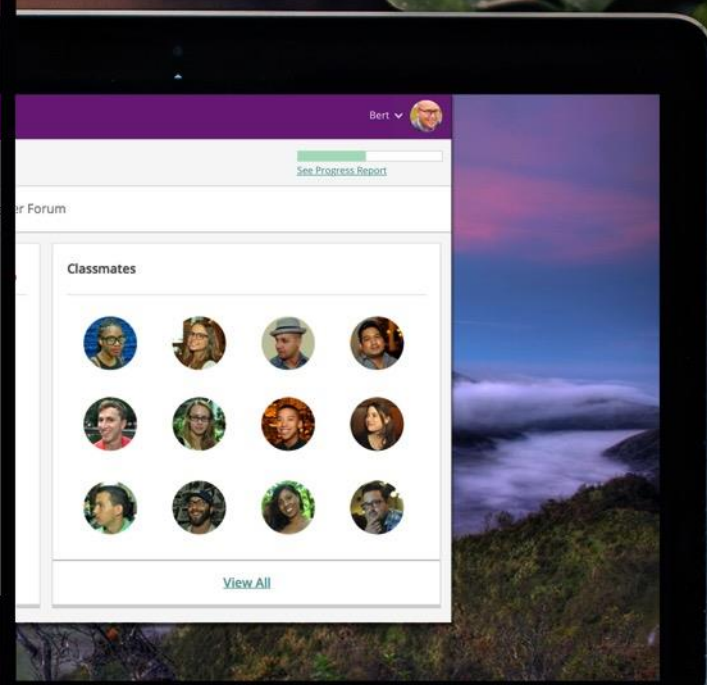
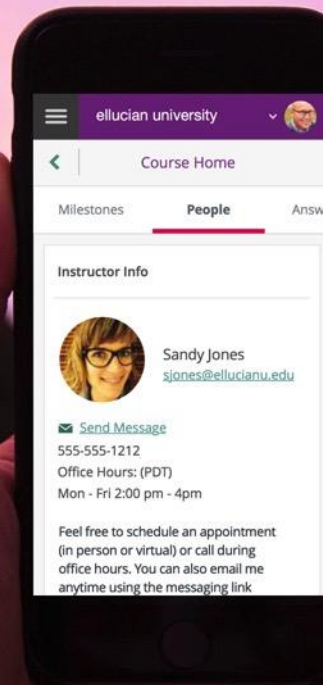
Customer Feedback

