Colleague Self-Service

Base Configuration Guide

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Revision Memo

This document reflect changes associated with Colleague Self-Service 2.26.

Description	Where to Look
Added current benefits information.	Current Benefits overview on page 21
Added leave information	Leave Overview on page 42
Added information about quick and baseline registration.	Registration on page 61
Added requisition information.	Procurement overview on page 54
Removed the step "On the POSD form, use the position ID to verify that the position is set up as non-exempt and hourly. Time Entry Self-Service does not currently support exempt positions." which was no longer correct after recent updates.	Set up Time Entry for employees on page 77

Contents

Colleague Self-Service Overview

Colleague Self-Service is an interactive web application that enables users to view their individual information contained in your institution's Colleague® databases.

Colleague Self-Service depends on having Colleague Web API installed to be able to communicate with Colleague.

Colleague Self-Service modules

Colleague Self-Service consists of pages that enable you to complete tasks, such as advising students or applying for graduation, independently.

Note: Unless otherwise noted, see the Colleague Self-Service documentation library in the Ellucian Customer Center for the latest version of each manual. In addition to these manuals, context-sensitive help is available within Colleague Self-Service.

Page	Base/optional	Where to find further info
Banking Information	Base	Banking Information overview on page 11
Budget to Actuals	Base	Budget to Actuals overview on page 13
Earnings Statements	Base	Earnings Statements overview on page 22
Employee Proxy	Base	*Self-Service Proxy User Guide*
Enrollment Verification	Base	Transcript Request and Enrollment Verification overview on page 86
Faculty Contracts	Base	Faculty Contracts overview on page 35
Financial Aid	Optional	*Setting Up Financial Aid*
Graduation	Base	*Setting Up Graduation Application*
Person Proxy	Base	*Self-Service Proxy User Guide*
Projects Accounting	Optional	Projects Accounting overview on page 56
Student Finance	Base	*Student Finance User Guide*
Student Planning	Optional	*Setting Up Student Planning*

Page	Base/optional	Where to find further info
Tax Information	Base	Form 1095-C Reporting U.S. Regulatory Reporting
Time Entry	Base	Time Entry overview on page 75
Transcript Request	Base	Transcript Request and Enrollment Verification overview on page 86
User Profile	Base	User Options overview on page 91

New Self-Service pages

Beginning with Self-Service 2.24, all new pages are delivered as disabled. This also includes new pages that were previously delivered with Self-Service 2.23.

Enable a Self-Service page

Allow user access to a disabled Self-Service page.

Procedure

1. In Self-Service, click on your name and click **Site Administration**.
2. Under Users and Permissions, click **Sitemap**.
3. Select the page you to which you want to allow access and clear the **Disabled** checkbox.
4. Add any appropriate roles and permissions for the page.
5. Click **Save**.
   Enabled pages will appear in the sidebar menu and breadcrumbs, and can be accessed using a correct URL and permissions.

Disable a Self-Service page

Deny user access to an enabled Self-Service page.

Procedure

1. In Self-Service, click on your name and click **Site Administration**.
2. Under Users and Permissions, click **Sitemap**.
3. Select the page you to which you want to deny access and click the **Disabled** checkbox.

4. Click **Save**.

   Disabled pages will not appear in the sidebar menu or breadcrumbs, and cannot be accessed using a correct URL and permissions.

Banking Information overview

Colleague Banking Information Self-Service enables employees, students, and vendors to maintain their own bank account information.

Note:

Verification refers to "Pre-noting" a bank account by generating a file that can be sent to the bank to verify that the account information is accurate. Many clients do not pre-note their bank accounts with the bank. In order to update the pre-note status of Colleague bank accounts, run the following and do not send the file to the bank.

- For Payroll, and the accounts that are stored in the EMPLOYES record, run DDPN.
- For Refunds, Reimbursements, Payments, and the accounts stored in PERSON.ADDR.BNK.INFO, use ECPP.
- You can go to the Employee Direct Deposits (EDDP) form and change the P or Y value to Null. Setting to Null allows for a direct deposit to be processed.

Page	Description
Banking Information	Employees can maintain both their payroll direct deposit and their reimbursement banking information. Students can maintain their refund banking information. Vendors can maintain their default and address-specific payment banking information. **Note:** For students and employees, only default refund/reimbursement information is displayed in Self-Service; refund/reimbursement information that is associated with a specific address cannot be maintained in Self-Service. To maintain address-specific banking information for students and employees, use the Bank Account Info Entry (BAIE) form.

Set up Banking Information

You can tailor Banking Information to meet the needs of your institution.

About this task

Before you set up Banking Information, ensure that you understand how to work with direct deposits and refunds/reimbursements/payments in Colleague. For additional information, see the following manuals:

- Direct deposits - *Using Payroll*
- Refunds/reimbursements/payments - *e-Checks Release Highlights*

Procedure

1. If your institution wants to notify users when their banking information is changed, enable security notifications.

   See "Security notifications" in the *Setting Up Colleague Web API* manual for additional information.

2. In addition to setting up security notifications, use the **Banking Information Web Parameters (BIWP)** form to accomplish the following:

   • Enable or disable access to payroll direct deposit or refund/reimbursement/payment bank account information for all users. For example, if you want employees to maintain only their reimbursement bank account information using Self-Service, you would disable access to payroll direct deposit banking information.

      Note: If you enable access for all users, you can still restrict access for certain users by assigning them a role without the corresponding permission.

   • Define terms and conditions to which users must agree before they can save new bank account information.

   • Define an informational announcement, or message, that is displayed to all users who have access to payroll direct deposit information.

   • Define a message that is displayed to users when they add payroll direct deposit bank account information, providing additional information related to their effective date. For example, you could provide a link to your payroll calendar.

   • For U.S. institutions, enable Self-Service to look up routing numbers against the Federal Reserve Banks' E-Payments Routing Directory in addition to your existing payroll direct deposit banks as defined on the U.S. Direct Deposit Banks (UDDB) form. Without access to the E-Payments Routing Directory, routing numbers are looked up only against your existing payroll direct deposit banks.

   • If your institution requires all employees to use direct deposit for the full amount of every paycheck, you can require users who enter payroll direct deposit information to enter a remaining balance account in addition to any number of direct deposits for specific amounts.

   • If your institution does not require users to enter their previously used account number to access their banking information, you can disable this functionality.

3. Verify that the address types that your institution assigns to vendor addresses can be viewed on the About You page. See the *Self-Service Installation and Administration* manual for additional information.

4. Ensure that each category of users has the appropriate role and permissions to use the Banking Information page. See the *Self-Service Installation and Administration* manual for additional information.

Category of users	Self-Service permissions
Employees	EDIT.ECHECKS.BANKING.INFORMATION EDIT.PAYROLL.BANKING.INFORMATION
Students	EDIT.ECHECKS.BANKING.INFORMATION
Vendors	EDIT.VENDOR.BANKING.INFORMATION

Budget to Actuals overview

Colleague Budget to Actuals in Self-Service enables users to see information about the cost centers for which they have access. The cost center information includes budget, actual, and encumbrance amounts for expense and revenue GL accounts. The cost centers sort in numerical order by cost center unit ID.

For each cost center, there is a bar graph displayed in the Bar Graph view, and there is a Financial Health indicator displayed in the List view. Bar graphs and indicators appear in different colors to represent whether a budget is underspent, close to being spent, or overspent. In the Bar Graph view, there is a bar graph for any revenue GL accounts included in the cost center, and a bar graph for any expense GL accounts included in the cost center. If there is only revenue or only expense GL accounts in that cost center, only the corresponding bar graph displays. In the List view, revenue cost centers do not have a Financial Health indicator, but expense cost centers do display an indicator.

In the Bar Graph view, if the revenue part of a cost center has a budget and there are no revenue transactions, the bar graph appears empty. As revenue transactions process, the bar graph will fill up with a teal color. If the expense part of a cost center has a budget and there are no expense transactions, the bar graph appears empty. As expense transactions process, the bar graph will fill up with a green color. After the expenses are over 85% of the budget, the bar graph will be yellow, and then it will be red when the budget is overspent.

The Object View is only in the list format.

Page	Description
Budget to Actuals	The My Cost Center tab provides a list or bar graph of expenses and revenue assigned to the user in Colleague. Users can switch between the two views by using the bar graph icon or the list icon. The remaining amount of the budget includes only expense type items.
	The Object View provides a list of assets, liabilities, fund balances, revenue, and expenses that relate to the Object View.
	Users can switch between the My Cost Centers tab and the Object tab.
	To see the Budget to Actuals pages, the user must have the cost center parameter defined on the Financial Web Params (CFWP) form.
	Users can choose the fiscal year for today's date, the future fiscal year, and up to five previous fiscal years to see cost center information.
	For budget, actual, and encumbrances for revenue GL accounts, the negative sign reverses and credits show as positive numbers.
	Users can filter data on this page by one or more GL components and export the data to a .csv file.

Page	Description
Cost Center Detail	Detail page from the My Cost Centers tab on the Budget to Actuals page. The information on this page displays revenue subtotals and then expense subtotals. The sort order is by the subtotal description within each section. If the cost center does not have any revenue GL accounts or any expense GL accounts, that section does not display. The user must have the subtotal component defined on the Financial Web Params (CFWP) form or the default subtotal will be the Object component of their GL account setup. Use this page to see all of the subtotal information associated with a department. The amounts displayed correspond to the fiscal year selected on the Budget to Actuals page. Users can choose the fiscal year for today's date, the future fiscal year, and up to five previous fiscal years to see cost center information.
	For budget, actual, and encumbrances for revenue GL accounts, the negative sign reverses and credits show as positive numbers.
	Users can export data on this page to a .csv file.
GL Detail	Accessed from the Cost Center Detail page or the Object View tab. This page displays the GL transactions associated to the GL account number. These broken down transactions are by encumbrances, actuals, and budget.
	Purged, archived, or imported source documents are not available to display.
	Users can access the Finance Query from this page.
	Users can export the data to a .csv file.
Purchase Order	Accessed from the GL Detail pages. If the procurement document the user sees is a GL encumbrance and begins with a P, you can detail to the Purchase Order page. This Purchase Order page displays the associated documents, comments, approvers, and line item details for purchase orders.
Voucher	Accessed from the GL Detail pages. If the procurement document that you see is a voucher, you can detail to the Voucher page. The Voucher page displays the associated documents, comments, approvers, and line item details for vouchers.
Journal Entry	Accessed from the GL Detail pages. If the procurement document that you see is a journal entry, you can detail to the Journal Entry page. The Journal Entry page displays the comments, approvers, and journal item details for journal entries.
	Note: The imported journal entry source documents from the GL Import (GLIM) form do not display.

Page	Description
Requisition	Accessed from the GL Detail page. If the procurement document that you see is a requisition, you can detail to the Requisition page. This Requisition page displays the associated documents, comments, approvers, and line item details for requisitions.
Blanket Purchase Order	Accessed from the GL Detail pages. If the procurement document that you see is a GL encumbrance and begins with a B, it links to the Blanket Purchase Order page. This Blanket Purchase Order page displays the associated documents, comments, approvers, and GL distribution details for blanket purchase orders.
Recurring Voucher	Accessed from the GL Detail pages. If the procurement document that you see is a GL encumbrance and begins with RV, it links to the Recurring Voucher page. The Recurring Voucher page displays the comments, approvers, and schedule details for recurring vouchers.

Set up Budget to Actuals

You can set up Budget to Actuals in Self-Service.

Before you begin

Ensure that the necessary setup is complete in Colleague.

Procedure

1. Use the **Staff and Volunteers (SVM)** form to set up users with the correct staff member information to allow them to view their cost centers.

   See the *Getting Started with Purchasing and Accounts Payable* manual for details.

2. Use the **GL Role Definition (GLRD)** and the **GL User Definition (GLUD)** forms to set up each user's GL account access.

   See the *WebAdvisor for Colleague Finance* manual for details.

3. Assign the appropriate role to all Budget to Actuals Self-Service users.

   This is done individually using Org Roles (AROR) or Batch Update Resource Assignments (BURA) to assign in batch. For more information about setting up Self-Service users, see the *Self-Service Installation and Administration* manual. The delivered role for Budget to Actuals Colleague Self-Service is General Ledger User.

Define Cost Center descriptions

You can make Cost Center descriptions available in Self-Service.

Procedure

1. Access **Financial Web Params (CFWP)**.
2. Set the **Cost Center Comp Desc** field to `Yes` for the descriptions that you want to display in Self-Service.
3. Save **CFWP**.
4. Recycle the app pools.

Define GL account descriptions to display

To determine which components of the general ledger account number have descriptions displayed on the views and the order of the components, use the Descriptions Display (GLND) form.

About this task

The GL account number descriptions for each module can be different.

You can setup GL account descriptions that are specific to Self-Service (SS) views by adding an SS module. If you do not enter settings for the SS module on GLND, use the default, which is the description for the last two major components defined on the Account Structure Maintenance (GLAS) form.

After making changes on GLND, you must run the Updated Stored Computed Column (USCC) form within the CF application.

Procedure

1. Access **GLND**.
2. At the **Module LookUp** prompt, enter `SS`.
3. In the **Components to Display Name** field, enter the components in the order that you want the descriptions displayed.
4. Save the **GLND** form.

Define subtotals

You can choose to have subtotals display on the Cost Center view in Self-Service.

Procedure

1. Access the **Financial Web Params (CFWP)** form.

2. In the **Cost Center Subtotals** field, select an Object Type subcomponent name to have subtotals display on the Cost Center view in Self-Service.

    If you do not define an Object Type subcomponent, the subtotals on the Cost Center in Self-Service do not display.

3. Save **CFWP**.

Reversals

On the Cost Center and Object View GL detail pages, you might see two identical transactions listed on the general ledger.

If you use the Reverse Postings Utility (RVRS) process in Colleague to reverse transactions that should not post to the General Ledger, the two transactions listed on the GL detail pages for the Budget to Actuals and the Object View. The references are to the same document, for example, Voucher, but have different descriptions. The reversing general ledger transaction has a description that includes "Reverse post" and the reversed reference number from the GL.POST.BACKUP record.