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

—Student at Lee University



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**

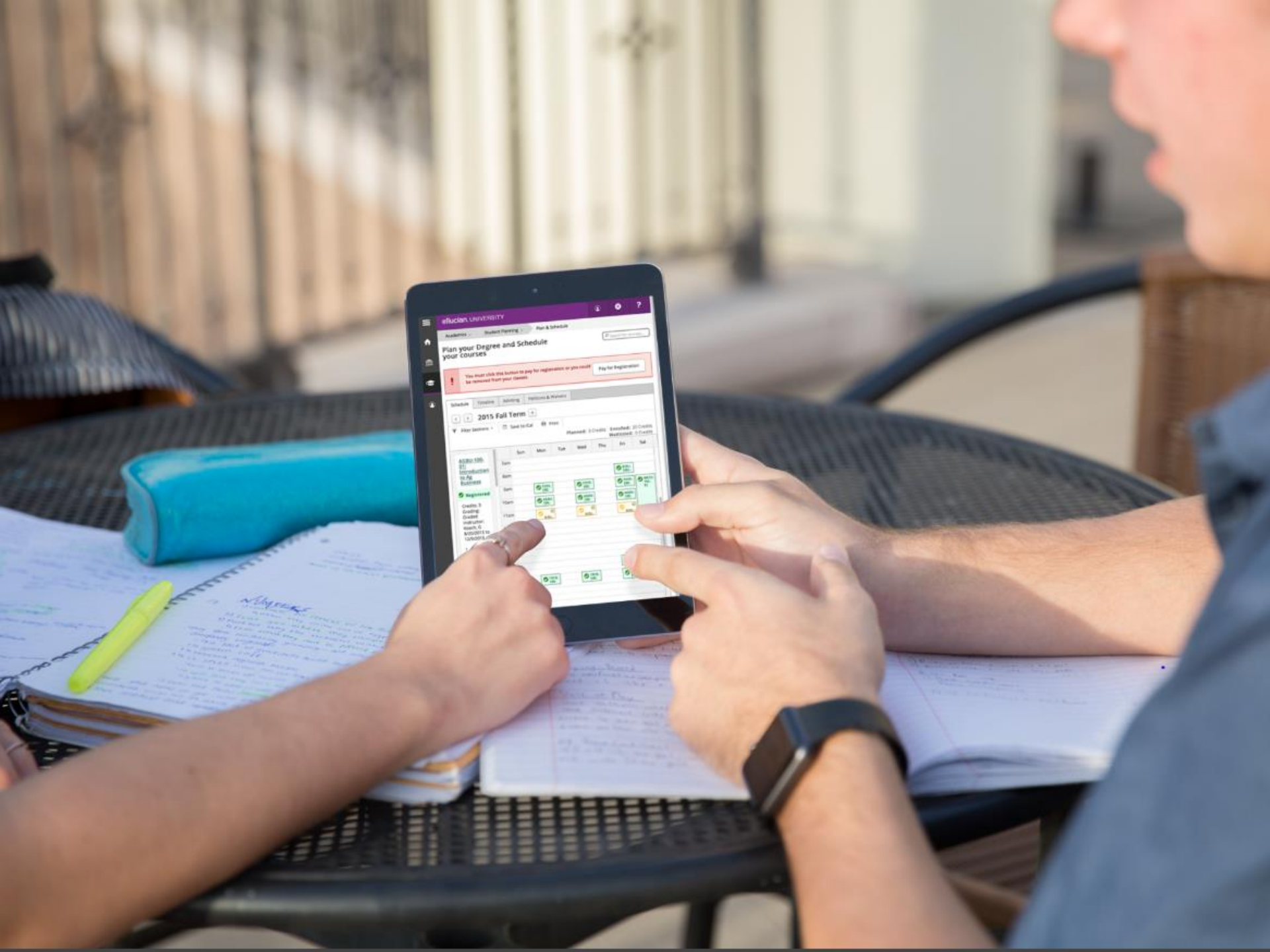


What does “Being Modern” look like?

Get Current and Take Advantage

A JOURNEY WITH COLLEAGUE TODAY





Plan your Degree and Schedule your courses

You must click this button to pay for registration or you could be removed from your classes. [Pay for Registration](#)

Schedule [Courses](#) [Adding](#) [Withdrawals & Waivers](#)

2015 Fall Term

Plan Details [Send to CA](#) [View](#) [Print](#) [Refresh](#)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
AZBU 100: Introduction to Business							
Registered							
Credits: 5							
Grading: Quality							
Prerequisites: MATH 100 & AZBU 100							

Plan your Degree and Schedule your 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		CRIM-222-02		CRIM-222-02		CRIM-222-02	
9am		ACCT-300-02		ACCT-300-02		ACCT-300-02	
10am							
11am		ARTH-100-01		ARTH-100-01		ARTH-100-01	
12pm							
1pm							
2pm							
3pm		ENGL-099-01		ENGL-099-01		ENGL-099-01	
4pm							
5pm							
6pm							
7pm							

Sections with no meeting time

- ACCT-101 Accounting I Section 001
- AOJU-100 Police Academy I Section 01
- ARTH-100 Business Art History Section 01



Later that day...

1:00 P.M.





Time Approval



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

Comments



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

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 %	✓
Net	\$500.00	\$35,524.95	\$2,130.00	-\$36,154.95	629 %	!

My Cost Centers

FY2017



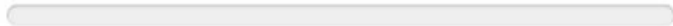
Export

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.