Budget Adjustment panel

The budget adjustment panel provides users with the appropriate access to make budget adjustments.

To use the Budget Adjustment panel, users must have the Budget Adjuster role and the **Allow Budget Adjustments** field on the Budget Web Parameters (BUWP) form set to Yes. Users initiate the transaction, enter the budget adjustment details, review the changes, and submit. After the user submits the transaction, Colleague assigns the budget number.

You can save an in progress budget adjustment as a draft, edit the draft, delete the draft, and submit the draft at a later date. You must enter a reason before saving the budget adjustment as a draft. A draft budget adjustment is not visible in Colleague. After you submit a budget adjustment, Colleague assigns a budget number.

You can view a list of drafts and submitted budget adjustments on the Budget Adjustment tab.

The Budget Adjustment panel is on the following pages:

- Budget to Actuals
- Cost Center
- Cost Centers GL Detail
- Object View GL Detail

Define Budget Adjustment parameters

You can use the Budget Web Parameters (BUWP) form to define your Budget Adjustment parameters in Self-Service.

Before you begin

When you are ready to start using the Budget Adjustment panel in Self-Service, users must have the Budget Adjuster role set up. See *Set up Colleague Self-Service* users for more information.

Procedure

1. Access **BUWP**.

2. In the **Allow Budget Adjustments** field, enter `Yes` when you are ready to use Budget Adjustment in Self-Service.

   If you enter "Yes", the Budget Adjustment panel is accessible to those users with the Budget Adjuster role assigned to them.

3. In the **Same Cost Center Required** field, enter `Yes` if you want to require the GL Accounts in the budget adjustment to be in the same cost center.

4. In the **Budget Adjustment Approval Needed** field, enter `Yes` if you want to require approvals for Budget Adjustments in Self-Service.

   This allows the initiator of the Budget Adjustment to see an Approvers section in the Budget Adjustment panel.

   If this field is No, approvals are not required to make budget adjustments on the Budget Adjustment panel in Self-Service.

5. In the **Same Cost Center Approval Reqd** field, enter `No` if you want to bypass approvals for Budget Adjustments in the same cost center.

   If this field is No, and all GL Accounts are in the same cost center, the initiator cannot add Next Approvers.

6. In the **Required Approvers** field, enter the approver IDs required for the budget adjustments created in Self-Service.

   One of these approvers must approve the budget adjustment or the budget adjustment does not become complete and post to the General Ledger. It does not matter whether any other approvers with sufficient authority have already approved the budget adjustment.

7. In the **Exclude GL Acct Element** field, select the budget adjustment GL account number components to exclude from the Budget Adjustment panel.

   This field along with the From Value and To Value fields, allows users to create criteria for defining which GL numbers cannot be used on a budget adjustment created in Self-Service.

   You can specify components and subcomponents. Each range is restricted and cannot be entered in a budget adjustment.

8. In the **From Value** and **To Value** fields, enter the from and to values for the excluded GL account component that users cannot use on Budget Adjustment in Self-Service.

9. Save **BUWP**.

Approvals and Budget Adjustments

If approvals are turned on for budget adjustments on the Budget Web Parameters (BUWP) form, the budget adjustments status is New, Draft, or Not Approved, users can add or delete one or more Next Approvers. The approvers in the Next Approvers fields are saved when a draft is saved, a budget adjustment is submitted, or when save is selected for a budget adjustment.

Initiators can manually add or delete next approvers before submitting the budget adjustment.

Initiators can modify the next approvers after submitting the budget adjustment.

An approver can view a list of budget adjustments that are pending approval.

Depending on the settings in the fields on the BUWP form, there are different results in Budget Adjustments Self-Service.

Budget Adjustment Approval Needed	Same Cost Center Approval Reqd	Are the GL numbers in the same cost center?	Status after Submit
Yes	Yes	Not applicable	Not Approved
Yes	No	Yes	Complete
Yes	No	No	Not Approved
No	No	Not applicable	Complete

For more information about setting up approvals for use with Budget Adjustments, see the quick start section in the *Using Online Approvals in Colleague Finance* manual.

GL account parameters impact on Budget Adjustment

The fields on the GL Account Parameters (GLAP) form can have an impact on Budget Adjustments in Self-Service.

Field on GLAP	Used in Budget Adjustment	Not used in Budget Adjustment
Require Budget Journals to Balance		All budget adjustments must balance
Require Override for Closed Months	Does not support overrides	
Check Available Funds for Expenses		Always checks funds availability
Number of Months in Future Date Warning	Yes	
Date Warning to Override Year Warning	If you use this parameter, the user gets a warning about a future date.	
Journal Entry Approval Needed	Not applicable	Not applicable
Budget Entry Approval Needed		Not applicable
Security Keys for Overrides		Does not support overrides
Full Access Roll ID	Yes	

Current Benefits overview

Colleague Current Benefits Self-Service enables employees to view the benefits assigned to them.

Page	Description
Current Benefits	Employees can view summary information about their benefits.

Set up Current Benefits for employees

You can set up Current Benefits for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to find or create a role for Current Benefits access.

   Note: You can customize this role by giving it any name you prefer.

2. Assign the role you created or identified in Step 1 to your selected employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Define Current Benefits parameters

Use the Current Benefit Enrollment Parameters (CBPR) form to set up parameters for Current Benefits in Self-Service.

Procedure

1. Specify the current benefits you want to exclude in the **Current Benefits to Exclude Description** field.

   The Current Benefits Self-Service page excludes benefits/deductions associated with the codes that you enter.

   Note: The **Current Benefits to Exclude Description** field includes all the benefit/deduction codes if you leave this field blank.

2. Specify any other text to display on the Current Benefits page in the **Other Text to Display on Current Benefits Form** field.

   This text may remind employees about other benefits provided by the institution, the end date of the current enrollment period, or any other information.

Earnings Statements overview

Colleague Earnings Statements Self-Service enables users to view and configure receiving preferences for their statements.

The following details apply to dealing with Earnings Statements when using Self-Service:

- To view Earnings Statements on Self-Service, the Employee History Update (EHUP) process must be completed. The Earnings Statement uses the PAYTODAT file to obtain some of its information. Previously, WebAdvisor Pay Advices only used the WEB.PAY.ADVICES file, so as soon as the Accept Paychecks and Advices (APAD) process had completed, WebAdvisor Pay Advices were viewable online. However, for Earnings Statements to be viewable, the payroll must be processed through the EHUP step.

- If you want to display Federal & State Withholding filing status on the Earnings Statement PDF, you must populate the filing status on TAXC for all federal and state tax codes.

- The **Applicable Gross** label on the Earnings Statement refers to Taxable Gross Amounts in the Taxes Section and Salary Base Amounts in the Benefits Section. The Taxable Gross Amount in the Tax section is the employee's gross pay minus any deferred benefit deductions applicable within each tax jurisdiction (FICA, MEDI, Federal, State, Local) plus any imputed taxable fringe benefits. The **Salary Base** in the Benefits Section is the employee's gross earnings used to calculate a particular benefit/deduction.

Page	Description
Earnings Statements	Employees can view their Earnings Statements using Self-Service.
Earnings Statements (Admin)	Administrators have access to earnings statements for all employees.

Set up Earnings Statements for employees

You can set up employees to view their earnings statement online and configure how some of the earnings statement header information is displayed using Self-Service.

Procedure

1. Set up the Employee role using the **Organization Role Definition (ORGR)** form.
2. Assign the Employee role to your users on the **Assign Resource to Org Roles (AROR)** form.

   You can use the Batch Update Resource Assignments (BURA) form to assign the role in batch.

3. In Self-Service Administration, access the Sitemap under Users and Permissions.

   a) Under the Employment menu and Employee submenu, select the **Earnings Statements** page and add the Employee role in the Allowed Roles section.

   b) Under the Employment menu and Employee submenu, select the **Employee Overview** page and verify that the Employee role is assigned in the Allowed Roles section.

   c) Under the Employment menu, select the Employee submenu and verify that the Employee role is assigned in the Allowed Roles section.

4. Verify your set up on the **Pay Advice Parameters (PASP)** form.

   For more information about the PASP form, refer to Earnings statements parameters on page 24 and Define earnings statements parameters on page 25.

5. If you want to display Federal & State Withholding filing status and exemptions on the Earnings Statement PDF in addition to setting the Display Holding Status field to Yes on the PASP form, populate this information on TAXC for all federal and state tax codes.

6. Review the entries in the `BENDED.TYPES` validation code table on the **Validation Codes (VAL)** form. If you want any of the benefit types to be listed under the Deductions heading on earnings statements, enter `D` in the second special processing code for that benefit type. Benefit types with a B or nothing in the second special processing code are shown under the Benefits heading.

7. Verify if your users have the **View Advices Online** field on the **Employee Overview (EPOV)** form set to Yes.

   Note: If you do not need to print earnings statements for any employees and want all employees to view their own earnings statements online, set View Advices Online to Yes for all employees using the Allow Viewing of Pay Advices (AVPA) form. Setting View Advices Online to No does not stop an employee from viewing their earnings statements in Self-Service, but it is used during payroll processing to print earnings statements for only employees with this flag set to No.

8. Recycle the application pools.

Set up Earnings Statements administrators

You can set up users as Earnings Statements Administrators, which gives them access to earnings statements for all employees.

Procedure

1. Use the **Organization Role Definition (ORGR)** process to create the Earnings Statement Admin role. You assign this role to users who need access to the **Earnings Statement Admin** page.

2. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the VIEW.ALL.EARNINGS.STATEMENTS permissions to this role.

   Note: You can customize the role you create in Step 1 by giving it any name you prefer.

3. Assign the Earnings Statement Admin role to each payroll super-user who should have access to Earnings Statements for administrators.

   Warning! Users granted this role are able to view Earning Statements for all employees. For privacy reasons, this role should be granted to only payroll administrators who have a clear business need to view employee Earning Statements.

4. In Self-Service Administration, access the Sitemap under Users and Permissions. Under the Daily Work menu, select the Earnings Statement (Admin) page and verify that the Earnings Statement Admin role is assigned in the Allowed Roles section.

   Note: Ellucian delivers the Earnings Statement Admin role with this page. If you created a custom name for this role in Step 1, you must remove the delivered Earnings Statement Admin role and add your custom role here on the Earnings Statement (Admin) page.

   Note: In order for administrators to view their own earnings statement information, you should set the option for viewing statements online for each administrator who chooses to view statements online using either the Employee Overview (EPOV) or Allow Viewing of Pay Advices (AVPA) form.

5. Recycle the application pools.

Earnings statements parameters

Use the Pay Advice Parameters (PASP) form to specify the parameters that control when earnings statements can be viewed and whether certain information is included in earnings statement page headers.

Use the Pay Advice Parameters (PASP) form to specify the following:

- When earnings statements are available for viewing in relation to the pay date.
- The number of previous years for which earnings statements are available for viewing online.
- Whether the employees' Social Security numbers appear on earnings statements.
- Whether federal and state withholding information appears on earnings statements.

Note: Only the earnings statements for which data exists in the `WEB.PAY.ADVICES` file are available for viewing online.

PASP form parameters apply to administrators and employees.

Define earnings statements parameters

Use the Pay Advice Parameters (PASP) form to control when earnings statements are viewed.

Procedure

1. On the PASP form, in the **Days Before/After Pay Date** field, enter a number that represents when you want statements to become available for viewing in relation to the pay date.

   To make earnings statements available for viewing:

   - Before the pay date, enter a negative number, for example, -2.

   - On the pay date, enter 0 or leave this field blank.

   - After the pay date, enter a positive number, for example, 4.

   You can enter any number from -99 to 99.

   Note: If you leave this field blank, then statements are not available for viewing until the pay date of the statement.

2. In the **Previous Years to Display** field, enter the numbers of previous years for which you want earnings statements information to be available for viewing. Do not include the current year in the numbers that you enter.

   You can enter up to two characters.

   You can enter any number between 0 and 99. If you enter 0, then only current earnings statements, that is, statements issued in this year, are available for viewing.

3. To control how Social Security Numbers appear on earnings statements, in the **Display SSN** field, choose one of the following options:

Option	Description
S	Shows complete Social Security Numbers.
L	Shows the last four digits of the Social Security Numbers.
N	Nothing is shown of the Social Security Numbers. If you choose N, neither the SSN label nor the SSN itself will appear on the earnings statements

4. In the **Display Withholding Status** field, enter one of the following: Yes if you want federal and state withholding status, the number of federal and state exemptions, and additional and federal withholding amounts to appear on earnings statements. If you enter No here, none of these labels nor the withholding information itself will appear on the earnings statements.

5. Save your changes and update from the PASP form.

Example

The following is an example you can reference when you define earnings statements parameters.

Note: Pay date refers to the check date, or the statement date if the check was paid by direct deposit.

Earnings statements parameters example: the current year is 2018 for this example and you enter the following on the PASP form:

• 0 in the Days Before/After Pay Date to View Advices field.

• 3 in the Prior Years to Display field.

With these parameters, employees can view their own earnings statements as follows:

• Earnings statements issued in 2018 can be viewed beginning on the pay date (this is the check date) of the earnings statement.

• Previous year earnings statements can be viewed for the years 2017, 2016, and 2015

Emergency Information Access overview

Colleague Emergency Information Access enables authorized users to view in Colleague Self-Service emergency contacts and other emergency information for a person.

Page	Description
Emergency Info Access	Allow authorized users to view emergency information for other users. Depending on an institution's policies, authorized users can view emergency contact information. **Note:** If a person has a privacy code defined on the Biographic Information (BIO) form, the search results will display the person with a message indicating the person's request for privacy. The person's emergency information will only be accessible for viewing by staff members with privacy access to the person's privacy code.

Set Up Emergency Information Access

Set up authorized users to access emergency information in Self-Service about other users.

About this task

You can allow authorized users with the assigned role and permissions to access emergency contact information for other users. For example, your public safety office may need to access emergency contacts and hospital preference when a student is involved in an accident.

Use roles and permissions to allow access to users' emergency information.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to add a new role for emergency information access.
2. Use the **Maintain Role-Permission Relationships (MRPR)** form to add the permissions for emergency contact access to the new role.
3. In Self-Service administration, access the sitemap under Roles and Permissions.

   a) For the **Emergency Info Access** page, add the new role in the Allowed Roles section.

   The **Emergency Info Access** page will be displayed under the Daily Work menu in Self-Service.

Faculty overview

Colleague Faculty Self-Service enables you to manage information about courses, grades, textbooks, waivers, and petitions.

Note: You can search for students by name or ID in the following faculty section detail permission views: Requisite Waiver, Faculty Consent, Add Authorization, and Student Petition.

Create and view waivers

Use Student Requisite Waivers Summary (SRWS) and Student's Requisites Waiver (SRQW) to create and view any waivers that you create through Colleague Self-Service. Any waivers that exist for a course or section display in the Faculty Waivers view, Petitions and Waivers tab, and on SRWS.

About this task

You cannot edit waivers in Colleague Self-Service, but you can edit waivers using SRWS in Colleague, if necessary. For more information about using SRWS and SRQW, see the *Using Registration* manual.

Procedure

1. Access the **Student Requisite Waivers Summary (SRWS)** form and detail to the **Student's Requisites Waiver (SRQW)** form.

2. In the **Crs/Sec With Requisites** field, select **Course**, if you want to define the requisites you want to waive at the course level and use the waiver for any sections offered for the course. Select **Section** if you want to define the requisites at the section level or use the waiver only for a particular section of the course.

   Depending on the option you select, either the **Crs** or **Sec** field is available.

3. In the **Crs** or **Sec** field, enter the course or section for which you are setting up the waiver.

4. For a course waiver, enter either a term or a start and end date to indicate when the waiver is active.

   If you are creating a section waiver, the term defaults from the section information.

5. In the **Reason** field or the **Comments** field, enter information about why you are granting the student the waiver.

6. Select the requisites you want to waive using one of the following options:

   • Enter `Yes` in the **Waive Previous** and **Previous-or-Concurrent** field to set the **Waive** field to Yes for all the requisites with a timing of previous or previous-or-concurrent.

   • Enter `Yes` in the **Waive All Requisites** field to waive all of the requisites.

   • Enter `Yes` in the **Waive** field for the specific requisites you want to waive.

7. Save your entries on **SRQW** and **SRWS**.

   You cannot change a waiver after you save it. If you need to change the waiver, you will need to revoke the waiver and create a new waiver with the updated information.

Set up grade restrictions

Setting up grade restrictions in Colleague allows you to control a student's access to their grade information. Grade restrictions are based on rules on the Grade Printing Restrictions (GRPR) form. Colleague evaluates the rules based on the settings on the Grading Web Parameters (GRWP) form.

Procedure

1. Access **GRPR** to review and update your grade restrictions, as needed.

2. Access **GRWP** and use the **Grade Restriction Enforcement** field to indicate whether Colleague should verify grade restrictions when students are trying to view their grades online.

3. Save your work on **GRWP**.

Results

If you have turned on grade restriction enforcement, Colleague evaluates the rules on **GRPR** when students access Self-Service. If students do not pass all of the rules defined on **GRPR**, Colleague displays a message indicating that they cannot view their grade information. If the **Grade Restrictions Enforcement** flag on **GRWP** is set to No, Colleague does not restrict grade information.

Identify grades in a scheme that are available in Self-Service for final and midterm grading

You can identify grades in a scheme available for final and midterm grading so that faculty will only see applicable grades.

Procedure

1. Access the **Grade codes (GRCD)** form and enter or look up the grade scheme you want to process.

2. Enter or look up the grade you want to process.

3. Enter `Yes` in the **Use in SS after Drop Grade Reqd Date** field if you want the grade to be available for use after the Drop Grade Required Date has passed.

4. Enter `Yes` in the **Include in SS Midterm Grade List** field if you want this grade to be available for midterm grading.

5. Enter `Yes` in the **Include in SS Final Grade List** field if you want this grade to be available for final grading.

6. Save your work on **GRDC**.

Grant petitions and faculty consent

Use the Student Petitions (STPE) form to grant petitions and faculty consent and view any petitions that you create through Colleague Self-Service. Any petitions or faculty consent that exist for a course or section display in both the Student Petitions/Faculty Consent view and on STPE.

Procedure

1. Access **STPE**, and enter or add a student's name for whom you want to grant a petition.
2. If the petition is valid for a specific term, enter that term in the **Term** field. Otherwise, leave this field blank.

   If you enter a term, Colleague automatically populates the **Start/End Date** fields.
3. Enter courses for which you want to grant a petition.
4. Enter the section to which the petition applies.
5. Enter the status of the petition.

   If the petition status is equivalent to "granted," Colleague registers the student in the section. If the status is other than "granted," the student needs an override to register for the section.
6. Enter the status of the faculty member's consent.

   If the student's schedule requires an overload petition, go to Step 4. Otherwise, go to Step 8.

   If the faculty consent status is equivalent to "granted," Colleague registers the student in the course. If the status is other than "granted," the student needs an override to register for the section.
7. Enter the status of the student's overload petition.

   The overload status does not function correctly if you do not specify a term in the **Term** field.
8. Repeat this procedure for each student requiring a petition.
9. Save your work on **STPE**.

Define how students and faculty view and enter grades online

Use the Grading Web Parameters (GRWP) form to define the ways your faculty members and students are able to view or enter grades online.

Procedure

1. Access **GRWP**.
2. Enter `Yes` in the **Verify Final Grades** field if you want faculty to be able to verify all of the final grades that they enter by pressing a "Post Grades" button. After faculty post grades, they cannot make any further changes. Enter `No` if you want the grades that faculty enter to remain unverified. They will not see the "Post Grades" button.
3. Enter `Yes` in the **Include Deleted Students** and **Include Cross-Listed Sections** fields to include those students in the list of students under the grading tabs.

4. Enter the number of midterm grades allowed at your institution (0-6) in the **Number of Midterm Grades in Student Planning** field.

    The system uses this field to determine the number of midterm grades that faculty members can enter. If you leave this field blank, Colleague treats it as zero.

5. Use the **Show Midterm Grading Complete** field to indicate whether faculty members entering midterm grades should be given an option to indicate that they have finished entering midterm grades for a section.

6. Use the **Lock Midterm Grading when Complete** field to indicate whether you want to prevent faculty members from entering or modifying midterm grades after they indicate that they have finished entering those grades for a section.

7. Use the **Enforce Allowed Terms for Midterm Grading** field to indicate whether you want to limit faculty to entering midterm grades in just the sections in the Allowed Terms listed on this form.

8. Use the **Allowed Terms** field to enter the terms whose sections users can grade online.

    If this field is left blank, users cannot grade sections online. Colleague records entered and verified final grades for an entire section on the student transcript and viewable by the student through Self-Service. Verified grades require registrar assistance if you want to make further modifications to them.

9. Save your work on **GRWP**.

Define what textbook information displays to students

The Section Details view includes the ability to either display the total costs of the textbooks for the section or display a link to the bookstore with information specific for the section.

Procedure

1. Access the **Course Planning Web Params (CPWP)** form.

2. Use the **Section Bookstore URL Template** field to define the URL for the bookstore link.

3. Save your work on **CPWP**.

Section bookstore URL template syntax

The URL that Colleague generates using the format defined on CPWP appears on the Section Detail page within Student Planning in Self-Service.

Values to be substituted when the actual section URL is constructed are limited to the following list. These must be query parameters within the URL and not elements of the main path.

Substitution values are:

*   {0} - substitute the term code for the specific section

*   {1} - substitute the section's course's Subject code (for example, MATH)

*   {2} - substitute the section's course number (for example, 100 as in MATH-100-01)

*   {3} - substitute the section's section number (for example, 01 in the example MATH-100-01)

- {4} - substitute the section's ID number

- {5} - substitute the section's course ID number

- {6} – substitute the section's location

An example template might look like: http://www.books.com/store?
term={0}&dept={1}&courseNumber={2}&sectionNumber=(3}&sectionId={4}&courseId={5}&sectionLocation={6}

Faculty books tab

The **Faculty > Books** tab provides faculty the ability to add, update and delete books associated
with a section.

If faculty should not be able to update books, go to **Site Administration > Sitemap > Faculty
Navigation (Section Details) > Subpages** to hide the tab by un-checking the **Books** checkbox.
There are no permissions associated with this functionality.

Set up faculty view of terms

Faculty members can view their assigned sections on the Faculty Overview.

About this task

This view shows their assignments in any current or future term that falls within the next year and in
a term on the Registration Web Parameters (RGWP) form. This information is valid until either the
term or section end date has passed.

Procedure

1. Access **RGWP**.

2. In the **Allowed Registration Terms** field, enter the terms you want to be available for both
   registration and advisor selection in My Advisees.

   The entries in this field determine which terms are available in the **Term** field on the My
   Advisees Term and Date Selection web form. This is the only field on the form that affects the
   list of advisees.

   Warning! Changing this field affects students' ability to register.

3. Save your work on **RGWP**.

Results

When registering students, My Advisees uses the registration user group of the advisor rather
than the registration user group entered on **RGWP**. However, if an advisor is not assigned to
a registration user group, Colleague uses the registration user group on **RGWP**. This allows
institutions to create separate registration controls and overrides for advisors. See *Using
Registration* for more information about working with registration user groups.

Define faculty add authorization parameters

Use the Registration Defaults (RGPD) form to set up parameters for faculty add authorization requirements at your institution.

Procedure

1. Access **RGPD**.

2. Use the **Require Faculty Add Authorization** field to indicate whether you want to require students to obtain faculty authorization before they add a section during add authorization periods.

3. If you set the Require Faculty Add Authorization field to yes and the requirement for faculty authorization does not start at the beginning of the add period for the class, use the **Add Authorization Start Date Offset** field to enter the number of days beyond the start date when you require faculty authorization. Otherwise, leave this field blank or enter zero if add authorization is required from the beginning of the add period.

4. Enter `Yes` in the **Exceed Cap with Add Authorization** field if the use of Add Authorization at your institution includes the authorization to register during the Add Authorization period even if that registration would exceed the section's capacity. Enter `No` or leave this field blank if you want Colleague to enforce section capacity the same way for students with and without add authorization.

   Colleague only allows the section capacity to be exceeded when the Add Authorization is actually used to add the section. Although it would be unlikely to occur, if a student had been granted add authorization but was registering on a date on which add authorization was not required, Colleague enforces the section capacity.

   Exceed capacity does not work when waitlisting is enabled on the section.

5. Save your work on **RGPD**.

Access the faculty waitlist tab

You can make the waitlist tab visible to faculty. The Waitlist tab shows two waitlists: Active and Nonactive. The Nonactive waitlist shows students who have a status other than active and permission to register.

Procedure

1. Log into Self-Service as a user with Self-Service Administration permissions.

2. From the **User Profile** menu, select **Site Administration**.

3. On the **Site Administration** page, click on the **Site Map** link under **Users and Permissions**.

4. Scroll down to the Faculty section and click on **Faculty Navigation** (Section Details).

5. On the **Page Configuration** page for **Faculty Navigation** scroll to the Subpages section and check the box next to **Waitlist**.

Show waitlist rank and rating

You can set the parameter that determines whether Self-Service displays the waitlisted rank and rating information for faculty on the waitlist tab.

Procedure

1. Access the **Faculty Course Web Parameters (FCWP)** form.
2. Use the **Show Waitlist Rank and Rating** field to indicate whether you want to show the waitlist rank and rating on the faculty view of waitlisted students in Self-Service.
3. Save your work on **FCWP**.

Manage the student profile information in Self-Service

You can manage the student profile information in Self-Service.

About this task

Note: Access the Student Profile Params (STPP) form either directly from the menu or from the Student Profile Params field on the Web Student Profile Params (SPWP) form.

Procedure

1. Access **STPP**.
2. Use the **Phone Number** and **Academic Program** fields to indicate whether you want to display this student profile information.
3. Save your work on **STPP**.
4. Recycle the application pools.

Faculty Contracts overview

You can allow faculty members to view detailed information about their contract assignments by load period.

Set up faculty contracts

Set up faculty contracts to display in Colleague Self-Service.

Procedure

In Colleague HR, use the **Assignment Contract Params (ACPS)** form to list one or more statuses for which you want to display faculty contracts.

Note: If you do not list any contract statuses in the **Visible Faculty Contract Statuses** field, employees will not be able to see any contract information in Colleague Self-Service.

Finance Query

Use the Finance Query to access Financial Data in Colleague Self-Service. It displays asset, liability, revenue, and expense accounts.

You can sort data to see the GL account totals, sub-totals, and grand totals for more than one department.

You can sort by a GL component or sub-component.

You can select and apply new and existing default filters. Ellucian recommends that you use a filter to limit the results that are returned.

Debits show as positive numbers and credits show as negative numbers.

You can produce a .csv file from the Finance Query.

From the GL Detail page, you can view the Purchase Order, Voucher, Journal Entry, Requisition, Recurring Voucher, and Blanket Purchase Order pages. For more information about these pages, see Budget to Actuals overview on page 13.

Set up Finance Query

You can set up Finance Query in Self-Service.

Before you begin

Ensure that the necessary setup is complete in Colleague.

Procedure

1. Use the **Staff and Volunteers (SVM)** form to set up users with the correct staff member information to allow them to view their cost centers.

   See the *Getting Started with Purchasing and Accounts Payable* manual for details.

2. Use the **GL Role Definition (GLRD)** and the **GL User Definition (GLUD)** forms to set up each user's GL account access.

   See the *WebAdvisor for Colleague Finance* manual for details.

3. Assign the appropriate role to all Finance Query Self-Service users.

   This is done individually using Org Roles (AROR) or Batch Update Resource Assignments (BURA) to assign in batch. For more information about setting up Self-Service users, see the *Self-Service Installation and Administration* manual.

Graduation Application Overview

Overview of graduation application self-service content.

Colleague Graduation Application Self-Service provides an interface for a student to apply for graduation.

Advisors can view a read-only version of the advisee's graduation application in a separate tab in Self-Service

Validation codes

You must define the following validation codes if you are not providing a link to a third party where a student can order their cap and gown and you want to record their size preference in Colleague.