HEMINGWAY HERO

- THE FLAWED
- THE STOIC
- HE

T.S. ELIOT

- THE WASTELAND
- THE LOVE SONG OF JACQUES PRUPROUX
- POST-MODERNISM

LIT 101

- THEMES
- CONFLICTS
- SYMBOLS
- STORY ARC

HEM



< 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
Term, Joe2	0013384						3



M/W/F 3:00 PM - 3:50 PM
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	3/16/2017 12:18:49 PM	Audition



Recap



Dispelling the Misconceptions

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

Registration Billing Updates

These releases gave you the ability to:

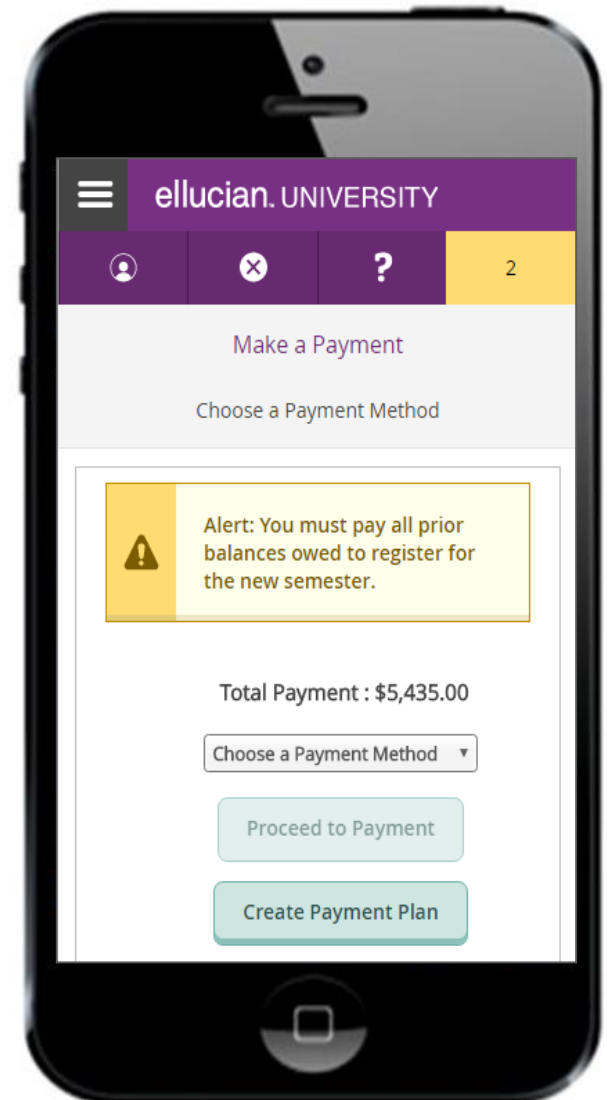
- Run BILL in report only mode
- Create New Static Rate Billing Tables (STRT)
- Avoid Registration Billing batches (ARDE)
- Remove custom code workarounds

SU016334-1805*52 – Colleague Registration Billing 1

- Released September 28, 2016

SU016863-1805*17 – Colleague Registration Billing 2

- Released December 8, 2016



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)