- GRADUATION.CAP.SIZES
- GRADUATION.GOWN.SIZES

The cap and gown information is stored on the **Student Graduation Data (SGRD)** form.

Graduation application links

Use the Grad Application Link (GAPL) form to define links to websites that provide additional information related to the graduation application process.

Note: The web addresses you enter on **GAPL** must include a fully formatted web address for the link to work correctly.

Graduation application questions

Use the Graduation Application Questions (GAPQ) form to configure particular questions on the graduation application.

GAPQ contains a list of questions that are predefined in Colleague and show on the Self-Service graduation application. You can choose to hide any of the questions or you can make the question required. You cannot create new questions. You can modify the text of the question through the resource file in Self-Service.

Define graduation application parameters

Use this procedure to define graduation application parameters.

Procedure

1. Access the **Grad Appl Web Parameters (GAWP)** form.

2. Enter Y in the **Immediate Payment** field if you want immediate payment of application fees.

   Note: If you also entered Y in the eCommerce Implemented field on the Financial Web Parameters (FIWP) form, to calculate the graduation application fee for the application. If the amount is greater than zero the fee is displayed and the student will be asked to enter their method of payment. When they select Proceed to Payment they will be directed to the Student Finance payment pages and will be permitted to submit an eCommerce payment through the providers set up. When on the payment pages, if they fail to make a valid payment the graduation application is still on file and the charge will be applied to the students account for later payment.

   Enter N to display an acknowledgement of the application as soon as the new application is submitted.

   Payments are not required when editing an existing application.

3. Use the **Grad Appl Paragraph** field to enter the acknowledgment paragraph sent to the online user after a successful submittal.

4. Use the **Email Appl Return Address** field to enter the return address for emails sent to students who reply to the acknowledgment email.

5. Use the **Appl Custom Subroutine** field to enter the name of a subroutine that finds the term for term-based invoices.

   In a SaaS environment, you can register a subroutine on the CDD Subroutine Hook Extensions (CSHE) form. To select your subroutine, access the Subroutine List Selection (SLSR) form from this field.

6. In the **Graduation Allowed Terms** field, enter terms that you want to appear in the **Anticipated Graduation Term** drop-down box on the graduation application.

   If you leave this field blank, all of the academic terms defined in your Colleague account appear in the drop-down box.

7. Use the **Maximum Number of Commencement Guests** field to enter a number from 1-100 to define the maximum number of guests a student can invite to commencement.

8. Enter Y in or leave the **Allow Graduation Application Edits** field blank if you want to allow students to edit previously submitted graduation application information in Self-Service.

9. Access the **Grad Application Links (GAPL)** form, and enter URL addresses for any of the fields for which you want to provide a link to a website.

10. Save your work on **GAPL** and return to **GAWP**.

11. Access the **Graduation Application Questions (GAPQ)** form.

12. For the graduation questions that are displayed, enter Yes in the **Hidden** field for each question you want to hide on the graduation application in Self-Service.

13. For the graduation questions that are displayed, enter `Yes` in the **Required** field for any of the questions that a student must answer on the graduation application in Self-Service.

14. Save your work on **GAPQ** and return to **GAWP**.

15. Enter `Y` in the **Override Commencement Cap and Gown Display** field to display the Cap and Gown questions if students indicate they are not attending the commencement ceremony.

16. Save your work on **GAWP**.

Define program eligibility rules for a student

Use the Graduation Application Eligibility Rules (GAER) form to define rules that determine whether a student is eligible to apply for graduation in a program. A student must pass all the rules to be offered the option to apply for graduation in Colleague Self-Service. If you do not provide rules, any student can apply for graduation in this program.

Procedure

1. Access the **Academic Programs (PROG)** form and use the **Grad Elig** field to access the **Graduation Application Eligibility Rules (GAER)** form.

2. Use the **Allow Graduation** field to indicate whether the student can graduate from this program.

3. Enter one or more rules in the **Graduation Application Eligibility Rules** field to define the criteria that a student must meet to apply for graduation in this program.

   Note: Colleague does not apply these rules unless the **Allow Graduation** field is set to Yes.

4. Save your work on **GAER** and **PROG**.

5. Exit **PROG**.

   Note: Use the Grad App Rule Ovrd field on the Student Academic Program (SACP) form to allow a student to apply for graduation even if the student does not pass all the defined rules.

Set up graduation application confirmation emails

As part of the graduation application process you can have Self-Service send emails to students when the application has been submitted. Follow the steps below to setup your email confirmation notices.

Procedure

1. Access the **Grad Appl Web Parameters (GAWP)** form.

2. From the **Grad Appl Paragraph** field, access the **Define Custom Paragraphs (DPAR)** form to create the paragraph to use for the subject and body of the email that is sent to students who have submitted a graduation application.

   You can use the `PERSON`, `STUDENT` or `GRADUATES` merge files. Enter merge values based on the dictionary of that file depending on the merge file that you specify.

   The description of the paragraph becomes the subject of the email. The paragraph can contain HTML tags if the email should be HTML. For example, you could include a link to commencement information.

3. Save your work on **DPAR**.

4. If you want to send a copy of the confirmation email to another email address, enter an email address in the **Grad Appl Acknowledgment Email** field.

   If you want a staff member notified when a graduation application has been submitted, enter the email address of the staff member in this field.

5. To specify a different return email address instead of default for the email server, enter an email address in the **Email Grad Appl Return Address** field.

6. Save your work on **GAWP**.

7. Access the **Web Access Core Parameters (ACWP)** form.

8. In the **Email Type** field, enter the email address type you want to use.

   The email address used for the student will be the one with the email type as defined in this field. If the student does not have an email address with this type, the student's preferred email address is used.

9. Save your work on **ACWP**.

10. Verify that the text on the **Confirmation** page in Self-Service is what you want to display to the student.

   You can change the text in the Graduation resource file if you want to change the message. For more information about resource files, see the *Self-Service Installation and Administration* manual.

Set up billing for the graduation application

Define AR fee defaults for the graduation application fee if you want to bill a student for applying for graduation when they submit their graduation application.

Procedure

1. Access the **AR Fee Defaults (ARFD)** form.

2. At the **AR Fee Type LookUp** prompt, enter `GRAP`.

3. Modify the fee defaults as required.

   Note: For information about ARFD, see the Accounts Receivable section of the *Getting Started with Colleague Student* manual.

4. Save your work on **ARFD**.

Set up graduation address update parameters

Define address parameters if you want students to provide an updated current address using the alternative diploma mailing address under Commencement Details on the Graduation Application page in Self-Service.

Procedure

1. Set the **Address updates allowed** field on the **Web Users Profile Parameters (WUPP)** form to `Yes`.

   If you enter No, students also cannot change their address on the **User Profile** page.

   The system displays a `Request this be used as my address going forward` option to students.

2. Do one of the following:

   - Set the **Users without permission can update addresses** field on **WUPP** to `Yes` for students you want to allow to update phone numbers through Self-Service even though they do not have address update permissions.

   - Set the **Users without permission can update addresses** field on **WUPP** to `No` and assign the UPDATE.OWN.ADDRESS permission to students who are allowed to submit address changes through Self-Service.

3. Save your work on **WUPP**.

4. Specify the **Valid Address Type** on the **Web Access Core Parameters (ACWP)** form.

5. Specify the **Address Change Source** on **ACWP**.

6. Save your work on **ACWP**.

Customize graduation application text

You can edit resource files using the Resource File Editor in Colleague Self-Service Administration to configure the Colleague Self-Service labels and text.

See "Configure Colleague Self-Service labels and text with the Resource File Editor" in the *Self-Service Installation & Administration* manual.

Leave Overview

Colleague Leave Self-Service enables employees to view their leave balances and leave requests.

Page	Description
Leave	Employees can view summary information about their leave balances and leave requests.

Set up Leave for employees

You can set up Leave for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to find or create a role for Leave access.

    Note: You can customize the role by giving a name of your preference.

2. Assign the role you created or identified in Step 1 to your selected employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Define Leave parameters

Use the **Leave Self Service Parameters (LVSS)** form to set up parameters for Leave in Self-Service.

Procedure

Specify the leave plans you want to exclude in the **Exclude Leave Plans** field.
The Leave Self-Service page excludes the leave plans associated with the codes that you enter.

Note: The **Exclude Leave Plans** field includes all the leave plans if you leave this field blank.

Organizational Structure overview

Organizational Structure enables users to view or update an employee's organizational relationships in Colleague Self-Service. Authorized users can also view position-based relationships.

Organizational Structure provides two views of information:

- *Position view* allows users to search by position, and to view the position's supervisor and subordinates. Only users with update permission can use the position view.

- *Employee view* allows users to search by employee name or ID, and to view the employee's supervisor & subordinates. Authorized users can also view any inferred relationships based on position. Only users with update permission can make updates to supervisors and subordinates.

Page	Description
Organizational Structure	Authorized users can search for an employee or position to access supervisor and subordinate information.

Set up Organizational Structure

Set up the Resource Database to enable authorized users to create organizational relationships in Colleague Self-Service.

Before you begin

Refer to the *Using the Resource Database* manual to become familiar with the following concepts:

- How the Resource Database uses data from the Colleague CORE and HR applications.

- How the Resource Database synchronizes data with the Colleague CORE and HR applications.

- How you can set up Colleague to automatically export new positions to the Resource Database.

Procedure

1. In the Colleague UT application, identify the role types in the ORG.ROLE.TYPES validation code table that Colleague uses to represent positions in the Resource Database.

   These role types must have a code of ORG in the first special processing code, and a code of DFLT in the second special processing code. If you don't have this role type, you must create at least one.

2. Create or export organization roles that represent positions to the Resource Database.

   Note: After you define your role types in 1 on page 43 and complete this step, all future position short titles, start dates, and end dates are automatically synchronized with the Resource Database.

Colleague HR is implemented	Action
Yes	Use the Export HR Positions to ResDB (EPRD) process to export positions to roles and assign the role type from Step 1 on page 43. **Note:** Run the EPRD process only for positions that you have not currently assigned to a person that you want included in the organizational structure. You export positions assigned to a person in Step 3 on page 44.
No	Use the **Organization Role Definition (ORGR)** form to create each role and assign the role type from Step 1 on page 43.

   Refer to the *Using the Resource Database* manual for information about creating and exporting organization roles.

3. Export or create role assignments.

   Note: After you define your role types in 1 on page 43 and complete this step, all future role assignment start and end dates are automatically synchronized with the Resource Database.

Colleague HR is implemented	Action
Yes	Use the **Export PERPOS to Resource DB (EPPS)** form to export your person positions to the Resource Database.
No	a. Use the **Export Person to Resource DB (EPDB)** form to export records from the Colleague `CORE PERSON` file to the Resource Database. b. Use the **Assign Resource to Org Roles (AROR)** form to manually assign persons to roles in the Resource Database.

   Refer to the *Using the Resource Database* manual for information about assigning organization role members.

4. In the Colleague UT application, create a relationship category in the RELATIONSHIP.CATEGORIES validation code table with a code of ORG in the first special processing code.

    You will use this relationship category when you create management relationships in Colleague Self-Service.

    a) On the **Role Relationships (RROL)** form, add a duplicate relationship with this relationship category to any role that you want displayed in the position view and also displayed as an inferred relationship in the employee view.

5. **Optional:** Use the **Workflow Administrator Params (DWPA)** form to define whether to use the Organizational Structure relationship as the preferred relationship in workflow management.

    Note: You define an organization structure relationship with a relationship category that has ORG in the first special processing code.

    For information about how workflow management uses relationships from Organizational Structure, refer to the online help for the DWPA form.

6. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the permissions required to view and update organizational relationships.

Permission	Description
VIEW.ORGANIZATIONAL.RELATIONSHIPS	Assign to any role allowed to only view position relationships.
UPDATE.ORGANIZATIONAL. RELATIONSHIPS	Assign to any role allowed to view position relationships, and to update supervisor and subordinate relationships.

    a) Verify that you have defined the roles your institution uses to allow access to the **Organizational Structure** page in Colleague Self-Service as an Allowed Role in the sitemap.

Person agreements overview

Authorized users can set up agreements and assign them to individuals. The individuals can see the agreements and accept or decline these agreements in Self-Service.

Define agreement codes

You can use the Agreement Definition (AGRD) form to define agreement codes.

Procedure

1. Access **AGRD**.
2. In the Agreements LookUp field, either enter a new agreement to add or select an agreement to review.

    If you are creating a new agreement code, you have the option to copy information from a previously defined code.
3. Enter the agreement title, description, and whether to allow an individual to decline the agreement.

    All agreements have an "Accept" option in Self-Service but the agreements that you mark in this field also have a "Decline" option.
4. Complete the other fields on the form.
5. Save **AGRD**.

Update person agreements in batch

You can use the Batch Update Person Agreements (AGRB) form to batch assign or delete agreements from a student's record.

Procedure

1. Access **AGRB**.
2. In the **Update Mode** field, enter `Yes` if you want to review what will be updated when you run the process.

    If you enter No in this field, the people selected using the list of IDs or saved list on this form have the agreements assigned or re-assigned to them.

    If you want to reassign an agreement to an individual for a given report period because the agreement text is updated. You might want to reassign the agreement for the same reporting period. The individuals can view the most updated agreement text before Accepting or Declining.
3. Complete the other fields on the form.

4. Save **AGRB**.

View an individual's agreement history

Authorized users can use the View Person Agreements (AGRV) form to view a list of agreements for an individual.

Procedure

1. Access **AGRV**.
2. In the Person LookUp prompt, enter the individual's ID number, name, or other identifying data. The AGRV form displays the agreement history for the individual.

Define agreement periods

Use the Agreement Periods Definition (AGPD) form to define agreement periods.

About this task

Each agreement you assign to someone also has an agreement period assigned to it, representing a period of time for which the agreement is relevant. You can define these periods as terms, years, or any other segment of time. The bottom half of this form contains a list of agreement codes to which you have tied this agreement period as a default. This is done on the Agreement Definition (AGRD) form. If you later assign an agreement to someone through the Batch Update Person Agreements (AGRB) process and use an agreement period other than the default value, this list always reflects the default value on AGRD.

Procedure

1. Access **AGPD**.
2. In the **Agreements Period Look Up**, search for an existing agreement period or add a new agreement period.
3. If the agreement period is not listed in the existing list, you are prompted to add the new period.
4. Enter a description in the **Agreement Period Description** field.
5. Save **AGPD**.

Person Restrictions overview

When a user logs into Colleague Self-Service, active person restrictions can be displayed.

Configure person restriction notifications

Configure how person restriction notifications are displayed when a user logs into Colleague Self-Service.

Procedure

1. Complete the **Restriction Severity Styles (RSVS)** form to specify how person restrictions are displayed in Colleague Self-Service.
2. Enable the restrictions that you want to display in Colleague Self-Service as follows:
   a) Access the Restriction Codes (REST) form.
   b) Select the restriction code you want to enable.
   c) Verify that the severity assigned to the restriction code is consistent with the severity styles defined on RSVS.
   d) Detail from the Notification Settings for this Restriction field to the Restrictions Notifications Settings (RPRS) form.
   e) In the Display Restrictions in Notifications field, enter `Yes`.
   f) Complete the rest of the fields on RPRS as necessary.
   g) Save your changes.

Plan and Schedule Overview

Plan and Schedule allows students to see the courses they are planning to take or are registered for in a particular semester. It also gives students an overview of the steps needed to plan their degrees.

Set up registration restrictions

You can restrict access to registration based on start/end dates and times, and for specific terms.

Procedure

1. Assign a priority number to a student using the **Assign Registration Priority (ARGP)** process.
2. Set the registration time based on the priority using the **Assign Registration Times (ARGT)** process.

   For more information about registration restrictions, see the *Using Registration* manual.

   Note: A student can also be prevented from registration if they fail any registration rules that have been defined by your institution.

Set parameters to prompt for a drop reason and require a response

You can tell Self-Service whether to issue a prompt for a drop reason and require a response.

Procedure

1. Access the **Registration Self-Service Parameters (RGSP)** form.
2. Use the **Prompt for Drop Reason** field to indicate whether you want Self-Service registration to ask for a reason when a course section is dropped from a student's schedule during the defined drop period.

   The special processing on the drop reason validation code determines the Prompt for Drop Reason list. If you plan to enter Y in the **Prompt for Drop Reason** field, you should first verify that your STUDENT.ACAD.CRED.STATUS.REASONS validation table has at least one entry with special processing code S.

3. If you entered Y in the **Prompt for Drop Reason** field, use the **Require Drop Reason** field to tell Self-Service registration to require a reason when a course section is dropped from a student's schedule.
4. Save your work on **RGSP**.

Define academic terms

You can define academic terms.

About this task

When you set up academic years on the Reporting Years and Terms (RYAT) form, make sure there are enough years and terms available for student planning to cover the longest running program at your institution. For example if your institution offers primarily two year programs but if you have a less common program that runs for four years and you want it available on Student Planning, then you will need four years' worth of terms built on RYAT. This procedure affects which terms are displayed on new course plans and which terms can be added to course plans.

Procedure

1. Access the **Reporting Years and Terms (RYAT)** form and detail to the **Academic Term (ACTM)** form.

2. Enter Y in the **Available for Student Planning** field to indicate that this term should be displayed and made available for course planning.

3. Enter Y in the **Default on New Course Plans** field to indicate that this term should default into the Course Plan.

   Only terms with start dates between the Course Plan start date and the student's anticipated completion date are displayed on a newly created plan.

4. Save your work on **ACTM** and exit **RYAT**.

Set up requisites for a course

You can record requisites for a course.

About this task

When a student registers for a course, Colleague checks for requisite course and non-course work entered in this form and alerts students to the requirement. Colleague refers to this record when a student registers for this section and enforces the requisites that are flagged as "Required."

Procedure

1. Access the **Course Requisites (CREQ)** form.

2. In the **Requisite Courses** field, enter the courses that a student must take before registering for this course.

   Colleague checks the courses listed in this field against a student's record. The student is not allowed to register for this course without completing the requisites.

3. Save your work on **CREQ**.

Define academic programs

You can define academic programs.

About this task

When you assign a student to a program, the student inherits the academic level, degrees, CCDs, majors, minors, and specializations listed in those fields. In Colleague Self-Service, the academic programs that are displayed are determined by the settings in the Status and End Date fields.

Procedure

1. Access the **Academic Programs (PROG)** form.
2. Enter the status of the program.

   When you enter a status, today's date automatically defaults into the Status Dt field. For Colleague Self-Service, the Status field must contain a special processing code in the PROGRAM.STATUSES validation code table. 2 indicates "not current."
3. Enter the departments that own the program.

   Each academic program belongs to a department and is considered "owned" by that department. The department controls any modifications to the program.
4. Enter the catalogs in which this academic program is valid.

   If you associate the academic program to a person who is not associated with one of these catalogs, a message warns you that the academic program is not valid for the catalog.
5. Enter the dates on which the academic program becomes available to students.

   This is not necessarily when the program specific courses begin and end, but when students can submit applications and be enrolled in the academic program.
6. Use the **Stu Select** field to indicate whether you want this academic program to appear in the list of programs available in the Academic Programs dialog box.

   If you enter Y, the academic program is available for selection. If you enter N, the academic program is not displayed in the dialog box.
7. Save your work on **PROG**.

Purge degree plan courses from past terms

You can remove records from the degree plan terms planned courses.

Procedure

1. Access the **Purge Degree Plan Planned Courses (PDPC)** process.
2. Enter Y in the **Update Mode** field.

3. Enter one or both of the following:

   - a saved list of IDs from the STUDENTS file

   - one or more terms

4. Save your work on **PDPC**.

   PDPC generates a comma separated value (.csv) file that you can view and save.

Position History overview

Colleague Position History Self-Service enables employees to view positions to which they have been assigned.

Page	Description
Position History	Employees can view summary information about all the positions to which they have been assigned.

Set up Position History for employees

You can set up Position History for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to create a role for Position History Employee access or identify existing roles for employees who will access this page.

   Note: You can customize this role by giving it any name you prefer.

2. Assign the role you created or identified in Step 1 to your selected employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Procurement overview

You can view Requisitions and Purchase Orders in Self-Service.

The Requisitions and Purchase Orders displayed are those for which you are either the requestor or the initiator.

Date ranges on the Purchasing Web Parameters (PUWP) form can affect what requisitions display.

You can also create and maintain Requisitions in Self-Service. You can add as many line items as you need and add multiple GL account numbers to a requisition.

You can enter Next Approvers and view the approver information on the Requisition.

Set up requisitions

Your institution needs to set up a couple forms to allow users to access requisitions in Self-Service.

Before you begin

You must have a STAFF record and the procurement permissions set up before viewing, creating, and maintaining requisitions in Self-Service. You can find that information in the *Self-Service Installation and Administration* manual.

Procedure

1. Use the **Staff and Volunteers (SVM)** form to set up a STAFF record.

2. Use **Purchasing Web Parameters (PUWP)** to define the **Start/End Dates** and the **Desired Days**.

   Self-Service calculates the Desired Date for requisitions by adding the number of days in the Desired Date field on PUWP to today's date.

3. Use the **PUWP** form to select whether to **Allow Miscellaneous Vendors**.

   If you enter Yes in the Allow Miscellaneous Vendors field, you can enter miscellaneous vendors in Self-Service.

4. Use the **PU Parameters Definition (PUPD)** form to define the **Ship To Code/Name** field.

   If you have a ship to code defined on PUPD, that code defaults in the same field on the Requisitions page in Self-Service.

5. Use the **Financial Web Params (CFWP)** form to define the **User E-Mail Types** and default **Tax Codes**.

Warning and error messages

If you enter a requisition date that is not acceptable, you might get an error message. The error message could prevent you from continuing and require a date change.

Message	Can continue to submit	Must change date to continue
<date> falls outside the current fiscal year	X	
<date> falls beyond the current fiscal year	X	
<date> falls in a future year	X	
<date> falls in a future month	X	
<date> falls in a prior closed month		X
<date> is for a non-existent fiscal year		X
<date> falls in a closed year		X
<date> is currently in year end status		X

Purchase orders

You can view Purchase Orders in Self-Service.

Your institution needs to set up the permissions to view Purchase Orders. You can find more information about permissions in the *Self-Service Installation and Administration* manual.

Projects Accounting overview

Colleague Projects Accounting enables users of the Colleague Finance Projects Accounting module to see information in Colleague Self-Service about the projects to which they have access.

The project information that is displayed on My Projects includes budget, actual, and encumbrance amounts that are currently charged to the expense and revenue type line items on each project.

Note: GL account access is enforced in the Procurement and Accounts Payable pages that are accessed from the transactions for a project. Individuals viewing the procurement document pages see only line items for which they have at least partial GL access. If users have partial access to the GL account numbers on a line item, they see only the details about the GL account numbers to which they have access. Colleague masks the GL account numbers to which the user does not have access on that line item.

Page	Description
My Projects	Provides a list or bar graph of projects that have been assigned to the user in Colleague. Users can switch between the two views by using the bar graph icon or the list icon. The project roles that allow the user to view a specific list of projects are designated on the Project Definition (PAUD) form. Only revenue and expense type line items are included in this view. Users can choose to filter their projects by status and project type.
Project Detail	Accessed from the My Projects page. The information on this page is sorted by the project line item code description and then by the line item code. Use this page to see all of the line item information associated with a project for all types of line items including asset, liability, fund balance, revenue, and expense. You can expand each line item to see the GL summary for each project line item. This includes the GL account number, GL account description, and the break down of the budget, encumbrances, and actuals dollar amounts. Users can export the data to a .csv file.
GL Detail	Accessed from the Project Detail page by clicking on a GL account. This page displays the GL transactions that are associated to the GL account number. The GL transactions are broken down between encumbrances and actuals. The amounts reflect expenses, revenue, assets, liabilities, and fund balance amounts posted to the GL account number for the project. Users can export the data to a .csv file.

Page	Description
Purchase Order	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a GL encumbrance and begins with a P, you can detail to the Purchase Order page. The Purchase Order page displays the associated documents, comments, approvers, and line item details for purchase orders.
Voucher	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a voucher, you can detail to the Voucher page. The Voucher page displays the associated documents, comments, approvers, and line item details for vouchers.
Journal Entry	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a journal entry, you can detail to the Journal Entry page. The Journal Entry page displays the comments, approvers, and journal item details for journal entries.
Requisition	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a requisition, you can detail to the Requisition page. The Requisition page displays the associated documents, comments, approvers, and line item details for requisitions.
Blanket Purchase Order	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a GL encumbrance and begins with a BPO, you are linked to the blanket purchase order page. The Blanket Purchase Order page displays the associated documents, comments, approvers, and GL distribution details for blanket purchase orders.
Recurring Voucher	Accessed from the GL Detail page. If the procurement document that you see on the GL Detail page is a GL encumbrance and begins with a RV, you are linked to the Recurring Voucher page. The Recurring Voucher page displays the comments, approvers, and schedule details for recurring vouchers.

Set up Projects Accounting

Besides the setup required in the Colleague Finance Projects Accounting module, very little setup is required for Colleague Self-Service.

Before you begin

Ensure that the necessary Colleague Finance and Projects Accounting setup has been completed in Colleague:

• Use the **Staff and Volunteers (SVM)** form to set up users with the correct staff member information to allow them view their projects. See the *Getting Started with Purchasing and Accounts Payable* manual for details.

- Use the Project User Definition (PAUD) and the Project Role Definition (PRLE) forms to set up each user's project access. See the *Using Projects Accounting* manual for details.

- Use the GL Role Definition (GLRD) and the GL User Definition (GLUD) forms to set up each user's GL account access. See the *WebAdvisor for Colleague Finance* manual for details. The GL account access is only used when accessing the procurement documents from the GL Detail page for a project.

Procedure

Assign the appropriate role to all Projects Accounting Self-Service users.

Proxy Access overview

Colleague Self-Service enables you to set up proxy functionality for persons and employees.

Refer to the *Self-Service Proxy User Guide* for information about enabling proxy access. Refer to the table below for information about what type of proxy access you can allow in Self-Service.

Proxy Access Group	Self-Service Proxy Permitted	Access Allowed
CORE General	Notifications	Allows person proxy to view home page restriction notifications.
	Required Documents	Allows person proxy to view all documents needed by the institution.
EM Employee	Time Approval	Allows employee proxy to update and approve time sheets.
FA Financial Aid	Financial Aid Home	Allows person proxy to view Financial Aid information.
	FA Required Documents	
	My Awards	
	Report/View Outside Awards	
	Request a New Loan	
	Award Letter	
	Federal Shopping Sheet	
	Correspondence Option	
	Satisfactory Academic Progress	
SF Student Finance	Account Activity	Allows person proxy to view account information and make a payment.
	Account Summary	
	Make a Payment	
ST Academics	Grades	Allows person proxy to view student grades.
TAX Tax Information	Tax Information	Allows person proxy to view 1098-T information.

Set up View/Add Proxy Access

You can tailor View/Add Proxy Access in Colleague Self-Service to meet the needs of your institution.

Refer to the *Self-Service Proxy User Guide* for complete setup information.

Registration

Both Baseline and Quick Registration are available in Colleague Self-Service.

Set up baseline registration

Registration is available in Baseline Colleague Self-Service. Students use the Course Catalog and Register for Classes in Self-Service to add sections to their schedule and to register.

Before you begin

This task assumes that the Course Catalog is already set up.

About this task

If you want to enable Quick Registration to allow students to register previously added sections from the Self-Service homepage, see *Set Up Quick Registration*.

Procedure

1. Access the **Registration Web Parameters (RGWP)** form.

2. In the **Allowed Registration Terms** field, enter the terms you want to be available for registration.

   The entries in this field determine which terms are available for registration in conjunction with the dates on the Academic Terms (ACTM) form.