View Midterm Grades



GRWP - Grading Web Parameters

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

Grade Restriction Enforcement Yes

Verify Final Grades Yes

Include Deleted Students Yes

Include Dropped/Withdrawn Students Yes

Include Cross-Listed Sections Yes

Number of Midterm Grades in Student Planning

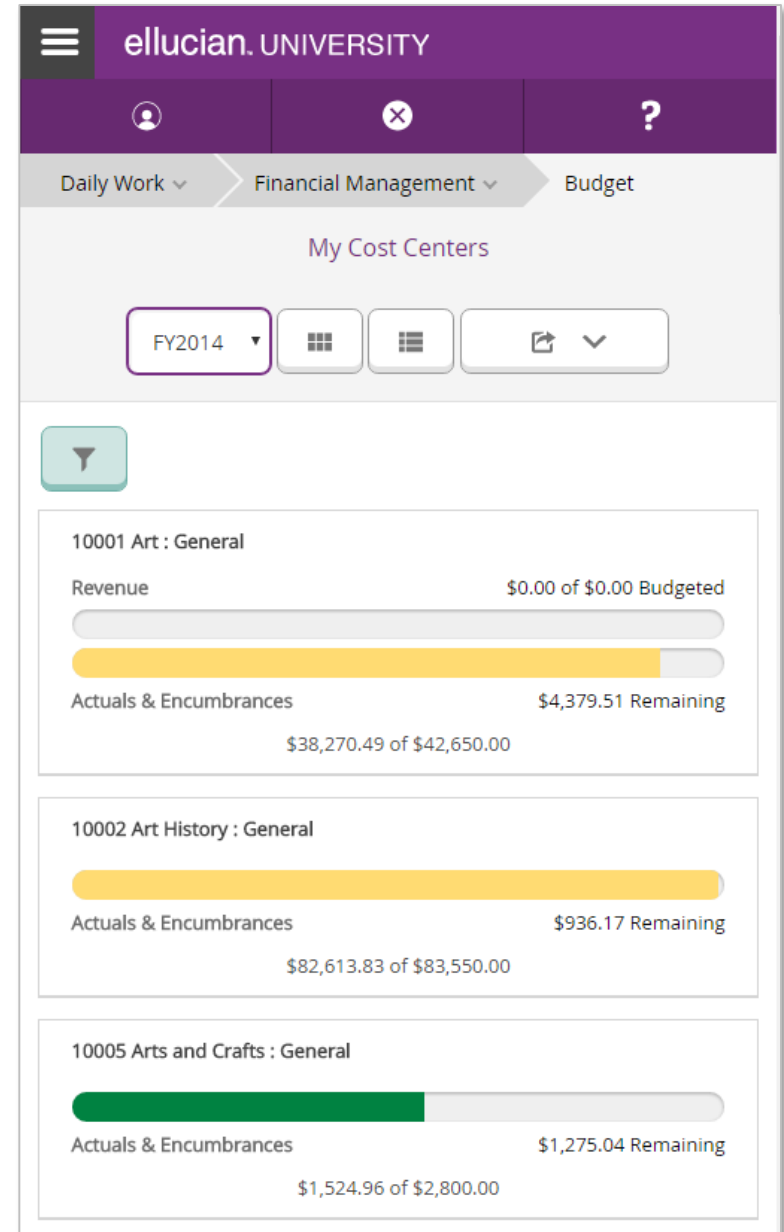
Single Midterm Grade in WebAdvisor Yes

Allowed Terms

Budget Officer Self-Service

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

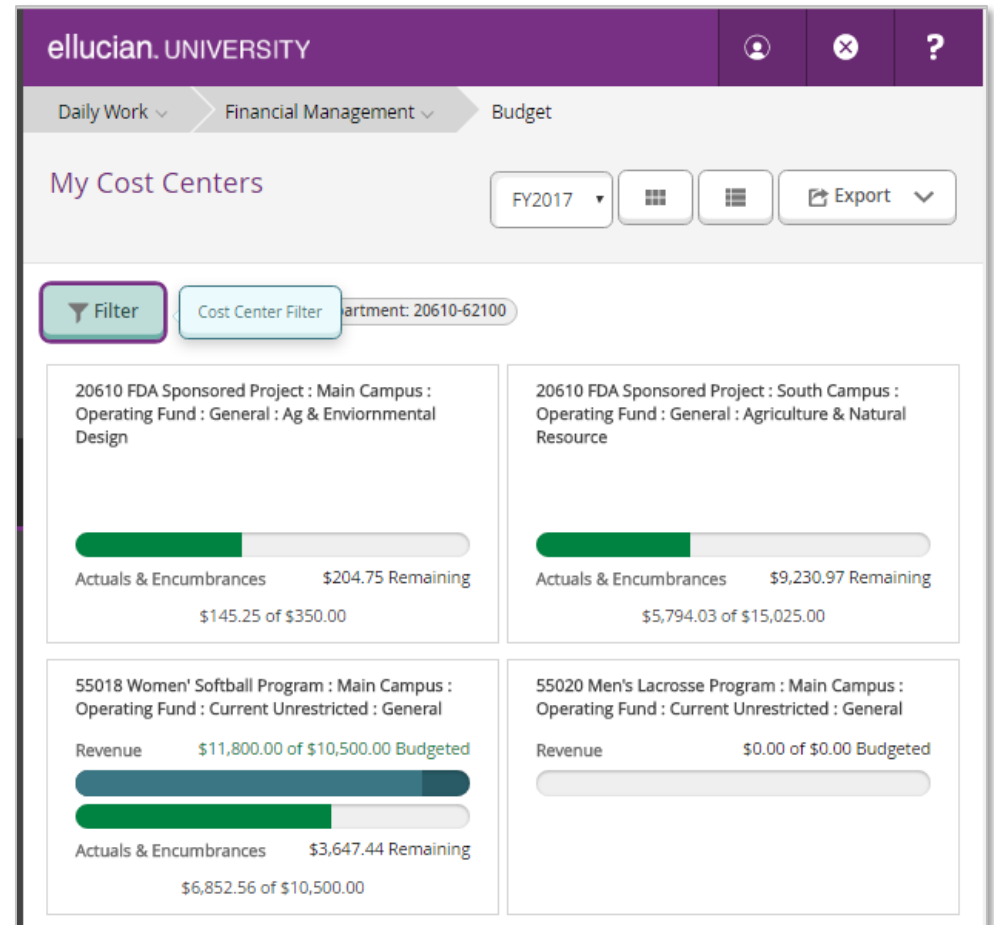
- Easy to use interface
- Monitor and control budget dollars in real time
- Cost center information is at your fingertips
- Summary to source documents
- Mobile and tablet ready
- Was released in 2.12