3. In the **Registration Users ID** field, enter the registration users ID to be used for online registration.

   Enter the registration users ID that is used to register for sections online if the web user does not have an assigned registration users ID. The registration users ID record determines registration override rights and the controls that identify which checks are made during registration. The permissions that are granted to a web user during registration are defined on the Registration Users (RGUS) form.

4. In the **Registration Acknowledgment Paragraph** field, enter the paragraph that defines the content of the email that Colleague sends to a student after the student successfully registers for sections through the Register for Classes page.

   You can enter the ID of an existing paragraph or access the Define Custom Paragraphs (DPAR) form to define a new paragraph or edit an existing paragraph. If you want Colleague to send a registration acknowledgment to a student, you must also identify an email type in the Email Type field on the Web Access Core Parameters (ACWP) form.

5. In the **Email Reg Ack Address** field, enter the email address of the person or office that you want to receive copies of all registration acknowledgment emails.

   These are the emails that are automatically sent to students when they register for sections using the Register for Classes page. Consider setting up an email address exclusively for copies of these emails. If you leave this field blank, Colleague does not send a copy of the registration acknowledgment email.

6. In the **Email Reg Return Address** field, enter the overriding email return address for registration forms.

   If you enter an internet email address here, Self-Service sends confirmation emails for registration from this address. If you don't enter an email address here, the registration email return address will default to the default return address for your internet mail server.

7. Save your work on **RGWP**.

8. Access the **Registration Self-Service Parameters (RGSP)** form.

9. In the **Prompt for Drop Reasons** field, enter `Yes` if you want Self-Service registration to ask for a reason when a course section is dropped from a student's schedule.

   You can only enter Yes if the `STUDENT.ACAD.CRED.STATUS.REASONS` validation table has at least one entry with special processing code S. Otherwise, there are no drop reasons to choose in Self-Service. Enter No or leave this field blank if you do not want to ask for a drop reason when a course section is dropped from a student's schedule during the defined drop period.

10. In the **Require Drop Reason** field, enter `Yes` if you want Self-Service registration to require a reason when a course section is dropped from a student's schedule.

    You can only enter Yes if the Prompt for Drop Reason field is also set to Yes. Enter No or leave this field blank if you do not want to require a drop reason.

What to do next

If you want to use Add Authorizations for registration during the term add period, see the Define faculty add authorization parameters section of the *Setting Up Student Planning* manual.

Set up quick registration

Quick Registration is available in both Baseline Colleague Self-Service and Student Planning. Quick Registration provides a quick way to register from the Self-Service home page for students who have already added their sections for the registration terms to their schedule and have addressed any outstanding issues that might prevent them from registering.

Before you begin

This task assumes that Baseline Registration and/or registration in Student Planning are already configured.

Procedure

1. Access the **Registration Web Parameters (RGWP)** form.

2. In the **Allowed Registration Terms** field, enter the terms you want to be available for registration.
   The Quick Registration terms must be in this list before Quick Registration can be enabled. The entries in this field determine which terms are available for registration in conjunction with the dates on the Academic Terms (ACTM) form.

3. Save your work on **RGWP**.

4. Access the **Registration Self-Service Parameters (RGSP)** form.

5. In the **Enable Quick Registration** field, enter `Yes` if you want to enable Quick Registration in Self-Service.

    If this field is set to Yes then you must have at least one term entered in Quick Registration Terms, or you cannot use Quick Registration. Enter No or leave this field blank if you do not want to enable Quick Registration.

6. In the **Quick Registration Terms** field, enter the terms that you want to make available for Quick Registration.

    Terms entered as Quick Registration Terms must be listed in the Allowed Registration Terms window on the Registration Web Parameters (RGWP) form. You cannot edit this field unless Enable Quick Registration is set to Yes.

7. Save your work on **RGSP**.

Results

In addition to the setup procedure above, the following variables determine whether a student will see the registration banner on the Self-Service home page:

*   the student must have sections on their schedule for the registration term,

*   a student must be eligible for registration based on things like registration and eligibility rules and registration priorities, and

*   the term must be currently in a pre-registration, registration, or add period.

Note: Quick Registration prompts for Add Authorization codes if authorization codes have been configured to prompt at registration. Quick Registration also shows students a message if a section is waitlisted but will not enroll students in waitlisted sections. This must be done from the schedule.

Required Documents overview

You can use the Required Documents workflow to allow a user to view a list of documents the institution expects to receive from the user, has already received, or has waived.

Page	Description
Required Documents	Allow users to view a list of incomplete, received, and waived correspondence requests as designated by your institution.

Define required documents parameters

You can set up the Required Documents workflow to display a list of incomplete, received, and waived correspondence requests.

Before you begin

You must have Colleague Communications Management implemented to use the Required Documents workflow. Refer to the *Using Communications Management* manual available in the Ellucian Customer Center for information.

Procedure

1. Use the **Communication Code Web Params (CCWP)** form to define the communication codes for the documents you want to list on the **Required Documents** page.

2. Use the **My Documents Web Parameters (MDWP)** form to specify display and sort parameters for the **My Documents** page.

Stipend History overview

Colleague Stipend History Self-Service enables employees to view their stipends.

Page	Description
Stipend History	Employees can view summary information about all of their stipends.

Set up Stipend History for employees

You can set up Stipend History for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to find or create a role for Stipend History access.

   Note: You can customize this role by giving it any name you prefer.

2. Assign the role you created or identified in Step 1 to your selected employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Student Finance overview

Colleague Student Finance Self-Service enables students to easily view their financial information and to make payments on their accounts.

Restrict access to the Pay for Registration workflow

If you have *not* implemented the Pay for Registration workflow, Ellucian recommends that you restrict access to the corresponding Self-Service pages.

Procedure

1. Access the Organization Role Definition (ORGR) form, and add a new role specifically for the Pay for Registration workflow.
2. Assign the newly created role to the Pay for Registration page and to the Registration Activity page.

   See the *Self-Service Installation and Administration* manual for step-by-step instructions.

Results

Because the new role is not assigned to any users, no one will be able to access these pages.

If you later implement the Pay for Registration workflow, you can remove this role from these pages to make them accessible to all students.

Tax Information overview

Colleague Tax Information in Self-Service enables students and employees to maintain their consent choice and view their tax forms in PDF format.

The following tax forms are available:

- 1095-C
- 1098-E
- 1098-T
- 1099-MISC
- T2202A
- T4
- T4A
- W-2

Set up Forms 1095-C

You can set up Form 1095-C to view in Self-Service.

Before you begin

Besides the setup required in Colleague Human Resources for year-end regulatory, you need to do the following to view Forms 1095-C in Colleague Self-Service.

1. Make sure that the current tax year work file has a frozen status.

2. To set permissions to view Forms 1095-C in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For Forms 1095-C viewed in Self-Service, complete the **1095-C Statement Parameters (CPPM)** form.

What to do next

You can set up email notification texts on the CPPM form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **1095-C Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **1095-C Statement Access Email** field.

For these emails, the To field uses the individual's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Set up Forms 1098

You can set up Forms 1098 to view in Self-Service.

Before you begin

Besides the setup required in Colleague Student for year-end regulatory, you need to do the following to view 1098-T forms in Colleague Self-Service.

1. Make sure that the current tax year work file has either a frozen or submitted status.
2. To set permissions to view 1098-T forms in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

1. Access the **Maintain 1098 Tax Year Params (T98Y)** form.
2. In the **Web Access Enabled** field, enter `Yes` to view the PDF in Self-Service.
3. Save the **T98Y** form.

What to do next

You can set up email notification texts on the 1098-T Defaults/Parameters (T9TD) or 1098-E Defaults/Parameters (T9ED) form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **Statement Access Email** field.

For these emails, the To field uses the student's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

View a student's consent history

You can use the 1098 Consent Inquiry (TCNI) form to view a student's consent history for Form 1098.

Procedure

1. Access **TCNI**.
2. In the **Person LookUp** prompt, enter the individual's ID number, name, or other identifying data. The TCNI form displays the consent history for the student.

Run the tax form consent report

You can use the Tax Form Consent Report (TFCR) form to view the consent history for a specific tax form.

Procedure

1. Access **TFCR**.
2. In the **Tax Form** field, select the tax form that you want to report on for the consent status.
3. In the **Consent Status** field, select the consent status for which you want to view in the report.
4. Save **TFCR**.

Results

The TFCR form produces a .csv file for the tax form and consenting status you selected.

Set up 1099-MISC

You can set up Forms 1099-MISC to view in Self-Service.

Before you begin

Besides the setup required in Colleague Finance for year-end regulatory, you need to do the following to view 1099-MISC forms in Colleague Self-Service.

1. Make sure that the current tax year work file has either a verified or certified status.
2. Set permissions to view 1099-MISC forms in Self-Service.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For 1099-MISC forms, complete the **1099-MISC Setup (MISU)** form.

What to do next

You can set up email notification texts on the MISU form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **Statement Access Email** field.

For these emails, the To field uses the individual's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Set up T2202A slips

You can set up T2202A slips to view in Self-Service.

Before you begin

Besides the setup required in Colleague Student for year-end regulatory, you need to do the following to view T2202A slips in Colleague Self-Service.

1. Make sure that the current tax year work file has either a frozen or submitted status.
2. To set permissions to view T2202A slips in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For T2202A slips viewed in Self-Service, complete the **T2202A Defaults/Parameters (T2AD)** form.

To view tax slips in Self-Service does not require consent. If a user has already consented or withheld consent, Colleague works as expected. If a user has not consented, the system allows the user to view their slips.

What to do next

You can set up email notification texts on the T2AD form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **Statement Access Email** field.

For these emails, the To field uses the student's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Set up T4 slips

You can set up T4 slips to view in Self-Service.

Before you begin

Besides the setup required in Colleague Human Resources for year-end regulatory, you need to do the following to view T4 slips in Colleague Self-Service.

1.   Make sure that the current tax year work file has either a frozen or submitted status.
2.   To set permissions to view T4 slips in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For T4 slips viewed in Self-Service, complete the **T4 Slip Parameters (T4SP)** form.

To view tax slips in Self-Service does not require consent. If a user has already consented or withheld consent, the system works as expected. If a user has not consented, the system allows the user to view their slips.

What to do next

You can set up email notification texts on the T4 Slip Parameters (T4SP) form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **T4 Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **T4 Statement Access Email** field.

For these emails, the To field uses the individual's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Set up T4A slips

You can set up T4A slips to view in Self-Service.

Before you begin

Besides the setup required in Colleague Finance for year-end regulatory, you need to do the following to view T4A slips in Colleague Self-Service.

1.   Make sure that the current tax year work file has either a frozen or submitted status.

2. To set permissions to view T4A slips in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For T4A slips viewed in Self-Service, complete the **T4A Maintain Tax Year Params (TAMP)** form.

To view tax slips in Self-Service does not require consent. If a user has already consented or withheld consent, the system works as expected. If a user has not consented, the system allows the user to view their slips.

What to do next

You can set up email notification texts on the T4A Consent Text (TACN) form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **T4A Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **T4A Statement Access Email** field.

For these emails, the To field uses the individual's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Set up Form W-2

You can set up Form W-2 to view in Self-Service.

Before you begin

Besides the setup required in Colleague Human Resources for year-end regulatory, you need to do the following to view W-2s in Colleague Self-Service.

1. For the current tax year, make sure the work file has either a frozen or submitted status.
2. To set permissions to view W-2 forms in Self-Service, see the *Self-Service Installation and Administration* manual.

Note: A list of tax form statements for all of the years available displays in Self-Service, regardless of the status of the current tax year.

Procedure

For W-2s forms viewed in Self-Service, complete the **W-2 Statement Parameters (W2SP)** form.

What to do next

You can set up email notification texts on the W2SP form for users to receive each time their consent changes and each time they access one of their tax form statements.

You can access the Define Custom Paragraphs (DPAR) form to set up the email paragraph a user receives when their consent changes by using the **W-2 Consent Change Email** field.

You can access DPAR to set up the email paragraph a user receives when one of their tax forms is accessed by using the **W-2 Statement Access Email** field.

For these emails, the To field uses the individual's preferred email address. The From field uses the email address in the **Email Return Address** field on the Web Access Core Parameters (ACWP) form.

Tax Information (Admin)

Colleague Tax Information (Admin) in Self-Service allows authorized administrators to see what students, employees, and recipients are seeing when they access Tax Information.

The following tax forms are available with an Administrator view:

- 1095-C
- 1098-E
- 1098-T
- T2202A
- T4
- T4A
- W-2

Authorized personnel who can perform searches on other individuals need to have a role with the VIEW.ANY.PERSON permission.

Tax information proxy

You can use Person Proxy for Form 1098-T in Colleague Self-Service.

Users have the ability to designate another person to access their data. See the *Self-Service Proxy User Guide* for more information on Proxy functionality in Self-Service.

Person Proxy is not active for Form 1098-T until you turn it on. You can turn on Person Proxy using the Proxy Access Permissions (PRAP) form and the Tax Information Proxy Access Group. You will need to activate the proxy functionality by entering Yes in the **Enable** field.

Test summary

The Test Summary allows students to view information about admission, placement, and other tests.

Time Entry overview

Colleague Time Entry Self-Service enables employees to record time worked. Supervisors are able to view and approve their employees' time, and with the proper permissions, edit their employees' time.

Page	Description
Time Entry	Employees can view, enter, and submit their time using Self-Service.
Time Approval	Supervisors can view, approve, reject, and with the proper permissions enter and update their employees' time using Self-Service.

Define Time Entry Self-Service parameters

Use the **Time Entry Self-Service Parameters (TESS)** form to set up parameters for Time Entry and Time Approval Self-Service.

Procedure

1. Select the **Setup Cutoff Dates** and **Times** detail button to access the **Time Entry Cutoff Parameters (TCTP)** form.

    On the TCTP form you can specify default date and time parameters by pay cycle that control the deadlines by which employees must enter time and supervisors must time approve. These defaults pre-populate the employee and supervisor cutoff date/time fields on the **Pay Period Preparation (PPPR)** form and can be changed there for a specific pay period. The pay period must be set up on PPPR before employees and supervisors can access the pay period in Time Entry Self-Service.

2. Define the **Default Start Day of Workweek**, which can be overridden by the pay cycle on the **Pay Cycle Definition (PCYL)** form.

    Warning! Changing the work week start day may corrupt data. Contact Action Line before making this change.

3. Define the **Default Overtime Calculation Definition**, defined on the **Overtime Calculation Definition (OTDF)** form, which can be overridden by position on the **Position Definition (POSD)** form.

4. **Optional:** If you pay shift differential for time entered in Time Entry Self-Service and you need to allow authorized users to modify shift differential groups that are in use, use the **Record Security Setup (SCDR)** form to add the ERNDIFFGRP characteristic to your defined HR security class for accessing all in use records.

5. **Optional:** If you pay shift differential for time entered in Time Entry Self-Service and you have modified the subroutine provided by Ellucian that calculates shift differential pay, specify your modified subroutine's name in the **Shift Differential Subroutine** field.

6. Enter (Y)es or (N)o in the **Enable Comp Time** field to indicate whether compensatory time can be used in Time Entry Self-Service.

   Warning! Disabling Comp Time may cause unexpected results or corrupted data. Contact Action Line before making this change.

7. **Optional:** If you enable comp time and you have modified the subroutine provided by Ellucian that validates compensatory time accrual entered in Time Entry Self-Service, specify the name of your modified subroutine in the **Comp Time Subroutine** field.

8. **Optional:** If you enable comp time, specify the maximum hours of comp time employees can take in a pay period in the **Max Comp Time Per Pay Period** field. If you do not limit the number of hours of comp time employees can take in a pay period, leave this field empty.

9. Enter (Y)es or (N)o in the **Enable Work Schedules** field to indicate whether work schedules functionality is enabled for Self-Service. If you enter Yes, the Time Entry detail page displays scheduled hours for each of an employee's positions that has a work schedule defined on the **Person's Work Schedule (PWSC)** form.

   Note: Because projects accounting is not currently supported in Time Entry Self-Service, any scheduled hours associated with a project on the PWSC form are ignored.

   An Accept button may be displayed on the time entry detail page when a time card is first created for an employee position that has a work schedule defined on the PWSC form. Selecting the Accept button copies the scheduled hours into the time entry fields for that position for the current week. After any hours are populated for the position in the week, either by selecting the Accept button or by manually inserting hours, Colleague hides the Accept button.

   The Accept button is never available for positions defined on the Position Definition (POSD) form with a Web Time Entry Form of DETAIL. You can define a work schedule for a DETAIL position, but work schedules are currently always recorded as summary hours worked. If you define a work schedule for a DETAIL position, the scheduled hours are shown on the time entry detail page as hours per day just as they are for SUMMARY positions, but the schedule hours cannot be copied into the time card. You must enter actual hours worked manually as time in and time out.

10. Enter (Y)es or (N)o in the **Enable Salary Nonexempt Employees** field to indicate whether salary nonexempt positions are enabled in Time Entry Self-Service.

    Warning! Disabling Salary Nonexempt may cause unexpected results or corrupted data. Contact Action Line before making this change.

11. Enter (Y)es or (N)o in the **Enable Exempt** field to indicate whether exempt positions are enabled for in Time EntrySelf-Service. Salary exempt positions are enabled only if salary nonexempt positions are also enabled.

    Warning! Disabling Exempt may cause unexpected results or corrupted data. Contact Action Line before making this change.

12. Define the **Previous Years of Time Card History to Display** which defines how long time history is available for viewing.

13. Define rules identifying which employee positions are not paid if their time is not approved. These rules apply to the PERPOS table.

14. Define the notification paragraphs used in email sent to supervisors when employees submit and unsubmit timecards. Define the notification paragraphs used in email sent to employees when supervisors submit, unsubmit, approve, unapprove, reject, and unreject timecards. These notifications use the preferred email address as the recipient address for employees and supervisors. Define the email return address used on all these email notifications.

15. In the **Allow Supervisor to Edit Timecards** field, indicate whether supervisors can edit timecards.

16. Define the notification paragraph used in email sent to employees when a supervisor edits their timecard.

17. Click **Save**.

Set up Time Entry for employees

You can set up Time Entry for employees in Self-Service.

About this task

Consider the following when setting up Time Entry for employees:

- A pay period is available for Time Entry Self-Service only after you complete the **Pay Period Preparation (PPPR)** form to create a PAYCNTRL record.

- The **Time Card Entry (TCDE)** and the **Time Card Batch Entry (TCBE)** forms will continue to populate the EMPTIME.DTL, EMPTIME.HISTORY, and EMPTIME.PRD files while Time Entry Self-Service and the Pay Period Time Entry (PPTE) form will populate the TIMECARD, TIMECARD.HISTORY, TIME.ENTRY, TIME.ENTRY.HISTORY, TIMECARD.COMMENTS, TC.COMMENTS.HISTORY, and TIMECARD.STATUS files.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to add a role for Time Entry Employee access. The ORGR role must be active on or before the pay period start date for which employees will begin using Time Entry Self-Service.

2. Assign the Time Entry Employee role to your employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch. If you have employees migrating from Web Advisor Time Entry to Time Entry Self-Service, you can assign the Time Entry Employee role when the employees are migrated.

3. **Optional:** If any of your employees require a different overtime calculation definition than the default defined on the TESS form, then populate the **Overtime Calc Definition** value on the **Position Definition (POSD)** form for the appropriate position. Alternatively, you can use the **Overtime Calculation Definition Assignment (OTDA)** form to batch assign or delete overtime calculation definitions on multiple positions.

   In Time Entry Self-Service, the calculation of non-exempt employees' overtime hours is controlled by an overtime calculation definition. The following rules determine which overtime

calculation definition is used to calculate an employee's overtime hours for a particular work week:

- If the employee's primary position is non-exempt and there is an overtime calculation definition assigned to that position, then use that definition.

- If the employee's primary position is exempt and all of the employee's non-exempt secondary positions are assigned the same overtime calculation definition, then use the secondary positions' overtime calculation definition.

- In all other cases, use the default overtime calculation definition specified on the **Time Entry Self-Service Parameters (TESS)** form.

For each position to which employees will record time worked, continue with the following steps:

4. On the POSD form, verify that the position uses the **Summary Web Time Entry** or the **Detail Web Time Entry** form. You can use the **Time Entry Form Assignment (TEFA)** form to batch assign to two or more positions.

5. On the **Person's Position (PPOS)** form, verify that a supervisor is identified for each employee assigned to the position or on the POSD form, verify that a position is referenced to which the supervisor is currently assigned.

   Time Entry Self-Service recognizes the supervisor specified on the PPOS form first, if populated. Otherwise all other persons assigned to the supervisor position specified on the POSD form are treated as the employee's supervisor for that position. Alternate supervisors specified on the PPOS and POSD forms are not supported by Time Entry Self-Service. Use the Employee Proxy feature instead.

6. On the PPOS form, for each employee assigned to the position, verify that the employee's current wage is associated with an hourly pay class. Time Entry Self-Service does not currently support salaried positions

Migrate employees from Web Advisor Time Entry

You can migrate employees whose time was previously entered through the **Time Card Entry (TCDE)** or **Time Card Batch Entry (TCBE)** forms or who entered their own time using WebAdvisor Time Entry (WTEA).

Before you begin

Determine the employees, the pay cycle, and the pay period in which these employees will begin recording their time using Time Entry Self-Service.

Only employees whose positions associated with the chosen pay cycle meet the following criteria are eligible for migration to Time Entry Self-Service for that pay cycle:

- Each position meets one of these conditions:

  – Is hourly and nonexempt.

  – Is salary and nonexempt and the **Enable Salary Nonexempt** flag on TESS is Yes.

  – Is hourly and exempt and the **Exempt** flag on TESS is Yes.

  – Is salary and exempt and the **Enable Salary Nonexempt** and **Enable Exempt** flags on TESS are Yes.

- Each position uses the detail or summary time entry form.

If an employee has multiple positions that are paid in the migrating pay cycle, all of the employee's positions must meet these criteria.

If an employee has positions that are paid in another pay cycle that you do not migrate to Self-Service, the employee can continue to record time for those positions as in the past while recording time for any migrated positions using Time Entry Self-Service.

You cannot migrate an employee for whom a timecard has been entered on TCDE, TCBE, or WTEA in the migrating pay cycle and pay period.

Time cannot be entered on TCDE, TCBE, or WTEA in the migrating pay period or later for employees and positions that have been migrated to Time Entry Self-Service.

Procedure

1. Access the **Migrate to Time Entry Self-Service (MTSS)** form.

   Note: Ellucian recommends that you execute the process in Test mode and verify the results before running in Live mode.

2. Enter the **Pay Cycle** to migrate. You must migrate each pay cycle separately.

3. Enter the **Pay Period End Date** of the first pay period for which employees will record time using Time Entry Self-Service.

4. To specify employees to migrate, you can enter a saved list containing employee IDs, or enter the IDs directly on the MTSS form. MTSS processes only individuals who have a record in the EMPLOYES file.

5. **Optional:** If you want the migration process to assign the Time Entry Employee role to the migrated employees, enter the role that you created on the **Organization Role Definition (ORGR)** form in the **Organization Role** field on the MTSS form. Alternatively, you can assign the Time Entry Employee role to your employees individually on the **Assign Resource to Org Roles (AROR)** form or use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Results

After running this process, the EMPLOYES records will have Self-Service migration information in the EMP.SS.PPD.END.DATES, EMP.SS.PAYCYCLES, and EMP.SS.POSITION.IDS fields that prevents time from being entered for the migrated employees and positions after the migration date through TCDE, TCBE, and WTEA.

Note: You do not need to migrate new employees that have never used TCDE, TCBE, or WTEA for them to use Time Entry Self-Service. Migration is necessary for only employees who have previously used those time entry methods.

Set up Time Approval for supervisors

You can set up Time Approval for supervisors in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to add a role for Time Management Supervisor access. The ORGR role must be active on or before the start date of the pay period for which employees will begin using Time Entry Self-Service.

2. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the APPROVE.REJECT.TIME.ENTRY permission to this role.

   Note: You can customize the role you create in Step 1 by giving it a custom name.

3. On the **Assign Resource to Org Roles (AROR)** form, assign the supervisor the Time Management Supervisor role that gives them access to the Time Approval function. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

4. **Optional:** If your supervisors need the ability to edit employees' time, on the **Time Entry Self-Service Parameters (TESS)** form, enter `Yes` in the **Allow Supervisor to Edit Timecards** field.

What to do next

Note: Time Entry Self-Service recognizes the supervisor specified on the **PPOS** form first, if populated. Otherwise all other persons assigned to the supervisor position specified on the **Position Definition (POSD)** form are treated as the employee's supervisor for that position. Alternate supervisors specified on the PPOS and POSD forms are not supported by Time Entry Self-Service. Use the Employee Proxy feature instead.

Time History overview

Colleague Time History Self-Service enables employees to view their paid time card history.

Page	Description
Time History	Employees can view their paid time card history.
Time History (Supervisor)	Supervisors can view Time History for their employees.
Time History (Admin)	Administrators can view Time History for all employees.

Set up Time History for employees

You can set up Time History for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to add a role for Time History Employee access. The ORGR role must be active on or before the pay period start date for which employees will begin using Time History Self-Service.
2. Assign the Time History Employee role to your employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Set up Time History for supervisors

You can set up Time History for supervisors in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to add a role for Time History Supervisor access. The ORGR role must be active on or before the start date of the pay period for which supervisors need to access their employees' Time History.
2. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the APPROVE.REJECT.TIME.ENTRY permission to this role.

   Note: You can customize the role you create in Step 1 by giving it giving it a custom name.

3. On the **Assign Resource to Org Roles (AROR)** form, assign the supervisor the Time History Supervisor role to each supervisor who needs access to their employees' Time History. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Set up Time History administrators

You can set up users as Time History Administrators, which gives them access to Time History for all employees.

Procedure

1. Use the **Organization Role Definition (ORGR)** process to create the Time History Admin role. The ORGR role must be active on or before the start date of the pay period for which payroll administrators need to access employees' Time History.

2. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the VIEW.ALL.TIME.HISTORY permission to this role.

   Note: You can customize the role you create in Step 1 by giving it any name you prefer.

3. On the **Assign Resource to Org Roles (AROR)** form, assign the Time History Admin role to each payroll super-user who should have access to Time History for all employees.

   Warning! Users granted this role are able to view Time History for all employees. For privacy reasons, this role should be granted to only payroll administrators who have a clear business need to view all employees' Time History.

4. In Self-Service Administration, access the Sitemap under Users and Permissions. Under the Daily Work menu, select the Time History (Admin) page and verify that the Time History Admin role is assigned in the Allowed Roles section.

5. Recycle the application pools.

Define Time History Self-Service parameters

Use the **Time Entry Self-Service Parameters (TESS)** form to set up parameters for Time History Self-Service.

Procedure

Specify the number of Previous Years of Timecard History to Display.

Note: Do not include the current year in the number that you enter.

You can enter any number between 0 and 99. If you enter 0, then time history from only the current year will be available for viewing.

Total Compensation Statement

Colleague Total Compensation Statement Self-Service enables employees to view their total compensation statement information.

Page	Description
Total Compensation Statement	Employees can view summary information about their total compensation.

Set up Total Compensation Statement for employees

You can set up Total Compensation Statement for employees in Self-Service.

Procedure

1. Use the **Organization Role Definition (ORGR)** form to find or create a role for Total Compensation Statement access.

   Note: You can customize this role by giving it any name you prefer.

2. Assign the role you created or identified in Step 1 to your selected employees on the **Assign Resource to Org Roles (AROR)** form. You can use the **Batch Update Resource Assignments (BURA)** form to assign the role in batch.

Set up Total Compensation Statement administrators

You can set up users as Total Compensation Statement Administrators, which gives them access to Total Compensation Statement for all employees.

Procedure

1. Use the **Organization Role Definition (ORGR)** process to create the Total Compensation Statement Admin role. The ORGR role must be active on or before the start date of the pay period for which payroll administrators need to access employees' Total Compensation Statement.