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



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

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

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



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

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

Configuration over Customization

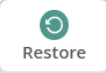
Resource file editor and upgrade merge! (2.15)

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

Resource File Editor

[Back to Self-Service Administration Home](#)

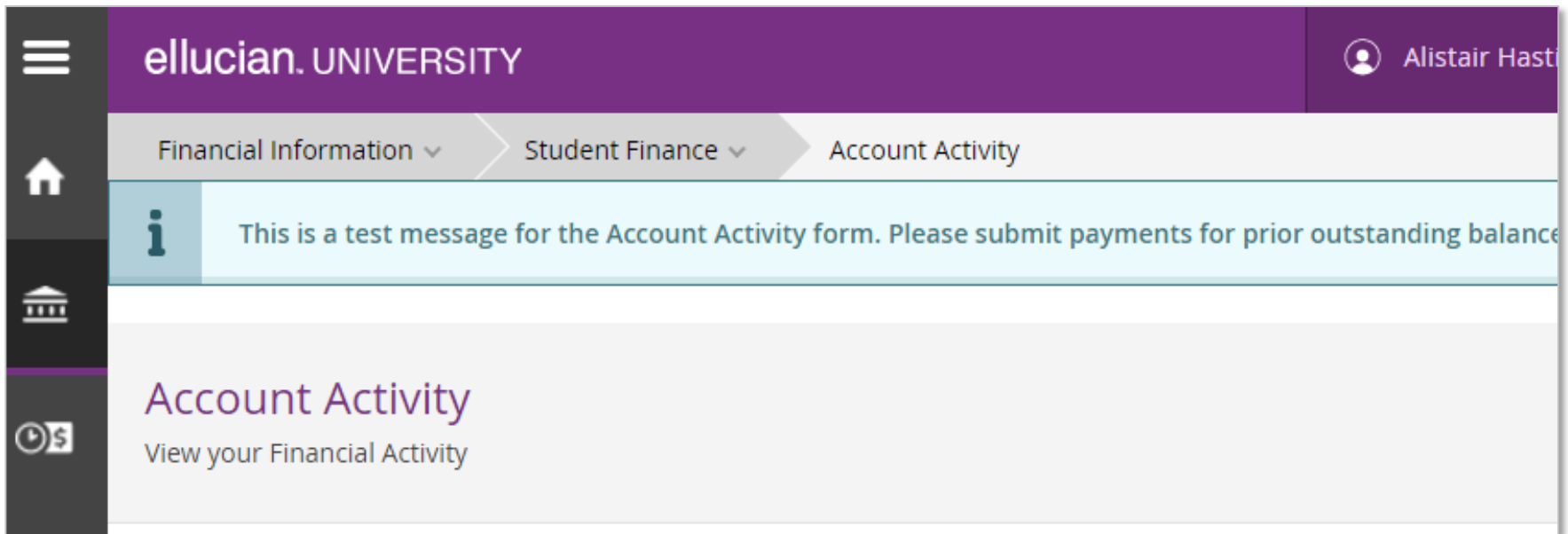
Resource Files	Full Path
AccountSummaryResour	C:\TFS\StudentSelfService\Dev_Team_STDemo\Source\Ellucian.Web.Student\Ellucian.WebalResources\Finance\AccountSummaryResources.resx

Key	Value	Ellucian Value	Comme
AccountOvervie wText	<input type="text" value="Account Summary"/>	 Restore	Account Overview
AmountDueText	<input type="text" value="Amount Due"/>		Amount Due
AmountOverdue Text	<input type="text" value="Amount Overdue"/>		Amount Overdue

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



View/Edit Contact Info - WUPP

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

ellucian COLLEAGUE WUPP: Web User Profile Parameters Navigate

No Active Context. Search for People or open Favorites to get started

WUPP - Web User Profile Parameters Save Save All Cancel Cancel All

User Profile Form Text

1	Below you will see your current addresses, email addresses, and
2	phones. Please verify they are accurate.

Addresses of all types can be viewed

Specific address types that can be viewed

1	WB Web-obtained
2	LO Local/Mailing
3	CK Check Address

Address updates allowed

Users without permissions can update addresses

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

The screenshot shows the 'ellucian UNIVERSITY' interface for the 'Course Catalog'. It features a search bar with the placeholder text 'Search for courses...'. Below the search bar, there are tabs for 'Subject Search' and 'Advanced Search', with 'Advanced Search' being the active tab. The 'Catalog Advanced Search' form includes several fields: 'Term' (set to '2017 Fall Term'), 'Meeting Start Date' and 'Meeting End Date' (both with 'M/d/yyyy' placeholders), 'Courses' (set to 'Accounting'), '100' and '01' input fields, 'Biology' (set to 'Biology'), '200' and '02' input fields, 'Biology' (set to 'Biology'), '200L' and '22' input fields, and an 'Add More...' button. At the bottom, there are 'Location' (set to 'Miller Chester University'), 'Academic Level' (set to 'Continuing Education'), and 'Course Type' (set to 'Select Course Type') dropdown menus. 'Clear' and 'Search' buttons are located at the bottom of the form.

**“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.

The screenshot shows a web application interface for Name and Address Entry (NAE). The top navigation bar includes the user ID '18MAINS06', a search icon, the title 'NAE: Name and Address Entry', a 'Navigate' button, and a 'Log Out' button. Below the navigation bar is a summary card for 'Robert Smithson' with a profile picture, ID '0000309', address '203 Halifax Rd., Shaker Heights OH 44135', phone '216-594-2039', birth date '05/22/1946', and SSN 'xxx-xx-5858'. The main form area is titled 'NAE - Name and Address Entry' and contains various input fields. The 'Name LFM' field 'Smithson' is highlighted with a red border. The 'Address' field '203 Halifax Rd.' is highlighted with a green border. The 'Phone/Ext/Type' field '216-594-2039' is also highlighted with a green border. Other fields include 'Prefix' (Mr.), 'Suffix', 'City/St/Zp/Cnty' (Shaker Heights, OH, 44135), 'Country', 'Source' (FAC Facult), 'Origin/Date', 'SSN' (309-22-5858), 'Sex' (M), and 'Birth Date' (05/22/1946). The form also includes buttons for 'Save', 'Save All', 'Cancel', and 'Cancel All'.