2. Use the **Maintain Role-Permission Relationships (MRPR)** form to assign the VIEW.ALL.TOTAL.COMPENSATION permission to this role.

   Note: You can customize the role you create in Step 1 by giving it any name you prefer.

3. On the **Assign Resource to Org Roles (AROR)** form, assign the Total Compensation Statement Admin role to each payroll super-user who should have access to Total Compensation Statement for all employees.

   Warning! Users granted this role are able to view Total Compensation Statement for all employees. For privacy reasons, this role should be granted to only payroll administrators who have a clear business need to view all employees' Total Compensation Statement.

4. In Self-Service Administration, access the Sitemap under Users and Permissions. Under the Daily Work menu, select the Total Compensation Statement (Admin) page and verify that the Total Compensation Statement Admin role is assigned in the Allowed Roles section.

5. Recycle the application pools.

Define Total Compensation Statement parameters

Use the **Total Compensation Parameters (TCSP)** form to set up parameters for Total Compensation Statement Self-Service.

Procedure

1. Specify the **Employee Restriction Rule** to prevent certain employees from using Total Compensation Statement.

   For example, you can enter a rule that prevents temporary employees from accessing their Total Compensation Statements.

2. Specify the **Benefits/Deductions Included** that you want to include on the Total Compensation Statement. Only the amounts associated with the codes that you enter are included in the calculation.

   For example, you can include only the benefit/deductions that are meaningful to employees without including any that are used for administrative purposes.

   Note: If you leave this field blank, all of the employee's currently assigned benefit/deduction code amounts are included.

3. Specify the **Tax Benefits Included** that you want to include on the Total Compensation Statement. Only the amounts associated with the codes that you enter are included in the calculation.

   Some examples of tax benefits are Medicare, Social Security, Canada Pension Plan, and Canadian Employment Insurance.

   Note: If you leave this field blank, all tax code amounts are included.

4. Specify the **Page Header For Self-Service** which is the header text appearing on the Total Compensation Statement page.

5. Specify the **Other Benefits Text** which reminds employees of their benefits that are not defined as benefit/deductions.

   Examples include tickets, parking, or fitness center usage.

6. Set the **Display Employee Costs in Self-Service** field to **Yes** to display the employee costs column on the Total Compensation Statement.

7. Specify the **SS Base Pay Subroutine** to use to calculate the employee's annualized base pay.

8. Specify the **SS Total Compensation Subroutine** to use to calculate the annualized amounts that are displayed on each employee's Total Compensation Statement.

9. Enter the code for the **Annual Pay Cycle** that was defined on the **Pay Cycle Definition (PCYL)** form to calculate the annualized amounts displayed on the Total Compensation Statement.

10. Enter the code for the **Annual Pay Class** that was defined on the **Pay Class Definition (PCLS)** form to calculate the annualized amounts displayed on the Total Compensation Statement.

Transcript Request and Enrollment Verification overview

Colleague Transcript Request and Enrollment Verification in Colleague Self-Service allows users to view, request, and pay for (if required by your institution) transcripts and enrollment verifications.

Page	Description
Transcript Requests	Enables users to view their transcript requests and add a new transcript request.
Request a Transcript	Enables users to complete and submit a request for a transcript.
Transcript Request Payment Details	Provides details about the number of copies, amount due, and payment methods.
Enrollment Verification Requests	Allows users to view their enrollment verification requests and add a new enrollment verification request.
Request an Enrollment Verification	Allows users to complete and submit a request for an enrollment verification.
Enrollment Verification Request Details	Provides details about the status of the enrollment verification, when it was requested, the recipient and address, number of copies, and payment status.

Set up Transcript Request

You can tailor Transcript Request in Colleague Self-Service to meet the needs of your institution.

About this task

If you want to provide confirmation to students who submit transcript requests, complete the following steps using the Transcript Web Parameters (TRWP) form.

Procedure

1. Specify the postal address hierarchy that you want to use in the **Name/Address Hierarchy** field.

2. Specify which types of transcripts students can view online in the **Valid Trans Groupings** field.

   If you have selected any official transcript groupings on the Additional Acad Program Info (APRI) form, Colleague uses that transcript information. Otherwise, Colleague uses the transcript groupings on TRWP. If there are transcript groupings on both forms, the system ignores the ones on TRWP.

   Self-Service displays a list of transcripts (shown as Transcript Types) to students. The list uses the description from the Transcript Groups (TRGR) form for each transcript grouping. Otherwise, the system suppresses the Transcript Group question in Self-Service.

3. Specify whether your institution requires immediate payment for requests.

4. Enter the acknowledgment paragraph.

   This is the text that you want the system to display after a student successfully submits a transcript request.

5. Specify the return email address that you want the system to use for transcript request emails.

6. Specify a subroutine to find specific terms for invoices.

7. Use the **Student Name Hierarchy** field on the **Student Profile Parameters (SPWP)** form to select a hierarchy for Colleague to use to select a student's name to display.

   If you do not specify a hierarchy in this field, Colleague displays the student's last name, first name, and middle initial. Access the Name and Address Hierarchy (NAHM) form to view and maintain name, address, and email hierarchy search records.

Set Up Enrollment Verification

You can tailor Enrollment Verification in Colleague Self-Service to meet the needs of your institution.

About this task

If you want to provide confirmation to students who submit enrollment verification requests, complete the following steps using the Enrollment Request Web Param (ENWP) form.

Procedure

1. Specify whether your institution requires immediate payment for requests.

2. Enter the acknowledgment paragraph.

   This is the text that you want the system to display after a student successfully submits an enrollment verification request.

3. Specify the return email address that you want Colleague to use for enrollment verification emails.

4. Specify a subroutine to find specific terms for invoices.

Unofficial Transcript

The Unofficial Transcript provides links to the student's transcript, a request form, and online payment information if immediate payment is required by your institution.

Define transcript groupings

You can define which transcript grouping to use when a transcript is generated.

Procedure

1. Access the **Additional Acad Program Info (APRI)** form.
2. If the transcript grouping specified on the **Academic Programs (PROG)** form is not a valid transcript grouping to use, enter the transcript grouping in the **Unofficial Transcript Grouping** field to use when generating an unofficial transcript for students in this program.

   The value you enter in this field must also be included in the list of Allowed Transcript Groupings specified on the Transcript Web Parameters (TRWP) form. If this field is left blank, then the Transcript Grouping from PROG is used to generate the unofficial transcript, if it also exists in the list of Allowed Transcript Groupings on TRWP.
3. Use the **Official Transcript Grouping** field to specify the official transcript grouping that you want to display in Self-Service to students who are in this academic program.

   The system uses the transcript groupings on this form unless there are none, in which case it uses the transcript groupings on the Transcript Web Parameters (TRWP) form. If there are transcript groupings on both forms, the system ignores the ones on TRWP.

   Self-Service displays a list of transcripts (shown as Transcript Types) to students. The list uses the description from the Transcript Groups (TRGR) form for each transcript grouping. Otherwise, the system suppresses the Transcript Group question in Self-Service.
4. Save your work on **APRI**.

Determine when a student can view unofficial transcripts

You can define rules that determine when students can view their unofficial transcripts.

Procedure

1. Access the **Transcript Print Restrictions (TRPR)** form.
2. Enter or look up any rules in the **Transcript Restrictions** field that you want to apply.
3. Save your work on **TRPR**.

Change the unofficial transcript orientation

You can change the orientation of the unofficial transcript from portrait to landscape.

About this task

You can customize the unofficial transcript to adjust the view of the output to ensure that the information can be read correctly. For example you can change the orientation or the margins to prevent the data from wrapping to the next line.

For information about customizing Colleague Self-Service labels and text, see *Self-Service Installation and Administration*.

Procedure

1. Using IIS, navigate to your Colleague Web API site on your server.
2. Using the **Explore** option go to the **Reports** and then **Students** folder.
   D:\Ellucian\ColleagueApi_StableDev\ColleagueApi\Reports\Student\
3. Right click on the **UnofficialTranscript.rdlc** file and open with a text editor.
4. To adjust the width of the Transcript Report, you will need to make adjustments in two locations (lines 23 and 46) by changing the value in the **Width** tag.
   You might have to try several different sizes for the height and the width to get the correct size to accommodate your margins and paging and to avoid blank pages.
5. Save and close the file.
6. Right click on the **UnofficialTranscriptDeviceInfo.txt** file and open with a text editor.
7. Modify the margins for the page.
   You can adjust the top, bottom, left, and right margins.
8. Save and close the file.
9. Recycle your app pool and verify your changes.

Change the font size in the unofficial transcript

You can change the font size for the unofficial transcript.

About this task

You can customize the unofficial transcript to adjust the view of the output to ensure that the information can be read correctly. For example you can change the orientation or the margins to prevent the data from wrapping to the next line.

For information about customizing Colleague Self-Service labels and text, see *Self-Service Installation and Administration*.

Ellucian recommends that you do not change the font. If you do change the font, you will want to use a font that is not proportionally spaced to get the correct display.

Procedure

1. Using IIS, navigate to your Colleague Web API site on your server.

2. Using the **Explore** option go to the **Reports** and then **Students** folder.
   D:\Ellucian\ColleagueApi_StableDev\ColleagueApi\Reports\Student\

3. Right click on the **UnofficialTranscript.rdlc** file and open with a text editor.

4. To change the font size, you will need to change the value in the **FontSize** tag (line 15).

5. Save and close the file.

User Options overview

Colleague User Options enable users to view and update their own identity, demographic, and emergency information, and to assign proxy access.

Page	Description
User Profile/About You	Allows users to view their demographic information, including the person's name, address, phone number, email address, and date of birth from the Name and Address Entry (NAE) form.
	Also allows users to view their personal identity preferences. For example, if the user has a nickname, chosen name, personal pronoun, or gender identity, these will display in addition to the person's name.
	Note: Nickname and chosen name are defined on the Biographic Information (BIO) form; gender identify and personal pronoun are defined on the Addnl Bio Information (ABIO) form.
	Depending on an institution's policies, users can update their demographic information and personal identity preferences in Colleague Self-Service.
Emergency Information	Allows users to confirm or update their emergency contact information. This information can also be viewed and maintained by designated staff members on the Emergency/Missing- Person Contacts (EMPC) form. When users change their information on the Emergency Information page, the changes are immediately reflected in Colleague and can be viewed on the EMPC form.
View/Add Proxy Access	Allows users to grant secure proxy access to other users for select Self-Service pages and workflows. When users add or change proxy access, the proxy information is immediately reflected on the View Proxy Permissions (VPXP) form in Colleague.

Set up User Profile

You can tailor User Profile in Colleague Self-Service to meet the needs of your institution.

Procedure

1. If your institution wants to notify users when one of their addresses, phone numbers, or email addresses is changed, enable security notifications.

    See the Security notifications section in the *Setting Up Colleague Web API* manual for additional information.

2. Use the **Web User Profile Parameters (WUPP)** form to accomplish the following:

    • Display institution-specific text at the top of the **About You** page.

    • Specify which types of addresses to display in Self-Service, and which types can be updated.

      Note: Ellucian recommends that you allow web users to update only web-type addresses in Self-Service. This allows your back office to verify changes to home address or other types of addresses, and to take householding decisions into consideration. A web-type address type has a 3 in the first special processing field. Self-Service address changes to non-web addresses are effective immediately and apply only to the self-service user and to no other person sharing the same address. Colleague moves the former address to the self-service user's address history.

    • Specify which types of phone numbers to display in Self-Service.

      Note: Refer to the Colleague Demographics: Personal Phones article in the Ellucian Support Center for important information about phone types.

    • Control whether users can update their own phone numbers and which types of phone numbers they can update.

    • Specify which types of email addresses to display in Self-Service.

    • Control whether users can update their own email addresses and which types of email addresses they can update.

    • Specify which identity options users can view and update.

3. If you require permissions, verify that users are set up with the permissions needed to make updates to profile information.

    See the *Self-Service Installation and Administration* manual for information.

4. If your institution allows users to request address updates, use the **Web Access Core Parameters (ACWP)** form to set up the **Address Change Source** field.

    Refer to the online help for the ACWP form for additional information.

5. If your institution allows users to request address updates, verify that address statuses are correctly defined.

    Refer to the **Purpose** field for the ADREL.STATUSES validation code table for information about special processing codes.

6. If your institution requires students to confirm their user profile information before registration, complete the following steps:

    a) Access the **Rules Definition (RLDE)** form, and write a student eligibility rule for the data you want to verify has been confirmed, using the following computed columns:

        • Address confirmation: CONF.ADDR.DAYS.SINCE.CONFIRM

        • Email confirmation: CONF.EML.DAYS.SINCE.CONFIRM

        • Phone confirmation: CONF.PHN.DAYS.SINCE.CONFIRM

        For more information about how to define the rule, see the *Getting Started with Colleague Student* manual.

    b) Access the **Registration Controls (RGCT)** form, and enter your rule in the **Student Eligibility Rules** field.

Set up Emergency Information

You can tailor Emergency Information in Colleague Self-Service to meet the needs of your institution.

Procedure

1. Use the **Web Emergency Information Parameters (WEIP)** form to accomplish the following:

   - Display or hide health conditions.

   - Display or hide other emergency information.

   - Require at least one emergency contact be entered before users are able to confirm their information.

     If users do not have at least one emergency contact, they will be required to add one to confirm their emergency information. In addition, users will not be able to delete a contact if it is their only emergency contact.

   - Allow users to opt out of entering emergency contact information before users are able to confirm their information.

     If you allow users to opt out of providing emergency information, they will not be required to enter contact information.

2. If your institution requires students to confirm that their emergency information is accurate before registration, complete the following steps:

   a) Access the **Rules Definition (RLDE)** form, and write a student eligibility rule using the EMER.DAYS.SINCE.CONFIRMED computed column.

      For more information about how to define the rule, see the *Getting Started with Colleague Student* manual.

   b) Access the **Registration Controls (RGCT)** form, and enter your rule in the **Student Eligibility Rules** field.

Set up View/Add Proxy Access

You can tailor View/Add Proxy Access in Colleague Self-Service to meet the needs of your institution.

Refer to the *Self-Service Proxy User Guide* for complete setup information.