18MAINS06

NAE: Name and Address Entry

Navigate

Log Out

0000309

Robert Smithson

203 Halifax Rd.
Shaker Heights OH 44135

Phone: 216-594-2039
Get Lost:

Birth date: 05/22/1946
Oldness: 70

Where Used: CON,FAC,STA...
SSN: xxx-xx-5858
Group:

NAE - Name and Address Entry

Save Save All Cancel Cancel All

Prefix Mr. Person ID 0000309

Name LFM Smithson Robert

Suffix

Address 1 203 Halifax Rd.

City/St/Zp/Cnty Shaker Heights OH 44135

Res Cnty/State

Country Source 1 FAC Facult

Phone/Ext/Type 1 216-594-2039 HO Home / Permanent

Origin/Date

SSN 309-22-5858 Sex M Birth Date 05/22/1946

UI 5.3 – Coming in Early May

The image shows a user profile page for '18MAINS06' with a 'NAE: Name and Address Entry' section. The profile includes a photo, name '0000309', address '203 Halifax Rd. Shaker Heights OH 44125', and phone number '216-594-2039'. A 'Preferences' dialog box is open, showing settings for 'PRIMARY COLOR' (with a color palette), 'MISCELLANEOUS' (with checkboxes for search results, bar graphs, error sounds, accessibility, and report views), 'Display Person Photos' (set to 'Yes'), and 'Form Background' (set to 'Dark'). The 'Form Background' setting is highlighted with a blue box. The dialog box also has 'OK', 'Cancel', and 'Restore Defaults' buttons at the bottom.

18MAINS06

NAE: Name and Address Entry

0000309

203 Halifax Rd.
Shaker Heights OH 44125

Phone: 216-594-2039
Get Lost:

NAE - Name and Address Entry

Prefix

Name LFM

Suffix

Address

Cty/St/Zp/Cnty

Res Cnty/State

Country

Phone/Ext/Type

Origin/Date

Preferences

Personal appearance settings. Changes apply to your user only.

PRIMARY COLOR

Restore Default Color

MISCELLANEOUS

Number of Search Results Per Page:
Card View 8 Grid View 20

Automatically Close Bar Graph When Finished

Play Error Sound on Error Messages

Verbose Accessibility (screen reader)

Show Full Page Report Browser View

Display Person Photos:
 Yes No

Note: Your institution may have permanently disabled photos in certain areas, so this setting might not be changeable or have the direct effect. Contact your system administrator for more details.

Form Background
 Light Medium Dark

OK Cancel Restore Defaults



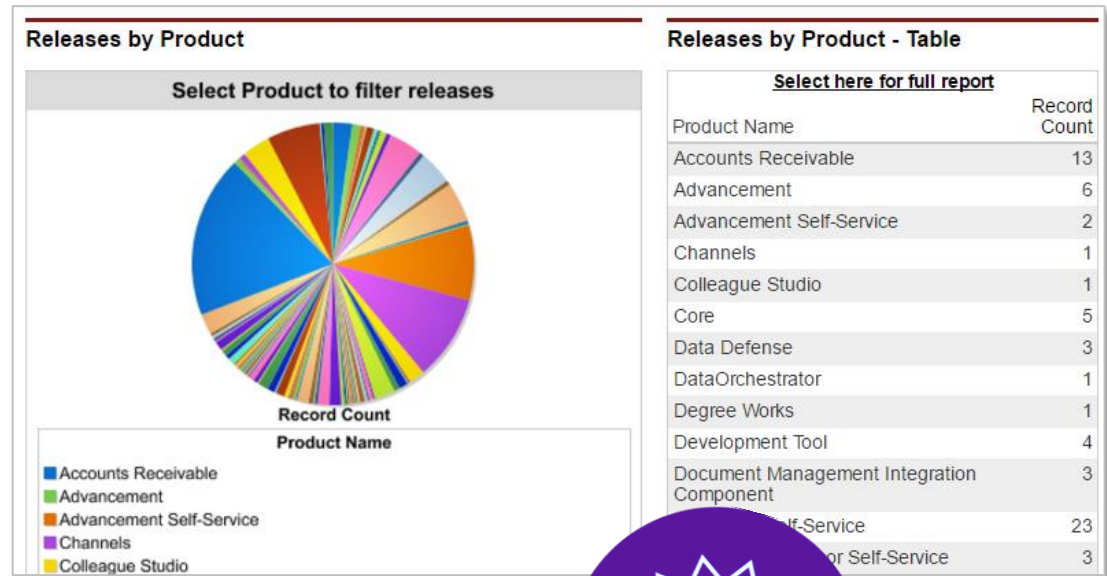
How to Get Modern

Product Calendar Dashboard with Real-Time Access

Available via the Ellucian Support Center under Dashboards

Only shows what you own

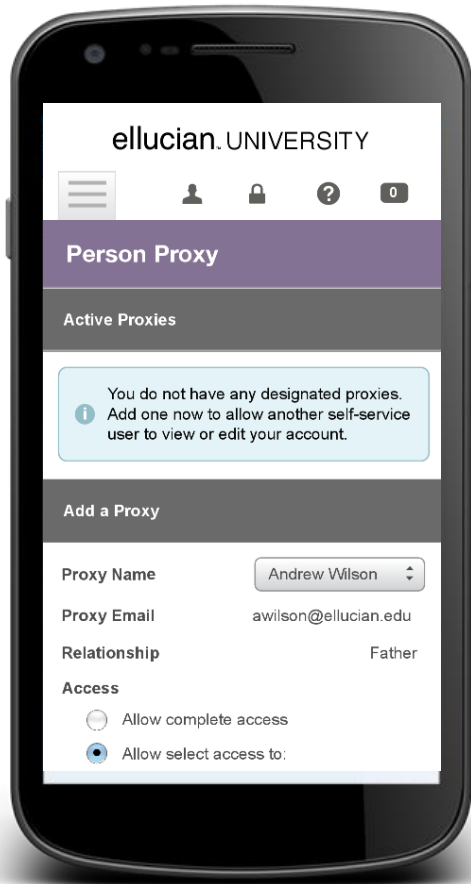
Ability to view online and to export for sharing



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 upg
Colleague	016864	12/14/2016	12/14/2016	Complete	AR Collections Management 1
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 1098T
Banner	BA AR 8.5.2.1	11/14/2016	11/14/2016	Complete	2016 1098T update for institution
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



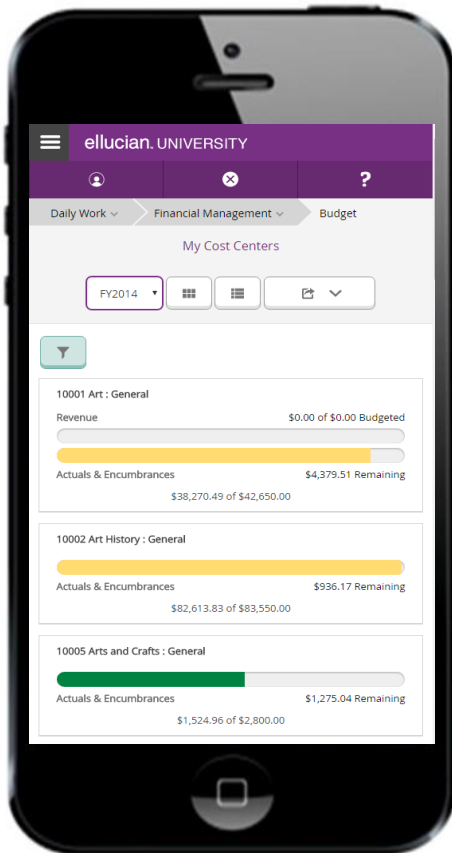
Colleague Modernization – Getting Started



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

Colleague Modernization – Getting Started



Reduce Overhead

- Ex. Resource File Editor

Solve a Business Problem

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

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

What we covered

1 Why modernize?

2 What does “modern Colleague” look like?

3 Misconceptions

4 How to get modern

Q&A



Want more information?

ellucian.

Kristy Elliott – M.A., PMP

Director of Product
Management

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